

# COMMISSION OF THE EUROPEAN COMMUNITIES

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## Commission report to the Council

on the situation regarding the production and marketing of hops :  
1979 harvest.

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Proposal for a

Council Regulation (EEC)

laying down, in respect of hops, the amount of aid to producers for  
the 1979 harvest

(Submitted to the Council by the Commission)

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Commission Report to the Council on the situation  
regarding the production and marketing of hops :  
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INTRODUCTION

Under Council Regulation (EEC) No 1696/71 of 26 July 1971 on the common organization of the market in hops, the Commission each year before 30 April presents to the Council a report on the situation regarding the production and marketing of hops and concludes by submitting proposals for aid in respect of the harvest of the previous calendar year. This report concerns the 1979 harvest.

In December 1979 the Commission proposed to the Council that the prohibition on the extension of Community areas should be extended for nine months from 31 December 1979 in order to rationalize the Community and world market on a lasting basis. At the same time, it proposed to the Council that following the expiry of this period all producers in the Community, whether or not associated in producer groups which had taken part in the structural measures, would be put on the same footing to enable them to develop their areas freely according to market requirements. In view of the difficulties encountered in the Council, the Commission withdrew its proposal on 18 March 1980.

However, on the basis of this report the Commission considers that in the medium term there is a danger that areas will be extended in excess of demand. This extension could again have harmful effects on the prices obtained by producers. Accordingly, it proposes that the Council should limit aid and it reserves the right to present to the Council new proposals relating to the control of areas on the basis of the 1980 harvest. In addition, the Commission will bring home to the other major countries in the world the need to pursue a cautious policy with regard to new plantings.

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I. WORLD SITUATION

a) Market structure (Tables 1, 2)

Since there is a very large volume of international trade in hops, prices are strongly influenced by the relationship between supply and demand at world level.

The world market can be divided into five roughly homogeneous sectors:

- 1 - EEC : net exporter of 25 % of its production
- 2 - USA : net exporter of 25 % of its production
- 3 - COMECON : net importer of 5 to 10 % of its requirements
- 4 - Other major producer countries:  
net importers of 5 to 10 % of their requirements
- 5 - Other mainly non-producer countries:  
net importers of 95 % of their requirements.

This structure does not exclude considerable trade within each sector and between sectors, especially in the EEC - USA - COMECON triangle.

In this structure, five countries are normally net hop exporters with output in excess of their requirements. Estimated figures are as follows:

1979

<u>Ztr (50 kg)</u>	<u>PRODUCTION</u>	<u>OWN</u> <u>REQUIREMENTS</u>	<u>DIFFERENCES</u>
FEDERAL REPUBLIC OF GERMANY	620.000	270.000	350.000
USA	498.000	370.000	128.000
CZECHOSLOVAKIA	236.000	110.000	126.000
YUGOSLAVIA	88.000	30.000	58.000
AUSTRALIA	39.000	21.000	18.000
	<u>1,481.000</u>	<u>801.000</u>	<u>680.000</u>

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It clearly emerges from these figures that in 1979 there were three major exporting countries, with the Federal Republic of Germany in first place, followed by the USA and Czechoslovakia.

The greater part of American production (about 95 %) is usually contracted for in advance while the Federal Republic of Germany sells a large proportion of its production on the open market (normally about 20 to 30 %; in 1979: 16 %). Most of Czechoslovak production is contracted for in advance (about 90 %).

b) 1979 harvest

The Commission notes that, with regard to the 1979 harvest, prices on the free market increased considerably compared with those for the 1978 harvest and also compared with the prices applied in respect of contracts concluded in advance.

In 1979 world production was 115.800 t from an area of 78.146 ha, or slightly less than the quantity required by the world brewing industry (estimated at 118.000 t). Consequently, there was some depletion of stocks. While they were about 4 % higher than normal following the 1978 harvest, they are about 2 to 3 % less than normal following the 1979 harvest.

As a result, prices on the free market rose. The pattern was as follows in the Federal Republic of Germany, the world's leading exporter:

<u>Price/Ztr</u>	<u>Free market</u>			<u>ECU</u>
	<u>1977</u>	<u>1978</u>	<u>1979</u>	
<u>Aromatic varieties:</u>				
Hallertauer	46,42	119,75	140,62	
Tettnanger	53,92	131,82	171,49	
Hersbrucker Spät	40,98	115,13	145,80	
<u>Bitter varieties:</u>				
Northern Brewer	47,27	98,42	119,42	
Brewers Gold	48,72	83,18	111,50	

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c) Medium term forecasts - World (Table 4)

For the 1980 harvest an increase of about 4.600 ha (to 81.900 ha) is expected as a result of an increase of about 900 ha in the EEC and about 2.000 ha in the USA, 1.100 ha in the Comecon countries and about 600 ha in the rest of the world.

If yield is normal (about 1.46 t/ha) production will remain slightly short of the requirements of the world brewing industry and stocks will be reduced slightly in 1981. Prices for the 1980 harvest are thus expected to increase. Nevertheless it should be noted that if yield were 5 % above normal surplus stocks could again be constituted. In these circumstances the Commission considers that it is reasonable to prevent the too rapid extension of areas under hops.

With regard to the 1981 and 1982 harvests, the Commission considers that market balance depends on the judicious planning of areas in relation to demand by the major hop producing countries in order to prevent an excessive increase in areas following the good prices for the 1979 and 1980 harvests. This is all the more important as hop gardens do not come into full production for three years. Given the trend in demand and yields and the reduction in stocks in 1979/80, the Commission considers that the world area under hops should not exceed 83 and 84.000 ha respectively at the time of the 1981 and 1982 harvests.

