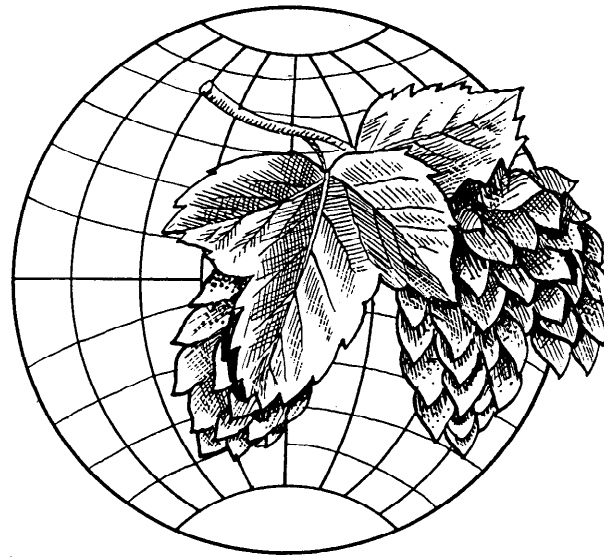


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

FREISING, GERMANY
MAY, 2025



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Freising, Germany - May 27, 2025

Country	Hop Acreage 2024 (Hectares, Ha)					Hop Production 2024 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2025 (Hectares, Ha) estimations					Hop Production 2025 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	MT		
Argentina	131	47	178	0	178	263	97	360	31	131	47	178	0	178	280	100	380	33		
Australia ^{**}	649	109	758	0	758	1 343	165	1 508	247	530	100	630	0	630	1 400	200	1 600	250		
Austria [°]	208	58	266	4	270	260	70	330	22	208	58	266	4	270	260	70	330	22		
Belgium	125	52	177	0	177	150	116	257	24	121	46	167	0	167	145	102	247	23		
Brasil [°]	25	25	50	3	53	77	103	180	16	25	25	50	3	53	77	103	180	16		
Bulgaria	23	19	42	0	42	33	22	56	5	23	19	42	0	42	34	24	58	6		
Canada [°]	200	150	350	0	350	325	200	525	53	200	150	350	0	350	325	200	525	53		
China [°]	300	2 400	2 700	0	2 700	700	5 800	6 500	470	300	2 400	2 700	0	2 700	700	5 800	6 500	470		
Czech Republic	4 572	77	4 649	196	4 845	6 357	137	6 494	235	4 507	83	4 590	226	4 816	6 150	150	6 300	300		
France [*]	566	69	635	24	725	844	116	960	54	525	92	616	12	750	800	150	857	49		
Germany	9 498	10 026	19 524	765	20 289	18 179	28 318	46 497	5 391	8 550	10 470	19 020	520	19 540	16 378	29 484	45 862	5 375		
Great Britain	428	108	536	0	536	588	188	776	56	380	104	484	0	484	543	185	728	59		
Italy [°]	14	2	18	2	20	21	4	25	2	14	2	18	2	20	21	4	25	2		
Japan [°]	39	39	78	0	78	60	100	160	15	39	39	78	0	78	60	100	160	15		
New Zealand [°]	1 000	400	1 400	0	1 400	1 400	630	2 030	204	1 000	400	1 400	0	1 400	1 400	630	2 030	204		
Poland	713	812	1 525	45	1 571	1 175	1 778	2 953	289	740	831	1 571	10	1 581	1 100	1 700	2 800	270		
Romania	73	202	275	5	280	41	167	208	18	73	207	280	0	280	40	160	200	14		
Russia [°]	130	45	175	130	305	280	120	400	24	130	45	175	130	305	280	120	400	24		
Serbia	12	0	12	0	12	24	0	24	2	12	0	12	0	12	24	0	24	2		
Slovakia	38	0	38	0	38	44	0	44	3	38	0	38	0	38	38	0	38	3		
Slovenia	1 554	18	1 572	72	1 644	2 200	45	2 245	125	1 515	18	1 529	72	1 601	2 400	50	2 450	135		
South Africa [°]	87	317	404	11	404	137	545	682	87	87	317	404	11	404	137	545	682	87		
Spain	9	546	555	18	573	13	950	963	114	9	521	530	31	561	14	910	924	109		
Ukraine [°]	100	50	150	0	150	100	58	158	8	100	50	150	0	150	100	58	158	8		
USA ^{**}	12 429	5 699	18 128	0	18 128	23 833	15 662	39 495	4 858	11 318	5 659	16 977	0	16 977	22 000	15 000	37 000	4 550		
IHGC	32 923	21 270	54 195	1 275	55 526	58 447	55 391	113 830	12 353	30 575	21 683	52 255	1 021	53 387	54 706	55 845	110 458	12 079		

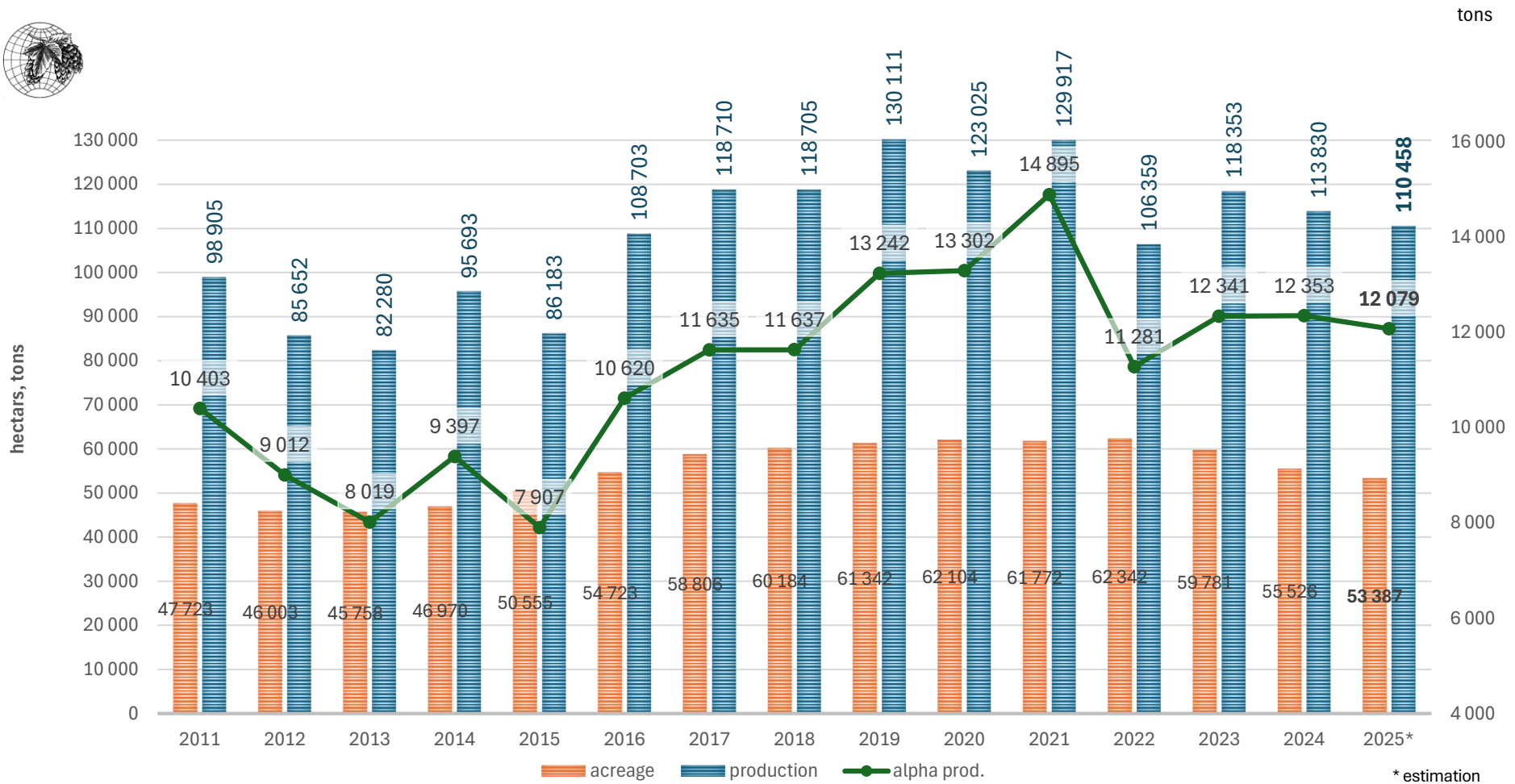
[°] Since no country updates were available, figures from November 2024 were used.

¹ Acreage without new hop areas

^{*} Includes undeclared hop area. Have a look at the detailed report.

^{**} Includes estimation of the EC chair's office

Difference Σ 2025-2024	-2 348	413	-1 940	-254	-2 139	-3 741	454	-3 372	-274
Difference Σ 2025-2020	-10 724	1 997	-8 737	-1 554	-8 717	-17 611	5 049	-12 567	-1 224
Difference Σ 2025-2015	-1 241	4 955	3 611	-3 821	2 832	9 196	15 172	24 275	4 172



International Hop Growers' Convention

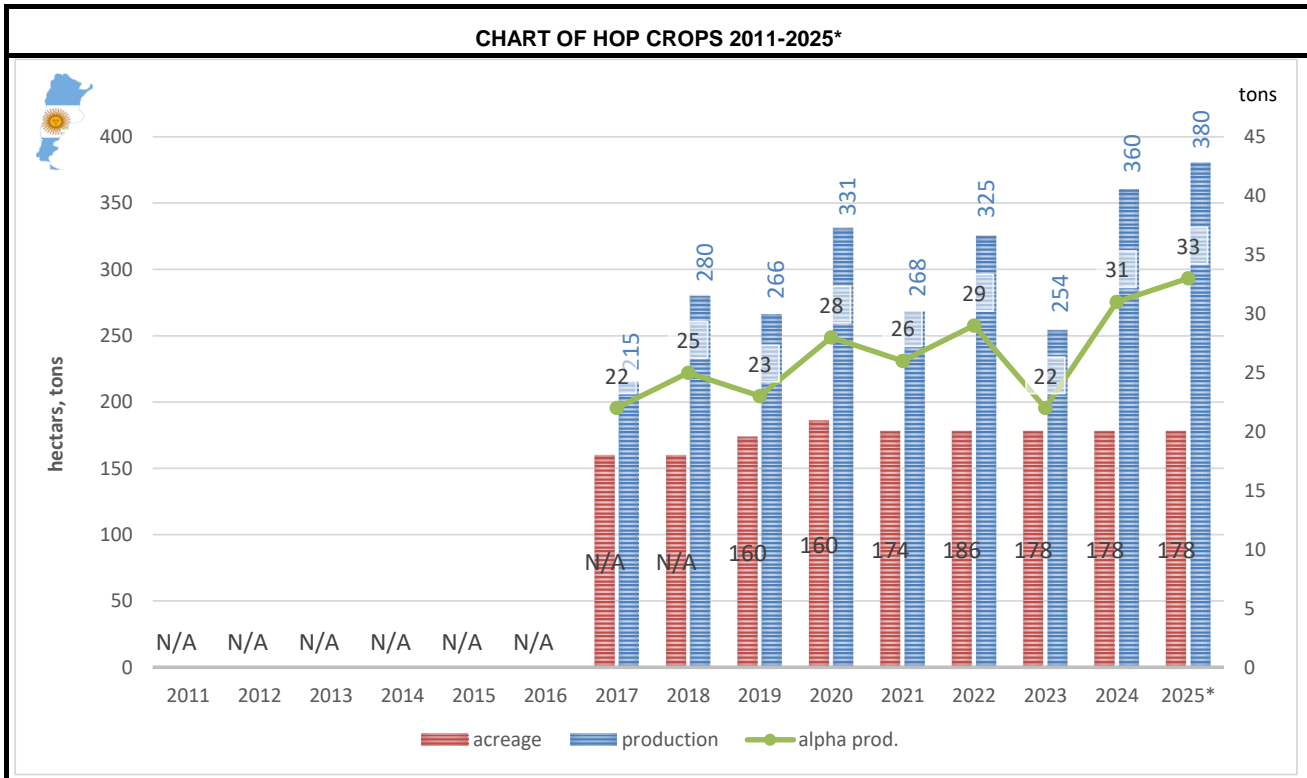
IHGC-Economic Commission: May - Freising, Germany

Country:
Argentina

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					1 year contract
Aroma Hops			16		
Alpha Hops			16		
Average Price			16		
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Estimated '25 values. No individual grower data. Overall very good harvest. Good climate. Fires have not affected crop. Market comments: Do to global surplus offer of hops (imported older harvest are entering Argentina at below cost price), together with the lower consumption of beer in Argentina due to recession led the beer industry to buy hops in 1 year contract terms (almost SPOT market). Growers comment they have half of the harvest allocated to craft market to be unsold as of today. Beer consumption is estimated that has dropped by 60% year to year.

