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REPORT FROM THE COMMISSION
on the production and marketing of hops
(1994 harvest)

Proposal for a
COUNCIL REGULATION (EC)
laying down, in respect of hops, the amount of aid to producers
for the 1994 harvest

(presented by the Commission)

REPORT FROM THE COMMISSION

on the production and marketing of hops

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1. INTRODUCTION

Article 11 of Regulation (EEC) No 1696/71 requires the Commission to present to the Council an annual report on the production and marketing of hops. The purpose of this report is to provide information on trends in production, prices and demand.

This report, the 24th such report presented by the Commission, outlines the main events of the 1994 harvest year. It focuses on the salient facts needed to calculate the amount of aid to producers for the 1994 harvest.

The Commission proposes that hop producers should again be granted aid to supplement their incomes.

2. 1994 HARVEST

2.1. World situation

2.1.1. Production

Worldwide, the total area under hops was approximately 89 500 ha, of which approximately 69 500 ha belonged to members of the International Hop Growers Convention (IHGC) and Member States of the Community (see Table 1). Production in China and the countries of the former Soviet Union was also substantial, but can only be roughly estimated, as no precise figures are available.

The area under hops in IHGC and EEC countries decreased on average by about 4%. The decrease was a little more marked in Belgium (- 6.13%), the United Kingdom (- 5.17%) and the Ukraine (- 18.25%). New Zealand (+ 7.81%) heads the list of the few countries in which there was an increase. The decrease worldwide is about 2.5%.

At around 2 450 000 ztr the 1994 harvest was markedly (11% or 300 000 ztr) lower than in 1993. Quality was less good with an alpha acid content of 6.4% and alpha acid production of 7 850 tonnes.

These figures are very close to those for 1992, which was considered a poor harvest although in 1992 production of alpha was higher (7 912 t) as a result of the larger areas under cultivation.

The harvest was particularly poor in the Hallertau in Germany owing to unfavourable weather (drought and very high temperatures) in the summer of 1994. Climatic factors generally play a less important role in the United States as almost all the plantations can be irrigated. But the water shortages, already mentioned in 1994, could get worse in 1995.

Worldwide there is overproduction of hops in relation to the needs of the breweries. For this reason the member states of the IHGC proposed that between 5 000 and 10 000 ha should be grubbed. This was partially done in Germany on 1 085 ha and in the Ukraine on 1 197 ha but only on 287 ha in the United States. If there is no additional voluntary grubbing, market forces will restore the balance.

Although beer production in Europe has fallen year after year since 1990, this is not so in the case of other continents, especially Asia. In China, in particular, beer production rose by 33% in 1993. With the United States in the lead, China ranks as the world's second-largest beer producer.

Worldwide, beer production is estimated at 1 238 million hectolitres for 1995. Since this volume usually requires 8 297 tonnes of alpha acid for hopping of 6.3 g/alpha/hl, the quantity of hops produced should in principle not be sufficient to meet requirements. There would be a shortfall of about 448 t of alpha. It should be noted that, for hopping of 6.3 g of alpha acid per hectolitre of beer, breweries need to have around 6.7 g/hl available, the difference being accounted for by losses in storage and at the hop processing stage. It should be added that less alpha is needed than previously as a result of a trend towards manufacturing less bitter beers, on the one hand, and of constant technological progress on the other. Breweries would appear, however, still to have stocks in hand, enough to cover six to nine months of production.

2.1.2. Market trend

Although prices in most countries remained the same or rose slightly in relation to 1993, the same cannot be said of the products of the Hallertau in Germany where production from the point of view of quantity and especially quality (50% less alpha acid compared with 1993) was very poor. This explains the little interest shown by the trade for certain varieties such as "Hallertauer Hersbrucker", "Hallertauer Northern Brewer" and some super-alpha varieties, which fetched DM 150/ztr, DM 300/ztr and between DM 400 and 550/ztr respectively. In the United States, alpha content - though lower than in 1993 - reached 9.5% on average; in addition there was very little hops on the free market which meant planters could sell it fairly quickly at prices ranging from DM 216 to 372/ztr. In the United States the average price for all aromatic and alpha varieties was DM 313/ztr (\$1.81 per lb).

Contracts signed in advance - though currently for smaller quantities and lower prices (only 52% of production in the European Union is covered by contract for 1996) - have proved after all to be a good system even though it cannot in times of crisis operate as well as it might (see Table 5).

A point some members of the IHGC are particularly concerned about is the price-fixing procedure for aromatic varieties based on kilos of alpha rather than on the aroma itself.

2.2 Community situation

2.2.1. Production structure

As in agriculture as a whole, structural change in hop-growing has continued. There are now 5 297 farms growing hops in the Community (see Annex, Table A), a 5.73% fall over 1993. The average area under hops rose from 5.1 to 5.2 ha per farm. More than 300 farms stopped growing hops in Germany. Since accession, Austria has been added to the list of hop-producing Member States.

2.2.2. Production

The area under hops in the Community was 27 648 ha in 1994, i.e. 1 265 ha (4.41%) down on 1993 (see Annex, Table 1), most of it (21 930 ha, or 80%) in Germany. But in that country areas were 1 085 ha, i.e. 4.71%, down on 1993.

At present, aromatic varieties account for 56.96% of the area, with Hersbrucker (34.90% of the aromatic area in spite of a reduction in Germany of 1 024 ha on 1993) still the most popular. Of the aromatic varieties for which there were large increases in area, mention should be made of

Hallertauer Tradition (+ 309 ha), Perle (+ 230 ha) and Spalter Select (+ 290 ha). Bitter varieties accounted for 42.47% and other for 0.57%.

The shares of bitter and of other varieties were both slightly down in 1994 to the benefit of aromatic varieties. Of the bitter varieties Northern Brewer remained far and away the most popular (4 918 ha, which represents a fall on 1993 of 890 ha) followed by Target (1 682 ha) and Brewer's Gold (1 342 ha). The area under the latter two varieties also fell, by 170 ha and 248 ha respectively. For the bitter varieties the general trend is towards increased production of the super-alpha varieties, which are more in demand on the markets, such as Hallertauer Magnum and Nugget. The area under Nugget rose by 30% on 1993 and the area under Magnum by about 45%.

Quantitatively the 1994 harvest was far inferior to that of 1993. At 740 756 ztr, average yield was 1.37 tonnes or 27 ztr per hectare. Quality was average to poor, and alpha acid content was around 4.60% on average for the Community as a whole for the three types of varieties, giving 1 696 tonnes - 61 kg per hectare - of alpha acid for beer production in 1995.

2.2.3. Sales and prices

Overall, the average price for hops sold under contract was ECU 161/ztr, ECU 2.71 up on the 1993 harvest, ranging from ECU 63/ztr in Portugal to ECU 213/ztr in Ireland. Both these countries sold their entire production under contract (see Annex, Table 6). On the other hand, the average spot price for hops sold on the free market was significantly up (almost double) on the preceding year, at ECU 123/ztr as opposed to ECU 65.53/ztr in 1993, although here too prices differed markedly from one Member State to another, ranging from ECU 52/ztr in Spain to ECU 212/ztr in the United Kingdom.

Of the 1994 crop 81% was sold under contract (see Annex, Table 5). Belgium was well below this average at 56%.

Highest average prices, both under contract and for spot sales, were made by the aromatic varieties (ECU 177/ztr and ECU 129/ztr respectively). The varieties fetching the highest prices were Challenger, Goldings, Hallertauer, Spalter and Tettnanger. Some varieties grown in the United Kingdom, i.e. Fuggles, Progress and WVG, also sold for prices distinctly higher than the average for the group, as did Strisselspalt in France, where average contract prices were ECU 214/ztr. The variety of aromatic hops fetching the lowest price was undoubtedly Hersbrucker, which accounted for about 35% of the area for this group of varieties (contract price ECU 151/ztr, spot price ECU 70/ztr).

