

# CROP AND MARKET UPDATE & HOP CROP 2023 ESTIMATE

| HOP MARKET |

Growing Area	Variety	Quantities	Estimate	Changes	Ø Yields in	
		Crop 2022	Crop 2023		2022	2023
		mt	mt	± %	mt / ha	
Hallertau	Hallertauer	414.5	467.9	12.9	0.90	1.05
	Hersbrucker	1,159.9	1,432.9	23.5	1.44	1.84
	Perle	3,395.9	4,801.8	41.4	1.17	1.74
	Akoya	147.4	164.2	11.4	1.40	1.47
	Spalter Select	594.8	725.6	22.0	1.40	1.74
	Tradition	3,321.4	4,140.4	24.7	1.29	1.67
	Saphir	429.6	469.5	9.3	1.44	1.84
	Mandarina Bavaria	347.5	423.2	21.8	2.04	2.49
	Northern Brewer	109.4	122.5	12.0	0.95	1.47
	Magnum	1,765.0	2,196.1	24.4	1.47	1.89
	Taurus	215.5	185.3	- 14.0	1.38	1.29
	Herkules	15,307.7	17,702.6	15.6	2.30	2.53
	Polaris	521.8	783.2	50.1	1.50	1.91
	Others	1,422.0	1,634.8	15.0	1.59	1.81
<b>Hallertau</b>		<b>29,152.4</b>	<b>35,250.0</b>	<b>20.9</b>	<b>1.70</b>	<b>2.06</b>
Elbe-Saale		2,528.6	2,928.5	15.8	1.60	1.87
Tettngang		2,301.7	2,360.0	2.5	1.54	1.56
Spalt		411.0	550.0	33.8	1.00	1.37
Bitburg		12.2	21.7	77.9	1.02	1.23
<b>Germany total</b>		<b>34,405.9</b>	<b>41,110.2</b>	<b>19.5</b>	<b>1.67</b>	<b>1.99</b>
Austria		450.0	440.0	- 2.2	1.71	1.67
Belgium		242.0	252.0	4.1	1.33	1.36
Bulgaria		58.3	62.0	6.3	1.51	1.46
Czech Rep.		4,291.3	6,000.0	39.8	0.87	1.23
England		639.0	718.0	12.4	0.98	1.30
France		680.0	749.0	10.1	1.24	1.33
Poland		3,424.0	3,500.0	2.2	1.98	2.01
Romania		185.0	225.0	21.6	0.69	0.82
Russia		500.0	500.0	0.0	1.43	1.43
Slovakia		20.0	35.0	75.0	0.53	0.92
Slovenia		2,283.0	2,500.0	9.5	1.40	1.49
Spain		1,000.0	948.0	- 5.2	1.73	1.65
Turkey		220.0	240.0	9.1	1.22	1.33
Ukraine		158.0	220.0	39.2	1.05	1.69
Rest		94.0	100.0	6.4	0.94	1.00
<b>Europe total</b>		<b>48,650.5</b>	<b>57,599.2</b>	<b>18.4</b>	<b>1.51</b>	<b>1.79</b>
USA (PNW)	Amarillo®	1,321.2	1,771.1	34.1	1.71	1.99
	Apollo	1,085.9	1,232.9	13.5	2.78	3.01
	Bravo	210.0	276.7	31.8	2.40	3.12
	Cascade	3,458.1	3,542.7	2.4	1.67	2.02
	Centennial	1,628.8	1,478.2	- 9.2	1.66	1.44
	Chinook	1,297.4	1,441.2	11.1	1.54	1.99
	Citra®	7,728.4	5,962.2	- 22.9	1.58	1.68
	Col./Tom./Zeus	4,805.1	7,320.6	52.4	2.91	2.79
	Eureka!	1,013.2	1,379.0	36.1	2.47	2.90
	Helios	0.0	1,059.6	-	-	2.20
	Mosaic	5,919.2	4,959.7	- 16.2	2.25	2.37
	Super Galena	472.0	486.2	3.0	3.17	3.26
	Willamette	663.7	793.1	19.5	1.55	1.69
	Rest	16,339.4	14,159.2	- 13.3	1.84	1.90
	Andere Staaten	113.4	113.4	0.0	0.22	0.25
<b>USA</b>		<b>46,055.8</b>	<b>45,975.8</b>	<b>- 0.2</b>	<b>1.86</b>	<b>2.03</b>
Argentina		325.0	254.0	- 21.8	1.83	1.43
Australia		1,824.0	2,100.0	15.1	1.98	2.22
Japan		202.0	202.0	0.0	1.91	1.91
New Zealand		2,030.0	2,000.0	- 1.5	2.08	2.05
P.R.China		6,055.0	5,950.0	- 1.7	2.25	2.28
South Africa		715.0	739.8	3.5	1.75	1.81
Rest		550.0	550.0	0.0	1.31	1.31
<b>World total</b>		<b>106,407.0</b>	<b>115,371.0</b>	<b>8.4</b>	<b>1.70</b>	<b>1.91</b>

The crop estimate for the Hallertau was announced on August 23rd., meaning that crop 2023 estimates have now been submitted for all German hop growing areas.

A comparison of the 2022 crop results with crop 2023 estimates for the world's most important hop growing areas is enclosed.

Much the same as last year, weather conditions in many growing areas have been challenging.

During the month of June some European growing areas experienced long dry periods, affecting quantity yields negatively. In July, in some areas, there was rainfall both during and after bloom. We believe that this had a positive effect, not only on the ingredients but the overall quality.

We will keep you informed about the crop progress and, in particular, about alpha acid contents.

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September 2023

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