	2024	Year N 2025
Organic-Hop Area (Ha)		
Organic-Product. (MT)		

Main hop varieties in organic production

Country, Date:

Member Organization(s):

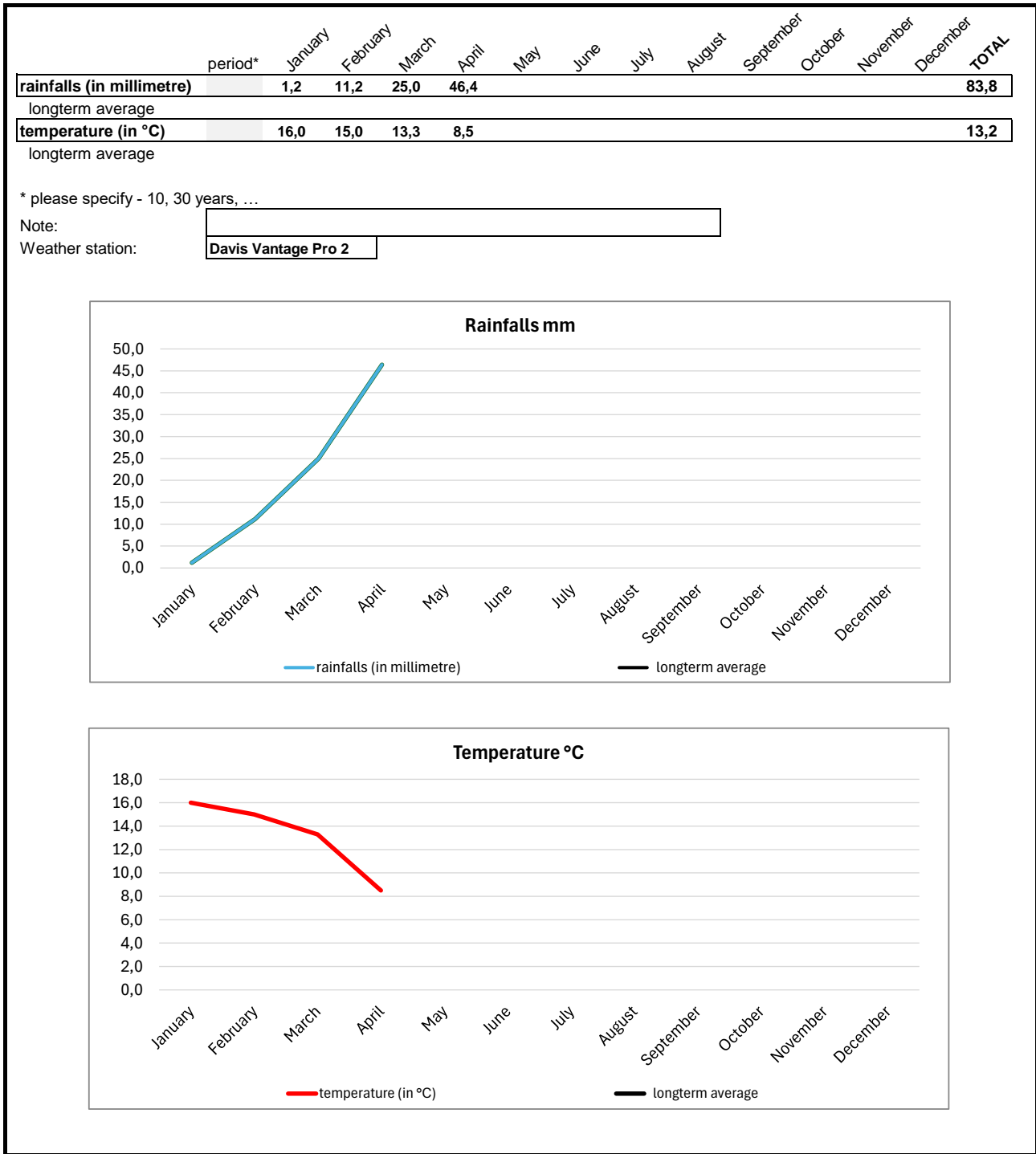
International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Argentina



Country, Date:
El Bolsón, Río Negro, Argentina

Member Organization(s):
Ing. Andrés Leibrecht

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Argentina

NOTES:

International Hop Growers' Convention

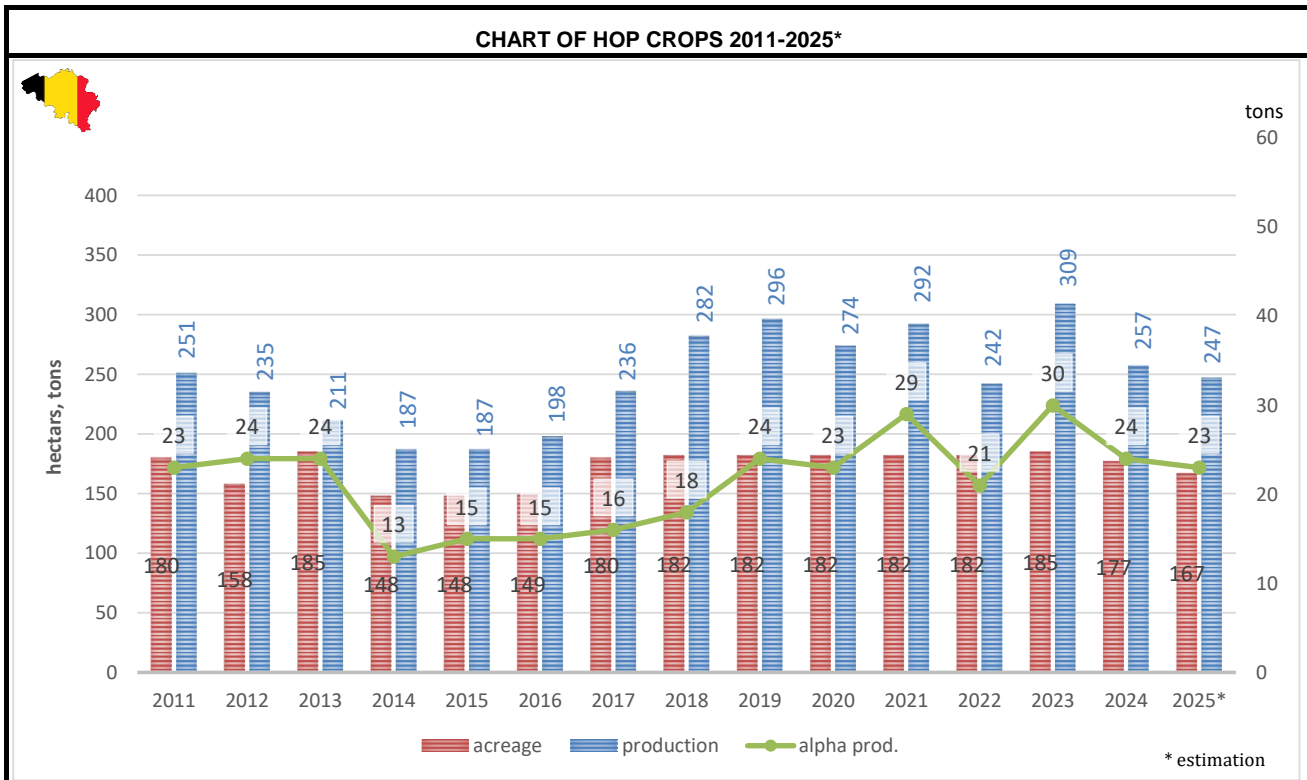
IHGC-Economic Commission: May - Freising, Germany

Country: Belgium

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2024
Organic-Hop Area (Ha)	15	24
Organic-Product. (MT)	17,31	30,20

Main hop varieties in organic production		
Golding	Cascade	Magnum
Pilgrim	Challenger	Target

Country, Date:
Belgium, 24/05/2025

Member Organization(s):
vzw Hop

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Belgium

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL	
rainfalls (in millimetre)	133,3	33,8	6,1	13,2	8,7								195,1	
longterm average	30	63,0	53,0	52,0	54,0	66,0	63,0	72,0	56,0	63,0	67,0	73,0	745,0	
temperature (in °C)		3,7	4,4	7,9	12,3	14,3							8,5	
longterm average	30	4,5	4,7	6,8	9,8	13,2	16,1	18,1	17,9	15,6	12,3	8,1	5,2	11,0

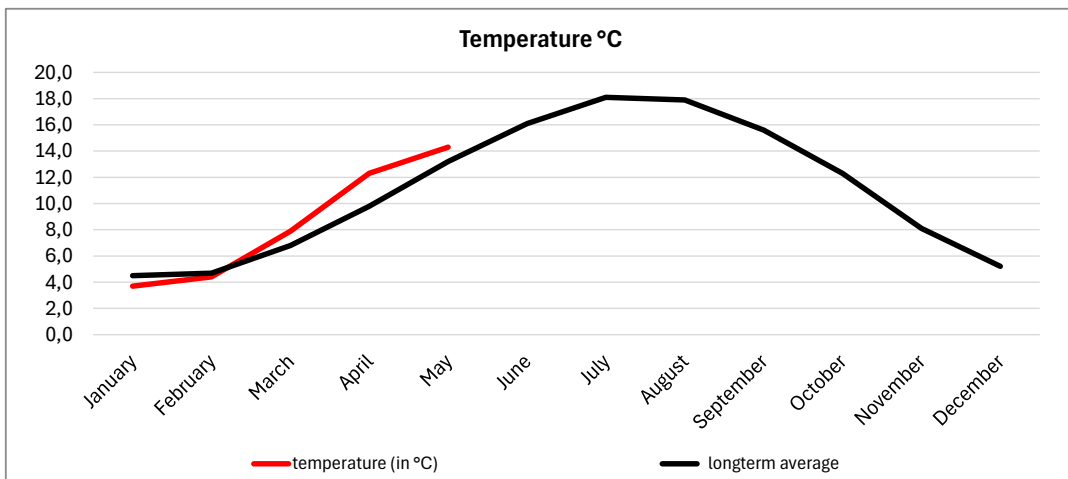
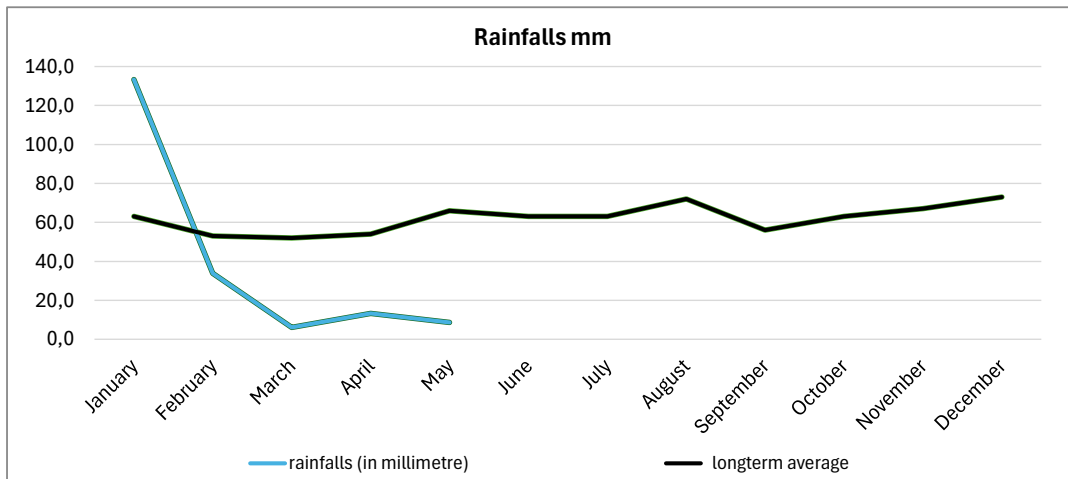
* please specify - 10, 30 years, ...