For bitter varieties the average price for sales under contract was ECU 139/ztr and for spot sales ECU 113/ztr, the varieties that fetched the highest prices in this group being Magnum and Northdown.

For other varieties, contract prices and spot prices were above the Community average. This was due to the relatively high prices paid for experimental varieties in Austria and the United Kingdom and to the rather high spot prices paid for Zenith in the United Kingdom.

Of the eight hop-producing Member States, four sold at prices below the Community average (all varieties taken together), i.e. Belgium, Germany, Spain and Portugal, with a very low spot price in Spain (ECU 52/ztr) and a very low contract price in Portugal (ECU 63/ztr).

The official figures indicate that, of the 740 756 ztr produced in the Community in 1994, only 2 951 ztr (0.40%) remain unsold. Ireland, Austria and Portugal sold their entire production under contract for an average price of ECU 213/ztr, ECU 282/ztr and ECU 63/ztr respectively (see Table 5), followed by France, which sold 98% of its production under contract for an average price of ECU 206/ztr.

Even though spot prices almost doubled in relation to the 1993 harvest, producers were expecting higher prices as a result of the poor harvest in 1994. In Germany, on account of low production, contracts signed in advance for the 1994 harvest could not even, for certain varieties such as Perle and Northern Brewer, be carried out. The structural deficit of certain varieties was also recorded in the United Kingdom for the production of English ales. Additional areas were consequently sown with Goldings and Fuggles.

The variety which fetched the lowest prices, already from the 1993 harvest, is undoubtedly the Hersbrucker aromatic variety, which was previously very popular with the Americans, but is now suffering from a definite slow-down in demand as American purchasing policy has changed to the benefit of other varieties such as Spalter Select and Hallertauer Tradition. While Hersbrucker has been selling for only DM 165/ztr (i.e. ECU 70/ztr) on the free market, the two new aromatic varieties have been fetching around DM 380-390 ztr, i.e. ECU 161-166 ztr, which is still more than the Community average for aromatic varieties. In this poor economic climate, it appears that pre-contracts for the coming years are being concluded only very hesitantly, for shorter periods, smaller quantities and lower prices than in previous years, since brewers know that they can always find hops on the free market at prices that may well remain low for several years, going by harvest forecasts and the fact that, according to some, hops are characterized by a ten-year production cycle. The way to increase hop prices would be to reduce the hop cultivation area in the world, as the Americans have proposed, and preferably to cut the area producing super-alpha varieties, since the hops market has become a market for alpha products.

2.2.4. Returns

These were lower than in 1993. The average return per hectare in full production was ECU 4 352 compared to ECU 4 444 in 1993.

As already mentioned in section 2.2.3., hop prices on the free market and the contract market were low. Low prices combined with poor production figures are the reason for still lower returns than in 1993, which was already considered a very bad year.

At Community level returns were highest for the aromatic variety group (ECU 4 705 per ha in full production, 4.31% down on 1993). Belgium, however, posted big increases (50%) for these varieties. The most profitable aromatic varieties were, for France, Strisselspalt (return of ECU 7 260/ha in full production), and for the United Kingdom Bramling Cross (return of ECU 7 202/ha in full production), Challenger (ECU 6 501/ha in full production), Goldings (ECU 8 011/ha in full production) and WVG (ECU 6 725/ha in full production). The only aromatic variety which produced a lower return in the United Kingdom was Fuggles, for which the return of ECU 5 829/ha was nevertheless still above the Community average for this group.

Returns dropped less sharply for the bitter variety group, by 1.39% to ECU 3 885/ha in full production. In some producer Member States returns fell, some by very large amounts (- 24% for Ireland), in others they rose substantially (+ 54% for the United Kingdom, + 22% for Belgium, + 17% for Portugal). In the case of England, this increase is explained by the fact that contract and

spot prices for Target (which covers about 1 400 ha) more than doubled in relation to the preceding year while yield at the same time was high, fairly close to that for 1993. Spot prices followed the same trend in Belgium, although yields were lower than in 1993, except in the case of Target and Yeoman. In Portugal, increases were due to the fact that part of the area covered by a varietal conversion plan had by now reached the full production stage. Average returns for other varieties, cultivated principally in Germany (103 ha), and to a small extent in Belgium (2 ha), the United Kingdom (46 ha) and Austria (7 ha), rose by 0.86%. As these varieties are only cultivated on small areas, their impact on overall returns for producers was negligible.

2.2.5 Production costs

These fell by 0.11% on average from 1993 (see Annex, Table D) to ECU 6 764/ha. They are thus very close to those of the previous year. Belgium had the highest costs (ECU 9 537/ha) and Portugal the lowest (ECU 4 521/ha). Fluctuations in individual Member States did not exceed 16.13% in either direction compared with 1993 levels.

3. THE COMMON ORGANIZATION OF THE MARKET IN HOPS

3.1. Community policy on the hop market

In 1971 a common organization of the market in hops was established by Regulation (EEC) No 1696/71. The aim was to improve product quality and safeguard the standard of living of hop growers. Since it was quite deliberately decided when the market organization was set up to make no special arrangements for external trade or intervention, the Community hop sector is highly exposed to competition on the world market.

The essential aspects of the basic Regulation, which were dealt with in greater detail by subsequent, more specific Council and Commission regulations, are rules for the marketing of hops via a certification procedure and a forward contract system, for the recognition and promotion of producer groups, and for trade with non-EEC countries. The Regulation also lays down aid arrangements for Community-grown hops.

The Community has two main financial responsibilities in this sector. Firstly, frequent use is made of the arrangements whereby aid per hectare is granted to producers with unsatisfactory returns. For the 1993 harvest year, aid per hectare was granted at a rate of ECU 395 for aromatic varieties, ECU 435 for bitter varieties and ECU 307 for other varieties and experimental varieties. Secondly, special aid is granted under Regulation (EEC) No 2997/87 to encourage growers to convert to varieties more suited to market requirements (see also point 3.2.).

In addition the Community makes a contribution towards the promotion of newly founded producer groups at the initial stage provided national aid is also granted for this. However, this measure is now of little significance since almost all hop growers in the Community now belong to a recognized producer group. Of course this does not exclude the possibility of new groups being founded in the future as a result of restructuring and reorganization.

3.2. Aid for varietal conversion

The long-standing imbalance between supply and demand for most bitter varieties and the resultant problems for hop growers in certain areas of the Community led the Council to adopt special measures for the hop sector in 1987.

Regulation (EEC) No 2997/87 introduced special aid amounting to ECU 2 500/ha - subject to a maximum area of 1 000 ha per Member State - to be granted to recognized producer groups who undertake to implement a plan to convert areas under bitter varieties to aromatic or super-alpha varieties.

In June 1989 the Council adopted Regulation (EEC) 1809/89 amending Regulation (EEC) No 2997/87 with a view to increasing the number of growers qualifying for aid under the varietal conversion programme. The amended criteria now allow special aid to be granted throughout the Community and not just in certain areas, as was originally provided for.

A further restriction laying down that producer groups could take part in the conversion programme only if their total area did not increase in the period 1986 to 1988 was also lifted. The extension of the duration of the programme from 31 December 1990 as originally provided for to the end of 1994 gives the producer groups more time to implement their conversion plans.

A further change was introduced by Regulation (EEC) No 423/95, extending the time limit for implementation of the conversion programme by a further two years, i.e. up to the end of 1996, in the case of Spain, Portugal and Belgium and by one year in the case of the United Kingdom. This amendment became necessary, as far as Spain is concerned, when many hop growers, whose land at the time was involved in a re-parcelling project, made it known that they were prepared to take part in the varietal conversion programme. It was not possible to carry out both measures, i.e. re-parcelling and subsequent varietal conversion, in the time originally provided for. For the three other Member States the reasons were a shortage of planting stock (Portugal) and bad weather (Belgium and the United Kingdom).

The Community varietal conversion programme has been very well received by hop growers. All hop-growing Member States are taking advantage of it with the exception of Ireland. Some of the varietal conversion programmes submitted have been revised several times, above all to comply with requests for further areas to be included (see Table E in the Annex).

The programmes submitted by the different Member States provide principally for grubbing up the traditional bitter varieties Brewer's Gold and Northern Brewer, with which it is increasingly difficult to compete with American super alpha varieties on the world market, and also, in the case of Germany, grubbing up the aromatic Hersbrucker variety, which is no longer finding market outlets.

4. CONCLUSIONS

On the basis of the foregoing analysis the Commission proposes that income aid be granted to growers for the 1994 harvest.

The average level proposed is higher than for the 1993 harvest for aromatic and bitter varieties but slightly lower for other varieties, including experimental varieties.

Under Article 12a of Regulation (EEC) No 1696/71 the Commission proposes that the same rate of aid be granted for areas planted with experimental varieties as for 'other varieties'.

The possibility of granting aid for growing experimental varieties was introduced in 1990 when the Council adopted Regulation (EEC) No 2780/90. The purpose of the aid, which can be granted for land used by growers for the cultivation of experimental varieties in collaboration with a research institute, is to encourage the development of new varieties, which must be continued if hop growing in the Community is to remain competitive.

TABLE A

Number and size of hop-growing farms in the Community

1994

	Number of farms	Total area under hops (ha)	Areas under hops per farm (ha)
Belgium	90	384	4,3
Germany	3.282	21.930	6,7
Spain	1.447	1.156	0,8
France	153	670	4,4
Ireland	2	13	6,5
Austria	81	238	2,9
Portugal	31	100	3,2
United Kingdom	211	3.157	15,0
EC	5.297	27.648	5,2

TABLE B

**Average prices for selected hop varieties in Germany
1983-1999**

Prices in ECU/Ztr

	Hallertauer	Tettnanger	Hersbrucker	Northern Brewer	Brewer's Gold
Spot market					
1983	125,27	198,84	67,61	104,19	69,20
1984	111,21	161,06	78,24	69,93	43,10
1985	194,96	207,53	126,20	102,72	45,70
1986	129,26	138,17	94,94	62,88	24,45
1987	220,35	228,09	209,15	76,55	54,50
1988	227,86	230,82	216,85	142,73	93,18
1989	218,54	231,25	173,65	127,48	88,09
1990	555,18	637,16	425,20	576,85	427,33
1991	209,41	223,86	146,55	173,31	126,58
1992	246,02	262,01	168,66	232,61	154,73
1993	151,65	199,64	28,88	61,17	31,86
1994	215,79	220,03	70,09	100,25	50,97
Contract market*)					
1983	178,16	212,72	166,23	151,12	142,37
1984	181,88	218,52	164,87	154,13	144,78
1985	191,60	288,92	168,96	161,41	147,58
1986	196,39	226,33	170,17	171,77	144,62
1987	195,37	220,11	169,38	169,80	137,94
1988	200,33	223,20	170,68	168,54	126,64
1989	199,91	220,66	168,57	160,09	116,89
1990	205,59	221,31	167,36	161,42	116,81
1991	208,57	222,58	160,14	159,72	108,74
1992	258,92	269,75	187,74	184,65	134,62
1993	214,94	224,71	150,37	153,34	115,11
1994	216,64	222,58	150,80	140,18	115,11
Forward contracts					
1995	152,49	222,58	143,57	153,34	117,24
1996	152,49	225,13	142,30	157,17	120,21
1997	152,49	227,26	142,30	155,89	122,34
1998	152,49	227,26	140,18	158,44	121,49
1999	228,53	240,00	149,10	153,34	109,17

*) The prices shown are the average prices specified in contracts signed in previous years for the relevant harvest.

TABLE C

Return on areas in full production, in ECU/ha*)

	1987	1988	1989	1990	1991	1992	1993	1994	1994/93 (%)
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BY VARIETY GROUP

Aromatic	5.428	5.586	5.562	5.663	5.854	5.339	4.908	4.705	-4,31%
Bitter	4.727	4.491	4.633	5.644	5.415	4.328	3.939	3.885	-1,39%
Others	4.439	4.196	4.093	5.365	3.382	3.948	3.569	3.600	0,86%

BY COUNTRY

Belgium	4.199	4.368	3.995	11.158	5.931	6.602	3.317	4.256	22,06%
Germany	5.353	5.238	5.307	5.616	5.456	4.818	4.379	4.087	-7,14%
Spain	3.122	3.173	4.473	4.456	4.441	2.605	4.900	4.396	-11,46%
France	4.674	6.170	5.572	7.450	5.512	6.320	6.794	6.912	1,71%
Ireland	4.918	5.943	5.283	10.817	7.901	9.055	7.109	5.399	-31,67%
Austria								7.713	100,00%
Portugal	4.763	2.452	4.329	3.322	1.715	1.495	1.203	1.405	14,38%
United Kingdom	4.695	5.001	4.577	5.615	7.212	5.404	4.803	5.423	11,43%

BY COUNTRY AND BY VARIETY GROUP

	Aromatic			Bitter			Other		
	1993	1994	1994/93 %	1993	1994	1994/93 %	1993	1994	1994/93 %
Belgium	2.809	4.216	50,09	3.505	4.286	22,28	655	2.023	208,85
Germany	4.602	4.348	-5,52	4.035	3.661	-9,27	3.597	3.408	-5,25
Spain	1.609	1.582	-1,68	4.901	4.398	-10,26	-	-	-
France	7.152	7.252	1,40	3.844	4.250	10,56	-	-	-
Ireland	-	-	-	7.109	5.399	-24,05	-	-	-
Austria	-	7.660	-	-	-	-	-	10.045	-
Portugal	-	-	-	1.203	1.405	16,79	-	-	-
United Kingdom	7.882	6.827	-13,38	2.969	4.560	53,59	5.305	3.260	-38,55

*)Areas newly planted in 1994 and 1993, were assumed to give 40 % and 65 % respectively of the return on areas in full production.

TABLE D

Production costs per hectare (ECU)

	1993*	1994**	Change on 1993 (%)
Belgium	9.458	9.537	0,84
Germany	7.504	7.470	-0,45
Spain	3.993	4.637	16,13
France	6.712	6.795	1,24
Ireland	6.914	6.657	-3,72
Austria	5.735	5.735	0,00
Portugal	4.339	4.521	4,19
United Kingdom	9.521	8.763	-7,96
EC	6.772	6.764	-0,11

***) Agricultural conversion rates 1.1.1993**

*****) Agricultural conversion rates 1.1.1994**

TABLE E

Varietal conversion programmes carried out by the
Member States under Regulation
(EEC) No. 2997/87

(Situation at March 1995)

	Type of variety to which conversion is to be made		
	Aromatic (ha)	Super-Alpha (ha)	Total (ha)
Belgium	41	204	246
Germany	432	568	1.000
Spain	-	181	181
France	-	-	170
Ireland	-	-	0
Austria	-	-	0
Portugal	-	100	100
United Kingdom	326	634	960
EC	800	1.687	2.656

TABLE 1

Area under hops, production of hops and alpha acid by producer countries
1994

Country	Area				Production				Yield	Alpha			Forecast Area	
	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	XIII	XIV
	ha 1993	ha 1994	ha (+/-) 1994/93	ha (+/-) 1994/93 %	Zentner 1993	Zentner 1994	Zentner +/- 1994/93	Zentner +/- 1994/93 %	t/ha	Production tons	Percent	Yield kg/ha	ha - 1995	Change ha 1995-94
			(II-I)	(III/II)			(VI-V)	(VII/V)	(VI/II/20)		(X/(VI/20))	(IX*1000 *XI)		(XIII-II)
Belgium	409	384	-25	-6,13%	11.705	11.233	-472	-4,03%	1,46	41	7,37%	108	385	1
Germany	23.015	21.930	-1.085	-4,71%	848.556	568.686	-279.870	-32,98%	1,30	1.080	3,80%	49	21.000	-930
Spain	1.142	1.156	14	1,23%	41.857	41.366	-491	-1,17%	1,79	165	7,98%	143	1.145	-11
France	670	670	-0	-0,03%	21.417	22.093	676	3,16%	1,65	28	2,57%	42	?	-670
Ireland	13	13	-0	-0,46%	379	331	-48	-12,66%	1,27	1	8,78%	112	7	-7
Austria	-	238	-	-	-	3.397	-	-	0,71	17	10,18%	73	253	15
Portugal	96	100	4	3,71%	780	1.937	1.157	148,33%	0,97	11	11,50%	111	144	44
United Kingdom	3.329	3.157	-172	-5,17%	109.199	88.794	-20.405	-18,69%	1,41	351	7,91%	111	3.065	-92
EC-15	28.675	27.648	-1.265	-4,41%	1.033.893	737.837	-296.058	-28,84%	1,32	1.696	4,60%	61	25.999	-1.650
U.S.A.	17.461	17.174	-287	-1,64%	692.200	656.900	-35.300	-5,10%	1,91	3.532	10,75%	206	17.174	0
Australia	1.178	1.178	0	0,00%	62.630	62.630	0	0,00%	2,66	309	9,88%	263	1.178	0
New Zealand	320	345	25	7,81%	12.604	15.310	2.706	21,47%	2,22	98	12,79%	284	345	0
Yugoslavia*)	560	576	16	2,86%	11.400	14.088	2.688	23,58%	1,22	30	4,30%	53	576	0
Slovenia	2.450	2.420	-30	-1,22%	70.200	70.000	-200	-0,28%	1,45	192	5,47%	79	2.400	-20
Czech Republic	10.400	10.200	-200	-1,92%	192.060	184.400	-7.660	-3,99%	0,90	240	2,60%	24	10.100	-100
Slovak Republic	1.200	1.200	0	0,00%	18.800	18.000	-800	-4,26%	0,75	23	2,60%	20	1.050	-150
Ukraine	6.560	5.363	-1.197	-18,25%	80.000	66.000	-14.000	-17,50%	0,62	255	7,72%	48	5.363	0
Poland	2.391	2.341	-50	-2,09%	57.400	44.000	-13.400	-23,34%	0,94	72	3,26%	31	2.401	60
Bulgaria	695	685	-10	-1,44%	11.905	11.905	0	0,00%	0,87	36	6,06%	53	685	0
Total IHB (-EC)	43.215	41.482	-1.733	-4,01%	1.209.199	1.143.233	-65.966	-5,46%	1,35	4.787	8,37%	113	41.272	-210
Total IHB (+EC)	71.890	69.130	-2.998	-4,17%	2.243.092	1.881.070	-362.022	-16,14%	1,34	6.483	6,89%	92	67.271	-1.860
Romania	3.100	3.200	100	3,23%	58.000	50.000	-8.000	-13,79%	0,78	120	4,80%	38		
Russia**)	3.600	3.500	-100	-2,78%	73.000	70.000	-3.000	-4,11%	1,00	123	3,50%	35		
Argentina	350	350	0	0,00%	10.200	9.100	-1.100	-10,78%	1,30	50	11,00%	143		
China	8.000	8.500	500	6,25%	270.000	275.000	5.000	1,85%	1,62	825	6,00%	97		
Japan	615	590	-25	-4,07%	21.300	20.500	-800	-3,76%	1,74	62	6,00%	104		
South Africa	730	720	-10	-1,37%	26.400	26.600	200	0,76%	1,85	141	10,60%	196		
Total World	91.608	89.247	-2.361	-2,58%	2.756.017	2.452.783	-303.234	-11,00%	1,37	7.849	6,40%	88		

*) Republics of former Yugoslavia with the exception of Slovenia.

**) Republics of the former USSR with the exception of Ukraine.

Source: Member States + C.I.C.H. + Horst Report

TABLE 2
ESTIMATED FORWARD SALES
1995-1999

Zentner = 50 kg

Country	1995	1996	1997	1998	1999 & onwards
Belgium	3.850	1.495	1.260	1.000	400
Germany	485.300	367.200	289.900	212.200	142.400
Spain	40.000	*)	*)	*)	*)
France	21.198	21.286	17.280	7.085	8.646
Ireland	200	200	*)	*)	*)
Austria	7.590	7.590	7.590	7.590	7.590
Portugal	3.000	4.000	*)	*)	*)
United Kingdom	62.047	44.020	31.921	14.175	10.375
EC-15	623.185	445.791	347.951	242.050	169.411
New Zealand	13.210	12.680	9.100	4.323	3.200
U.S.A.	618.406	425.870	342.554	290.939	155.340
Australia	*)	*)	*)	*)	*)
Poland	45.000	40.000	35.000	35.000	30.000
Czech Republic	130.000	110.000	80.000	60.000	50.000
Slovak Republic	12.000	10.000	10.000	8.000	7.000
Slovenia	42.000	33.000	20.000	12.000	10.000
Serbia	*)	*)	*)	*)	*)
Hungary	*)	*)	*)	*)	*)
Ukraine	3.860	*)	*)	*)	*)
Total IHGC (-EC)	864.476	631.550	496.654	410.262	255.540
Total IHGC (+EC)	1.487.661	1.077.341	844.605	652.312	424.951

(*) Data do not exist or have not been provided by the producer countries.

Source: CICH + Member States

TABLE 3
HOPS : WORLD BASE SERIES
1973 - 1994

YEAR	AREA	PRODUCTION		YIELD				GERMANY		U.S.A.
		I	II	II	VI	V	VI	VII	VIII	IX
	(ha)	(Ztr)	(t)	(t/ha)	(alpha t)	(% alpha) V*20/II*100	(kg/alpha) V*1000/l	DM/Ztr. Contract	DM/Ztr. Spot	\$ / lb (1lb = 453,59 gr)
1973	81.247	2.366.020	118.301	1,46	7.468	6,31	91,92	331	207	0,75
1974	82.083	2.223.520	111.176	1,35	6.627	5,96	80,74	331	235	0,80
1975	80.527	2.270.040	113.502	1,41	7.230	6,37	89,78	331	221	0,83
1976	78.206	2.135.200	106.760	1,37	6.137	5,75	78,47	327	264	0,85
1977	79.262	2.355.920	117.796	1,49	7.066	6,00	89,15	319	128	0,90
1978	80.230	2.200.173	110.009	1,37	6.374	5,79	79,45	297	290	0,90
1979	81.224	2.359.848	117.992	1,45	7.348	6,23	90,47	324	533	0,98
1980	86.348	2.378.772	118.939	1,38	7.046	5,92	81,60	341	1.400	1,51
1981	92.434	2.652.833	132.642	1,43	7.997	6,03	86,52	377	606	1,51
1982	95.532	2.966.785	148.339	1,55	8.805	5,94	92,17	390	167	1,74
1983	92.688	2.651.851	132.593	1,43	7.543	5,69	81,38	405	210	1,93
1984	88.701	2.472.791	123.640	1,39	8.165	6,60	92,05	409	191	2,10
1985	86.700	2.419.725	120.986	1,40	6.990	5,78	80,62	401	245	2,03
1986	85.699	2.372.455	118.623	1,38	7.528	6,35	87,84	410	151	1,78
1987	87.274	2.366.497	118.325	1,36	8.414	7,11	96,41	405	301	1,51
1988	90.044	2.407.032	120.352	1,34	7.382	6,13	81,98	398	378	1,40
1989	90.504	2.365.235	118.262	1,31	7.436	6,29	82,16	387	326	1,38
1990	89.567	2.200.977	110.049	1,23	6.661	6,05	74,37	384	1.190	1,47
1991	93.272	2.520.357	126.018	1,35	8.746	6,94	93,77	375	391	1,60
1992	91.503	2.472.726	123.636	1,35	7.913	6,40	86,48	367	382	1,74
1993	91.608	2.756.017	137.801	1,50	9.784	7,10	101,09	364	133	1,76
1994	89.247	2.452.783	122.639	1,37	7.849	6,40	101,09	359	227	1,81
Average	86.995	2.425.798	121.290	1,39	7.569	6,23	87,25	365	372	1,42
Index 94 (1973 = 100)	110%	104%	104%	94%	105%	101%	110%	108%	110%	241%
Index 94 (1982 = 100)	93%	83%	83%	88%	89%	108%	110%	92%	136%	104%

TABLE 4a

Community external trade in hops and hop products - in tonnes

September 1993 - August 1994

Member States	Cones	Powders = * 1,1	Extracts = * 3,5	Equivalent total (1)
	NC 12 10 10	NC 12 10 20	NC 13 02 13	Hop cones
BELGIUM+LUX. ;				
- Import	417	388	106	1.215
- Export	4	4	35	131
- Net	-413	-384	-71	-1.084
DENMARK				
- Import	0	6	0	7
- Export	0	23	7	50
- Net	0	17	7	43
GERMANY				
- Import	9.691	1.010	283	11.793
- Export	3.485	11.993	1.241	21.021
- Net	-6.206	10.983	958	9.228
GREECE				
- Import	0	0	0	0
- Export	0	0	0	0
- Net	0	0	0	0
SPAIN				
- Import	0	8	21	82
- Export	0	0	4	14
- Net	0	-8	-17	-68
FRANCE				
- Import	749	5	2	762
- Export	526	0	6	547
- Net	-223	-5	4	-215
IRELAND				
- Import	0	228	79	527
- Export	0	2	34	121
- Net	0	-226	-45	-406
ITALY				
- Import	10	3	6	34
- Export	0	0	1	4
- Net	-10	-3	-5	-31
NETHERLANDS				
- Import	28	24	149	576
- Export	0	0	0	0
- Net	-28	-24	-149	-576
PORTUGAL				
- Import	0	0	56	196
- Export	0	0	2	7
- Net	0	0	-54	-189
UNITED KINGDOM				
- Import	803	632	120	1.918
- Export	34	360	152	962
- Net	-769	-272	32	-956
TOTAL EC				
- Import	11.698	2.304	822	17.109
- Export	4.049	12.382	1.482	22.856
- Net	-7.649	10.078	660	5.747

(1) 100 kg powder = 110 kg cones
100 kg extracts = 350 kg cones

Source: Eurostat - Comext

In tonnes		Cones		Powders = * 1,1		Extracts = * 3,5		Equivalent total (1)	
		NC 12	10 10	NC 12	10 20	NC 13	02 13	Hop Cones	
Total EEC	- Import		11.698		2.302		654		16.519
	- Export		4.048		12.382		1.482		22.855
	- Net		-7.650		10.080		828		6.336
of which									
Czech Republic	- Import		3.727		396		0		4.163
	- Export		26		364		125		864
	- Net		-3.701		-32		125		-3.299
U.S.A.	- Import		2.169		805		760		5.715
	- Export		3.349		905		49		4.516
	- Net		1.180		100		-711		-1.199
Slovenia	- Import		2.573		68		0		2.648
	- Export		1		44		1		53
	- Net		-2.572		-24		1		-2.595
Poland	- Import		1.381		0		0		1.381
	- Export		76		118		70		451
	- Net		-1.305		118		70		-930
Switzerland	- Import		50		0		32		162
	- Export		58		196		80		554
	- Net		8		196		48		392
Australia	- Import		99		877		21		1.137
	- Export		12		8		2		28
	- Net		-87		-869		-19		-1.109
China	- Import		777		0		2		784
	- Export		0		31		1		38
	- Net		-777		31		-1		-746
Thailand	- Import		0		0		0		0
	- Export		0		1.163		80		1.559
	- Net		0		1.163		80		1.559
South Africa	- Import		133		0		0		133
	- Export		0		145		47		324
	- Net		-133		145		47		191
Hungary	- Import		59		0		0		59
	- Export		25		319		9		407
	- Net		-34		319		9		348
Slovak Republic	- Import		126		0		0		126
	- Export		0		123		30		240
	- Net		-126		123		30		114
Japan	- Import		0		0		0		0
	- Export		0		5.218		46		5.901
	- Net		0		5.218		46		5.901
Austria	- Import		256		18		0		276
	- Export		181		414		123		1.067
	- Net		-75		396		123		791
Finland	- Import		0		0		0		0
	- Export		0		294		27		418
	- Net		0		294		27		418
Sweden	- Import		0		0		0		0
	- Export		0		335		17		428
	- Net		0		335		17		428

1) 100 kg powder = 110 kg cones
100 kg extracts = 350 kg cones

Source: Eurostat - Comext

TABLE 5

**Hops production sold and average prices obtained
under contract and not under contract
1980-1994**

EEC	Production			Average prices			
	1	2	3	4	5		
	Not under Contract *) 50 kg	Under Contract 50 kg	Under Contract % 2/(2+1)	Not under Contract ECU/50 kg	Under Contract ECU/50 kg		
A. 1980 - 1994							
1980	67.385	723.983	91%	469	133		
1981	154.754	768.155	83%	226	163		
1982	363.795	763.131	68%	65	177		
1983	223.549	744.142	77%	92	183		
1984	195.478	728.662	79%	70	190		
1985	173.339	718.124	81%	92	173		
1986	202.218	667.937	77%	63	170		
1987	161.850	634.361	80%	123	168		
1988	119.035	632.255	84%	159	170		
1989	169.083	641.429	79%	135	164		
1990	70.306	644.352	90%	469	167		
1991	235.415	679.700	74%	165	167		
1992	103.879	622.778	86%	168	160		
1993	390.867	639.633	62%	66	158		
1994	142.973	594.831	81%	123	161		
B. 1994				1993	1994	1993	1994
- Belgium	4.809	6.017	56%	51	111	146	142
- Germany	131.118	437.576	77%	57	120	155	156
- Spain	1.366	40.000	97%	37	52	127	124
- France	389	21.044	98%	102	152	201	206
- Ireland	-	331	100%	-	0	230	213
- Austria	-	6.316	100%	-	0	-	282
- Portugal	-	1.937	100%	63	0	-	63
- United Kingdom	5291	81610	94%	146	212	139	185

*) Unsold quantities are not included

TABLE 6: MEMBER STATE RETURNS - HOPS 1994

Group A/I		SURFACE AREA IN HECTARES					PRODUCTION (5 kg = 1 Zentner)					RETURNS (ECU)			AVER.PRICE (ECU) 50 KG		RETURNS (ECU) ha		
Aromatic Hops		I Total	II New 1994	III New 1993	IV Previous to 1993	V Full Production (II*0,4)+ (III*0,65) + IV	VI Production	VII Yield 50kg/ha	VIII Contract	IX Spot	X Not sold	XI Contract	XII Spot	XIII Total	XIV Contract	XV Spot	XVI Total Planted	XVII Full Production	
Variety	Origin	II - IV								VI- (VIII+IX)	XIV*VIII	XV*IX	XI+XII+ (X*0,7)*XV			XIII / I	XIII / V		
Aurora	OE CE	33			33	33	993	30	993		0	0	263.052	0	263.052	265	0	7.928	7.928
Bramling Cross	UK CE	43	7	3	33	38	1.259	29	995	264	0	220.168	53.848	274.014	221	204	6.314	7.202	
Challenger	B	15			15	15	492	33	227	265	0	34.796	37.863	72.659	153	143	4.878	4.878	
	F	2	0	0	2	2	60	29	35	25	0	7.761	3.540	11.301	222	144	5.460	5.460	
	UK	374	2	4	368	371	10.616	28	9.837	779	0	2.228.238	183.400	2.411.638	227	235	6.456	6.502	
	CE	391	2	4	385	388	11.168	29	10.099	1.069	0	2.270.795	224.803	2.495.598	225	210	6.391	6.432	
Fino Alsacio	Esp CE	1			1	1	11	11	11		0	1.582	0	1.582	144	0	1.582	1.582	
Fuggles	UK CE	289	20	2	267	278	6.879	24	6.225	654	0	1.451.189	158.429	1.609.618	233	242	5.566	5.822	
Goldings	B	3	0	1	2	3	75	22	39	19	17	7.119	3.488	12.759	183	183	3.694	4.332	
	OE	82		1	81	81	2.484	30	2.484		0	711.327	0	711.327	286	0	8.719	8.732	
	UK	338	16	6	316	326	10.024	30	9.166	858	0	2.378.070	233.491	2.611.561	259	272	7.736	8.012	
	CE	423	16	8	399	410	12.583	30	11.689	877	17	3.096.516	236.959	3.335.647	265	270	7.893	8.122	
Hallertauer	B	51	1	0	50	51	1.608	31	585	1.023	0	81.687	121.498	203.184	140	119	3.962	3.992	
	D	926	42	27	857	891	27.128	29	20.228	6.900	0	4.382.112	1.488.926	5.871.038	217	216	6.340	6.587	
	F	0	0	0	0	0	4	19	0	0	4	0	0	0	0	0	0	0	
	CE	978	43	27	907	942	28.740	29	20.813	7.923	4	4.483.798	1.810.424	6.074.222	214	203	6.214	6.442	
Hall.Tradition	B	1	1			0		0	0		0	0	0	0	0	0	0	0	
	D	859	269	266	324	805	17.881	21	14.673	3.208	0	2.499.330	531.448	3.030.778	170	166	3.528	5.012	
	CE	860	270	266	324	805	17.881	21	14.673	3.208	0	2.499.330	531.448	3.030.778	170	166	3.528	5.012	
Hersbrucker Spät	B	4			4	4	119	32	119	0	0	17.249	0	17.249	145	0	4.693	4.693	
	D	5.485	6	5	5.474	5.480	160.594	29	120.943	39.651	0	18.237.673	2.779.063	21.016.736	151	70	3.832	3.832	
	OE	7			7	7	204	28	204		0	58.225	0	58.225	285	0	7.976	7.976	
	CE	5.496	6	5	5.485	5.491	160.917	29	121.266	39.651	0	18.313.147	2.779.063	21.092.211	151	70	3.838	3.842	
Hueller	D CE	242	1		241	241	6.687	28	3.049	3.638	0	438.483	802.881	1.039.144	143	168	4.294	4.302	
Malling	OE CE	73			73	73	1.897	26	1.897		0	540.448	0	540.448	285	0	7.405	7.405	
Perle	B	0			0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	D	3.591	281	164	3.146	3.365	84.109	23	69.741	14.368	0	10.894.382	2.380.243	13.074.625	153	166	3.841	3.882	
	F	0	0	0	0	0	2	21	0	0	2	0	0	0	0	0	0	0	
	Oe	36	6	5	25	31	559	16	559		0	155.962	0	155.962	279	0	4.337	5.052	
	CE	3.627	287	169	3.171	3.396	84.670	23	70.300	14.368	2	10.850.345	2.380.243	13.230.587	154	166	3.848	3.892	
Progress	UK CE	135	46	27	62	97	2.812	21	2.311	501	0	545.775	122.064	667.839	236	244	4.959	6.852	
Saaz	B	2	0		2	2	57	30	0	57	0	0	9.248	0	9.248	0	162	4.862	4.902
	D	9			9	9	153	17	153		0	30.741	0	30.741	201	0	3.416	3.416	
	CE	11	0	0	11	11	210	19	153	57	0	30.741	9.248	39.989	201	162	3.668	3.872	
Saxon																			
Spalter	B	0	0			0		0			0	0	0	0	0	0	0	0	0
	D	183	1	2	180	182	4.155	23	2.980	1.175	0	648.107	239.574	887.681	217	204	4.851	4.882	
	CE	183	1	2	180	182	4.155	23	2.980	1.175	0	648.107	239.574	887.681	217	204	4.850	4.882	
Spalter Select	D CE	1.253	260	343	650	977	29.750	24	23.730	6.020	0	4.102.537	971.718	5.074.255	173	161	4.050	5.192	
Star																			
Sunshine																			
Tardif de Bourgogne																			
Strisselspalt	F CE	585	13	25	546	568	19.265	33	19.040	190	35	4.077.636	39.731	4.122.432	214	209	7.051	7.260	
Tettlinger	D CE	1.057	17	21	1.019	1.039	25.107	24	21.720	3.387	0	4.834.499	745.256	5.579.754	223	220	5.279	5.368	
WVG	UK CE	71	15		56	62	1.682	24	1.466	216	0	357.439	58.328	415.767	244	270	5.881	6.725	
TOTAL	B	76	2	1	73	75	2.351	31	970	1.364	17	140.850	172.077	314.428	145	126	4.138	4.216	
	D	13.605	877	828	11.900	12.789	355.564	26	277.217	78.347	0	45.865.843	9.738.907	55.604.751	165	124	4.087	4.348	
	E	1			1	1	11	11	11		0	1.582	0	1.582	144	0	1.582	1.582	
AROMATIC	F	587	14	25	548	570	19.331	33	19.075	214	41	4.085.397	43.271	4.134.477	214	202	7.043	7.252	
	OE	231	6	6	220	226	6.138	27	6.138	0	0	1.729.015	0	1.729.015	282	0	7.485	7.660	
	UK	1.249	106	42	1.100	1.170	33.272	27	30.000	3.272	0	7.180.877	809.560	7.990.437	239	247	6.397	6.827	
	CE	15.749	1.004	902	13.843	14.831	416.667	26	333.411	83.197	58	59.003.564	10.763.816	69.772.644	177	129	4.430	4.705	

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TABLE 6 MEMBER STATE RETURNS - HOPS 1994 (cont'd 1)

Group B/II		SURFACE AREA IN HECTARES					PRODUCTION (5 kg = 1 Zentner)					RETURNS (ECU)			AVER. PRICE (ECU) 50 KG		RETURNS (ECU) ha		
Bitter Hops	Variety	Origin	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	XIII	XIV	XV	XVI	XVII
			Total	New 1994	New 1993	Previous to 1993	Full Production (I+II,IV)+ (III+0,85) + IV	Production	Yield 50kg/ha	Contract	Spot	Not sold	Contract	Spot	Total	Contract	Spot	Total	Total Planted
			II - IV									VI- (VIII+IX)	XIV+VIII	XV+IX	XI+XII+ (X+0,7)*XV			XIII / I	XIII / V
Brewer's Gold	B		6	0	-	6	6	210	36	35	155	20	3.651	15.435	20.480	104	100	3.650	3.582
	D		1.316	5	3	1.308	1.312	54.592	41	31.679	22.913	0	3.646.709	1.167.948	4.814.657	115	61	3.659	3.670
	F		20	0	0	20	20	1.001	49	721	168	111	66.861	14.924	90.659	95	89	4.473	4.505
	CE		1.342	5	3	1.334	1.336	55.603	42	32.435	23.236	131	3.719.221	1.198.307	4.925.795	116	52	3.670	3.662
Bullion	D		57			57	57	2.184	38	1.663	301	0	151.172	6.950	160.122	80	30	2.809	2.809
Chinook	F		1	0	0	1	1	53	56	53	0	0	6.569	0	6.569	161	0	9.020	9.020
Galena	F		0	0	0	0	0	6	41	6	0	0	979	0	979	161	0	6.526	6.526
H-3 Leones	Esp		769	18	9	742	755	34.378	45	33.012	1.368	0	3.962.610	70.526	4.033.336	120	52	5.245	5.342
H-7 Leones	Esp		386	-	-	386	386	6.977	18	6.977	-	0	985.223	0	985.223	141	0	2.562	2.562
Hallerlauer	B		11	7	3	0	6	137	12	0	127	10	0	14.993	15.020	0	118	1.417	2.643
Magnum	D		1.317	352	553	412	912	34.953	27	25.161	9.792	0	4.200.305	2.229.444	6.429.748	167	228	4.862	7.046
	F		4	4	0	0	2	37	10	30	0	7	3.946	0	3.946	132	0	1.030	2.403
	CE		1.332	363	557	413	919	35.127	26	25.191	9.919	17	4.204.251	2.244.437	6.448.514	167	228	4.842	7.014
Keyw Midseason																			
Northdown	Ir		13	-	-	13	13	331	25	331	-	0	70.510	0	70.510	213	0	5.399	5.399
	UK		390	24	13	354	372	9.526	24	9.137	389	0	2.065.008	84.035	2.169.043	228	216	5.569	5.836
	CE		403	24	13	367	385	9.657	24	9.468	389	0	2.155.518	84.035	2.239.553	228	216	5.554	5.823
North Brewer	B		82	2	1	78	80	1.960	24	1.222	638	100	178.416	80.082	267.284	146	126	3.279	3.350
	D		4.821	27	14	4.780	4.800	96.772	20	85.355	11.417	0	11.964.739	1.144.523	13.109.262	140	100	2.719	2.731
	F		9	0	0	9	9	225	25	65	0	160	9.171	0	9.171	141	0	999	1.002
	UK		6	-	-	6	6	131	22	123	8	0	31.066	1.896	32.962	253	237	5.590	5.590
	CE		4.916	29	15	4.873	4.895	99.088	20	86.765	12.063	260	12.183.413	1.226.500	13.418.699	140	102	2.729	2.741
Nugget	B		8	3	1	4	6	136	17	40	86	10	5.679	7.653	13.955	142	89	1.787	2.340
	D		503	124	122	257	386	15.547	31	9.273	6.274	0	1.366.816	1.103.329	2.470.145	147	176	4.911	6.401
	F		27	6	6	14	21	781	29	716	0	65	115.105	0	121.365	161	136	4.537	5.608
	P		100	3	33	64	86	1.937	19	1.937	0	0	121.472	0	121.472	63	0	1.217	1.405
	CE		637	136	182	340	499	18.401	29	11.966	6.360	75	1.609.071	1.110.983	2.726.937	134	175	4.278	5.463
Omega	UK	CE	4	-	-	4	4	95	25	84	-	11	14.447	0	15.811	172	177	4.161	4.161
Orion	D	CE	117	-	1	116	117	3.097	26	2.900	197	0	443.467	30.125	473.592	153	153	4.048	4.080
Target	B		171	42	37	93	133	5.560	32	3.340	2.060	160	465.027	205.093	681.271	139	100	3.975	5.106
	D		91	7	18	86	81	3.676	40	2.208	1.476	-8	329.205	276.240	603.401	149	166	6.631	7.496
	F		15	1	3	11	13	480	32	327	6	147	41.219	886	56.922	126	144	3.625	4.311
	UK		1.405	5	37	1.364	1.369	43.556	31	41.656	19	1.881	5.674.556	2.790	5.670.656	136	147	4.179	4.226
	CE		1.682	54	95	1.533	1.616	53.272	32	47.531	3.561	2.180	6.510.007	484.009	7.212.252	137	136	4.268	4.462
Yeoman	B		28	2	2	24	26	843	30	410	343	90	58.207	36.507	101.419	142	106	3.625	3.659
	F		7	0	1	6	7	179	25	50	0	129	6.891	0	6.891	136	0	954	1.019
	UK		58	0	0	57	58	1.686	29	321	1.365	0	50.494	186.662	237.056	157	137	4.116	4.122
	CE		93	2	3	86	91	2.708	29	781	1.708	219	115.592	223.089	345.366	148	131	3.722	3.614
TOTAL	B		306	56	44	206	257	8.846	29	5.047	3.409	390	710.980	359.764	1.100.230	141	106	3.600	4.266
	D		8.222	515	711	6.996	7.664	210.821	26	158.459	52.370	-8	22.102.413	5.959.559	28.061.334	139	114	3.413	3.661
	ESP		1.155	18	9	1.128	1.141	41.355	36	39.989	1.366	0	4.948.033	70.528	5.018.561	124	52	4.345	4.396
BITTER	F		83	11	11	61	73	2.762	33	1.969	175	619	254.740	15.810	309.749	129	91	3.722	4.250
	IRL		13	-	-	13	13	331	25	331	-	0	70.510	0	70.510	213	0	5.399	5.399
	P		100	3	33	64	86	1.937	19	1.937	0	0	121.472	0	121.472	63	0	1.217	1.405
	UK		1.862	29	49	1.784	1.828	54.994	30	51.321	1.781	1.892	7.855.590	275.282	8.335.580	153	155	4.476	4.560
	CE		11.741	631	857	10.252	11.062	321.046	27	259.053	59.101	2.893	36.063.736	6.680.942	42.973.573	139	113	3.660	3.665

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TABLE 6 MEMBER STATE RETURNS - HOPS 1994 (cont'd 2)

Group C/III		SURFACE AREA IN HECTARES					PRODUCTION (5 kg = 1 Zentner)					RETURNS (ECU)			AVER.PRICE (ECU) 50 KG		RETURNS (ECU) ha	
OTHER		I Total	II New 1994	III New 1993	IV Previous to 1993	V Full Production (II*0,4)+ (III*0,85) + IV	VI Production	VII Yield 50kg/ha	VIII Contract	IX Spot	X Not sold	XI Contract	XII Spot	XIII Total	XIV Contract	XV Spot	XVI Total Planted	XVII Full Production
Variety	Origin	II - IV					VII			VI- (VII+IX)	XIV*VIII	XV*IX	XI+XII+ (X*0,7)*XV			XIII / I	XIII / V	
Hersbrucker Pure	CE																	
Kent	CE																	
Record	B	2	-	-	2	2	36	18	0	36	0	4.048	4.048	0	112	2.023	2.023	
	D	93	1	-	92	92	2.064	22	1.700	364	0	52.570	312.533	153	144	3.361	3.382	
	CE	95	1	0	94	94	2.100	22	1.700	400	0	58.618	316.579	153	142	3.332	3.354	
Viking																		
Zenith	UK CE	3	-	-	3	3	104	37	83	21	0	5.550	20.260	177	284	7.236	7.236	
Other	D	10	1	-	9	9	237	24	200	37	0	4.715	34.449	149	127	3.445	3.665	
	OE	7	0	4	2	5	178	27	178	-	0	0	51.354	288	0	7.631	10.045	
	UK	43	18	14	11	28	424	10	206	217	1	31.074	78.703	231	143	1.826	2.856	
	CE	60	19	18	23	42	839	14	584	254	1	35.789	164.508	220	141	2.749	3.910	
TOTAL	B	2	-	-	2	2	36	18	0	36	0	4.048	4.048	0	112	2.023	2.023	
	D	103	2	0	101	102	2.301	22	1.900	401	0	57.285	348.983	152	143	3.369	3.408	
	OE	7	0	4	2	5	178	27	178	-	0	0	51.354	288	0	7.631	10.045	
OTHER	UK	46	18	14	14	30	528	11	289	238	1	36.624	98.967	216	154	2.156	3.260	
	CE	158	20	18	120	139	3.043	19	2.367	675	1	97.955	501.349	170	145	3.180	3.600	
GRAND	B	384	57	48	281	333	11.233	29	6.017	4.809	407	535.887	1.418.704	142	111	3.698	4.256	
	D	21.930	1.394	1.539	18.997	20.555	568.688	26	437.578	131.118	-8	15.755.751	84.013.088	156	120	3.831	4.087	
TOTAL	ESP	1.156	18	9	1.129	1.142	41.368	36	40.000	1.366	0	70.528	5.020.143	124	52	4.343	4.396	
	F	670	24	36	610	643	22.093	33	21.044	389	660	59.081	4.444.228	206	152	6.631	6.912	
	IRL	13	-	-	13	13	331	25	331	-	0	0	70.510	213	0	5.399	5.399	
	OE	238	6	10	222	231	6.316	27	6.316	0	0	0	1.780.368	282	0	7.489	7.713	
	P	100	3	33	64	86	1.937	19	1.937	0	0	0	121.472	63	0	1.217	1.405	
	UK	3.157	153	105	2.899	3.029	88.794	28	81.610	5.291	1.893	1.121.466	16.424.984	185	212	5.202	5.423	
	CE	27.648	1.656	1.778	24.215	26.032	740.756	27	594.831	142.973	2.951	17.542.712	113.293.475	161	123	4.098	4.352	

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Proposal for a

COUNCIL REGULATION (EC)

**laying down, in respect of hops, the amount of aid
to producers for the 1994 harvest**

EXPLANATORY MEMORANDUM

On the basis of the attached Commission report on the production and marketing of hops from the 1994 harvest it is proposed that the Council adopt the attached proposal for a Regulation setting aid to hop growers for that harvest at the following levels:

- | | |
|--------------------------|-------------|
| - aromatic varieties | ECU 495/ha |
| - bitter varieties | ECU 532/ha |
| - other varieties | ECU 368/ha |
| - experimental varieties | ECU 368/ha. |

The proposal takes account of changes in returns and production costs in relation to the 1993 harvest for the different variety groups, with experimental varieties receiving the same aid as 'other varieties'.

While average production costs are more or less the same as for the 1993 harvest (ECU 6 764/ha, representing a reduction of 0.11%), there has been a downwards trend in average returns per hectare for aromatic and bitter varieties, which fell by 4.31% and 1.39% respectively to ECU 4 705/ha and ECU 3 885/ha while for 'other varieties' they rose by 0.86% to ECU 3 600/ha.

The proposal is therefore for a proportionate rise in the aid for aromatic and bitter varieties and a proportionate reduction in that for other varieties and experimental varieties.

By comparison with the 1993 harvest the average aid rate for all varieties together increases by 4.72% (from ECU 487/ha to ECU 510/ha).

The cost of the proposal to the EAGGF Guarantee Section is estimated at ECU 14.29 million.

**Proposal for a
COUNCIL REGULATION (EC) No**

**laying down, in respect of hops, the amount of aid
to producers for the 1994 harvest**

95/0153 (CNS)

THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty establishing the European Community,

Having regard to Council Regulation (EEC) No 1696/71 of 26 July 1971 on the common organization of the market in hops¹, as amended by the Act of Accession of Austria, Finland and Sweden and by Regulation (EC) No 3290/94 of 22 December 1994² on the adjustments and transitional arrangements required in the agriculture sector in order to implement the agreements concluded during the Uruguay Round of multilateral trade negotiations, and in particular Article 12(7) thereof,

Having regard to the proposal from the Commission,

Having regard to the opinion of the European Parliament³,

Whereas Article 12 of Regulation (EEC) No 1696/71 provides that aid may be granted to hop producers to enable them to achieve a fair income; whereas the amount of this aid is fixed per hectare and differs according to varieties, taking into account the average return on the areas in full production as compared with the average returns for previous harvests, the current position of the market and trends in costs;

Whereas Article 12a of the said Regulation provides that aid to producers may also be granted for areas cultivated with experimental strains in order to facilitate the development of new varieties;

¹ OJ No L 175, 4.8.1971, p.1.

² OJ No L 349, 31.12.1994, p.105.

³ OJ No C

Whereas an examination of the results of the 1994 harvest reveals the need to fix aid for groups of varieties of hops cultivated in the Community; whereas aid to producers should also be granted for areas cultivated with experimental strains,

HAS ADOPTED THIS REGULATION:

Article 1

1. For the 1994 harvest, aid shall be granted to the producers of hops cultivated in the Community for the groups of varieties set out in the Annex as well as for experimental strains.
2. The amount of the aid shall be as set out in the Annex.

Article 2

This Regulation shall enter into force on the third day following its publication in the Official Journal of the European Communities.

This Regulation shall be binding in its entirety and directly applicable in all Member States.

Done at Brussels,

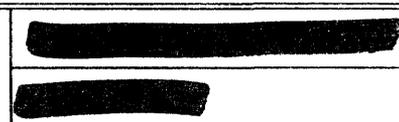
For the Council

ANNEX

Aid to hop producers for the 1994 harvest

<u>Group of varieties</u>	<u>Aid in ECU/hectare</u>
Aromatic	495
Bitter	532
Other	368
Experimental strains	368

FINANCIAL STATEMENT



1. BUDGET HEADING: 181		APPROPRIATIONS: ECU 27 million		
2. TITLE: Proposal for a Council Regulation laying down, in respect of hops, the amount of aid to producers for the 1994 harvest				
3. LEGAL BASIS: Article 43 of the Treaty				
4. AIMS OF PROJECT: To fix the aid per hectare for certain groups of hop varieties for the 1994 harvest				
5. FINANCIAL IMPLICATIONS:	PERIOD OF 12 MONTHS (ECU million)	CURRENT FINANCIAL YEAR (95) (ECU million)	FOLLOWING FINANCIAL YEAR (96) (ECU million)	
5.0. EXPENDITURE - CHARGED TO THE EC BUDGET (REFUNDS/INTERVENTION) - NATIONAL AUTHORITIES - OTHER	14.3	14.3	p.m.	
5.1. REVENUE - OWN RESOURCES OF THE EC (LEVIES/CUSTOMS DUTIES) - NATIONAL				
	1997	1998	1999	2000
5.0.1. ESTIMATED EXPENDITURE	-	-	-	-
5.1.1. ESTIMATED REVENUE	-	-	-	-
5.2. METHOD OF CALCULATION:	Ha	ECU/ha	(A) ECU million	
Aromatic varieties:	15 749 x	495 =	7.80	
Bitter varieties:	11 741 x	532 =	6.24	
Other varieties:	158 x	368 =	0.06	
	-----		----- DR	
	27 648		14.10 x 1.014 = 14.29 million ECU	
6.0.	CAN THE PROJECT BE FINANCED FROM APPROPRIATIONS ENTERED IN THE RELEVANT CHAPTER OF THE CURRENT BUDGET?			YES
6.1.	CAN THE PROJECT BE FINANCED BY TRANSFER BETWEEN CHAPTERS OF THE CURRENT BUDGET?			
6.2.	WILL A SUPPLEMENTARY BUDGET BE NECESSARY?			
6.3.	WILL FUTURE BUDGET APPROPRIATIONS BE NECESSARY?			YES
OBSERVATIONS	The new measure represents a saving of ECU 0.2 million on the assumptions made in the '95 SAB.			

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DOCUMENTS

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