

HOPSTEINER – NEWSLETTER

SEPTEMBER 2009

CROP & MARKET UPDATE



**Hopsteiner**[®]

COMMITTED TO THE BREWER.

Crop & Market Update

The official German 2009 hop crop estimates were published on August 19th. Following please find those estimates as well as the final world hop crop figures for crop 2008.

For crop 2009 the estimates point to good quality and yields for all of the principal growing areas. The early summer hail damage in Germany has been largely compensated for by this positive outlook. The supply of some aroma varieties remains affected by the storm but in general no supply problems are anticipated at the time of this report.

We look forward to seeing you to discuss the crop and market at the Drinktec trade show in Munich from September 14th-19th. Our stand is 512 in Hall B1.

HOPSTEINER
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Hop Crop 2009 - Estimate

Growing Area	Variety	Quantities Crop 2008	Estimate Crop 2009	Changes 2008 / 2009	
		mt	mt	± mt	± %
Hallertau	Hallertauer	2.707	792	-1.915	- 70,8
	Hersbrucker	1.472	1.326	-146	- 9,9
	Perle	6.880	5.776	-1.105	- 16,1
	Spalter Select	1.669	1.349	-320	- 19,2
	Tradition	5.399	4.620	-779	- 14,4
	Aroma Total	18.127	13.863	-4.264	- 23,5
	Northern Brewer	551	415	-136	- 24,7
	Herkules	3.237	5.504	2.267	+ 70,0
	Magnum	8.465	5.795	-2.670	- 31,5
	Nugget	653	432	-221	- 33,8
	Taurus	2.394	2.042	-352	- 14,7
Bitter Total	15.300	14.188	-1.113	- 7,3	
	Other	904	700	-205	- 22,6
Hallertau Total		34.332	28.750	-5.582	- 16,3
Elbe/Saale		2.830	2.574	-256	- 9,1
Tettngang		1.836	1.640	-196	- 10,7
Spalt		642	630	-12	- 1,8
Rest Germany		37	39	2	+ 6,1
Germany Total		39.676	33.633	-6.043	- 15,2
USA	Apollo	706	816	111	+ 15,7
	Cascade	1.711	2.041	330	+ 19,3
	Chelan	730	635	-95	- 13,0
	Col./Tom.	5.735	5.216	-519	- 9,0
	Galena	2.140	2.087	-54	- 2,5
	Millennium	1.131	998	-134	- 11,8
	Nugget	2.721	2.767	46	+ 1,7
	Summit	1.879	1.991	112	+ 5,9
	Super Galena	757	1.134	377	+ 49,8
	Willamette	4.668	3.493	-1.175	- 25,2
	Zeus	8.050	7.938	-112	- 1,4
	Other	6.344	7.571	1.227	+ 19,3
USA Total		36.573	36.687	113	+ 0,3
China		13.950	15.180	1.230	+ 8,8
Czech Republic		6.753	6.555	-198	- 2,9
Poland		3.446	3.446	0	+ 0,0
Slovenia		2.359	2.200	-159	- 6,7
UK England		1.409	1.350	-59	- 4,2
France		1.469	753	-716	- 48,8
Spain		812	890	78	+ 9,6
Australia		1.189	1.343	154	+ 13,0
New Zealand		730	832	102	+ 14,0
South Africa		628	807	179	+ 28,5
Slovakia		328	300	-28	- 8,5
Rest*		3.802	3.907	105	+ 2,8
WORLD TOTAL		113.125	107.883	-5.242	- 4,6

*Belgium, Bulgaria, Austria, Romania, Russia, Turkey, Ukraine, Portugal, Serbia, Belarus, Croatia, Switzerland, Hungary, Argentina, Japan, India