Note:

1992-2021

Weather station:

Poperinge



Country, Date:
Belgium, 24/05/2025

Member Organization(s):
vzw Hop

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Belgium

NOTES:

International Hop Growers' Convention

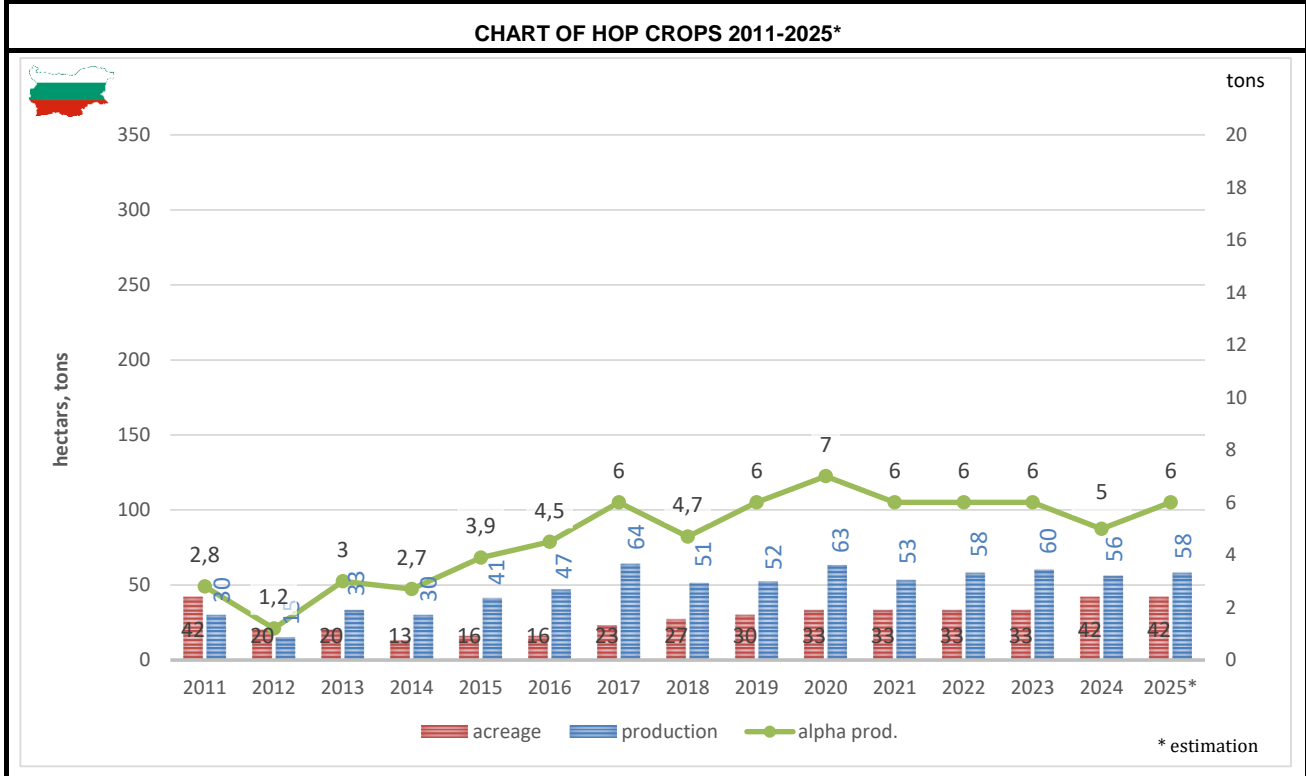
IHGC-Economic Commission: May - Freising, Germany

Country: Bulgaria

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons	58	59	60			
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops		6		6
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	2024	Year N 2025	
Organic-Hop Area (Ha)			Main hop varieties in organic production
Organic-Product. (MT)			

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



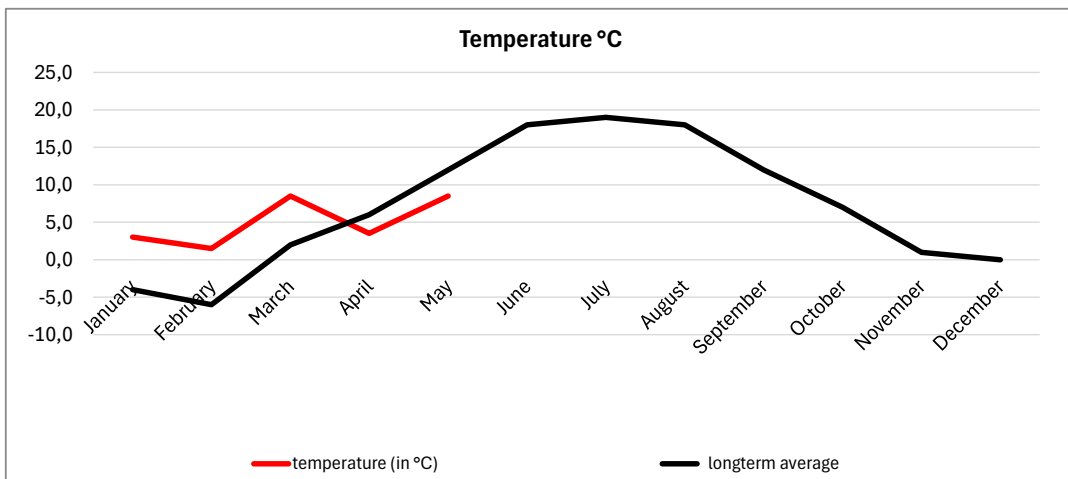
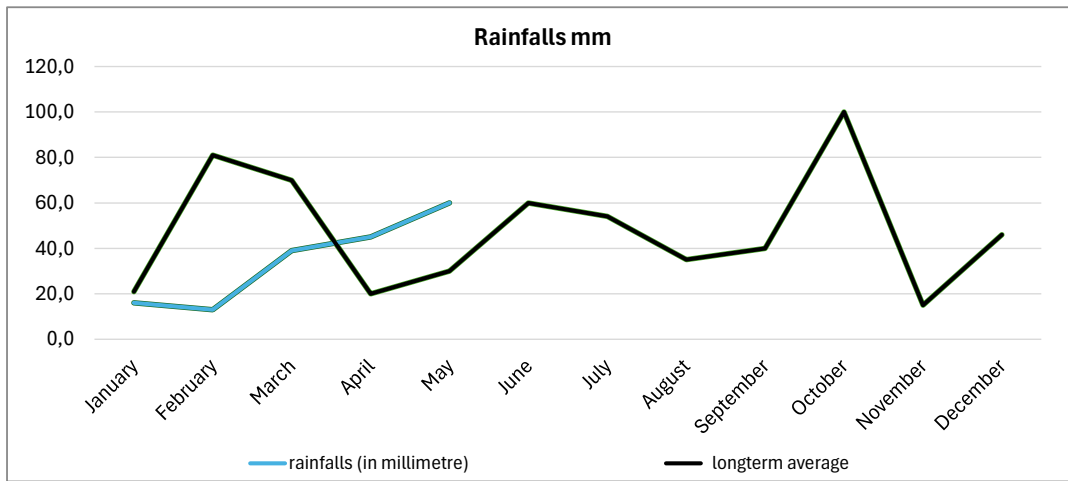
Country:
Bulgaria

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	16,0	13,0	39,0	45,0	60,0								173,0
longterm average	21,0	81,0	70,0	20,0	30,0	60,0	54,0	35,0	40,0	100,0	15,0	46,0	572,0
temperature (in °C)	3,0	1,5	8,5	3,5	8,5								5,0
longterm average	-4,0	-6,0	2,0	6,0	12,0	18,0	19,0	18,0	12,0	7,0	1,0	0,0	7,1

* please specify - 10, 30 years, ...

Note:

Weather station:



Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Bulgaria

NOTES:

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Czech Republic

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL	
rainfalls (in millimetre)	29,8	13,3	10,0	28,9									82,0	
longterm average	30	18,2	15,3	23,1	26,7	51,9	65,4	76,3	71,9	43,6	28,6	26,4	24,4	471,8
temperature (in °C)	0,8	-2,0	4,7	10,6									3,5	
longterm average	30	-0,1	0,8	4,3	9,4	14,0	17,4	19,2	18,4	13,5	8,5	4,1	0,8	9,2

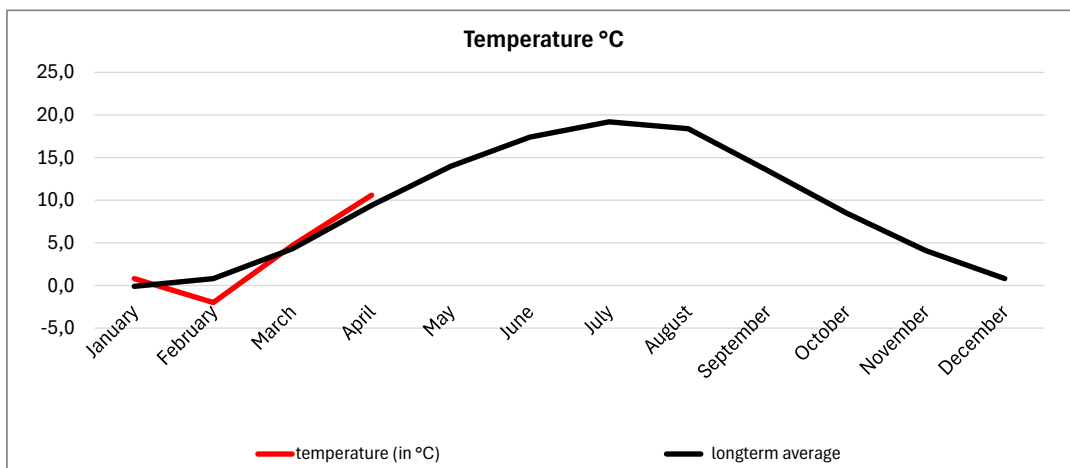
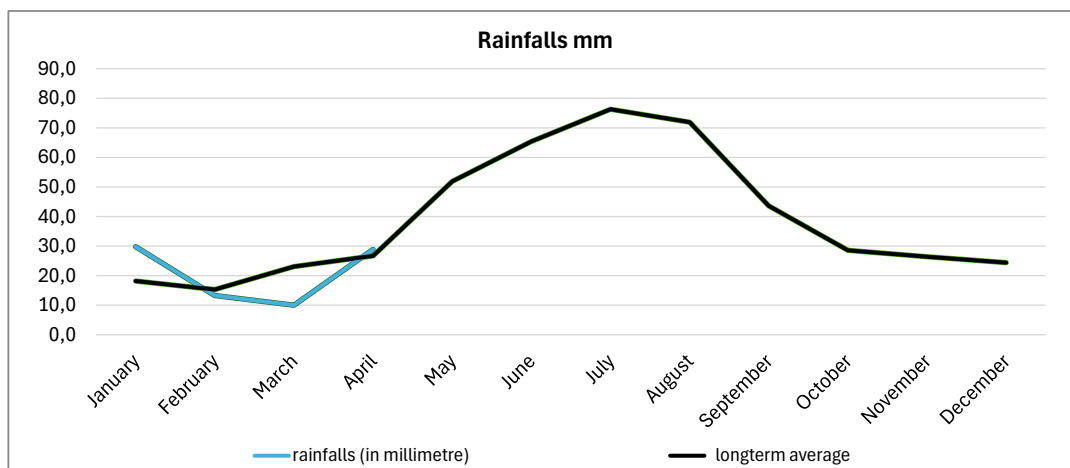
* please specify - 10, 30 years, ...

Note:

1991-2020

Weather station:

Zatec



Country, Date:
May 25, 2025

Member Organization(s):
Hop Growers Union of the Czech Rep.

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Czech Republic

NOTES:

International Hop Growers' Convention

IHGC-Economic Commission: May - Freising, Germany

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	554	515	-39,4	-7,1
Alpha	56	89	32,4	57,8
Total	610	603	-7,0	-1,1

New Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)
Aroma	11	10
Alpha	13	3
Total	24	13

TOTAL Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	566	525	-41,0	-7,2
Alpha	69	92	22,6	32,8
Total	635	616	-18,4	-2,9

Production MT=Metric Tons	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	844	771	-73,0	-8,6
Alpha	116	86	-30,0	-25,9
Total	960	857	-103,0	-10,7

Yield MT/Ha	Year N-1 2024	Year N 2025 (estimate)	Difference %
Aroma	1,49	1,47	-1,5
Alpha	1,68	0,94	-44,2
Total	1,51	1,39	-8,1

Alpha Prod.	Year N-1	2024	Year N	2025	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	42,2	5,0	39,4	0,0	-2,8	-6,7
Alpha	11,9	10,2	9,3	0,0	-2,6	-21,6
Total	54,1		48,7		-5,4	-9,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Strisselspalt	218,6	201,0	-17,6	2,2		
Aramis	72,6	63,7	-8,9	6,5		
Tradition	5,6	1,0	-4,6	4,0		
Triskel	12,7	5,7	-7,0	4,6		
Fuggle	35,8	3,4	-32,4	3,3		
Golding	12,7	10,0	-2,7	3,2		
Challenger	5,9	5,9	0,0	7,5		
Barbe-Rouge	25,6	16,6	-9,0	9,0		
Mistral	19,4	12,0	-7,4	7,2		
Cascade	27,3	14,8	-12,5	5,5		
Teorem	1,6	1,6	0,0	7,7		
Elixir	57,3	47,0	-10,3	5,5		
Chinook	13,1	6,1	-7,0	11,2		
Sorachi	2,4	2,8	0,4	42,0		
Wilamette	4,6	3,0	-1,6	5,0		
Alpha						
Columbus	4,3	2,7	-1,6	11,5		
Nugget	23,3	16,0	-7,3	11,2		
Magnum	1,1	9,6	8,5	13,5		
Target	8,9	8,7	-0,2	11,0		
Brewers Gold	17,9	13,8	-4,1	7,2		
Northern Brewer	0,3	0,2	-0,1	8,5		
Galena	2,6	1,0	-1,6	13,0		
Centennial	1,4	1,0	-0,4	12,0		
Autres						
R&D	5,1	5,1	0,0	7,2		