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II. SITUATION IN THE COMMUNITY (Tables 9 - 12)

a) Situation in 1979

In 1979 the EEC accounted for 32 % of the world area under hops and 38 % of world production. The Commission noted that the balance between varieties with a high alpha acid content and aromatic varieties was 29 % against 70 % of EEC production in 1971 and 47 % against 50 % in 1979.

In 1979 EEC production was 44.800 t from an area of 24.658 ha. The area was about 600 ha less than in 1978 following the results of the second year of structural measures, broken down by Member State as follows:

		<u>ha</u>
Germany	:	316
France	:	112
Belgium	:	48
United Kingdom	:	128
Ireland	:	-
Total	:	604

Production was about 5 % higher than in 1978.

In 1978/79 EEC exports were more or less the same as in 1977/78 but there was an increase in imports. Community exports are expected to increase during the 1979/80 marketing period compared with 1978/79 but imports are expected to remain steady.

The Commission estimates that the surplus held by brewers and the trade in the EEC - which was about 8 % at the beginning of the 1979 harvest - could be reduced to about 6 % following the anticipated increase in Community exports.

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In 1978 beer production in the EEC stabilized compared with 1977. No significant increase is expected in 1979 and 1980 but, given the effects of technical improvements, demand for hops should contract slightly.

Advance contract prices were maintained at the same level as in 1978 while non-contract prices rose. The price increase on the free market is mainly the result of the structural measures taken by the EEC during 1978 and 1979, which had the effect of reducing surplus production in the Community and the world and bringing it more into line with demand.

The quantities sold on the free market have been as follows in recent years:

	(Ztr)
1979	150.000
1978	166.000
1977	327.000
1976	174.000
1975	203.000
1974	227.000

b) Structural measures:

The structural measures for the reorganization of hop-gardens and varietal conversion, coupled with a 40 % reduction in the areas concerned, were applied to the 1978 and 1979 harvests. The results of this operation were the reorganization of 611 ha, the conversion of 692 ha and a reduction of 2.414 ha, broken down as follows:

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	<u>Reorganization of plantations</u>	<u>Varietal conversion</u>	<u>Grubbing</u>
Germany	591	659	2.024
France	11	10	199
Belgium	9	23	191
United Kingdom	-	-	-
Ireland	-	-	-
Total	611	692	2.414

The cost of these operations was 7,055.633 ECU.

The reduction of 2.414 ha in the area under hops in the Community is mainly responsible for the improvement in the Community and world market situation in 1978 and 1979.

c) Medium term forecasts - EEC (Table 11)

It is estimated that the area under hops in 1980 will increase by about 900 ha to 25.500 ha. If yield is normal the harvest could produce between 43.400 t and 44.900 t (about 44.100 t). Sales under advance contracts are estimated at between 80 and 85 % of production, or 36.000 t. Thus about 8.000 t will be offered on the free market.

If the estimates of net EEC exports in 1979/80 are accurate (about 11.200 t) a reduction can be expected in stocks held by the Community brewing industry (estimated at about 4 % higher than normal at the beginning of the 1979 harvest), which will thus attain a well-balanced level.

The Commission estimates that outlets for Community production will stabilize at between 45.000 and 45.500 t in 1981 and 1982. This reflects a reduction of about 1 % per year in the internal consumption of EEC breweries (following technical development and the utilization of hop products) and the tendency of EEC net exports



to increase by about 3 % per year. As a result, the Commission estimates that the area under hops in the Community should be about 25.700 ha at the time of these two harvests so that the EEC can continue to pursue a policy of market stability.

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### III. 1979 HARVEST

#### a) Area under hops (Table 9)

In 1979 the areas under hops in the EEC fell from 25.273 ha to 24.658 ha.

There was a reduction in the following varieties:

Hallertauer	Huller
Bramling Cross	Strisselspalt
Brewers Gold	Nothern Brewer
Record	Bullion

and an increase in the following:

Hersbrucker Spät	Target
Challenger	Perle
Goldings	Tettninger

This means that, overall, aromatic varieties have increased by 285 ha since 1978 while bitter varieties have been reduced by 652 ha.

#### b) Yield and production (Table 9)

In 1979 the average yield in the EEC (36,3 Ztr/ha) was higher than in 1978 (33,7 Ztr/ha) and in 1977 (34,9 Ztr/ha).

EEC production in 1979 amounted to 44.800 t, compared with 42.700 t in 1978.

#### c) New plantings

In 1979 969 ha in the EEC had been planted in the previous year and were therefore in their first year of production.

In 1978 166 ha had been planted.



(i) by group of varieties:

	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1979/78</u>	<u>1979/77</u>
Aromatic :	3.362	4.035	4.866	21 %	45 %
Bitter :	3.560	3.640	4.821	32 %	35 %
Others :	2.472	3.194	4.509	41 %	82 %

(ii) by country:

<u>Country</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1979/78</u>	<u>1979/77</u>
Germany	3.558	3.713	4.652	25 %	31 %
France	2.859	3.251	4.986	53 %	74 %
Belgium	2.192	3.537	6.690	89 %	205 %
United Kingdom	3.626	4.350	4.463	3 %	23 %
Ireland	4.148	2.981	4.011	35 %	97 %
Total :	3.438	3.826	4.683	22 %	36 %

Growers' total returns rose compared with 1977 and 1978:

ECU

1977	89, 252, 573
1978	94, 323, 774
1979	115, 510, 745

The Commission noted that in 1979 there were 6.701 producers in the Community (of whom 383 were members of non-recognized groups and 206 were independent), compared with 7.020 in 1978.

