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INTERNATIONAL HOP GROWERS' CONVENTION

IHGC Economic Commission

Zdeněk Rosa and Michal Kovařík

IHGC Economic Commission meetings from the last congress in Poland

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INTERNATIONAL HOP GROWERS' CONVENTION

July 2026 – Hallertau Germany + **May 2026** – Modena, Italy

November 2025 – On-line meeting + **August 2025** – Poperinge, Belgium + **May 2025** – Freising, Germany

November 2024 – Brau, Germany + **July 2024** – Lublin, Poland

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Combination of on-line meetings with standard meetings as well as hybrid meetings with participants both on-line and at the event

International Hop Growers' Convention

Economic Commission - Summary Reports

Ingolstadt, Germany

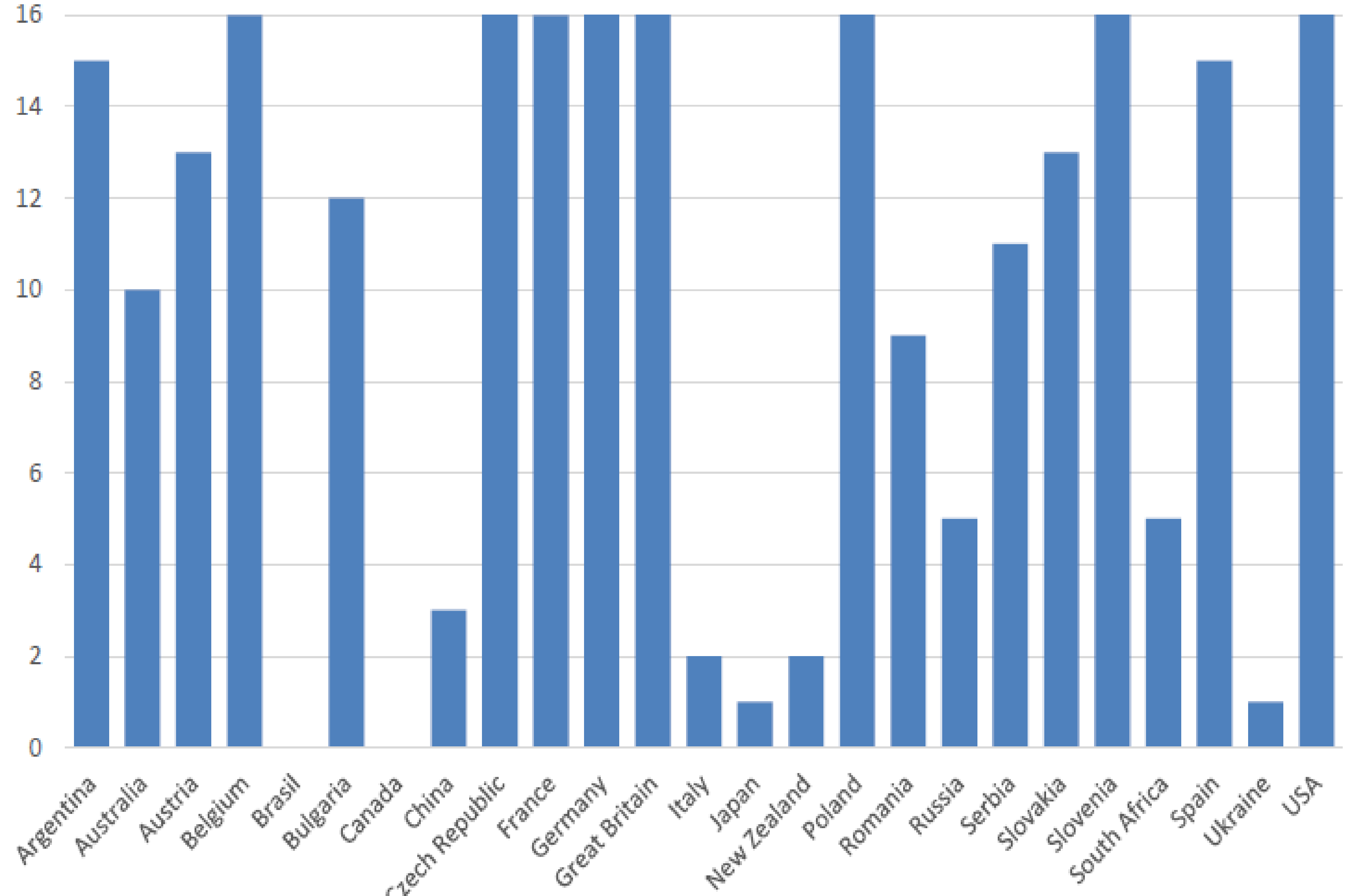
July, 2026

International Hop Growers' Convention

IHGC - Economic Commission, countries' activity

Country	2026	2025	2024	2023	2022	2021	activity 2026-2021	Responder
max.	2	3	3	3	3	3	17	
Argentina	2	1	3	3	3	3	15	Andreas Leibrecht (Lúpulos Patagónicos - Argentina)
Australia	1	1	2	2	2	2	10	***seldom*** : updated by representatives of Barth, Peter Hamilton (HPA) or EconComm own estimation base
Austria	2	2	2	2	3	2	13	Manuel Starlinger (Hopfenbaugenossenschaft eGen)
Belgium	2	3	3	3	2	3	16	Joris Cambie, Luc DeWulf (vzw Hop)
Brasil	0	0	0	0			0	N/A: in the past Gabriel Cássia Fortuna (APROLÚPULO)
Bulgaria	2	1	3	2	2	2	12	Assen Ivanov
Canada	0	0	0	0	0	0	0	*N/A*
China	0	0	1	1	1	0	3	***seldom*** : updated by representatives of Barth or Hopsteiner
Czech Republic	2	3	3	3	3	3	17	Michal Kovarik (Hop Growers Union of the Czech Republic), Zdeněk Rosa (CHMELARSTVÍ, cooperative
France	2	3	3	3	2	3	16	Antoine Wuchner (AGPH), Francis Heitz (Comptoir Agricole)
Germany	2	3	3	3	3	3	17	Johannes Wimmer (Verband Deutscher Hopfenpflanzer e.V.), formerly Gabriel Krieglmeier
Great Britain	2	3	3	3	3	3	17	Chris Daws (English Hops Ltd)
Italy	1	0	1				2	***seldom:*** Eugenio Pellicciari (Italian hops company), Stefano Fancelli - Luppolo Made in Italy
Japan	0	0	1	0	0	0	1	***randomly:*** *Tetsu Sugimura, Kirin*
New Zealand	0	0	0	2	0	0	2	***randomly:*** *hop merchants, once Sean Riley Free style hops…*
Poland	2	3	3	3	3	3	17	Jan Szałas (Import-Export J.A.Szałas)
Romania	0	1	1	1	3	3	9	*seldom* - Akos Mora
Russia	1	2	1	1	0	0	5	Mikhail Khlynovskiy
Serbia	2	1	3	3	2	0	11	prof. Jan Kisgeci
Slovakia	2	2	2	2	3	2	13	Marian Menšík (Bánskobystrický Brewery)
Slovenia	2	3	3	3	3	3	17	Jernej Ribić (Slovenian Hop Growers Association)
South Africa	0	0	1	1	2	1	5	*random* - Ntjapa Lebaka (InBev)
Spain	1	3	3	3	3	2	15	José Magadan (Hopsteiner)
Ukraine	0	0	0	1	0	0	1	***randomly*** : *hop merchants*
USA	2	3	3	3	3	3	17	Maggie Elliot, Jessica Stevens (Hop Growers of America)
IHGC								

Reports 2021 - 2026



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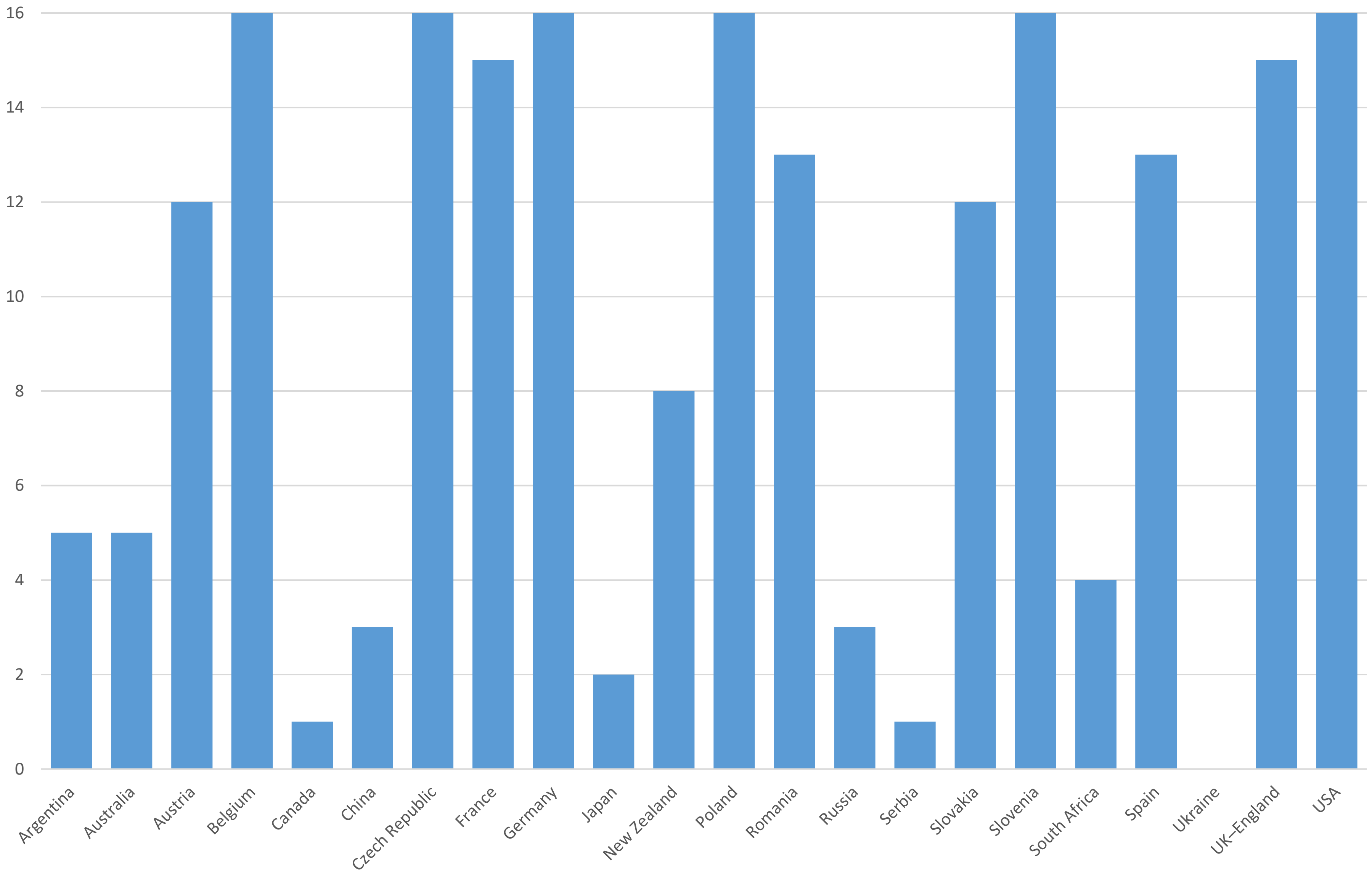
More than 15 reports (10 countries):

Argentina, Belgium, Czech Republic, France, Germany, Great Britain, Poland, Slovenia, Spain, USA

More than 10 reports (5 countries):
Australia, Austria, Bulgaria, Serbia, Slovakia

Reports 2016 - 2021



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More than 15 reports (7 countries):

Belgium, Czech Republic, France, Germany, Poland, Slovenia, Great Britain, USA

More than 10 reports (4 countries):
Austria, Romania, Slovakia, Spain

Special thanks to:

Andreas Leibrecht, Manuel Starlinger, Joris Cambie, Francis Heitz, Gabriel Krieglmeir, Jan Szalasz, Jernej Ribič, Mr. Mora, Marian Menšik, Jose Magadan, Chris Daws, Jessica Stevens, Maggie Elliot, Pascal Piroué/Stephan Schinagl

and

Leslie Roy, Martin Pavlovic, Erich Lehmair

and

Michal Kovařík

International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Ingolstadt, Germany - July 27, 2026

Country	Hop Acreage 2025 (Hectares, Ha)					Hop Production 2025 (in MT = 1.000 kg)			Alpha acid Prod.	Hop Acreage 2026 (Hectares, Ha) estimations					Hop Production 2026 (in MT = 1.000 kg) estimations			Alpha acid Prod.
	Aroma	Alpha	Hop area'	New	Total	Aroma	Alpha	Total	MT	Aroma	Alpha	Hop area'	New	Total	Aroma	Alpha	Total	MT
Argentina	131	47	178	0	**178**	280	100	**380**	**33**	131	47	178	0	**178**	260	90	**350**	**30**
Australia°	*500*	*80*	*580*	*0*	***580***	*1 300*	*200*	***1 500***	***245***	*450*	*60*	*510*	*0*	***510***	*1 100*	*150*	***1 250***	***240***
Austria	212	56	268	2	**270**	369	108	**477**	**46**	214	55	269	2	**271**	360	92	**452**	**35**
Belgium	121	46	167	0	**167**	154	92	**246**	**22**	112	49	161	0	**161**	140	95	**235**	**21**
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**	34	24	**58**	**6**	7	2	9	0	**9**	15	5	**20**	**2**
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	4 503	83	4 586	226	**4 812**	6 774	135	**6 909**	**290**	4 441	76	4 517	269	**4 786**	5 860	140	**6 000**	**240**
France*	523	71	594	14	**750**	737	117	**854**	**54**	460	77	537	15	**700**	580	100	**680**	**35**
Germany	8 248	10 111	18 359	603	**18 962**	15 629	27 512	**43 141**	**5 238**	7 406	9 810	17 216	645	**17 861**	12 000	22 000	**34 000**	**4 170**
Great Britain	384	94	478	0	**478**	514	137	**651**	**49**	400	97	497	0	**497**	536	142	**678**	**51**
Italy°	*21*	*6*	*27*	*0*	***27***	*28*	*4*	***32***	***2***	*27*	*8*	*32*	*7*	***35***	*33*	*6*	***39***	***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	729	787	1 516	60	**1 576**	1 210	1 438	**2 648**	**248**	772	804	1 576	30	**1 606**	1 050	1 150	**2 200**	**201**
Romania°	*73*	*207*	*280*	*0*	***280***	*40*	*160*	***200***	***14***	*73*	*207*	*280*	*0*	***280***	*40*	*160*	***200***	***14***
Russia	265	90	355	30	385	320	115	435	39	285	105	390	10	400	340	120	460	41
Serbia	12	0	12	0	**12**	24	0	**24**	**2**	2	0	2	0	**2**	4	0	**4**	**4**
Slovakia	38	0	38	0	**38**	38	0	**24**	**3**	38	0	38	0	**38**	30	0	**30**	**3**
Slovenia	1 481	30	1 511	92	**1 603**	2 300	45	**2 345**	**135**	1 311	30	1 341	110	**1 451**	1 700	50	**1 750**	**96**
South Africa°	*87*	*317*	*404*	*11*	***404***	*137*	*545*	***682***	***87***	*87*	*317*	*404*	*11*	***404***	*137*	*545*	***682***	***87***
Spain	9	465	474	31	**505**	12	850	**861**	**99**	15	382	397	63	**460**	15	780	**795**	**95**
Ukraine°	*100*	*50*	*150*	*0*	***150***	*100*	*58*	***158***	***8***	*100*	*50*	*150*	*0*	***150***	*100*	*58*	***158***	***8***
USA	12 655	4 202	16 857	0	**16 857**	25 167	12 546	**37 713**	**4 714**	12 982	3 871	16 853	0	**16 857**	24 852	10 738	**35 590**	**4 387**
IHGC	**31 679**	**19 775**	**51 454**	**1 072**	**52 657**	**57 729**	**51 019**	**108 733**	**12 092**	**30 877**	**19 061**	**49 935**	**1 165**	**51 237**	**51 714**	**43 254**	**94 968**	**10 520**

	Aroma	Alpha	Hop area'	New	Total	Aroma	Alpha	Total	MT
Difference ∑ 2026-2025	-802	-714	-1 519	93	-1 420	-6 015	-7 765	-13 765	-1 572
Difference ∑ 2026-2021	-9 746	-773	-10 531	-477	-10 535	-26 536	-8 492	-34 949	-4 376
Difference ∑ 2026-2016	-5 398	2 538	-2 862	-3 915	-3 486	-15 323	1 589	-13 735	-101

° *Since no country updates were available, figures from November 2025 were used.*

' Acreage without new hop areas

* Incl. hop areas outside of the AGPH

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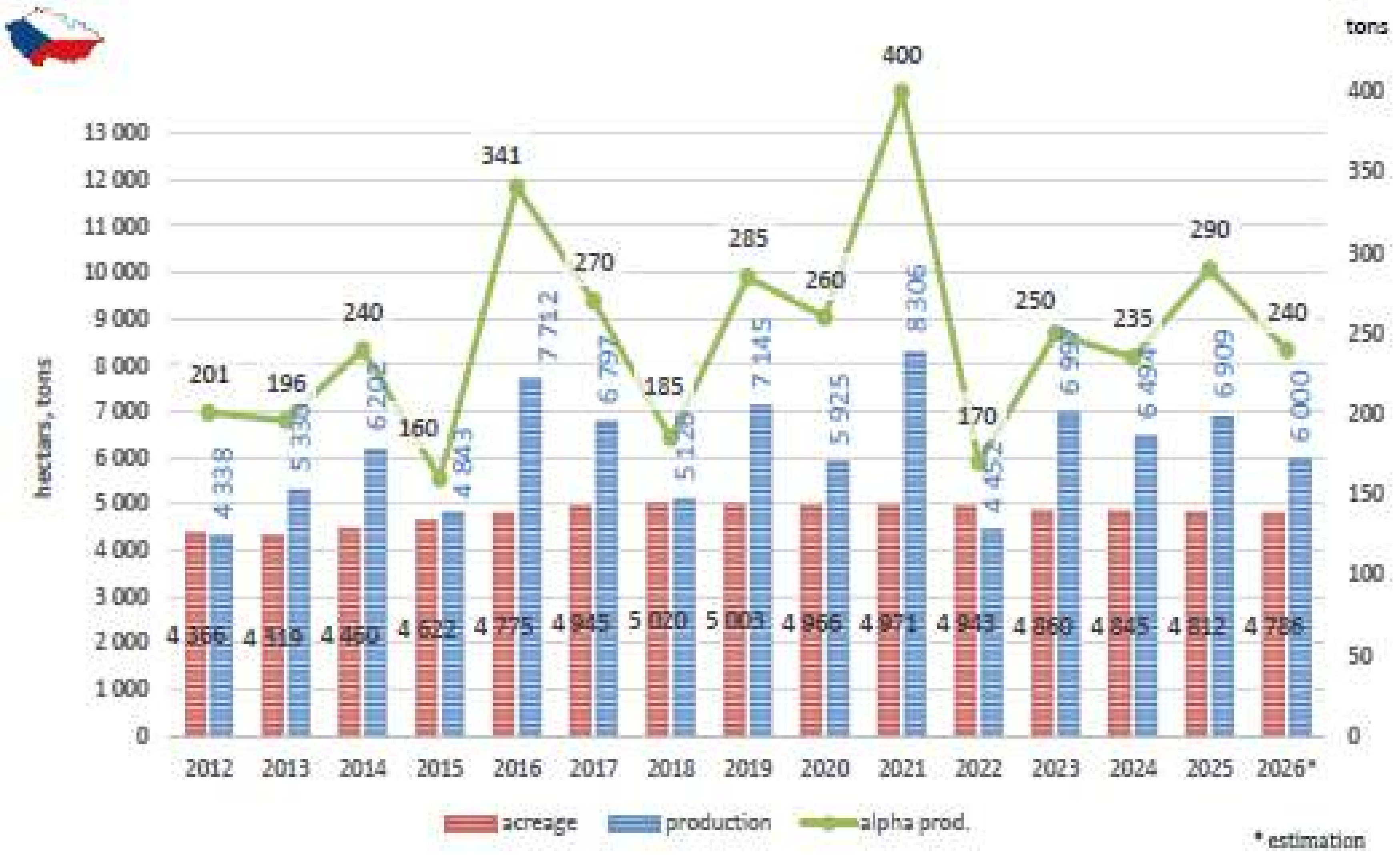

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Country report with long term acreage and production development

	Year N-1	Year N 2026	
O-Hop Area (Ha)	15,6	22,2	+ 3 in a transitional period
O-Production (MT)	15,6	10,0	

Organic hop acreage and production

	period*	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL
rainfalls (in millimetre)		**31,7**	**14,9**	**7,4**	**8,5**	**75,5**	**66,4**							**204,4**
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)		**-2,7**	**2,0**	**4,5**	**8,7**	**15,0**	**20,3**							**8,0**
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

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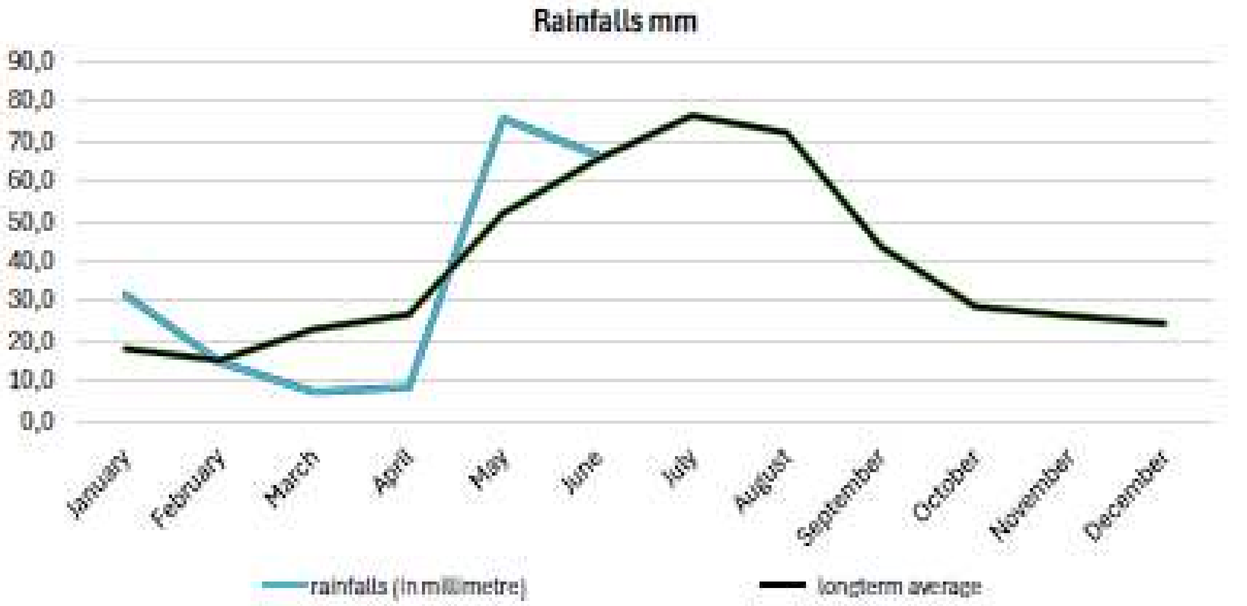
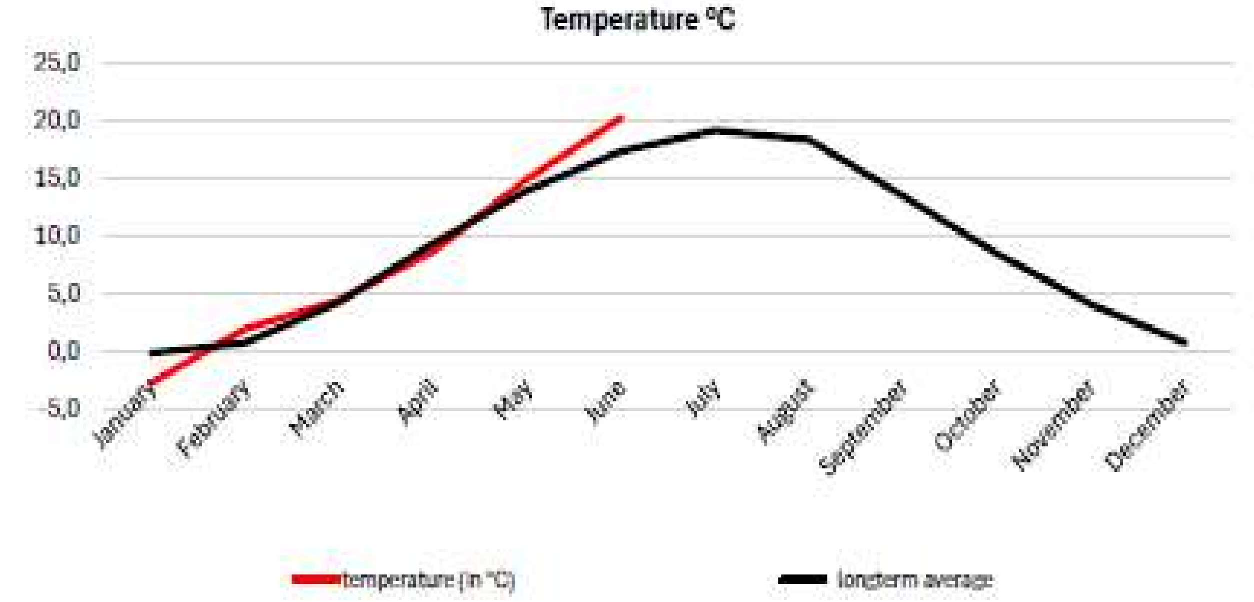
* please specify - 10, 30 years, ...

Note:	1991-2020
Weather station:	Žatec

Climatic data for the year compared to long-term average





Deutscher Hopfenwirtschaftsverband e. V.
Ledererstraße 2, 85276 Pfaffenhofen / Ilm

Deutscher Hopfenwirtschaftsverband e.V.

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MARKET REPORT JULY 2026

IHGC Economic Commission • Ingolstadt • July 27, 2026

Merchant market report

The global hop acreage for the 2026 harvest is estimated at approximately 51,000 hectares. This represents a decrease of around 3% compared with the previous year. The adjustment is therefore once again a step in the right direction; however, it remains below the level required to sustainably stabilize the market.

The adjustment of varieties is essentially focused on established varieties such as Hallertauer Tradition, Perle, Herkules and Magnum. These figures show that the need for acreage adjustments has been recognized, but that production decisions are still not fully following market realities.

The market assessment that has been clearly discussed within this committee for many years has pointed in the same direction: excessive acreage combined with beer production that continues to face pressure for a variety of reasons. This trend will continue and is primarily caused by changing consumption habits in the traditional beer markets of Europe, North America and Japan, an aging population, and an increasing focus on health.

The trend towards non-alcoholic alternatives and other beverage categories is unmistakable. These alternatives are expanding the portfolio of innovative breweries and can help secure their continued existence.

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Thank you for your support and contributions!