International Hop Growers' Convention

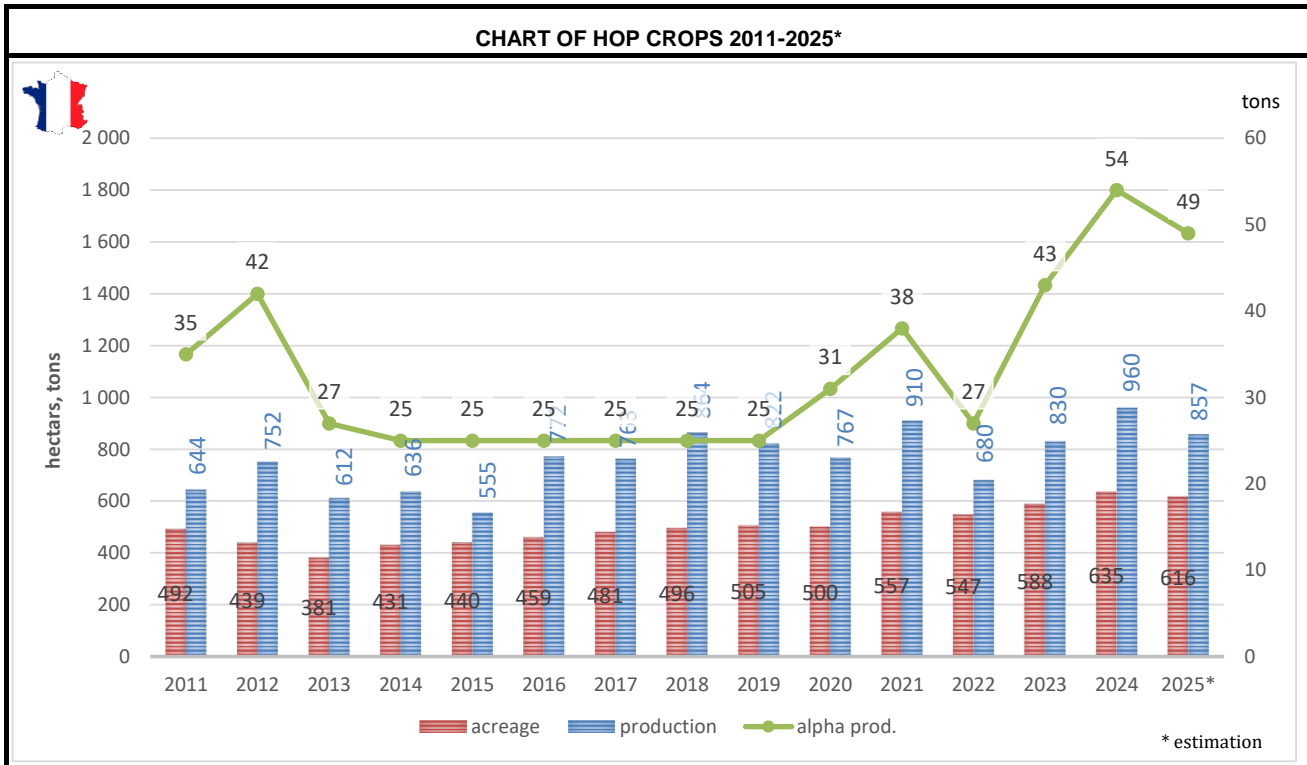
IHGC-Economic Commission: May - Freising, Germany

Country: France

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	60	40	40	20	20	20

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops		150		150
% unsold Hops				15,63%

Hop Prices Euro / Kg	Year (N-2) 2022	Year (N-1) 2023	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE		6,00-8,00 €/kg	5,00-16,00€/kg		



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Information area coming from France Agrimer - april 2025

Estimations undeclared area : approx 130ha, mainly Organic --> Global area in France : 750ha approx

Spot hops with prices 3€/kg !! ☐

90% of the new areas in France are Organic . Historic regions stabilised there production

Declared ha	112,4	2025
Not declared ha (est.)	140	2025

New production regions have higher prices (25/30/40€/t)
Prices expectations to be lower due to the complicated market
O Hop used as conventionnel ?

	Year N-1	Year N 2024
O-Hop Area (Ha)	300	252,4
O-Production (MT)	240	200

Main O-varieties
Strisselspalt, Aramis
Foreign variétés

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
France

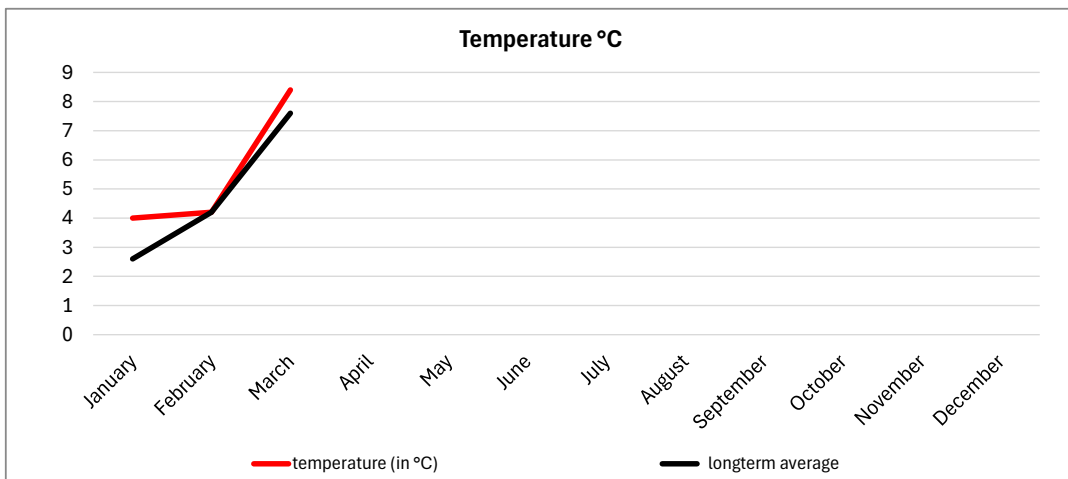
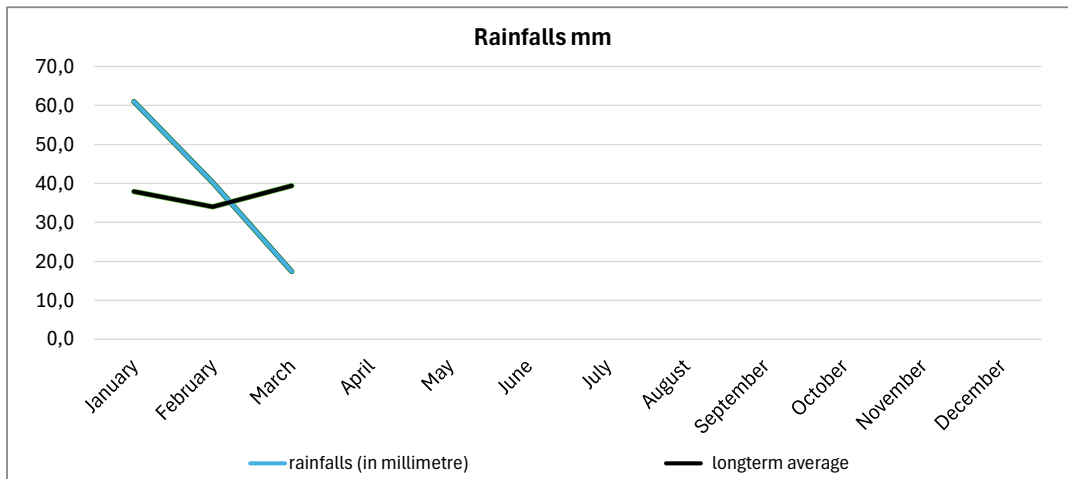
period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	2025	61,0	40,2	17,4									118,6
longterm average	30	37,9	34,0	39,4									111,3
temperature (in °C)		4	4,2	8,4									5,5
longterm average	30	2,6	4,2	7,6									4,8

* please specify - 10, 30 years, ...

Note:

Weather station:

Alsace



Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: France

NOTES:

International Hop Growers' Convention

IHGC-Economic Commission: May - Freising, Germany

Country: Germany

Hop Area (Ha = Hectares)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	9 498	8 550	-948	-10,0
Alpha	10 026	10 470	444	4,4
Total	19 524	19 020	-504	-2,6

New Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)
Aroma	61	70
Alpha	704	450
Total	765	520

TOTAL Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	9 559	8 620	-939	-9,8
Alpha	10 730	10 920	190	1,8
Total	20 289	19 540	-749	-3,7

Production MT=Metric Tons	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	18 179	16 378	-1 801	-9,9
Alpha	28 318	29 484	1 166	4,1
Total	46 497	45 862	-635	-1,4

Yield MT/Ha	Year N-1 2024	Year N 2025 (estimate)	Difference %
Aroma	1,90	1,90	-0,1
Alpha	2,64	2,70	2,3
Total	2,29	2,35	2,4

Alpha Prod. Metric Tons	Year N-1 Metric Tons	2024 Av. Contents %	Year N Metric Tons (estimate)	2025 Av. Contents %	Difference Metric Tons	N-(N-1) Av. Contents %
Aroma	964	5,3	870	5,3	-94	-9,8
Alpha	4 427	15,6	4 505	15,3	78	1,8
Total	5 391	11,6	5 375	11,7	-16	-0,3

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	2 861	2 550	-311	6,2	6,7	0,5
Tradition	2 461	2 150	-311	5,3	5,5	0,2
Hersbrucker	775	790	15	2,5	2,7	0,2
Tettnager	632	630	-2	3,3	3,4	0,1
Hallertauer	601	590	-11	3,3	3,8	0,4
Spalter Select	499	480	-19	3,9	4,5	0,6
Saphir	292	270	-22	3,2	3,4	0,2
Northern Brewer	175	150	-25	8,3	8,0	-0,3
Mandarina Bavaria	160	110	-50	9,0	8,4	-0,6
Alpha						
Herkules	7 917	8 200	283	15,8	16,0	0,2
Magnum	1 620	1 350	-270	12,9	12,8	-0,1
Polaris	588	600	12	19,8	18,6	-1,2
Titan	322	450	128	17,7	16,5	-1,2
Taurus	116	90	-26	15,9	15,5	-0,4
Nugget	91	80	-11	10,9	10,9	0

International Hop Growers' Convention

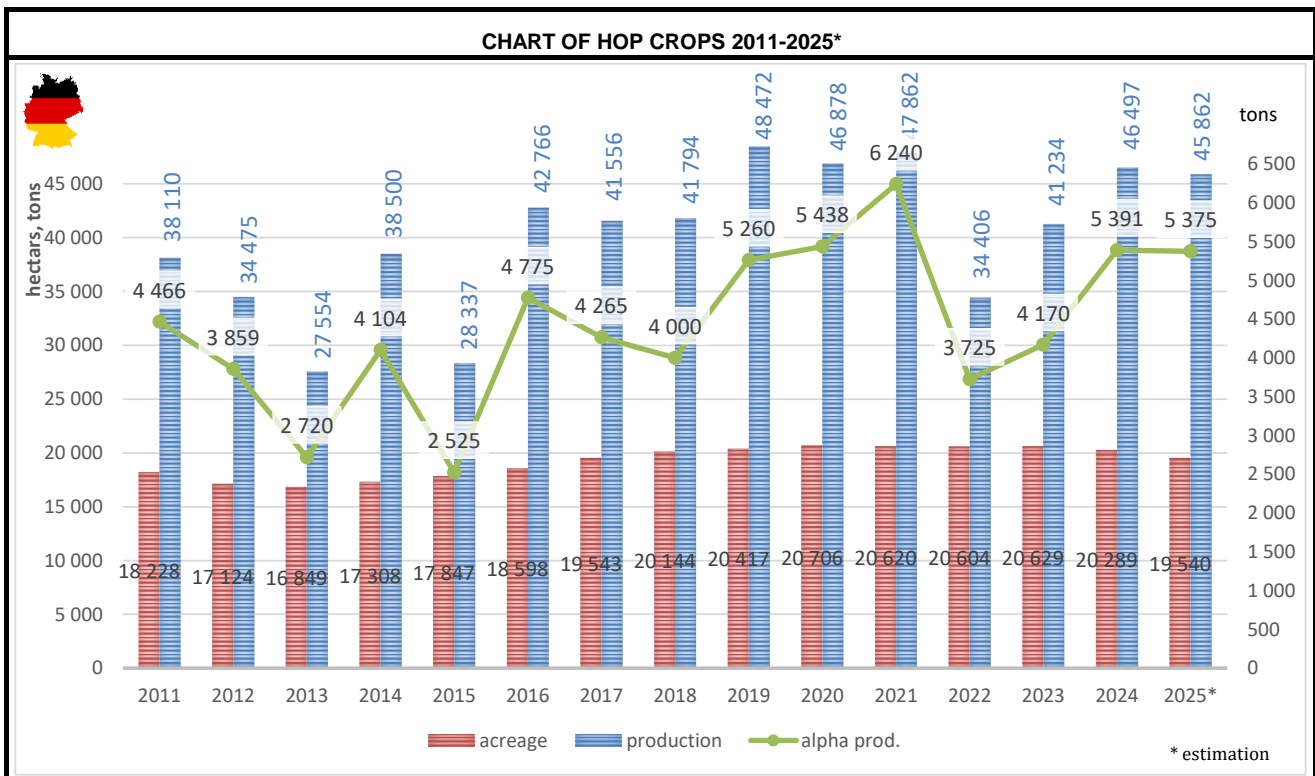
IHGC-Economic Commission: May - Freising, Germany