CONCLUSION

I. The Commission finds that the restructuring and conversion programme has produced positive results, with an overall reduction of 2.414 hectares in the area under hops in the Community, including 1.031 hectares for bitter varieties and 1.383 hectares for aromatic varieties.

This has brought more stability to the Community market, with a reduction in surplus stocks and a substantial improvement in price levels. The Commission also finds that application of the certification system for the second year has encountered no major problems and has provided better control over quality and greater transparency of marketing networks.

II. In view of these trends, the Commission's proposal on aid for the 1979 harvest is designed to achieve the following aims:

1. To provide an adequate supplement to growers' incomes, which, despite improvements, are in some cases insufficient owing firstly to the low price levels fixed in forward contracts made in the last few years and secondly to the cost of certification (Article 12(5)(a) of Regulation (EEC) No 1696/71).
2. To allow recognized producer groups to maintain a policy of market stability so as to achieve general and lasting balance between supply and demand.
3. To ensure, by means of differential aid, a rational distribution of production by hop type in accordance with the trend in demand.

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III. The Commission therefore proposes the following amounts:

<u>Group of varieties</u>	<u>Aid in ECU/ha</u>
Aromatic varieties	250
Bitter varieties	200
Other varieties	250

Therefore, the average aid per hectare for all eligible land will fall from 396 ECU for the 1978 harvest to 226 ECU for the 1979 harvest.

In spite of this fall in the aid, planters' revenues will be satisfactory owing to the better prices obtainable on the market.

This Commission proposal will make it possible, following the efforts made in respect of structural measures, to achieve significant economies in the budget of the Guarantee Section of the EAGGF (1978: 19 million ECU, 1979: 5,6 million ECU).

TAB. 1

PAYS/LAND/COUNTRY	HA 1977	ZTR 1977	ALPHA 1977	% ALPHA	HA 1978	ZTR 1978	ALPHA T 1978	% ALPHA 1978
BR. DEUTSCHLAND	19.250	740137	2.253	6,1	17.622	606602	1.705	5,6
FRANCE	1.010	34287	125	7,3	887	30027	95	6,3
BELGIE/BELGIQUE	982	36003	120	6,7	851	27727	86	6,3
UNITED KINGDOM	5.925	144662	484	6,7	5.837	187612	724	7,7
IRELAND	65	1674	6	7,2	65	1450	6	7,5
CEE/ EWG/EEC	27.232	956763	2.988	6,3	25.262	853418	2.616	6,13
U.S.A.	12.344	496930	1.789	7,2	12.525	499496	1.550	6,2
AUSTRALIA	950	42000	221	10,5	915	37180	186	10
JUGOSLAVIJA	3.240	89710	250	5,6	3.137	87616	274	6,3
ESPANA	1.803	40942	143	7,0	1.803	41796	156	7,5
CSSR	10.200	244236	488	4,0	10.400	201757	366	3,5
DDR	2.175	58892	190	6,5	2.104	47730	135	5,7
POLSKA	2.328	49460	128	5,2	2.400	38840	80	4,1
HUNGARY	504	10256	24	4,7	550	11800	37	6,3
IHB + IRELAND	60.776	1989189	6.221	6,3	59.096	1819633	5.400	5,94
JAPAN	1.286	45760	121	5,3	1.238	44800	134	6
USSR	12.000	230000	460	4	12.000	200000	400	4
ROMANIA	1.100	24000	66	5,5	1.100	22000	55	5
BULGARIA	14.000	15000	34	4,5	1.500	21000	47	4,5
OTHERS	2.700	52000	164	6,3	2.800	64000	216	6,8
MONDE/WELT/WORLD	79.262	2355949	7.066	6,0	77.734	2171433	6.252	5,76
PRODUCTION OOO ERZEUGUNG T		117,8				108,6		
RENDEMENT/YIELD/ ERTRAG T/HA		1,49				1,40		

TAB 2

PAYS/LAND/COUNTRY	HA 1979	ZTR 1979		HA 1980 EST (x) I	+ (-)	ZTR 1980	HA 1980 EST II	+ (-)
BR. DEUTSCHLAND	17306	620299		18200	894			
FRANCE	775	31770		750	(25)			
BELGIE/BELGIQUE	803	35457		756	(47)			
UNITED KINGDOM	5709	206259		5760	51			
IRELAND	65	1635		70	5			
CEE/EWG/EEC	24658	895420		25536	878			
U.S.A.	12890	498308		14090	1200		14890	2000
AUSTRALIA	915	39000		1165	250	40000		
JUGOSLAVIJA	3106	88046		3185	79			
ESPANA	1852	51716		1927	75			
CSSR	10400	236265		11100	700			
DDR	2160	72208		2200	40			
POLSKA	2447	45000		2447	-			
HUNGARY	568	12448		568	-			
IHB + IRELAND	58996	1938411		62218	3276		63018	4022
JAPAN	1200	44500		1200	-			
USSR	12250	225000		12500	250			
ROMANIA	1200	25000		1300	100			
BULGARIA	1500	24000		1500	-			
OTHERS	3000	58920		3200	200			
MONDE/WELT/WORLD	78146	2315831		81918	3772		82718	4572
PRODUCTION ERZEUGUNG	000 T	115,8		(x) IHB				
RENDMENT/YIELD ERTRAG	T/HA	1,48		PARIS				
				8.3.80				



TAB 3

HOUBLON - HUPFEN - HOPS : MONDE - WELT - WORLD

1972 - 79

		72	73	74	75	76	77	78	79	%	80	81	82
1	PRODUCTION T	105012	118301	111176	113502	106760	117796	108572	115791				
2	TREND (DEMAND)	104085	106091	108096	110101	112107	114112	116117	118122	1,7	120128	122133	124138
3	+ (-)	927	12210	3080	3401	(5347)	3684	(7545)	(2331)				
4	STOCKS : 1 SEPT	50906	51833	64043	67123	70524	65177	68861	61316		58985		
5	NORMAL : 6 M	52042	53045	54048	55050	56053	57056	58058	59061		60064	61066	62069
6	+ (-)	(1136)	(1212)	9995	12073	14471	8121	10803	2255		(1079)		
7	000 HA	78	81,3	82	80,6	78,9	79,3	77,7	78,1				
8	+ (-)/YR		3,3	0,7	(1,4)	(1,7)	0,4	(1,6)	0,5				
9	YIELD T/HA	1,35	1,46	1,35	1,41	1,35	1,49	1,40	1,48				
10	BEER PRODUCTION*	792	770	802	819	847	874	899	925		951		
11	GRMS HOPS/HL	140	138	135	1,34	132	130	129	127		126		
	* MHL												
	FOLLOWING YEAR												



TAB. 5

Following Year/Année - * suivante/Folgendes Jahr		BV = BITTERING VALUE/VALEUR AMERTUME/BITTERGEHALT	HOUBLON - HOFFEN - HOFS		MONDE - WELT - WORLD								
		Année/Jahr/Year	72	73	74	75	76	77	78	79			
1	PRODUCTION HOUBLON / HOP ERZEUGUNG : HOFFEN	000 T	16x18	105	118,3	111	113,5	106,8	117,8	108,6	115,8		
2	CONTENU/ANTEIL/ CONTENT : ALPHA	%		5,88	6,31	5,97	6,37	5,75	6,00	5,76	6,06		
3	PRODUCTION ERZEUGUNG : ALPHA	T	1x2	6174	7468	6627	7230	6137	7066	6252	7017		
4	PERTE/LOSS/VERLUST/AN/YR/JAH	%		(9,28)	(9,12)	(8,88)	(8,56)	(8,56)	(7,84)	(7,84)	(7,6)		
5	- PERTE/LOSS/VERLUST	BV	T	3-4	5601	6787	6039	6611	5612	6512	5762	6484	
6	PRODUCTION BIÈRE/BIERSERZU- GUNG/BEER PRODUCTION *	* M HL		742	770	802	819	847	874	899	925	951	
7	+ PAR AN/JE JAHR/ (-) PER YEAR	%			3,8	4,2	2,1	3,4	3,2	2,9	2,9	2,9	
8	CONTENU/ANTEIL/ CONTENT : ALPHA	GRMS/HL	9 ÷ 6	8,2	8,1	8,0	8,0	8,0	7,9	7,9	7,8	7,8	
9	DEMANDE/DEMAND/ NACHFRAGE : ALPHA	T		6102	6263	6423	6584	6744	6905	7065	7226	7386	
10	BESOIN/BEDARF/ REQUIREMENT : ALPHA	T	9 - 4	5540	5702	5864	6026	6187	6349	6511	6673	6834	
11	SURPLUS (DEFICIT) ÜBERSCHUSS (DEFIZIT) :	BV	T	5-10	61	1085	175	585	(575)	163	(749)	(189)	
12	STOCKS BESTENDE : 1 SEPT :	BV	T		2740	2801	3886	4051	4626	4036	4190	3432	3242
13	STOCKS BESTENDE : 6 MONTHS :	BV	T		2770	2851	2932	3013	3094	3175	3255	3337	3417
14	STOCKS BESTENDE : + (-) :	BV	T	12-13	(30)	(50)	954	1038	1532	861	935	95	(175)
15	- PERTE/LOSS/VERLUST	BV	T	1 %			(10)	(10)	(15)	(9)	(9)	(1)	
16	SUPERFICIE/FLÄCHE/AREA	000 HA		78	81,3	82	80,6	78,9	79,3	77,7			
17	+ PAR AN/JE JAHR - PER YEAR	000 HA			3,3	0,7	(1,4)	(1,7)	0,4	(1,6)			
18	RENDEMENT/ERTRAG/YIELD	T/HA		1,35	1,46	1,35	1,41	1,35	1,49	1,40			

TAB 6

Following Year/Année * suivante/Folgendes Jahr		BV = BITTERING VALUE/VALEUR AMERINE/BITTERMERT		HOUBLON - HOFFEN - HOPS			MONDE - WELT - WORLD				
		Année/Jahr/Year		78	79	80	79	80	79	80	
1	PRODUCTION HOUBLON / HOP ERZEUGUNG HOFFEN	000 T	16x18	108,6	115,8		115,8		115,8		
2	CONTENU/ANTEIL / CONTENT : ALPHA	%		5,76	5,96		6,06		6,15		
3	PRODUCTION ERZEUGUNG : ALPHA	T	1x2	6252	6902		7017		7122		
4	PERTE/LOSS/VERLUST/AN/YR/JAH	%		(7,84)	(7,6)		(7,6)		(7,6)		
5	- PERTE/LOSS/VERLUST BV	T	3-4	5762	6377		6484		6581		
6	PRODUCTION BIÈRE/BIERERZEU- TION/BEER PRODUCTION *	* M HL		899	925	951	925	951	925	951	
7	+ PAR AN/JE JAHR/ (-) PAR YEAR	%		2,9	2,9	2,9	2,9	2,9	2,9	2,9	
8	CONTENU/ANTEIL / CONTENT : ALPHA	GRAMS/HL	9 ÷ 6	7,9	7,8	7,8	7,8	7,8	7,8	7,8	
9	DEMANDE/DEMAND/ NACHFRAGE : ALPHA	T		7065	7226	7386	7226	7386	7226	7386	
10	BESOIN/BESÖRFT/ BENÖTIGT : ALPHA	T	9 - 4	6511	6673	6834	6673	6834	6673	6834	
11	SURPLUS (DEFICIT) ÜBERSCHUSS (DEFIZIT) :	BV	T	5-10	(749)	(296)	(189)		(92)		
12	STOCKS BESTÄNDE : 1 SEPT :	BV	T		4190	3432	3135	3432	3242	3432	3340
13	STOCKS BESTÄNDE : 6 MONTHS :	BV	T		3255	3337	3417	3337	3417	3337	3417
14	STOCKS BESTÄNDE : + (-) :	BV	T	12-13	935	95	(282)	95	(175)	3417	(77)
15	- PERTE/LOSS/VERLUST	BV	T	1 %	(9)	(1)		(1)		(1)	
16	SUPERFICIE/FLÄCHE/AREA	000 HA		77,7	78,1		78,1		78,1		
17	+ PAR AN/JS JAHR - PER YEAR	000 HA		(1,6)	0,4		0,4		0,4		
18	RENDMENT/ERTRAG/YIELD	T/HA		1,40	1,48		1,48		1,48		

TAB 7

Following Year/Année * suivante/Polgendes Jahr		BV = BITTERING VALUE/VALEUR AMERTUME/BITTERBIERT		HOUBLON - HOPFEN - HOPS			MONDE - WELT - WORLD						
		Année/Jahr/Year		1979	1980	1981	1980	1981	1980	1981	1980	1981	
1	PRODUCTION HOUBLON / HOP ERZEUGUNG HOPFEN	000 T	16x18	115,8	119,6		122,9		120,7		124,1		
2	CONTENU/ANTEIL/ CONTENT : ALPHA	%		6,06	6,09		6,19		6,09		6,19		
3	PRODUCTION ERZEUGUNG : ALPHA	T	1x2	7.017	7.282		7.604		7.351		7.682		
4	PERTE/LOSS/VERLUST/AN/YR/JAHR	%		(7,6)	(7,32)		(7,32)		(7,32)		(7,32)		
5	- PERTE/LOSS/VERLUST	BV	T	3-4	6.484	6.746	7.047		6.813		7.119		
6	PRODUCTION BIÈRE/BIERERZEU- GUNG/BEER PRODUCTION *	* M HL		925	951	977	951	977	951	977	951	977	
7	+ PAR AN/JE JAHR/ (-) PER YEAR	%		2,9	2,9	2,9	2,9	2,9	2,9	2,9	2,9	2,9	
8	CONTENU/ANTEIL/ CONTENT : ALPHA	GRAMS/HL	9 ÷ 6	7,8	7,8	7,7	7,8	7,7	7,8	7,7	7,8	7,7	
9	DEMANDE/DEMAND/ NACHFRAGE : ALPHA	T		7.226	7.386	7.597	7.386	7.547	7.386	7.597	7.386	7.547	
10	BESOIN/BEDARF/ REQUIREMENT : ALPHA	T	9 - 4	6.673	6.834	6.996	6.834	6.996	6.834	6.996	6.834	6.996	
11	SURPLUS (DEFICIT) ÜBERSCHUSS (DEFIZIT) :	BV	T	5-10	(189)	(88)	213		(21)		285		
12	STOCKS BESTENDE : 1 SEPT :	BV	T		3.432	3.242	3.154	3.242	3.455	3.242	3.221	3.242	3.527
13	STOCKS BESTENDE : 6 MONTHS :	BV	T		3.337	3.417	3.498	3.417	3.498	3.417	3.498	3.417	3.498
14	STOCKS BESTENDE : + (-) :	BV	T	12-13	95	(175)	(344)	(175)	(43)	(175)	(277)	(175)	29
15	- PERTE/LOSS/VERLUST	BV	T	1 %	(1)	-	-	-	-	-	-	-	
16	SUPERFICIE/FLÄCHE/AREA	000 HA		78,1	81,9		81,9		82,7		82,7		
17	+ PAR AN/JE JAHR - PER YEAR	000 HA		0,4	3,8		3,8		4,6		4,6		
18	RENDEMENT/ERTRAG/YIELD	T/HA		1,48	1,46		1,50		1,46		1,50		

