

---

# Update US Hops Supply Update

Amaey Mundkur

MBAA Sectional – Philadelphia

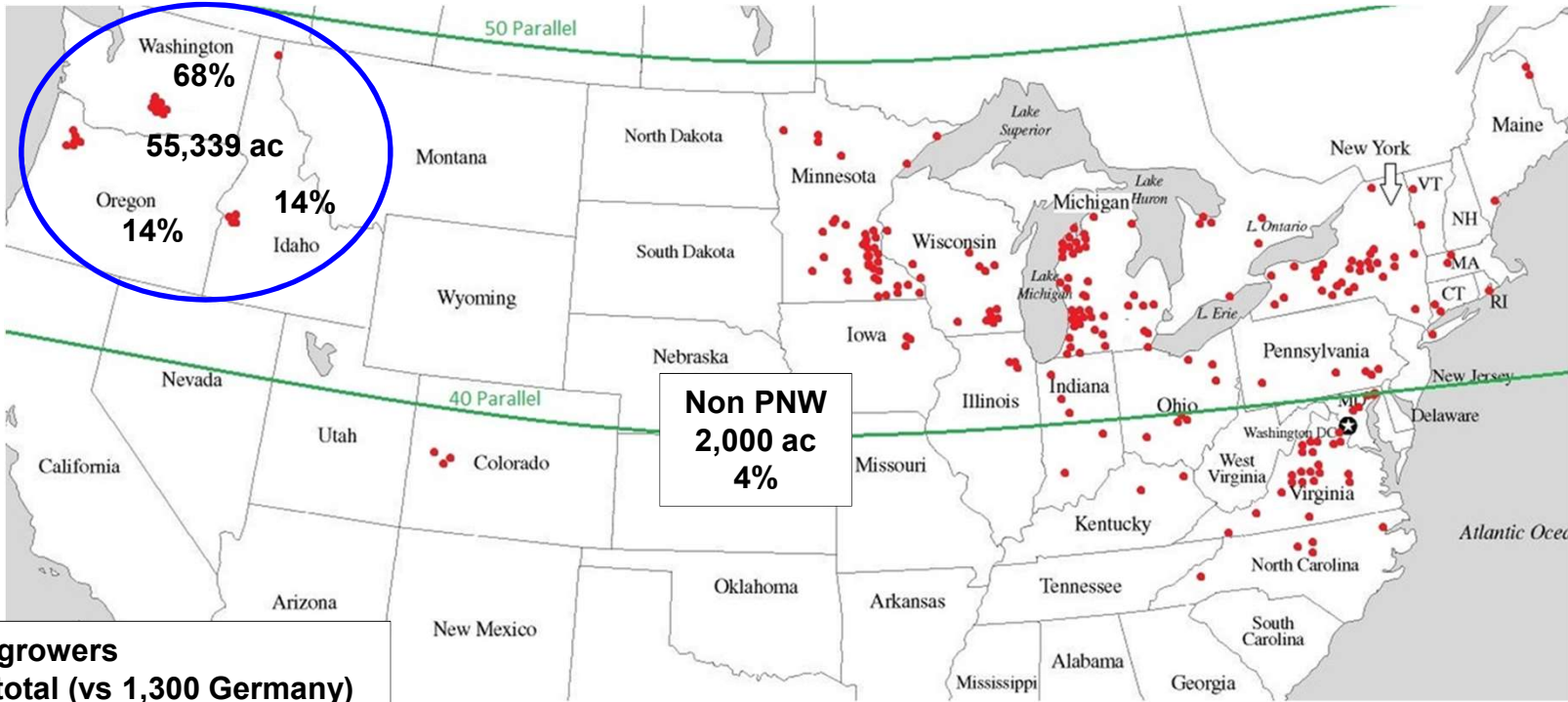
03 August 2018

---

**BARTH-HAAS**GROUP



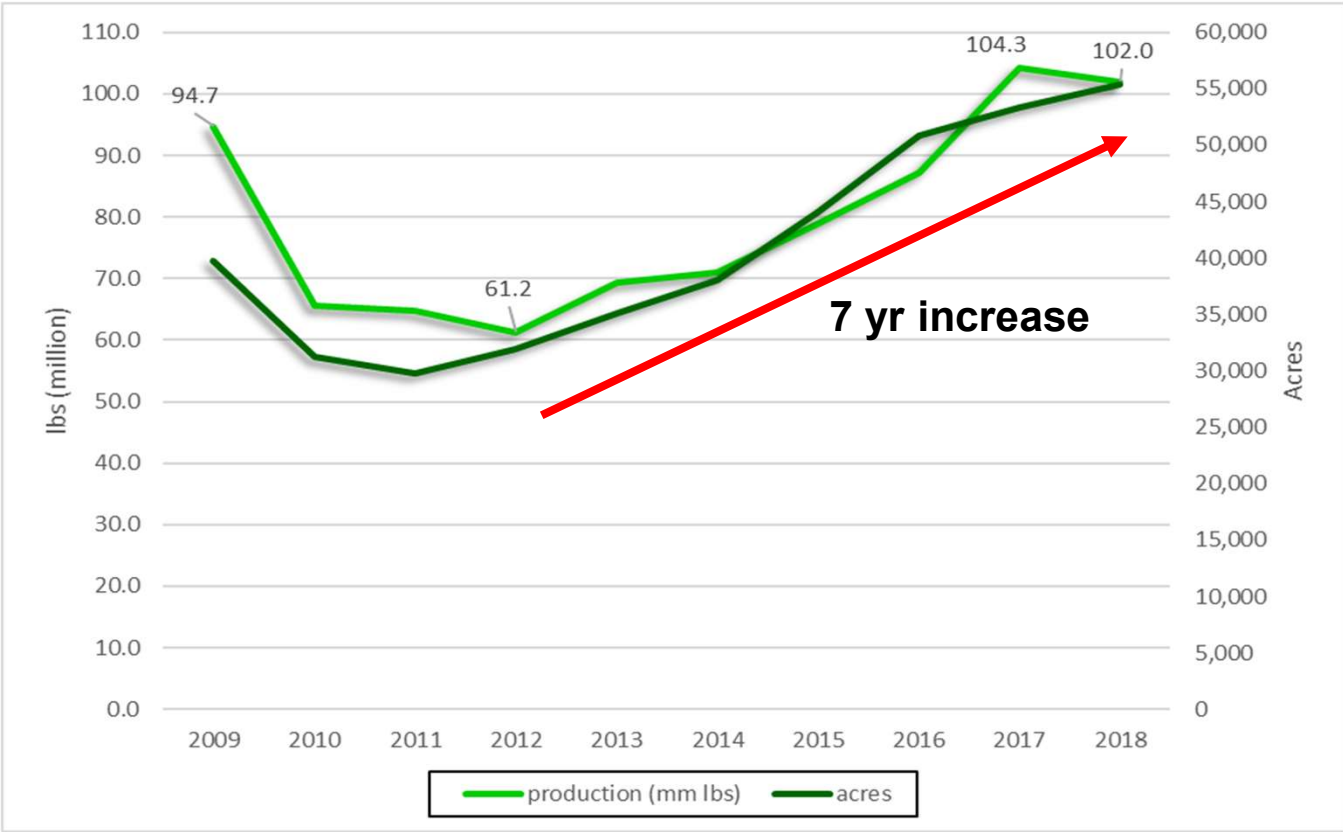
# US hop growing regions



**PNW growers**










- 69 total (vs 1,300 Germany)
- Top 20 = 70% acreage
- Top 11 = 50% acreage

# USA: acreage and production (PNW region only)



## USA: acreage development aroma varieties

- Citra® gains 30% to USA no. 1
- Chinook up 17%
- Reductions in Cascade, Centennial, Simcoe®
- Amarillo®, Mosaic® flat
- Smaller adjustments with others
- Total aroma acreage flat