Country:
Germany

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons	37 854	28 834	24 449	16 854	11 506	8 946
% Crop / Year N	83	63	53	37	25	20

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops		86	151	237
% unsold Hops		0,47	0,53	0,51

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					Farmer
Aroma Hops	5,84	3,24			
Alpha Hops	6,03	3,33			
Average Price	5,92	3,30			
Contract Prices					
Aroma Hops	7,68	7,93			
Alpha Hops	4,96	5,69			
Average Price	6,06	6,55			
Average Prices					
Aroma Hops	7,46	7,19			
Alpha Hops	5,02	5,33			
AVERAGE	6,07	6,05			



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	2024	Year N 2025	Main hop varieties in organic production
Organic-Hop Area (Ha)	260	260	
Organic-Product. (MT)	350	350	

Country, Date: 20.05.2025

Member Organization(s):
German Hop Growers

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Germany

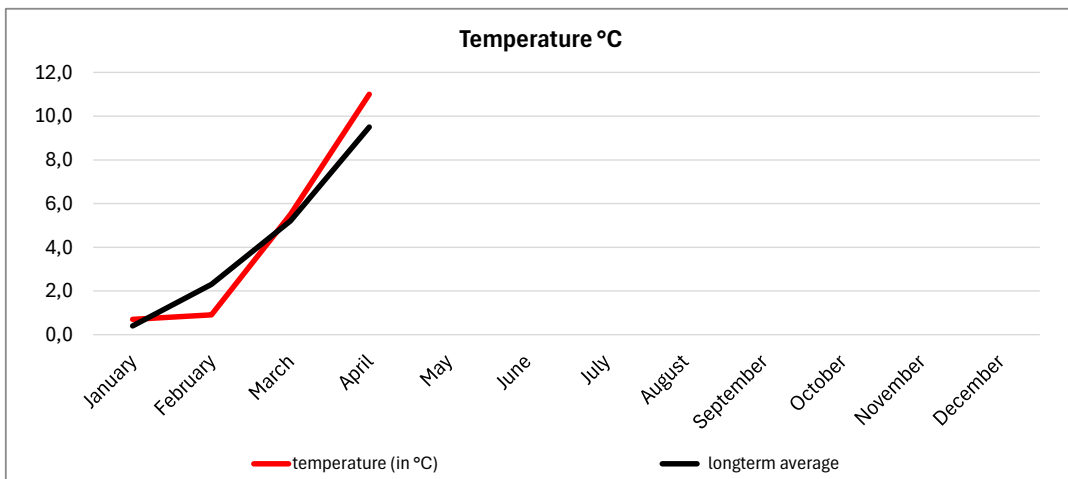
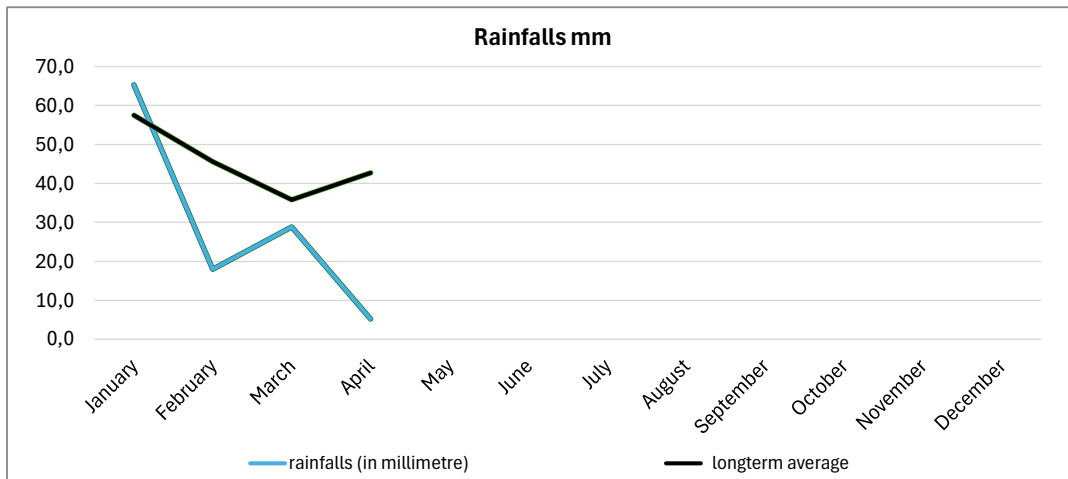
period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	65,3	18,0	28,8	5,2									117,3
longterm average	10	57,5	45,6	35,8	42,7								181,6
temperature (in °C)	0,7	0,9	5,5	11,0									4,5
longterm average	10	0,4	2,3	5,2	9,5								4,4

* please specify - 10, 30 years, ...

Note:

Weather station:

Hüll



Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Germany

NOTES:

International Hop Growers' Convention

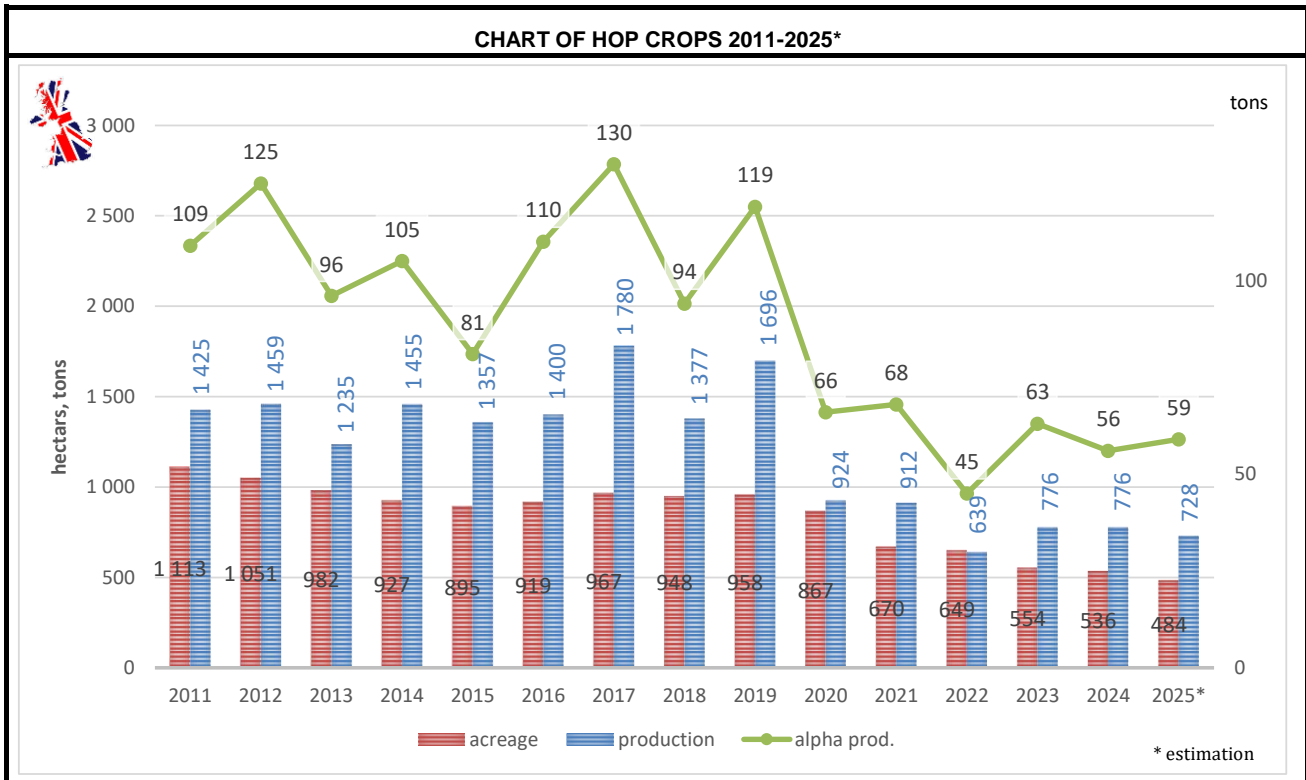
IHGC-Economic Commission: May - Freising, Germany

Country: GB

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	80	50	40			

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Production fully sold for the next three years.

	2024	Year N 2025
Organic-Hop Area (Ha)	6,4	8,6
Organic-Product. (MT)	1,15	1,55

Main hop varieties in organic production
Sovereign
Endeavour

Country, Date:
GB 15/05/2025

Member Organization(s):
British Hop Association

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:

GB

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL	
rainfalls (in millimetre)	114,0	65,0	7,0	25,0									211,0	
longterm average	30	84,0	61,0	51,0	53,0	52,0	54,0	54,0	63,0	60,0	89,0	94,0	89,0	804,0
temperature (in °C)		3,8	5,1	7,7	10,9								6,9	
longterm average	30	7,8	8,3	10,8	14,0	17,0	20,0	22,0	22,0	19,0	15,0	11,0	8,0	14,6

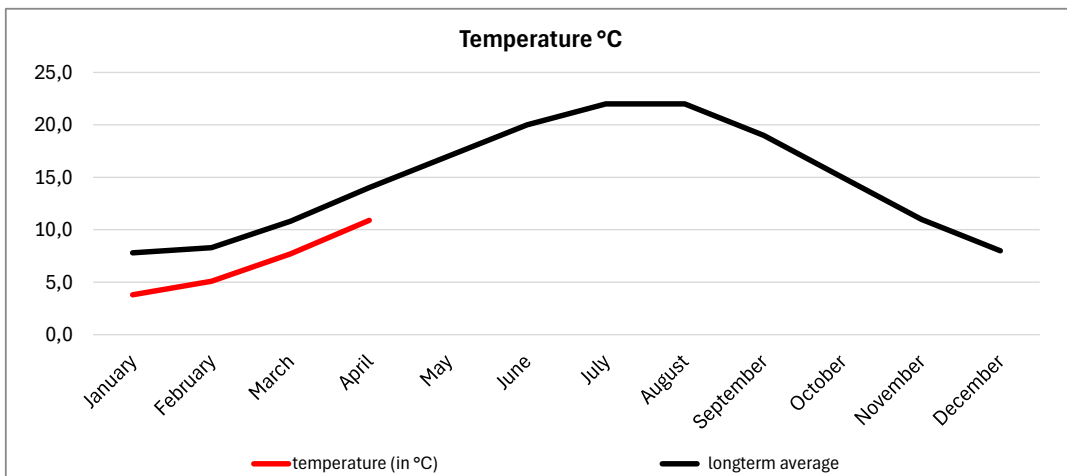
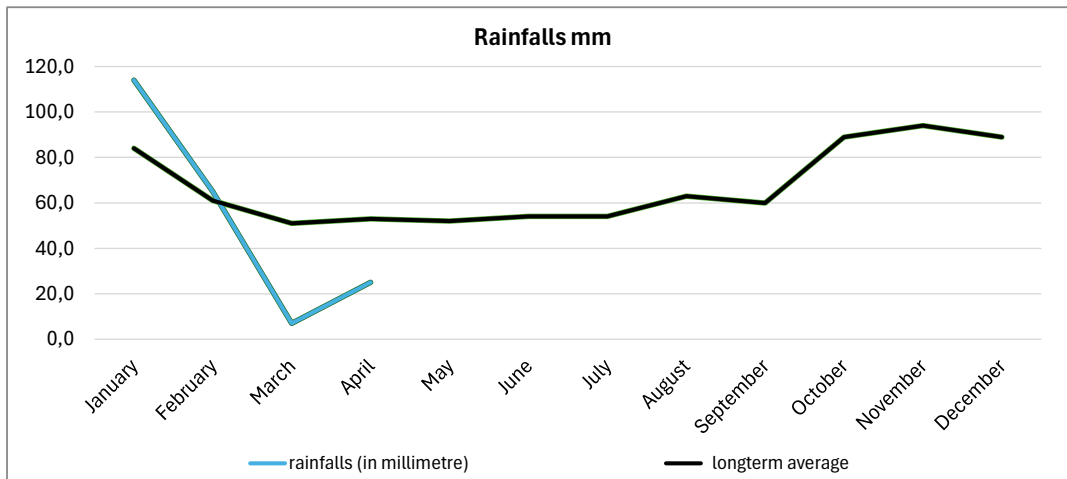
* please specify - 10, 30 years, ...