DEMAND AND AREA 1972-82

			72	73	74	75	76	77	78	79	% +	80	81	82
	IHB COUNTRIES													
1	PRODUCTION	T	90.601	10.244	97.042	96.288	90.744	99.265	90.860	95.890				
2	DEMAND (TREND)	T	89.162	90.587	92.011	93.436	94.860	96.285	97.709	99.134	1,4%	100.558	101.983	103.407
3	+ (-)	T	1.439	13.657	5.031	2.852	(4.116)	2.980	(6.849)	(3.244)				
4	YIELD	T/HA	1,51	1,66	1,52	1,52	1,47	1,63	1,54	1,63		1,59	1,60	1,60
5	HA		60.025	62.940	63.759	63.374	61.592	60.767	59.024	58.947		63.244	63.739	64.629
6	YIELD II	T/HA										1,64	1,65	1,67
7	HA II											61.315	61.807	61.920
8	HA EST 8 /3/80	PARIS										62.218		
	HA EST. 25/4/80	COMM										63.018		
	OTHERS (NON-IHB)													
9	PRODUCTION	T	14.411	14.057	14.134	17.214	16.016	18.361	17.712	19.210				
10	DEMAND (TREND)	T	14.913	15.457	15.999	16.542	17.085	17.629	18.172	18.715	2,9 %	19.258	19.801	20.344
11	+ (-)	T	(502)	(1.399)	(1.865)	672	(1.069)	732	(402)	1.035				

TAB. 9

Evolution des superficies, du rendement et de la production du houblon dans la CEE  
 Entwicklung der Flächen, Erträge und der Erzeugung von Hopfen in der EWG  
 Evolution of area, yields and production of hops in the EEC

ANNEE JAHR YEAR	1977	1978	1979
	<u>SUPERFICIE / FLÄCHEN / AREA (ha)</u>		
Deutschland	19.250	17.622	17.306
France	1.010	887	775
België/Belgique	982	851	803
United Kingdom	5.925	5.837	5.709
Ireland	65	65	65
Eur. - 9	27.232	25.262	24.658
	<u>RENDEMENT / ERTRAG / YIELD (50 kg)</u>		
Deutschland	38,4	34,4	35,8
France	33,9	33,8	41,0
België/Belgique	36,7	32,6	44,2
United Kingdom	24,4	32,1	36,1
Ireland	25,8	22,3	25,1
Eur. - 9	35,1	33,7	36,3
	<u>PRODUCTION / ERZEUGUNG / PRODUCTION (Ztr.)</u>		
Deutschland	740.137	606.602	620.299
France	34.287	30.027	31.770
België/Belgique	36.003	27.727	35.457
United Kingdom	144.662	187.612	206.259
Ireland	1.674	1.450	1.635
Eur. - 9	956.763	853.418	895.420

Source: OSCE/Quelle: SAEG/Origin: SOEG

TAB. : 10

			72	73	74	75	76	77	78	79	79	80	81	82
1	PRODUCTION	000 T	42,8	52,6	47,9	44,6	39,9	47,8	42,7	44,8		45,2	45,3	45,3
2	EXPORT NETTE	000 T	6,4	10,2	10,6	10,8	9,4	10,5	9,6		10,9	11,3	11,7	
3	OFFRE CEE	000 T	36,4	42,4	37,3	33,8	30,5	37,3	33,1		33,9			
4	DEMANDE CEE	000 T	36,9	36,5	36,2	35,8	35,4	35,0	34,6		34,3	33,9	33,6	
5	+ (-)	000 T	(0,5)	5,9	1,1	(2,0)	(4,9)	2,3	(1,5)		(0,4)			
6	STOCKS	000 T		14,5	20,4	21,5	19,5	14,6	16,9		15,4	15,0		
7	STOCKS NORMAUX	5 M	15,4	15,2	15,1	14,9	14,8	14,6	14,4		14,3	14,1	14,0	
8	- + (-)	000 T		(0,7)	5,3	6,6	4,7	-	2,5		1,1	0,9		
9	000 HA		27,6	29,5	29,3	29,0	27,8	27,2	25,3	24,7				
10	+ (-)			1,9	(0,2)	(0,3)	(1,2)	(0,6)	(1,9)	(0,6)				
11	RENDEMENT	T/HA	1,55	1,79	1,64	1,54	1,44	1,76	1,69	1,81				
12	PROD. BIERÉ	M HL	224	227	229	237	232	232	233		234	235	236	
13	GRAMMES / HL		165	161	158	151	153	151	148		146	144	142	



TAB. 11			ALT. I			ALT. II			ALT. III			ALT. IV		
			79	80	81		80	81		80	81		80	81
1	PRODUCTION	000 T	44,8	43,5			45,0			44,4			45,9	
2	EXPORT NETTE	000 T	10,9	11,3			11,3			11,3			11,3	
3	OFFRE CEE	000 T	33,9	32,2			33,7			33,1			34,6	
4	DEMANDE CEE	000 T	34,3	33,9	33,6		33,9	33,6		33,9	33,6		33,9	33,6
5	+ (-)	000 T	(0,4)	(1,7)			(0,2)			(0,8)			0,5	
6	STOCKS: 1 SEPT	000 T	15,4	15,0	13,3		15,0	14,8		15,0	14,2		15,0	15,5
7	STOCKS NORMAUX	5 M	14,3	14,1	14,0		14,1	14,0		14,1	14,0		14,1	14,0
8	+ (-)	000 T	1,1	0,9	(0,7)		0,9	0,8		0,9	0,2		0,9	1,5
9	000 HA		24,7	25,0			25,0			25,5			25,5	
10	+ (-)		(0,6)	0,4			0,4			0,9			0,9	
11	RENDEMENT	T/HA	1,81	1,74			1,80			1,74			1,80	

HOUBLON - HOPFEN - HOPS

CEE/ENG/EEC

H = HOUBLON/HOPS/HOPFEN

TAB. : 12

	ANNEE JAHR YEAR		1972	1973	1974	1975	1976	1977
1	PRODUCTION ERZEUGUNG : H	000 T	42,8	52,6	47,9	44,6	39,9	47,8
2	CONTENU/ANTEIL CONTENT : ALPHA	%	6,26	6,86	6,37	6,56	5,7	6,25
3	PRODUCTION ERZEUGUNG : ALPHA	T	2.679	3.608	3.051	2.926	2.274	2.988
4	PERTE/LOSS/VERLUST/AN/YEAR/ JAHR	%	(9,28)	(9,12)	(8,88)	(8,56)	(8,56)	(7,84)
5	- PERTE/LOSS/VERLUST : BV	T	2.431	3.279	2.780	2.676	2.079	2.754
6	PRODUCTION BIERE/BIERERZEU- GUNG/BEER PRODUCTION	* M HL	224	227	229	237	232	232
7	+ PAR AN/ JE JAHR/ PER YEAR	%		0,8	1,0	3,5	(2,1)	-
8	CONTENU/AN. EIL CONTENT : ALPHA	GRMS/HL	10,4	10,1	9,9	9,4	9,5	9,4
9	DEMAND/DEMAND/ NACHFRAGE : ALPHA	T	2.323	2.295	2.266	2.237	2.209	2.180
10	BESOIN/BEDARF/ REQUIREMENT : BV	T	2.108	2.087	2.067	2.046	2.026	2.006
11	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	323	1.192	713	630	53	748
12	EXPORTATIONS/AUSFUHR/ EXPORTS : H	000 T	14,1	17,5	18,7	20,0	18,4	17,5
13	IMPORTATIONS/EINFUHR/ IMPORTS : H	000 T	7,7	7,3	8,1	9,2	9,0	7,0
14	EXPORTATIONS/AUSFUHR/ EXPORT : H	000 T	6,4	10,2	10,6	10,8	9,4	10,5
15	NET : ALPHA	T	430	740	707	726	532	672
16	- PERTE/LOSS/VERLUST : BV	T	390	673	644	664	486	619
17	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	(67)	519	69	(34)	(433)	129
18	STOCKS BESTENDE : 1 SEPT : BV	T	883	816	1.335	1.399	1.360	922
19	STOCKS BESTENDE : 5 M : BV	T	878	870	861	853	844	836
20	STOCKS BESTENDE : + (-) : BV	T	5	(54)	474	546	516	36
21	- PERTE/LOSS/VERLUST : BV	T	-	-	(5)	(5)	(5)	(1)
22	SUPERFICIE/FLACHE/AREA	000 T	27,6	29,5	29,3	29,0	27,8	27,2
23	RENDMENT/ERTRAG/YIELD	T/HA	1,55	1,79	1,64	1,54	1,44	1,76

\* ANNEE SUIVANTE / FOLGENDES JAHR / FOLLOWING YEAR

BV = BITTERING VALUE/VALEUR AMERTISS/  
BITTERMERT

HOUBLON - HOPFEN - HOPS	CEE/ENG/EEC	H = HOUBLON/HOPS/HOPFEN
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TAB.: 13

	ANNEE JAHR YEAR		A				B	
			78	79	80	81	80	81
1	PRODUCTION ERZEUGUNG : H	000 T	42,7	44,8	44,3		45,1	
2	CONTENU/ANTEIL : ALPHA CONTENT	%	6,13	6,27	6,27		6,27	
3	PRODUCTION ERZEUGUNG : ALPHA	T	2.616	2.809	2.778		2.828	
4	PERTE/LOSS/VERLUST/AN/JAHR/ YEAR	%	(7,84)	(7,6)	(7,32)		(7,32)	
5	-- PERTE/LOSS/VERLUST : BV	T	2.411	2.596	2.573		2.620	
	PRODUCTION BIERE/BIERERZEU- GUNG/BEER PRODUCTION	* M HL	233	234	235	236	235	236
7	+ PAR AN/ JE JAHR/ PER YEAR	%	0,4	0,4				
8	CONTENU/ANTEIL : ALPHA CONTENT	GRMS/HL	9,2	9,1	8,9	8,8	8,9	8,8
9	DEMAND/DEMAND/ NACHFRAGE	T	2.151	2.122	2.094	2.065	2.094	2.065
10	BESOIN/BEDARF/ REQUIREMENT	T	1.985	1.965	1.944	1.924	1.944	1.924
11	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	426	631	629		676	
12	EXPORTATIONS/AUSFUHR/ EXPORTS	H 000 T	17,5					
13	IMPORTATIONS/EINFUHR/ IMPORTS	H 000 T	7,9					
	EXPORTATIONS/AUSFUHR/ EXPORT : H	NET 000 T	9,6	10,9	11,3		11,3	
15	NET : ALPHA	T	619	738	723		723	
16	-- PERTE/LOSS/VERLUST : BV	T	570	682	670		670	
17	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	(144)	(51)	(41)		6	
18	STOCKS BESTENDE : 1 SEPT : BV	T	1.050	904	852	810	852	857
19	STOCKS BESTENDE : 5 M : BV	T	827	819	810	802	810	802
20	STOCKS BESTENDE : + (-) : BV	T	223	85	42	8	42	55
24	-- PERTE/LOSS/VERLUST : BV	T	(2)	(1)	(1)		(1)	
22	SUPERFICIE/FLACHEN/AREA	000 T	25,3	24,7	25,0		25,5	
23	RENDEMENT/ERTRAG/YIELD	T/HA	1,69	1,81	1,77		1,77	
* ANNEE SUIVANTE / FOLGENDES JAHR / FOLLOWING YEAR					BV = BITTERING VALUE/VALEUR AMERTUME/ BITTERWERT			

27  
TAB. 14

POURCENTAGE DE HOUBLON VENDU SOUS CONTRAT ET RELATION PRIX HORS CONTRAT - SOUS CONTRAT  
PROZENTSATZ VON VERTRAGSHOPFEN UND VERHÄLTNIS PREISE FREIHOPFEN - VERTRAGSHOPFEN  
PERCENTAGE OF HOPS SOLD UNDER CONTRACT AND RELATION PRICES WITHOUT CONTRACT - UNDER CONTRACT

	hors contrat Freihopfen without contract 50 kg 1	sous contrat Vertragshopfen under contract 50 kg 2	% sous contrat % Vertragshopfen % under contract 3	hors contrat Freihopfen without contract ECU/50 kg 4	sous contrat Vertragshopfen under contract ECU/50 kg 5
A) <u>CE</u>					
1974	227.190	731.351	76	79,26	111,15
1975	202.672	689.378	77	72,80	114,13
1976	174.172	620.353	78	95,18	121,49
1977	327.043	623.643	66	46,45	118,76
1978	166.036	686.210	81	106,29	111,73
1979	150.109	745.308	83	182,12	118,30
B) <u>CE</u>					
R.F.A.	99.533	520.766	84	198,64	116,65
France	11.683	20.084	63	163,57	98,83
Belgique/België	23.902	11.555	33	160,79	132,21
Royaume Uni	14.991	191.268	93	120,93	123,75
Irlande	-	1.635	100	-	149,60

TAB. 15 CALCUL DE LA RECETTE :  
 BERECHNUNG ERTRAGSERLÖSE : 1979  
 CALCULATION OF THE RETURN:

VARIETES SORTEN VARIETIES	HA TP 1979	HA NP 1979	HA NP 1978	HA PP 1979	RCT/HA TP 1979 ECU	RCT/HA PP 1979 ECU
Hallertauer	3.340	81	42	3.217	4.462	4.552
Hersbrucke Spät	3.447	467	137	2.843	4.866	5.456
Huller	1.455	10	38	1.407	4.881	4.950
Spalter	294	9	0	285	5.645	5.785
Tettnanger	854	5	-	849	5.054	5.085
Progress	152	14	5	133	3.920	4.205
Fuggles	598	23	13	562	3.918	4.077
Goldings	489	27	16	446	5.013	5.393
W G V	335	25	12	298	4.145	4.469
Tutsham	4	-	-	4	3.326	3.326
Bramling Cross	410	2	-	408	3.466	3.483
Challenger	767	47	40	680	4.887	5.049
Saaz	13	0	-	13	7.157	7.180
Strisselspalt	183	3	1	179	4.037	4.090
Bourgogne	7	-	-	7	2.755	2.755
Star	4	-	-	4	11.346	11.346
Perle	115	87	10	18	2.591	6.705
Saxon	164	3	20	141	2.983	3.063
Sunshine	1	-	-	1	4.005	4.005
Aroma	12.632	803	324	11.505	4.623	4.866
Northern Brewer	6.348	39	45	6.264	4.422	4.453
Brewers Gold	2.800	46	22	2.732	5.560	5.635
Bullion	342	1	4	337	3.651	3.661
Target	1.017	40	18	959	4.672	4.852
K. Midseason	146	-	-	146	2.927	2.927
Northdown	944	38	43	863	5.380	5.658
Amer/Bitter	11.597	164	132	11.301	4.755	4.821
Record	398	2	4	392	4.666	4.697
Viking	83	0	6	17	3.137	3.143
Triploid.	2	-	-	2	4.569	4.569
Autres	429	2	10	417	4.509	4.509
Non couvertes	6	-	-	6	886	886
CEE/EWG/EEC	24.658	969	466	23.223	4.683	4.839

PROPOSAL FOR  
COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of aid  
to producers for the 1979 harvest

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community,  
and in particular Article 43 thereof,

Having regard to Council Regulation (EEC) No 1696/71 of 26 July 1971 on  
the common organization of the market in hops (1), as last amended by  
Regulation (EEC) No 235/79 (2), and in particular Article 12(7) thereof,

Having regard to the proposal from the Commission,

Having regard to the opinion of the European Parliament,

Having regard to the opinion of the Economic and Social Committee,

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 accor-  
ding to groups of varieties, taking into account the average return on  
the areas in full production in comparison with the average returns for  
previous harvests, the current position of the market and price trends;

Whereas an examination of the results of the 1979 harvest shows the  
need to fix aid for certain groups of varieties of hops cultivated  
in the Community;

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(1) OJ No L 175, 4.8.1971, p. 1  
(2) OJ No L 34, 9.2.1979, p. 4

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HAS ADOPTED THIS REGULATION:

Article 1

1. For the 1979 harvest, aid shall be granted to the producers of hops cultivated in the Community for the groups of varieties set out in the Annex.
2. The amount of the aid shall be that 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

For the Council

Aid granted to hop producers for the 1979 harvest

<u>Group of varieties</u>	<u>Aid ECU/ha</u>
Aromatic	250
Bitter	200
Others	250