variety	2017 acres	2018 acres	change acres	change %	GROUP
Citra® 	5,120	6,652	1,532	30%	
Cascade	6,945	6,009	(936)	-13%	
Centennial	5,269	4,864	(405)	-8%	
Simcoe®	4,608	3,916	(692)	-15%	
Amarillo®	3,007	2,894	(113)	-4%	
Chinook	2,425	2,839	414	17%	
Mosaic™	2,714	2,768	54	2%	
Willamette	1,531	1,402	(129)	-8%	
Ekuanot™	984	880	(104)	-11%	
Cluster	637	674	37	6%	
Crystal	686	611	(75)	-11%	
El Dorado®	682	555	(127)	-19%	
Azacca®	578	546	(32)	-6%	
Palisade®	576	521	(55)	-10%	
Mt. Hood	415	485	70	17%	
Mt. Rainier	144	433	289	201%	
Comet	245	328	83	34%	
Sterling	252	283	31	12%	
Ahtanum	371	260	(111)	-30%	
Calypso	286	212	(74)	-26%	
Tahoma	229	209	(20)	-9%	
Warrior®	231	143	(88)	-38%	
Golding	259	142	(117)	-45%	
Loral™	186	131	(55)	-30%	
Other	2,602	3,162	560	22%	
<b>total aroma</b>	<b>40,982</b>	<b>40,919</b>	<b>(63)</b>	<b>0%</b>	

# USA: acreage development high alpha varieties

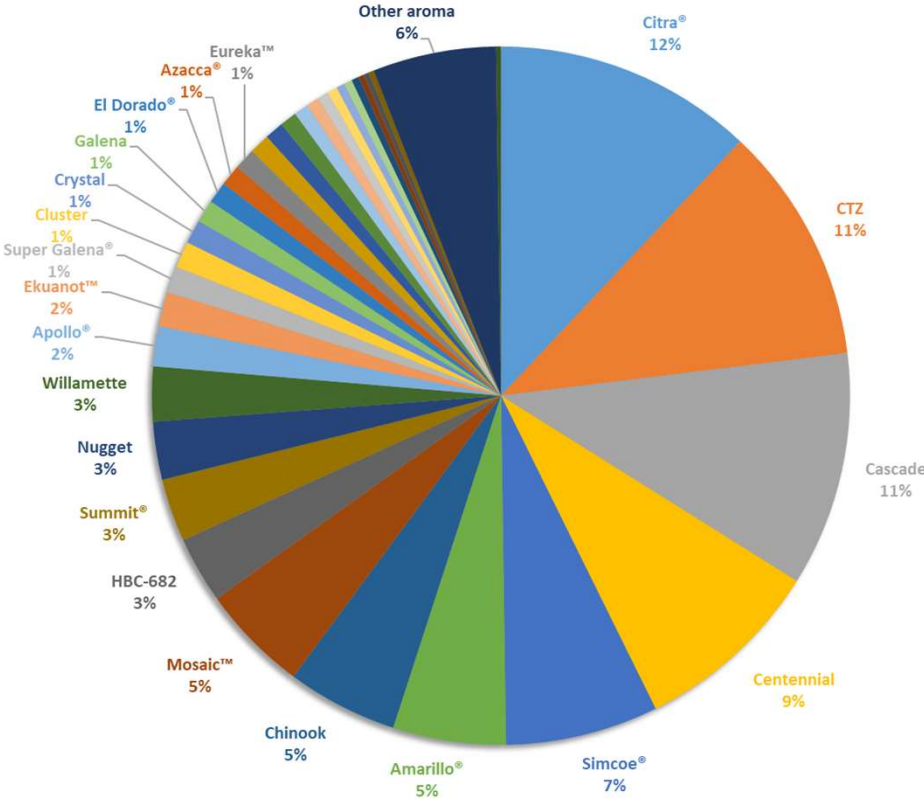
- CTZ no. 2 overall in US, +25%
- HBC 682 up 73% ('Pahto')
- Smaller changes with others
- Total alpha up 2,120 ac, +17%
- Herkules 15,590 ac
- Total US-PNW up 2,057, +4%

variety	2017 acres	2018 acres	change acres	change %
CTZ	4,884	6,102	1,218	25%
HBC-682	987	1,707	720	73%
Summit®	1,617	1,610	(7)	0%
Nugget	1,492	1,485	(7)	0%
Apollo®	917	1,025	108	12%
Super Galena®	571	678	107	19%
Galena	418	581	163	39%
Eureka™	437	544	107	24%
Bravo®	640	371	(269)	-42%
Magnum	129	190	61	47%
Other	208	127	(81)	-39%
<b>total high alpha</b>	<b>12,300</b>	<b>14,420</b>	<b>2,120</b>	<b>17%</b>
<b>USA total</b>	<b>53,282</b>	<b>55,339</b>	<b>2,057</b>	<b>4%</b>



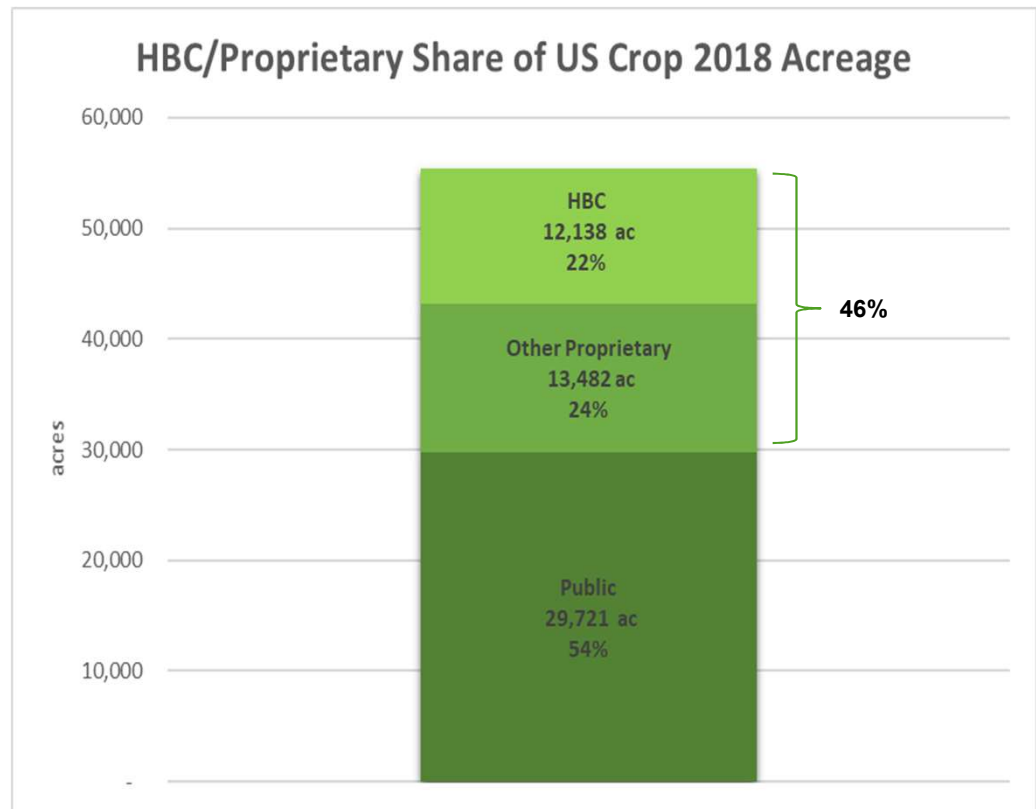
USA: varietal share (PNW region only)

- Citra® no. 1 at 12% share
- 5 varieties = 50% acreage
- Top 10 = 71%
- 7 of top 10 are aromas
- Proprietary = 46%

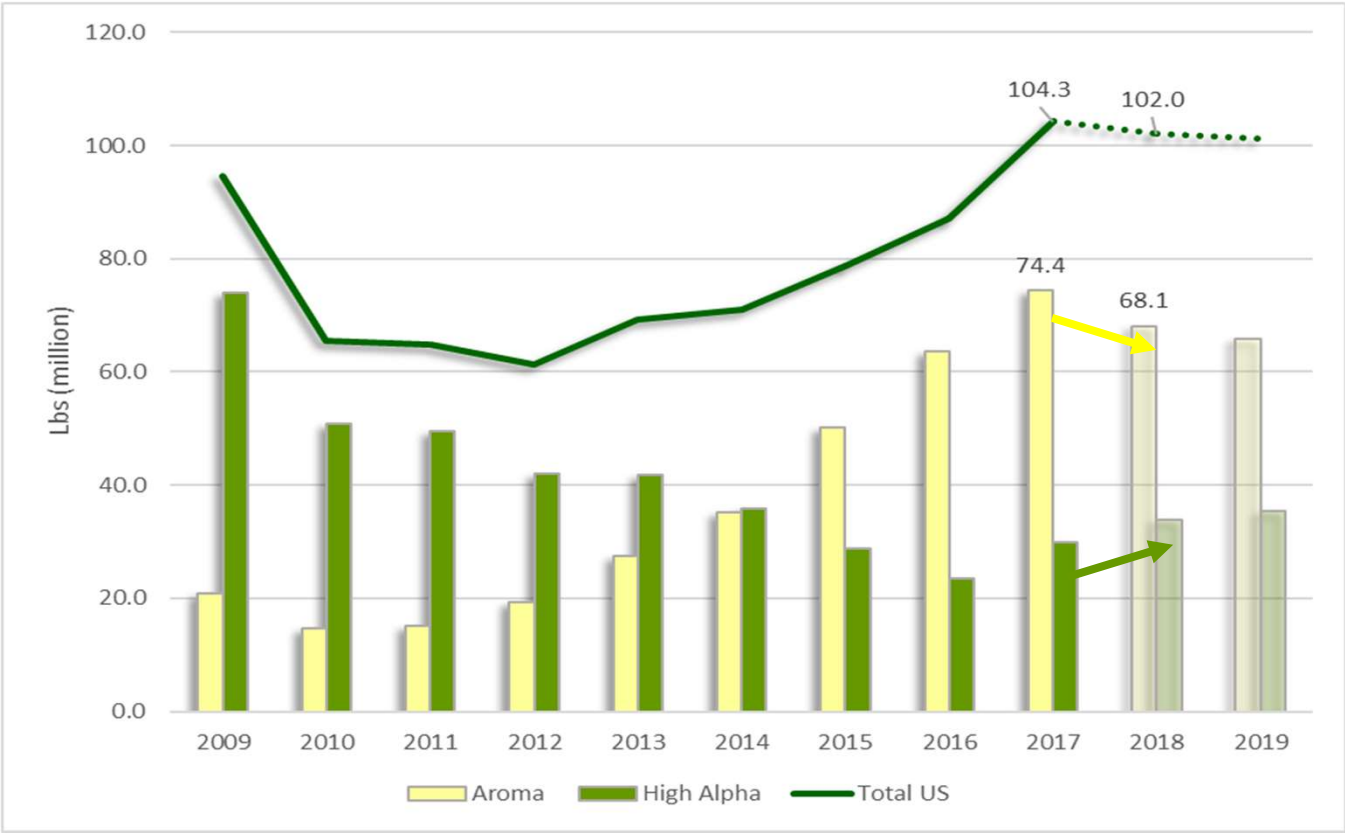


## HBC/Proprietary Varieties

- Proprietary varieties from 5% to 46% over past 10 yrs
- Contracted on a full production basis with variety owner, tightly managed
- Continued stronger demand in craft market for the most popular ones (Citra®, Mosaic®, Simcoe®, Amarillo®, etc)
- Currently providing premium prices/returns to growers relative to public varieties
- Less of a commodity



# USA: production (PNW region only)





## US 2018 Crop Estimate

---

- Plentiful water supply, favorable weather conditions so far
- Early bloom in some varieties, **Centennial** affected the most, will be down
- Other early maturing varieties (eg **Cluster**) look light
- **Cascade** looks weak, **Simcoe**® weak with powdery mildew in areas
- **Citra**® very strong, above average
- **Mosaic**® and **Amarillo**® solid average
- **Sabro**® looks good but mainly babies for this year, more in 2019
- High alphas (**CTZ, 682**) also solid average but alphas unknown yet
- Recent heat was needed to accelerate growth, particularly with high alpha
- Quality looks good, only moderate/normal pest/mildew pressure so far
- Crop maturity/harvest timing looks to be just slightly ahead of normal

Thank you for your attention

BARTH-HAASGROUP