Note:

Met Office Climate Information Centre

Weather station:

England SE & Central S



Country, Date:

GB 15/05/2025

Member Organization(s):

British Hop association

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: GB

NOTES:

International Hop Growers' Convention

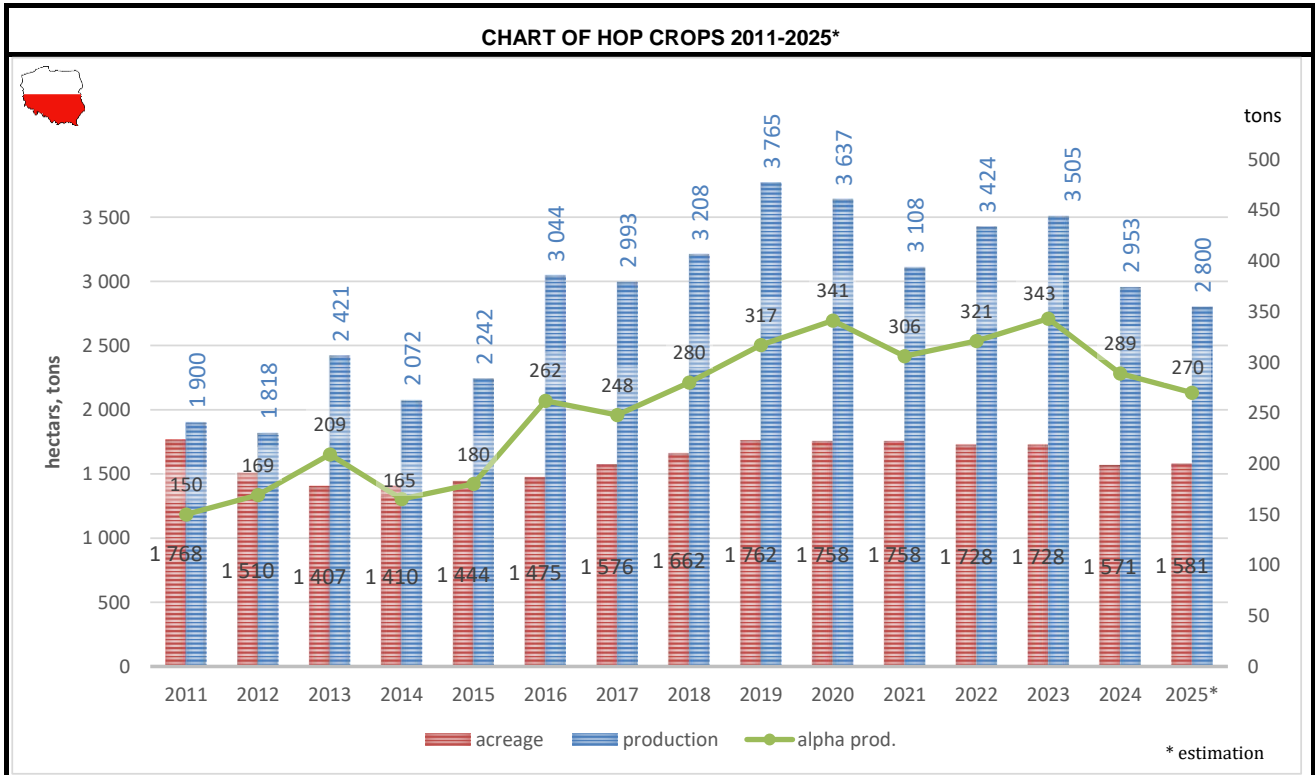
IHGC-Economic Commission: May - Freising, Germany

Country:
Poland

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	50	40	30	30	30	30

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	4,5	5	0	-5,00	Farmer Price
Alpha Hops	1,5	3	0	-3,00	Farmer Price
Average Price	3	4	0	-4,00	Farmer Price
Contract Prices					
Aroma Hops	4,9	4,9	4,9	0,00	Farmer Price
Alpha Hops	4,5	4,5	4,5	0,00	Farmer Price
Average Price	4,7	4,7	4,7	0,00	Farmer Price
Average Prices					
Aroma Hops	4,70	4,95	2,45	-2,50	Farmer Price
Alpha Hops	3,00	3,75	2,25	-1,50	Farmer Price
AVERAGE	3,85	4,35	2,35	-2,00	Farmer Price



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	2024	Year N 2025	Main hop varieties in organic production		
Organic-Hop Area (Ha)	13,5	14,2	HMG	MAR	PUL
Organic-Product. (MT)	23,00	23,00	MGN	CAS	

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Poland

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	22,6	5,1	38,8	44,7	33,5								144,7
longterm average	33,6	31,5	37,9	42,3	70,7	66,8	82,2	54,9	62,8	47,4	36,5	34,5	601,1
temperature (in °C)	2,4	2,3	8,1	15,0	16,3								8,8
longterm average	-2,5	-1,4	2,4	8,6	13,6	16,9	18,9	18,4	13,4	8,2	3,2	-1,0	8,2

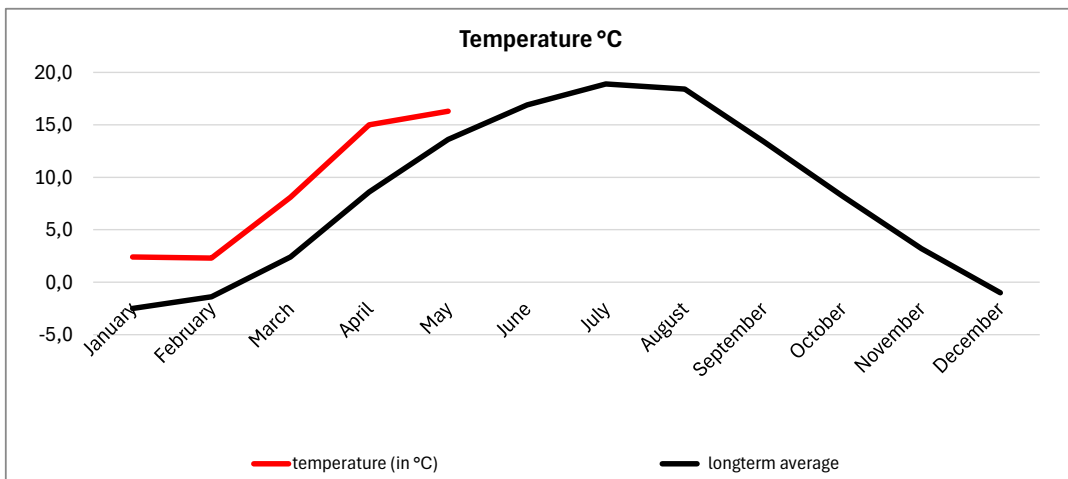
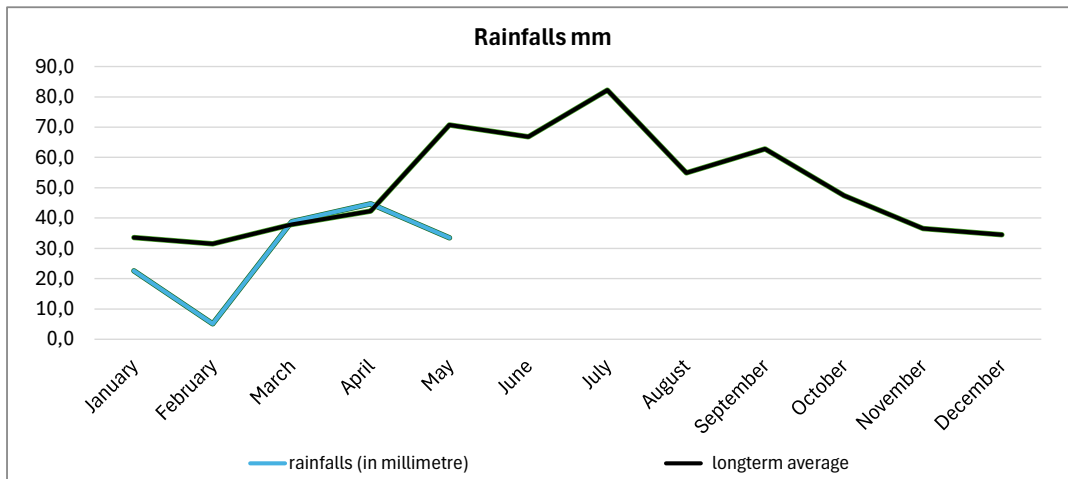
* please specify - 10, 30 years, ...

Note:

longterm data: 1991-2020; source: IMGW-PIB

Weather station:

LUBLIN



Country, Date:

Poland, 23.05.2025

Member Organization(s):

ZPPCh

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Poland

NOTES:

International Hop Growers' Convention

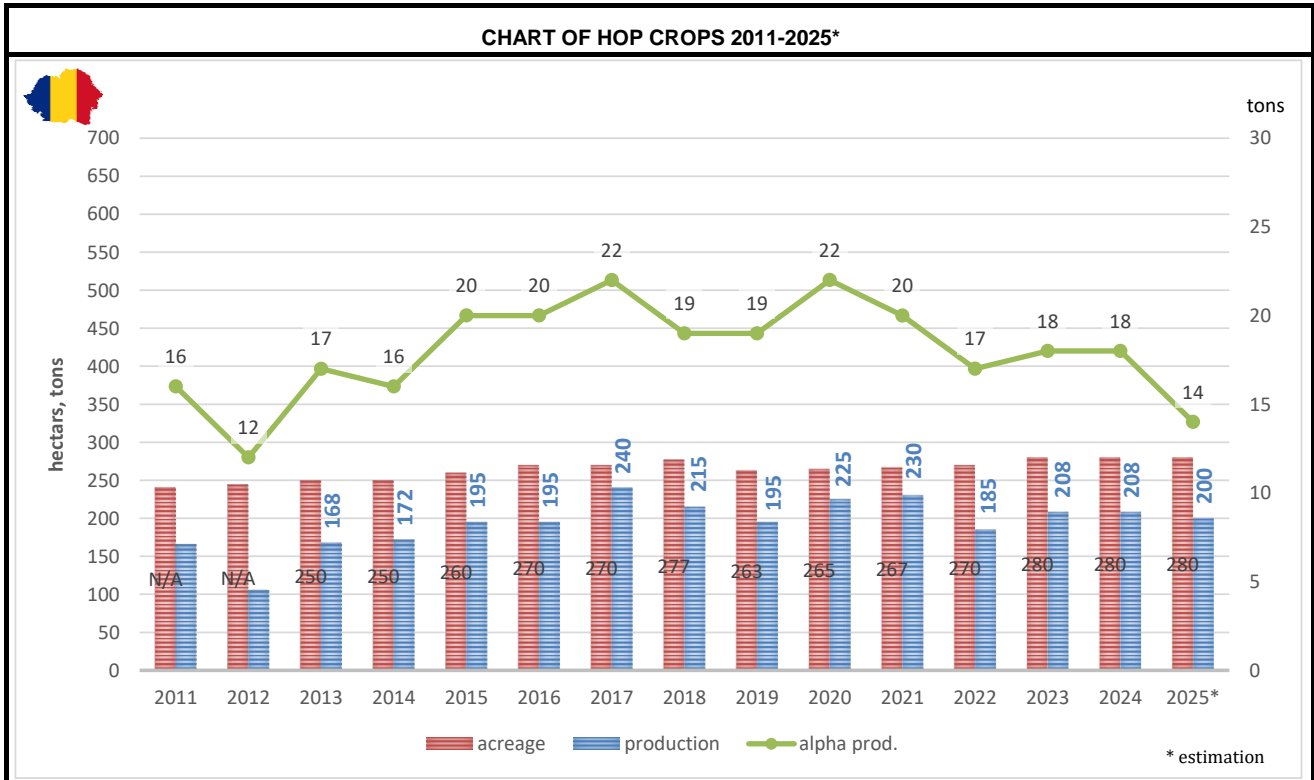
IHGC-Economic Commission: May - Freising, Germany

Country:
Romania

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons	240	250	250	250		
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops	0	0	0	0
% unsold Hops	0	0	0	0

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	7	7	7		
Alpha Hops	4	4	4		
Average Price					
Contract Prices					
Aroma Hops	7	7	7		
Alpha Hops	4	4	4		
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2024	Main hop varieties in organic production
Organic-Hop Area (Ha)	x	x	
Organic-Product. (MT)	x	x	
	x	x	

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:
Romania

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)													0,0
longterm average													0,0
temperature (in °C)													
longterm average													

* please specify - 10, 30 years, ...

Note:

Weather station:

Rainfalls mm

Temperature °C

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country:

Romania

NOTES:

International Hop Growers' Convention

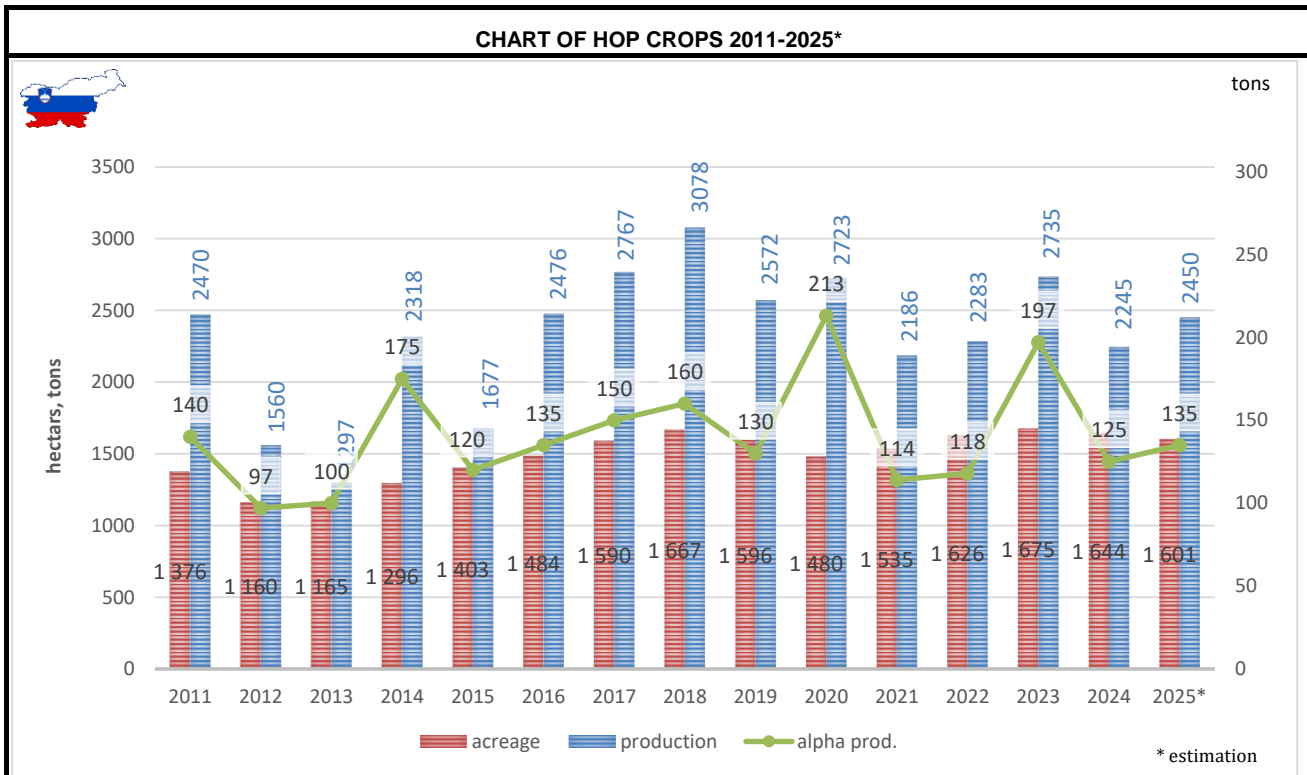
IHGC-Economic Commission: May - Freising, Germany

Country: Slovenia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	75	65	N.A.	N.A.	N.A.	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices	7	7			
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

There is sufficient amount of precipitation. Temperatures are within long term average. Growing stage of hops is an average. At the moment there is no disease or pest pressure. Spring work is proceeding normally. Hop growers are finishing training of hops and currently hilling the hops.

	2024	Year N 2025
Organic-Hop Area (Ha)	7	30
Organic-Product. (MT)		

Main hop varieties in organic production
Styrian Gold, Aurora, Styrian Cardinal

Country, Date:
Slovenia, May 21, 2025

Member Organization(s):
Hop Growers of Slovenia /
Hmezad exim / Inbarco

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



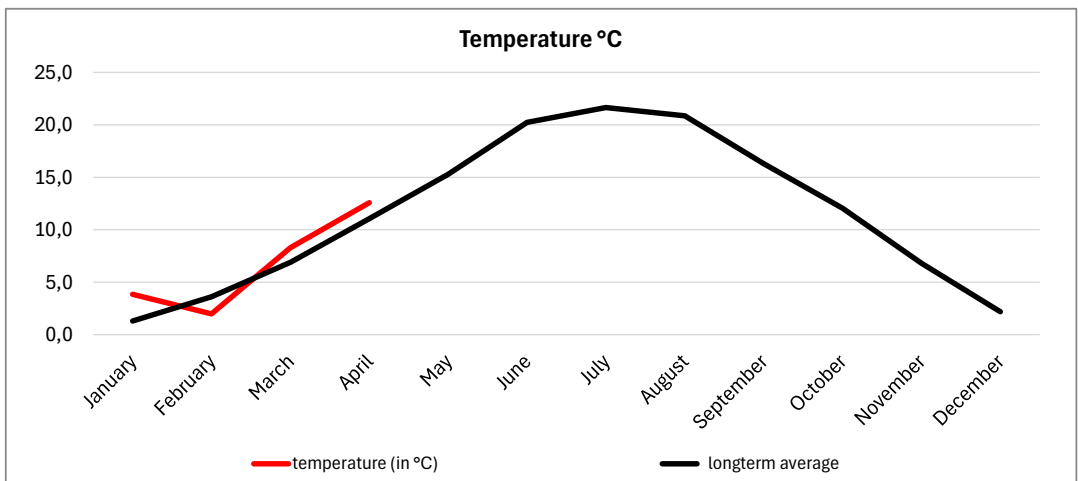
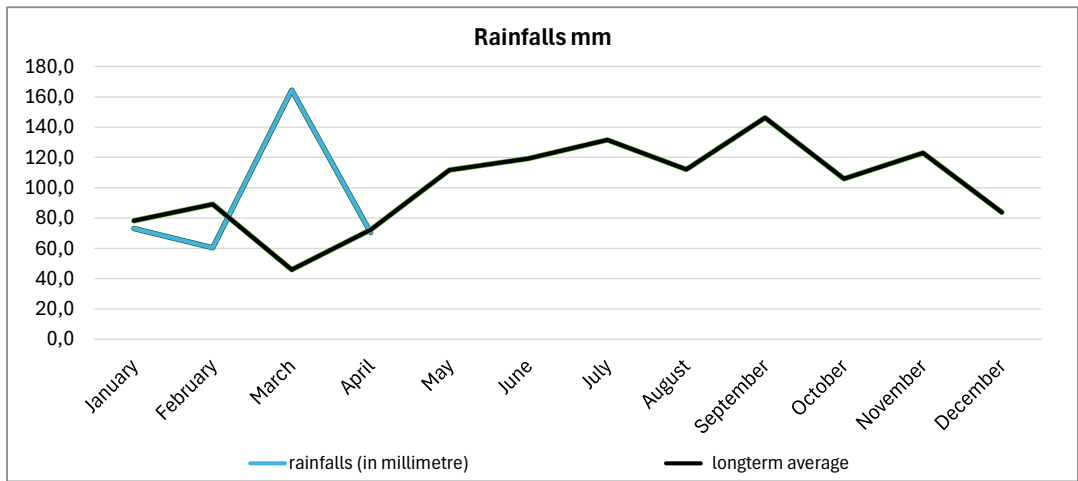
Country:
Slovenia

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL	
rainfalls (in millimetre)	73,0	60,4	164,4	70,4									368,2	
longterm average	10	78,2	89,0	45,9	72,2	111,7	119,3	131,5	112,1	146,2	106,0	123,1	83,8	1 219,0
temperature (in °C)		3,9	2,0	8,3	12,6								6,7	
longterm average	10	1,3	3,6	6,9	11,1	15,3	20,2	21,7	20,9	16,3	12,1	6,8	2,2	11,5

* please specify - 10, 30 years, ...

Note:

Weather station:



Country, Date:
Slovenia, May 21, 2025

Member Organization(s):
Hop Growers of Slovenia (source: IHPS)

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Slovenia

NOTES:

International Hop Growers' Convention

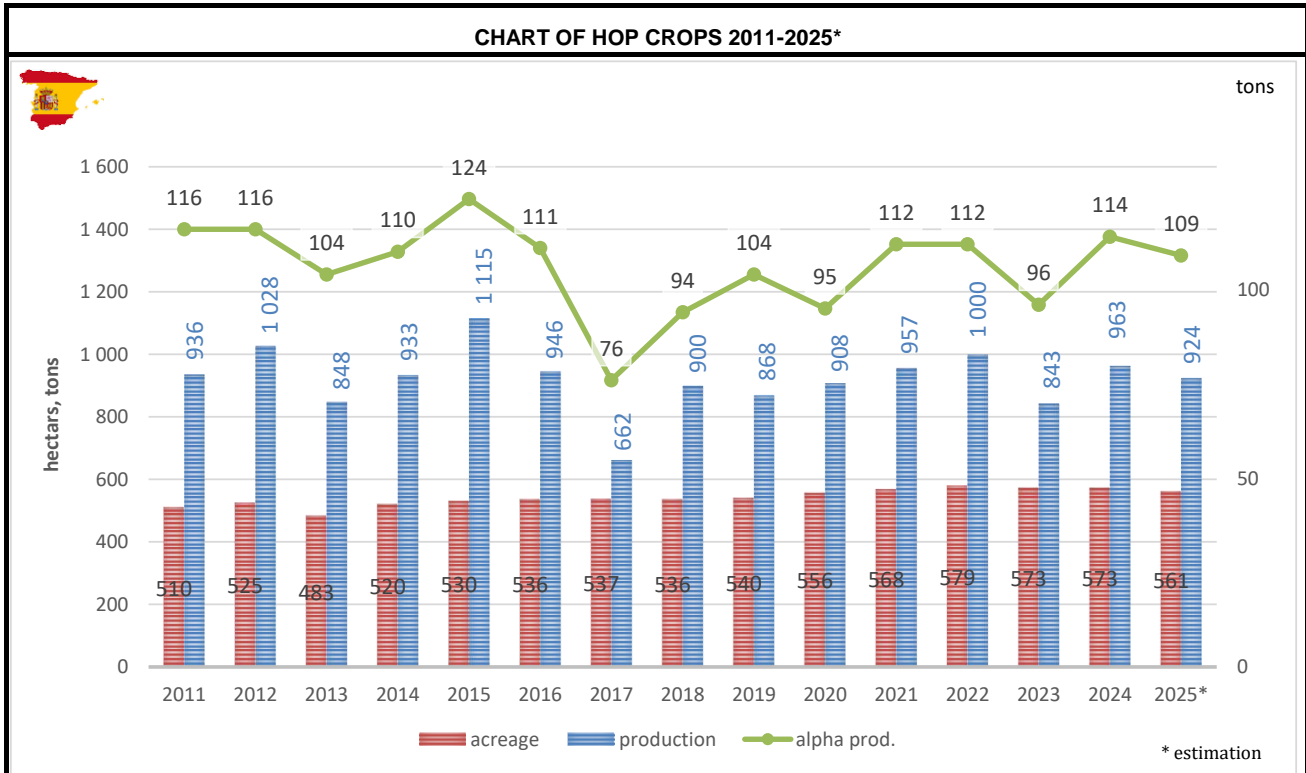
IHGC-Economic Commission: May - Freising, Germany

Country: Spain

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	90	90	90	90		

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops	0	0	0	0
% unsold Hops	0	0	0	0

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops	5,9	5,9			Farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	2024	Year N 2025	Main hop varieties in organic production
Organic-Hop Area (Ha)			
Organic-Product. (MT)			

Country, Date:
Spain - May 27, 2025

Member Organization(s):
Hopsteiner España, S.A

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report



Country:

Spain

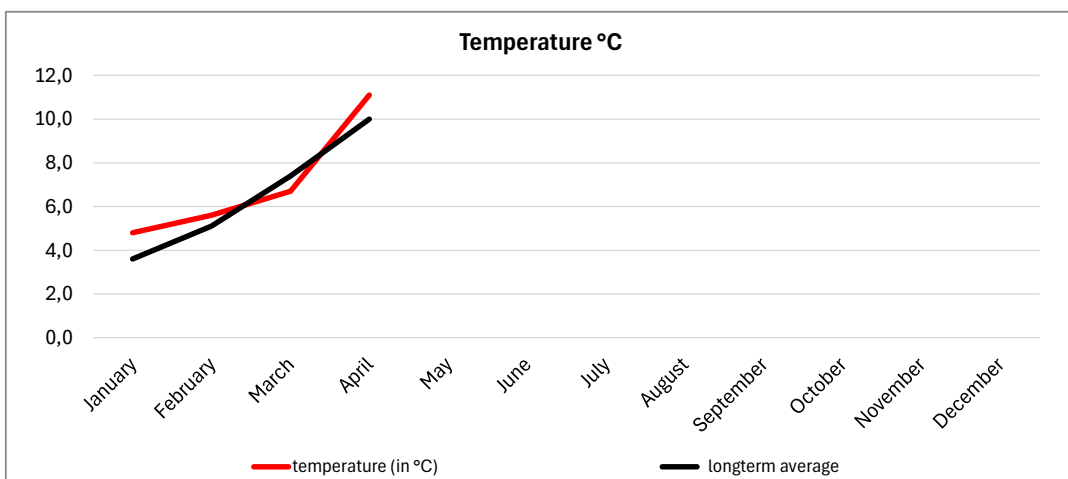
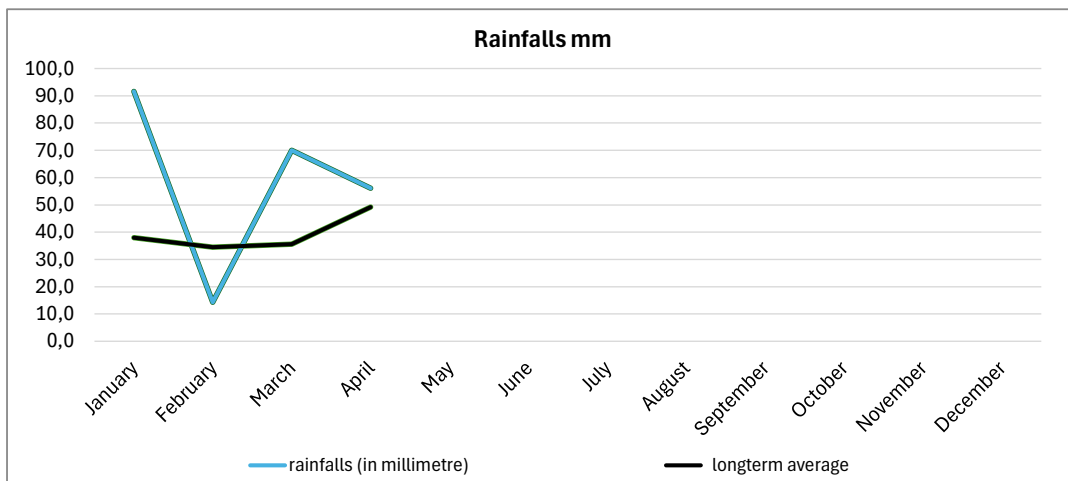
period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	91,6	14,3	70,0	56,1									232,0
longterm average	15	38,0	34,5	35,6	49,2								157,3
temperature (in °C)	4,8	5,6	6,7	11,1									7,1
longterm average	15	3,6	5,1	7,4	10,0								6,5

* please specify - 10, 30 years, ...

Note:

Weather station:

La Virgen del Camino (León)



Country, Date:
Spain - May 27, 2025

Member Organization(s):
Hopsteiner España, S.A

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: Spain

NOTES:

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	12 429			
Alpha	5 699			
Total	18 128	16 977	-1 151	-6,3

New Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	12 429			
Alpha	5 699			
Total	18 128	16 977	-1 151	-6,3

Production MT=Metric Tons	Year N-1 2024	Year N 2025 (estimate)	Difference N - (N-1)	Difference %
Aroma	23 833			
Alpha	15 662			
Total	39 495			

Yield MT/Ha	Year N-1 2024	Year N 2025 (estimate)	Difference %
Aroma	1,92		
Alpha	2,75		
Total	2,18		

Alpha Prod.	Year N-1	2024	Year N	2025	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	2 622	11,0		10,6		
Alpha	2 349	15,0		15,0		
Total	4 858	12,3				

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha	Year N Alpha %	Difference N-(N-1)
Aroma						
Amarillo®, VGXP01	2 015			8,80%		
Cascade	3 082			7,50%		
Centennial	2 448			10,00%		
Chinook	1260			12,10%		
Citra®, HBC 394	6 775			12,50%		
El Dorado®	565			12,90%		
Mosaic®, HBC 369	3 607			11,40%		
Simcoe®, YCR 14	3 607			12,60%		
Strata™, OR 91331	574					
Willamette	597					
Other Aroma	6 181			7,60%		
Total Aroma	30 711					
Alpha						
Apollo™	1080			14,00%		
CTZ	5 438			14,70%		
Eureka!™	853					
HBC 682	2429			17,50%		
Helios™, HS15619	511					
Super Galena™	355					
Other Alpha	3 416			13,60%		
Total Alpha	14 082					

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: USA

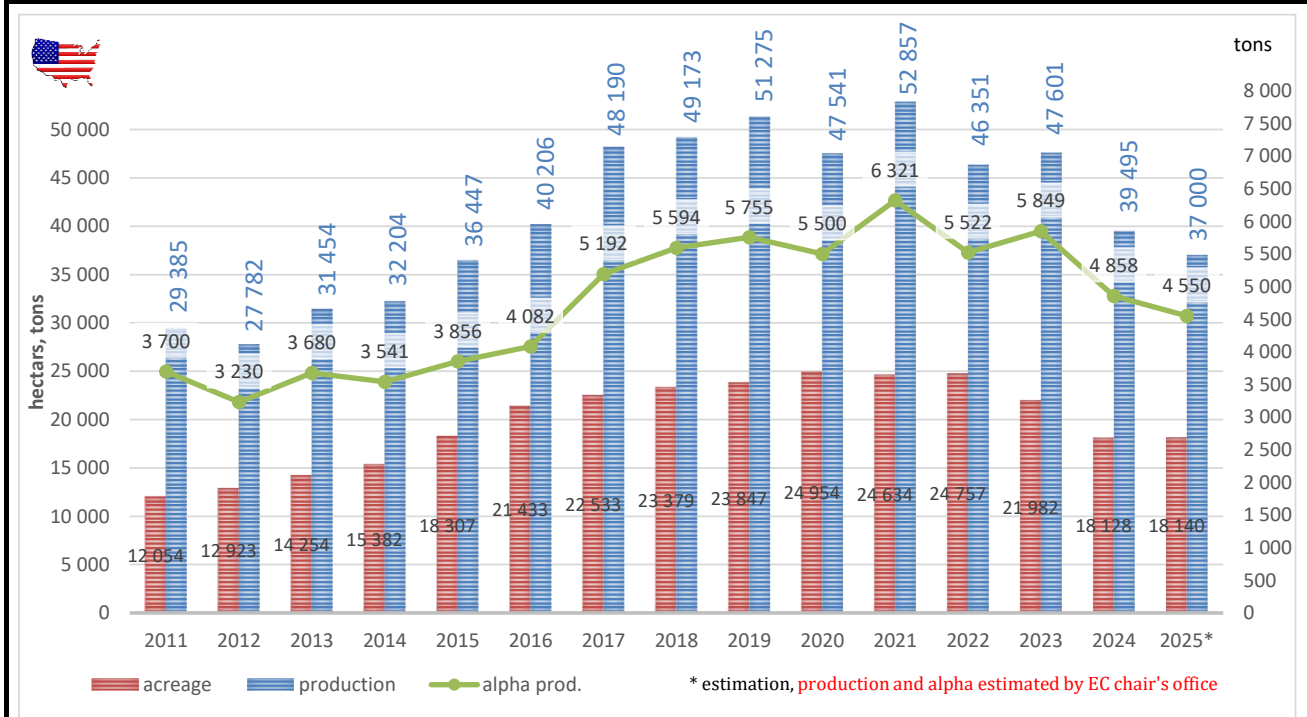
Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2025	2026	2027	2028	2029	2030
Metric tons						
% Crop / Year N	95	70	50	40	35	35

Unsold Hops (MT) : Crop Year (N-1)	2024	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2023	Year (N-1) 2024	Year (N) 2025	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE	10.77 Euro/kg	11.32 Euro/kg			

Average USD/lb. \$5,68 \$5,31

CHART OF HOP CROPS 2011-2025*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2024	Main hop varieties in organic production
Organic-Hop Area (Ha)	476		
Organic-Product. (MT)			

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Weather Report

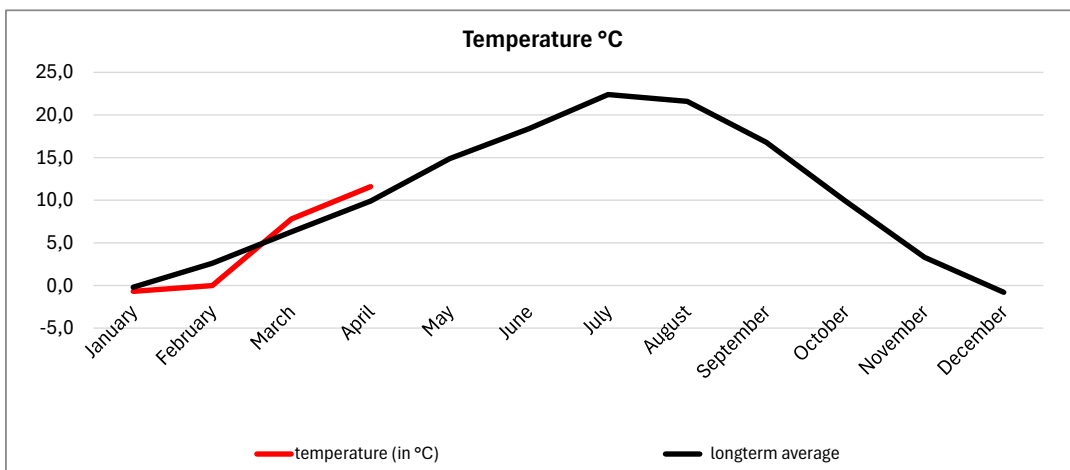
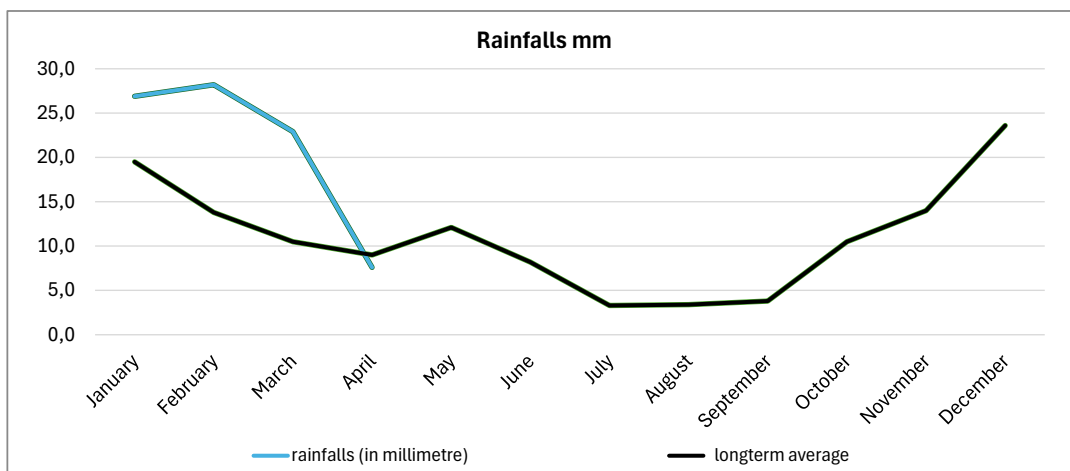


Country:
USA

period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)	26,9	28,2	22,9	7,6									85,6
longterm average	19,5	13,8	10,5	9,0	12,1	8,2	3,3	3,4	3,8	10,5	14,0	23,6	131,7
temperature (in °C)	-0,7	0,0	7,8	11,6									4,7
longterm average	-0,2	2,6	6,3	9,9	14,9	18,4	22,4	21,6	16,8	9,9	3,3	-0,8	10,4

* please specify - 10, 30 years, ...

Note:
 Weather station:



Country, Date:

V.25

Member Organization(s):

Hop Growers of America

International Hop Growers' Convention

IHGC-Economic Commission: May 2025 - Freising, Germany

Country: USA

NOTES: