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REPORT FROM THE COMMISSION TO THE COUNCIL

on the production and marketing of hops

(1995 harvest)

Proposal for a

COUNCIL REGULATION (EC) No

laying down, in respect of hops, the amount of aid to producers for the 1995 harvest

(presented by the Commission)

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* Table 4 (Community external trade in hops and hop products) is not yet available.

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 25th such report presented by the Commission, outlines the main events of the 1995 harvest year. It focuses on the salient facts needed to calculate the amount of aid to producers for the 1995 harvest.

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

2. 1995 HARVEST

2.1. World situation

2.1.1. Production

Worldwide, the total area under hops was approximately 86 133 ha, of which approximately 68 585 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 0.7%. The decrease was most marked in Australia (- 6.9%), the Slovak Republic (- 8.33%) and Ireland (- 40.69%). Estimates for the Ukraine point to a reduction of 6.80%. Portugal (+ 21.40%) heads the list of the few countries in which there was an increase. The decrease worldwide is about 0.30%.

At around 2 562 412 ztr the 1995 harvest was markedly higher (144 885 ztr or 5.99%) than in 1994. Quality was better with an alpha acid content of 6.7% and alpha acid production of 8 584 tonnes.

Although the records of the 1993 harvest were not equalled, the 1995 harvest was still considerably higher - in terms of yield - than the average for the last five years.

Worldwide there is overproduction of hops in relation to the needs of the breweries. For this reason the member states of the IHGC have proposed that between 5 000 and 10 000 ha should be grubbed. So far this has not been done.

Although beer production in Europe has fallen year after year since 1990, this is not so in the case of other continents, especially Asia, and in particular in China, which at present ranks as the world's second-largest beer producer after the United States.

Worldwide, beer production is estimated at 1 270 million hectolitres for 1996. Since this volume usually requires 8 255 tonnes of alpha acid for hopping of 5.9 g/alpha/hl, the quantity of hops produced should in principle exceed requirements (surplus of 329 tonnes). It should be noted that, for hopping of 5.9 g of alpha acid per hectolitre of beer, breweries need to have around 6.5 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 several months of production.

2.1.2. Market trend

Prices for German hops were up on the previous harvest, and all the 1995 harvest has been sold. Although they fell, average American prices were still high enough to cover production costs, with the yield being considerably higher than in Europe (2.05 tonnes/ha as against 1.43 tonnes/ha) and the alpha acid percentage also significantly higher (9.37% as against 5.76%) (see Table 1). 95% of the American harvest has been sold under contract.

Contracts signed in advance - although down in terms of quantity - have proved after all to be a good system even though in times of crisis it cannot operate as well as it might (see Tables 2 and 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 5 043 farms growing hops in the Community (see Annex, Table A), a 4.80% fall over 1994. At the same time the average area under hops rose from 5.2 to 5.5 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 27 499 ha in 1995, i.e. 149 ha (0.54%) down on 1994 (see Annex, Table 1), most of it (21 885 ha, or 80%) in Germany. But in that country areas were 45 ha, i.e. 0.21%, down on 1994.

At present, aromatic varieties account for 57.99% of the area, with Hersbrucker (31.18% of the aromatic area in spite of a reduction in Germany of 527 ha on 1994) still the most popular. Of the aromatic varieties for which there were large increases in area, the most significant are Hallertauer Tradition (+ 257 ha), Perle (+ 117 ha) and Spalter Select (+ 115 ha). Bitter varieties accounted for 41.37% and other varieties for 0.63%.

The share of bitter varieties was slightly down in 1995 to the benefit of aromatic varieties. Of the bitter varieties Northern Brewer remained far and away the most popular (4 280 ha, which represents a fall on 1994 of 638 ha) followed by Hallertauer Magnum (1 874 ha) and Target (1 541 ha) then Brewer's Gold (1 160 ha). The area under the latter two varieties also fell, by 141 ha and 182 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 38.8% on 1994 and the area under Magnum by about 40.7%.

Quantitatively the 1995 harvest was far larger than the 1994 harvest (13.41%). At 840 085 ztr, average yield was 1.43 tonnes or 31 ztr per hectare.

Quality was average, and alpha acid content was around 5.76% on average for the Community as a whole for the three types of varieties, giving 2 419 tonnes - 82 kg per hectare - of alpha acid for beer production in 1996.

2.2.3. Sales and prices

Overall, the average price for hops sold under contract was ECU 197/ztr, ECU 2.60/ztr up on the 1994 harvest, ranging from ECU 132/ztr in Portugal to ECU 287/ztr in Ireland. Both these countries sold their entire production under contract (see Table 6). The average spot price for hops sold on the free market was down on the preceding year, at ECU 140/ztr as opposed to ECU 149/ztr in 1994, although here too prices differed markedly from one Member State to another, ranging from ECU 116/ztr in Spain to ECU 201/ztr in the United Kingdom.

82% of the 1995 crop was sold under contract (see Annex, Table 5). Belgium was well below this average at 36%.

Highest average prices, both under contract and for spot sales, were made by the aromatic varieties (ECU 210/ztr and ECU 157/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 higher than the average for the group, as did Strisselspalt in France, where average contract prices were ECU 222/ztr. The variety of aromatic hops fetching the lowest price was undoubtedly Hersbrucker, which accounted for about 31% of the area for this group of varieties (contract price ECU 187/ztr, spot price ECU 80/ztr).

For bitter varieties the average price for sales under contract was ECU 179/ztr and for spot sales ECU 125/ztr, the varieties that fetched the highest prices in this group being Hallertauer 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 low spot price in Spain (ECU 116/ztr) and a low contract price in Portugal (ECU 132/ztr).

The official figures indicate that, of the 840 085 ztr produced in the Community in 1995, only 4 420 ztr (0.53%) remain unsold. Ireland, Austria and Portugal sold their entire production under contract for an average price of ECU 287/ztr, ECU 274/ztr and ECU 132/ztr respectively (see Table 5), followed by France, which sold 94% of its production under contract for an average price of ECU 217/ztr.

Producers were expecting higher prices for sales on the free market. There was a structural deficit of certain varieties 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, as it has since 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 152/ztr (i.e. ECU 80/ztr) on the free market, the two new aromatic varieties have been fetching around DM 374-388 ztr, i.e. ECU 167-172 ztr, which is still more than the Community average for aromatic varieties. It appears that precontracts 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. 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 considerably higher than in 1994. The average return per hectare in full production was ECU 6 037 compared to ECU 5 255 in 1994 (+ 14.88%).

At Community level, returns were highest for the aromatic variety group (ECU 6 271 per ha in full production, 10.39% up on 1994). However, Belgium, France, Austria and the United Kingdom recorded a fall for these varieties.

The most profitable aromatic varieties were, for France, Strisselspalt (return of ECU 7 272/ha in full production), and for the United Kingdom Challenger (ECU 7 223/ha in full production), Goldings (ECU 7 614/ha in full production) and WVG (ECU 7 215/ha in full production). The aromatic varieties which produced a lower return in the United Kingdom than the Community average for this group of varieties were Bramling Cross and Fuggles. After Spain, the greatest increase in returns was in Germany (17.24%), where the return on all aromatic varieties cultivated increased.

Returns also increased for the bitter variety group (+ 21.85%), reaching ECU 5 716/ha in full production, with returns in all producing Member States increasing, in some cases considerably, e.g. Germany (+ 34.68%), Ireland (+ 17.82%) and Portugal (+ 83.26%). In Germany this increase is explained by the sharp increase in returns for Northern Brewer (+ 72.80%) grown on 4 211 ha, and Brewer's Gold (+ 11.69%), grown on 1 316 ha. On the whole, contract prices for this group of varieties in Germany increased by 8.44%. In the case of England, the increase is explained by the fact that contract prices for Target (which covers about 1 242 ha) rose on the preceding year while yield was high at the same time. Contract prices followed the same trend in Belgium, combined with yields considerably up on 1994. 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 (95 ha), and to a small extent in Belgium (2 ha), the United Kingdom (68 ha) and Austria (9 ha), rose by 19.05%. As these varieties are only cultivated on small areas, their impact on overall returns for producers was negligible.

2.2.5 Production costs

At ECU 9 136/ha, they were very close to those of the previous year (+ 0.08%). Belgium had the highest production costs (ECU 12 182/ha) and Spain the lowest (ECU 5 667/ha). Fluctuations in individual Member States did not exceed 8.27% in either direction compared with 1994 levels (see Annex, Table D).

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 1994 harvest year, aid per hectare was granted at a rate of ECU 495 for aromatic varieties, ECU 532 for bitter varieties and ECU 368 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 1995 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 reparcelling 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. reparcelling 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 Annex, Table E).

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 1995 harvest.

The average level of aid for producers proposed is lower than for the 1994 harvest for the three groups of 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.

Proposal for a

COUNCIL REGULATION (EC) No

laying down, in respect of hops, the amount of aid to producers for the 1995 harvest

EXPLANATORY MEMORANDUM

On the basis of the attached Commission report on the production and marketing of hops from the 1995 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 444/ha
- bitter varieties ECU 416/ha
- other varieties ECU 298/ha
- experimental varieties ECU 298/ha.

The proposal takes account of changes in returns and production costs in relation to the 1994 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 1994 harvest (a rise of only 0.08%), average returns per hectare for the three groups of varieties rose to ECU 6 271/ha (+ 10.39 %), ECU 5 716/ha (+ 21.85 %) and ECU 5 175/ha (+ 19.05 %) respectively.

The proposal is therefore for a proportionate reduction in the aid for the three groups of varieties.

By comparison with the 1994 harvest the average aid rate for all varieties together decreases by 14.88 % (from ECU 510/ha to ECU 434/ha).

The cost of the proposal to the EAGGF Guarantee Section is estimated at ECU 12.2 million.

Proposal for a

COUNCIL REGULATION (EC) No
of

laying down, in respect of hops, the amount of aid to producers for the 1995 harvest

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 hops[1], as amended by the Act of Accession of Austria, Finland and Sweden and by Regulation (EC) No 3290/94 of 22 December 1994 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[2], and in particular Article 12(7) thereof,

Having regard to the proposal from the Commission[3],

Having regard to the opinion of the European Parliament[4],

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;

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1 OJ No L 175, 4.8.1971, p.1.
2 OJ No L 349, 31.12.1994, p.105.
3 OJ No C
4 OJ No C

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;

Whereas an examination of the results of the 1995 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:

<u>Article 1</u>

1. For the 1995 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.

<u>Article 2</u>

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

ANNEX

Aid to hop producers for the 1995 harvest

Group of varieties	Aid in ECU/hectare
Aromatic	444
Bitter	416
Other	298
Experimental strains	298

TABLE A

Number and size of hop-growing farms in the Community

1995

	Number of farms			Total area under hops (ha)			Areas under hops per farm (ha)		
	1994	1995	1995-1994	1994	1995	1995-1994	1994	1995	1995-1994
Belgium	90	86	-4	384	374	-10,05	4,3	4,3	0,1
Germany	3.282	3.122	-160	21.930	21.885	-45	6,7	7,0	0,3
Spain	1.447	1.379	-68	1.156	1.102	-54	0,8	0,8	0,0
France	153	136	-17	670	670	-0,29	4,4	4,9	0,5
Ireland	2	2	0	13	8	-5,29	6,5	3,9	-2,6
Austria	81	82	1	238	244	5,71	2,9	3,0	0,0
Portugal	31	31	0	100	121	21,4	3,2	3,9	0,7
United Kingdom	211	205	-6	3.157	3.095	-61,72	15,0	15,1	0,1
EC	**5.297**	**5.043**	**-254**	**27.648**	**27.499**	**-149,24**	**5,2**	**5,5**	**0,2**

TABLE B
Average prices for selected hop varieties in Germany
1983 - 2000

	Agricultural conversion rates 1st January	Hallertauer		Tettnanger		Hersbrucker		Norther Brewer		Brewer's Gold	
		DM/Ztr.	ECU/Ztr.	DM/Ztr.	ECU/Ztr.	DM/Ztr.	ECU/Ztr.	DM/Ztr.	ECU/Ztr.	DM/Ztr.	ECU/Ztr.
Spot market											
1983	2,65660	316	118,95	500	188,21	170	63,99	262	98,62	174	65,50
1984	2,51457	347	138,00	405	161,06	197	78,34	176	69,99	108	42,95
1985	2,30751	465	201,52	495	214,52	301	130,44	245	106,18	109	47,24
1986	2,30397	308	133,68	330	143,23	226	98,09	150	65,11	58	25,17
1987	2,17266	569	261,89	590	271,56	541	249,00	198	91,13	141	64,90
1988	2,09725	538	256,53	545	259,86	512	244,13	337	160,69	220	104,90
1989	2,07609	515	248,06	546	262,99	410	197,49	301	144,98	208	100,19
1990	2,07609	1.301	626,66	1.500	722,51	989	476,38	1.358	654,11	1.006	484,56
1991	2,05586	492	239,32	527	256,34	345	167,81	408	198,46	298	144,95
1992	2,05586	477	232,02	508	247,10	327	159,06	451	219,37	300	145,92
1993	1,96992	357	181,23	470	238,59	68	34,52	144	73,10	75	38,07
1994	1,94962	508	260,56	518	265,69	165	84,63	236	121,05	120	61,55
1995	1,94962	546	280,05	544	279,03	152	77,96	273	140,03	133	68,22
Contract market*)											
1983	2,65660	448	168,64	535	201,39	418	157,34	380	143,04	358	134,76
1984	2,51457	458	182,14	550	218,73	415	165,04	388	154,30	364	144,76
1985	2,30751	457	198,05	546	236,62	403	174,65	385	166,85	352	152,55
1986	2,30397	468	203,13	540	234,38	406	176,22	410	177,95	345	149,74
1987	2,17266	466	214,48	525	241,64	404	185,95	405	186,41	329	151,43
1988	2,09725	473	225,53	527	251,28	403	192,16	398	189,77	299	142,57
1989	2,07609	472	227,35	521	250,95	398	191,71	378	182,07	276	132,94
1990	2,07609	484	233,13	521	250,95	394	189,78	380	183,04	275	132,46
1991	2,05586	491	238,83	524	254,88	377	183,38	376	182,89	256	124,52
1992	2,05586	502	244,18	523	254,39	364	177,05	358	174,14	261	126,95
1993	1,96992	506	256,86	529	268,54	354	179,70	361	183,26	271	137,57
1994	1,94962	510	261,59	524	268,77	355	182,09	330	169,26	271	139,00
1995	1,94962	521	267,23	532	272,87	356	182,60	353	181,06	270	138,49
Forward contracts											
1996	1,90616	526	275,95	555	291,16	339	177,84	359	188,34	258	135,35
1997	1,90616	531	278,57	559	293,26	337	176,80	355	186,24	252	132,20
1998	1,90616	532	279,10	565	296,41	334	175,22	354	185,71	246	129,06
1999	1,90616	534	280,14	567	297,46	334	175,22	356	186,76	255	133,78
2000	1,90616	530	278,05	568	297,98	335	175,75	347	182,04	216	113,32

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

TABLE C

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

	1988	1989	1990	1991	1992	1993	1994**)	1995	1995/94 (%)
BY VARIETY GROUP									
Aromatic	5.586	5.562	5.663	5.854	5.339	4.908	5.681	6.271	**10,39%**
Bitter	4.491	4.633	5.644	5.415	4.328	3.939	4.691	5.716	**21,85%**
Others	4.196	4.093	5.365	3.382	3.948	3.569	4.347	5.175	**19,05%**
BY COUNTRY									
Belgium	4.368	3.995	11.158	5.931	6.602	4.908	5.139	4.980	**-3,09%**
Germany	5.238	5.307	5.616	5.456	4.818	3.939	4.935	6.079	**23,18%**
Spain	3.173	4.473	4.456	4.441	2.605	3.569	5.308	4.578	**-13,75%**
France	6.170	5.572	7.450	5.512	6.320	6.794	8.346	6.978	**-16,39%**
Ireland	5.943	5.283	10.817	7.901	9.055	7.109	6.519	7.681	**17,82%**
Austria							9.313	7.620	**-18,18%**
Portugal	2.452	4.329	3.322	1.715	1.495	1.203	1.697	3.110	**83,26%**
United Kingdom	5.001	4.577	5.615	7.212	5.404	4.803	6.548	6.203	**-5,27%**

BY COUNTRY AND BY VARIETY GROUP

	Aromatic			Bitter			Other		
	1994**)	1995	1995/94 %	1994**)	1995	1995/94 %	1994**)	1995	1995/94 %
Belgium	5.091	3.980	-21,82	5.175	5.292	2,26	2.443	2.321	-4,99
Germany	5.250	6.155	17,24	4.421	5.954	34,68	4.115	5.694	38,37
Spain	1.910	2.760	44,50	5.311	4.579	-13,78	-	-	-
France	8.757	7.258	-17,12	5.132	4.448	-13,33	-	-	-
Ireland	-	-	-	6.519	7.681	17,82	-	-	-
Austria	9.249	7.626	-17,55	-	10.157	-	12.129	7.452	-38,56
Portugal	-	-	-	1.697	3.110	83,26	-	-	-
United Kingdom	8.244	6.890	-16,42	5.506	5.688	3,31	3.936	4.045	2,77

*)Areas newly planted in 1995 and 1994, were assumed to give 40 % and 65 % respectively of the return on areas in full production.

**) Following the introduction of the swith-over mechanisme on 1st February 1995, these figures have been multiplied by 1,207509 in order to allow comparison with the 1995 figures.

TABLE D

Production costs per hectare - in national currency (M.N.) and in ECU

	Agricultural conversion rate *) + **)	Year	Fertilizer		Insecticide		Energie Costs		Buildings***)		Equipment costs		Interest on capital		Labour costs		Other		Total		Change on 1994 %
			M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	M.N.	ECU	
B	40,8337	1994	12.134	297	34.357	841	10.296	252	17.875	438	125.301	3.069	40.462	991	179.488	4.396	50.323	1.232	470.236	11.516	
	39,5239	1995	11.323	286	34.357	869	10.413	263	18.700	473	129.611	3.279	40.462	1.024	186.282	4.713	50.323	1.273	481.471	12.182	5,78
D	1,94962	1994	674	346	1.954	1.002	3.062	1.571	827	424	3.219	1.651	1.803	925	5.610	2.877	436	224	17.585	9.020	
	1,90616	1995	658	345	1.750	918	2.899	1.521	885	464	3.272	1.717	1.775	931	5.760	3.022	450	236	17.449	9.154	1,49
Es	160,399	1994	83.000	517	56.500	352	115.812	722	7.040	44	68.125	425	32.093	200	475.556	2.965	60.000	374	898.126	5.599	
	165,198	1995	86.643	524	58.164	352	121.543	736	7.377	45	71.346	432	32.629	198	495.806	3.001	62.660	379	936.168	5.667	1,21
Fr	6,61023	1994	1.367	207	6.231	943	1.940	293	3.061	463	8.795	1.331	3.952	598	22.658	3.428	6.171	934	54.175	8.196	
	6,61023	1995	1.486	225	5.388	815	2.203	333	3.082	466	8.850	1.339	3.978	602	19.841	3.002	6.391	967	51.219	7.748	-5,46
Irl	0,80863	1994	100	124	1.242	1.536	450	556	450	556	230	284	1.148	1.420	2.500	3.092	380	470	6.500	8.038	
	0,829498	1995	100	121	1.500	1.808	518	624	405	488	250	301	856	1.032	2.600	3.134	380	458	6.609	7.967	-0,88
Oe	13,7190	1994	6.585	480	7.662	558	20.169	1.470	7.099	517	21.487	1.566	16.235	1.183	36.675	2.673	22.757	1.659	138.669	10.108	
	13,4084	1995	5.373	401	7.701	574	21.220	1.583	7.048	526	21.256	1.585	15.980	1.192	36.931	2.754	23.225	1.732	138.734	10.347	2,36
P	160,399	1994	53.520	334	189.660	1.182	92.000	574	36.000	224	90.000	561	-	0	407.000	2.537	213.820	1.333	1.082.000	6.746	
	165,198	1995	53.520	324	189.660	1.148	92.000	557	36.000	218	90.000	545	-	0	438.000	2.651	203.894	1.234	1.103.074	6.677	-1,01
UK	0,7897	1994	263	333	1.000	1.266	262	332	843	1.067	1.520	1.925	2.409	3.051	1.753	2.220	713	903	8.763	11.097	
	0,856563	1995	289	337	694	810	276	322	885	1.033	1.554	1.814	2.338	2.730	1.855	2.166	828	967	8.719	10.179	-8,27
EC		1994																		9.130	
		1995																		9.136	0,07

*) for 1994 = 1.1.1995 / switch-over 1,207509

**) for 1995 = 1.1.1996

***) Upkeep and amortisation

TABLE E

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

(Situation at March 1996)

	Type of variety to which conversion is to be made		
	Aromatic (ha)	**Super-Alpha (ha)**	**Total (ha)**
Belgium	44,31	222,88	267,19
Germany	432,10	567,90	1000,00
Spain	-	230,00	230,00
France	125,00	45,00	170,00
Ireland	-	-	0,00
Austria	-	-	0,00
Portugal	-	121,40	121,40
United Kingdom	306,90	693,10	1000,00
EC	908,31	1880,28	2788,59

TABLE 1

Area under hops, production of hops and alpha acid by producer countries
1995

Country	Area				Production				Yield	Alpha			Forecast Area	
	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	XIII	XIV
Country	ha 1994	ha 1995	ha (+/-) 1995/94	ha (+/-) 1995/94	Zentner 1994	Zentner 1995	Zentner +/- 1995/94	Zentner +/- % 1995/94	t/ha	Production tons 1995	Percent 1995	Yield kg/ha 1995	ha 1996	Change ha 1996-95
			(II-I)	(III/I)			(VI-V)	(VII/V)	(VI/II/20)		(X/(VI/20))	(IX*1000 *XI)		(XIII-II)
Belgium	384	374	-10	-2,62%	11.233	12.069	836	7,44%	1,61	48	7,95%	128	360	-14
Germany	21.930	21.885	-45	-0,21%	568.686	681.081	112.395	19,76%	1,56	1.814	5,33%	83	21.800	-85
Spain	1.156	1.102	-54	-4,67%	41.366	33.845	-7.521	-18,18%	1,54	140	8,27%	127	1.054	-48
France	670	670	-0	-0,04%	22.093	22.075	-18	-0,08%	1,65	27	2,45%	40	716	46
Ireland	13	8	-5	-40,69%	331	206	-125	-37,76%	1,34	1	9,71%	130	8	0
Austria	238	244	6	2,34%	6.316	6.716	400	6,33%	1,38	22	6,55%	90	246	2
Portugal	100	121	21	21,40%	1.937	2.533	596	30,77%	1,04	12	9,47%	99	45	-77
United Kingdom	3.157	3.095	-62	-1,96%	88.794	81.560	-7.234	-8,15%	1,32	355	8,71%	115	3.023	-72
EC-15	**27.648**	**27.499**	**-149**	**-0,54%**	**740.756**	**840.085**	**99.329**	**13,41%**	**1,43**	**2.419**	**5,76%**	**82**	**27.251**	**-247**
U.S.A.	17.164	17.479	315	1,84%	676.395	715.338	38.943	5,76%	2,05	3.351	9,37%	192	17.880	401
Australia	1.131	1.053	-78	-6,90%	54.140	50.980	-3.160	-5,84%	2,42	262	10,26%	248	1.030	-23
New Zealand	345	355	10	2,90%	15.310	15.129	-181	-1,18%	2,13	99	13,09%	279	372	17
Yugoslavia*)	576	600	24	4,17%	14.100	15.235	1.135	8,05%	1,27	30	3,99%	51	600	0
Slovenia	2.420	2.370	-50	-2,07%	70.820	76.200	5.380	7,60%	1,61	214	5,60%	90	2.370	0
Czech Republic	10.200	10.070	-130	-1,27%	184.400	198.260	13.860	7,52%	0,98	317	3,20%	31	9.500	-570
Slovak Republic	1.200	1.100	-100	-8,33%	21.000	20.700	-300	-1,43%	0,94	31	3,00%	28	1.000	-100
Ukraine	5.400	5.033	-367	-6,80%	71.850	75.686	3.836	5,34%	0,75	117	3,08%	23	4.033	-1.000
Poland	2.341	2.401	60	2,56%	48.000	65.290	17.290	36,02%	1,36	152	4,67%	63	2.551	150
Bulgaria	645	625	-20	-3,10%	10.430	10.126	-304	-2,91%	0,81	35	6,81%	55	505	-120
Total IHB (-EC)	**41.422**	**41.086**	**-336**	**-0,81%**	**1.166.445**	**1.242.944**	**76.499**	**6,56%**	**1,43**	**4.607**	**7,41%**	**106**	**39.841**	**-1.245**
Total IHB (+EC)	**69.070**	**68.585**	**-485**	**-0,70%**	**1.907.201**	**2.083.029**	**175.828**	**9,22%**	**1,43**	**7.026**	**6,75%**	**96**	**67.092**	**-1.492**
Romania	2.170	2.200	30	1,38%	34.540	40.000	5.460	15,81%	0,91	100	5,00%	45		
Russia**)	3.510	3.500	-10	-0,28%	32.000	45.000	13.000	40,63%	0,64	81	3,60%	23		
Argentina	461	461	0	0,00%	8.500	7.500	-1.000	-11,76%	0,81	19	5,07%	41		
China	7.050	7.050	0	0,00%	340.000	340.000	0	0,00%	2,41	935	5,50%	133		
Japan	565	535	-30	-5,31%	22.080	20.600	-1.480	-6,70%	1,93	71	6,89%	133		
South Africa	720	640	-80	-11,11%	26.400	24.200	-2.200	-8,33%	1,89	123	10,17%	192		
Total World	**86.393**	**86.133**	**-260**	**-0,30%**	**2.417.527**	**2.562.412**	**144.885**	**5,99%**	**1,49**	**8.584**	**6,70%**	**100**		

*) Estimates

Source: Member States + International Hop Growers' Convention (IHGC) + Horst Report

TABLE 2

ESTIMATED FORWARD SALES

1996 - 2000

Zentner = 50 kg

Country	1996	1997	1998	1999	2000 & onwards
Belgium	1.595	1.360	1.100	500	100
Germany	431.779	348.646	260.898	174.400	113.318
Spain	32.130	32.160	32.160	*)	*)
France	22.381	20.953	20.428	18.713	16.110
Ireland	170	*)	*)	*)	*)
Austria	4.100	4.100	4.000	4.000	500
Portugal	4.000	4.600	4.600	*)	*)
United Kingdom	58.294	44.451	32.380	22.720	17.840
EC-15	**554.449**	**456.270**	**355.566**	**220.333**	**147.868**
New Zealand	13.332	11.410	7.072	3.247	2.972
U.S.A.	540.906	371.423	303.284	134.491	92.507
Australia	35.000	25.000	25.000	20.000	*)
Poland	45.000	45.000	45.000	45.000	*)
Czech Republic	110.000	80.000	60.000	60.000	*)
Slovak Republic	10.000	10.000	8.000	8.000	7.000
Slovenia	50.000	36.000	25.000	15.000	10.000
Serbia	*)	*)	*)	*)	*)
Hungary	*)	*)	*)	*)	*)
Ukraine	*)	*)	*)	*)	*)
Bulgaria	*)	*)	*)	*)	*)
Total IHGC (-EC)	**804.238**	**578.833**	**473.356**	**285.738**	**112.479**
Total IHGC (+EC)	**1.358.687**	**1.035.103**	**828.922**	**506.071**	**260.347**

TABLE 3
HOPS : WORLD BASE SERIES
1973 - 1995

YEAR	AREA	PRODUCTION		YIELD				GERMANY - PRICE		U.S.A. Avg. Price
	I	II	II	VI	V	VI	VII	VIII	IX	X
	(ha)	(Ztr)	(t) II*0,05	(t/ha) III/I	(alpha t)	(% alpha) V*20/II*100	(kg/ha) V*1000/I	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	91.653	2.435.121	121.756	1,33	7.549	6,20	82,36	387	326	1,38
1990	92.864	2.286.671	114.334	1,23	6.860	6,00	73,87	384	1.190	1,47
1991	91.512	2.618.744	130.937	1,43	8.773	6,70	95,86	375	391	1,60
1992	91.503	2.478.345	123.917	1,35	7.913	6,39	86,48	367	382	1,74
1993	90.185	2.817.586	140.879	1,56	9.862	7,00	109,35	364	133	1,76
1994	86.393	2.417.527	120.876	1,40	7.494	6,20	86,75	359	227	1,81
1995	86.133	2.562.412	128.121	1,49	8.584	6,70	99,66	371	261	1,74
Average	86.889	2.444.168	122.208	1,41	7.615	6,22	87,60	365	367	1,44
Index 95 (1973 = 100)	106%	108%	108%	102%	115%	106%	108%	112%	126%	232%
Index 95 (1982 = 100)	90%	86%	86%	96%	97%	113%	108%	95%	156%	100%

TABLE 5

Hops production sold and average prices obtained under contract and not under contract 1980-1995

EC	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 - 1995							
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	
1995	149.815	685.850	82%	140		197	
B. 1995				1994	1995	1994	1995
- Belgium	7.699	4.371	36%	111	119	142	173
- Germany	130.949	550.122	81%	120	138	156	195
- Spain	2.409	32.013	93%	52	116	124	144
- France	1.204	19.186	94%	152	143	206	217
- Ireland	-	206	100%	0	0	213	287
- Austria	-	6.716	100%	0	0	282	274
- Portugal	-	2.533	100%	0	0	63	132
- United Kingdom	7.554	70.705	90%	212	201	185	230

*) Unsold quantities are not included

TABLE 6: MEMBER STATE RETURNS - HOPS 1995

Group A/I			SURFACE AREA IN HECTARES					PRODUCTION (5 kg = 1 Zentner)					RETURNS (ECU)			AVER.PRICE (ECU) 50 KG		RETURNS (ECU) ha	
			A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Aromatic Hops			Total	New 1995	New 1994	Previous to 1994	Full Production (B*0,4)+ (C*0,65) + D	Production	Yield 50kg/ha	Contract	Spot	Not sold	Contract	Spot	Total	Contract	Spot	Total Planted	Full Production
Variety	Origin		B+C+D						F / A			F - (H+I)	N * H	O * I	K + L + (J * 0,7 * O)	S / R	T / R	M / A	M / E
Aurora	OE	EC	37	-	1	37	37	1.142	31	1.142	-	0	290.296	0	290.296	254	0	7.816	7.853
Bramling Cross	UK	EC	46	3	1	43	44	888	19	833	55	0	221.961	13.998	235.959	267	255	5.118	5.338
Challenger	B		22	8	0	14	17	399	19	335	65	0	67.703	12.662	80.365	202	196	3.725	4.737
	FR		1	0	0	1	1	29	25	29	0	0	8.286	0	8.286	283	0	7.082	7.082
	UK		341	4	2	335	338	9.118	27	8.678	434	6	2.336.136	101.335	2.438.452	269	233	7.154	7.223
		EC	364	12	2	350	356	9.546	26	9.041	499	6	2.412.125	113.998	2.527.083	267	229	6.950	7.104
Fuggles	UK	EC	308	9	20	279	295	6.216	20	5.785	426	5	1.615.357	124.831	1.741.214	279	293	5.657	5.895
Goldings	B		3	0	0	3	3	59	17	59	0	0	12.766	0	12.766	215	0	3.696	3.775
	OE		80	-	-	80	80	2.312	29	2.312	-	0	676.658	0	676.658	293	0	8.505	8.505
	UK		402	39	20	343	372	9.385	23	8.636	744	5	2.591.009	237.124	2.829.248	300	319	7.037	7.614
		EC	485	39	21	426	455	11.756	24	11.007	744	5	3.280.432	237.124	3.518.672	298	319	7.254	7.742
Hallertauer	B		50	1	1	48	49	1.463	29	368	1.095	0	67.260	116.227	183.487	183	106	3.682	3.733
	D		1.055	161	42	852	944	26.247	25	21.640	4.607	0	5.914.740	1.317.211	7.231.951	273	286	6.855	7.663
	FR		0	0	0	0	0	4	32	0	4	0	0	539	539	0	129	4.145	5.282
		EC	1.105	162	43	900	993	27.714	25	22.008	5.706	0	5.982.000	1.433.977	7.415.976	272	251	6.711	7.469
Hallert.Tradition	B		1	0	1	0	1	30	29	8	23	0	1.397	2.414	3.811	183	106	3.682	4.737
	D		1.133	251	269	613	888	33.593	30	26.938	6.655	0	5.483.246	1.110.237	6.593.483	204	167	5.819	7.423
	FR		3	3	0	0	1	0	0	-	-	0	0	0	0	0	0	0	0
	OE		0	-	-	0	0	8	18	8	-	0	2.088	0	2.088	261	0	4.641	4.641
		EC	1.137	254	270	614	891	33.631	30	26.954	6.678	0	5.486.731	1.112.651	6.599.382	204	167	5.802	7.410
Hersbrucker Spät	B		3	0	0	3	3	56	16	45	11	0	7.952	806	8.758	177	76	2.507	2.507
	D		4.958	8	6	4.944	4.951	150.300	30	129.390	20.910	0	24.165.254	1.667.394	25.832.648	187	80	5.210	5.218
	OE		10	-	-	10	10	254	25	254	-	0	64.407	0	64.407	254	0	6.253	6.253
		EC	4.972	8	6	4.958	4.965	150.610	30	129.689	20.921	0	24.237.613	1.668.200	25.905.813	187	80	5.211	5.218
Hueller	D	EC	210	-	1	209	210	6.368	30	3.906	2.462	0	672.120	352.607	1.024.727	172	143	4.880	4.888
Malling	OE	EC	67	-	1	66	67	1.794	27	1.794	-	0	468.289	0	468.289	261	0	6.979	7.019
Perle	B		0	0	0	0	0		0			0	0	0	0	0	0	0	0
	D		3.705	156	281	3.268	3.513	124.692	34	101.871	22.821	0	18.918.839	4.118.450	23.037.289	186	180	6.218	6.558
	ES		0	-	0	0	0	4	14	4	-	0	638	0	638	166	0	2.277	2.760
	OE		39	-	5	34	37	960	25	960	-	0	265.782	0	265.782	277	0	6.794	7.090
		EC	3.744	156	286	3.303	3.551	125.656	34	102.835	22.821	0	19.185.259	4.118.450	23.303.708	187	180	6.223	6.563
Progress	UK	EC	173	30	58	85	135	3.166	18	2.976	177	13	833.805	47.940	884.210	280	271	5.111	6.555
Saaz	B		2	0	0	2	2	61	37	0	61	0	0	11.477	11.477	0	189	6.924	6.963
	D		9	-	-	9	9	145	16	145	-	0	30.047	0	30.047	207	0	3.339	3.339
		EC	11	0	0	11	11	206	19	145	61	0	30.047	11.477	41.524	207	189	3.896	3.900
Spalter	D	EC	165	2	1	162	163	3.498	21	3.141	347	10	866.751	99.941	968.708	276	288	5.871	5.927
Spalter Select	D		1.367	93	260	1.014	1.220	42.783	31	37.756	5.027	0	7.942.752	862.377	8.805.129	210	172	6.441	7.216
	OE		1	-	-	1	1	22	21	22	-	0	5.743	0	5.743	261	0	5.469	5.469
		EC	1.368	93	260	1.015	1.221	42.805	31	37.778	5.027	0	7.948.495	862.377	8.810.872	210	172	6.440	7.215
Strisselspalt	FR	EC	589	17	18	554	572	19.157	33	18.048	695	415	4.004.452	110.369	4.160.902	222	159	7.067	7.272
Tettnanger	D	EC	1.061	25	17	1.019	1.040	21.897	21	20.735	1.162	0	5.787.038	332.233	6.119.271	279	286	5.767	5.884
WVG	UK	EC	106	29	25	52	80	1.980	19	1.754	225	1	507.435	69.084	576.734	289	307	5.420	7.215
TOTAL	B		81	8	2	71	76	2.068	25	815	1.253	0	157.078	143.586	300.664	193	115	3.705	3.980
VARIETY	D		13.663	696	877	12.090	12.938	409.523	30	345.522	63.991	10	69.780.786	9.860.451	79.642.315	202	154	5.829	6.155
AROMATIC	ES		0	-	0	0	0	4	14	4	0	0	638	0	638	166	0	2.277	2.760
	FR		593	20	18	555	575	19.191	32	18.077	699	415	4.013.376	110.908	4.170.312	222	159	7.033	7.258
	OE		235	0	6	228	233	6.492	28	6.492	0	0	1.773.263	0	1.773.263	273	0	7.555	7.626
	UK		1.376	114	127	1.135	1.264	30.752	22	28.661	2.061	30	8.105.702	594.314	8.706.071	283	288	6.326	6.890
		EC	15.948	838	1.030	14.080	15.085	468.029	29	399.570	68.004	455	83.830.843	10.709.258	94.590.204	210	157	5.931	6.271

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TABLE 6 MEMBER STATE RETURNS - HOPS 1995 (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	
			A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Bitter Hops Variety	Origin		Total B+C+D	New 1995	New 1994	Previous to 1994	Full Production (B*0,4)+(C*0,65) + D	Production	Yield 50kg/ha F / A	Contract	Spot	Not sold F - (H+I)	Contract N * H	Spot O * I	Total K + L + (J * 0,7 * O)	Contract S / R	Spot T / R	Total Planted M / A	Full Production M / E
Brewer's Gold	B		4	0	0	4	4	115	26	15	100	0	1.518	7.449	8.967	101	75	2.045	2.059
	D		1.140	-	5	1.135	1.138	49.942	44	29.916	20.026	0	4.237.483	1.397.290	5.634.773	142	70	4.943	4.950
	FR		16	0	0	15	16	902	58	589	106	206	58.619	12.225	87.474	100	115	5.593	5.623
		EC	1.160	0	5	1.155	1.158	50.959	44	30.520	20.232	206	4.297.620	1.416.964	5.731.213	141	70	4.941	4.949
Bullion	D	EC	47	-	-	47	47	2.047	44	600	1.447	0	91.283	106.276	197.559	152	73	4.203	4.203
Chinook	FR	EC	1	-	-	1	1	22	28	22	-	0	3.523	0	3.523	157	0	4.404	4.404
Galena	FR	EC	0	-	-	0	0	0	0	-	-	0	0	0	0	0	0	0	0
H-3 Leones	ES	EC	737	2	18	717	730	29.293	40	27.895	2.028	-630	3.925.948	214.833	4.094.064	141	106	5.555	5.612
H-7 Leones	ES	EC	300	-	-	300	300	4.105	14	4.105	-	0	679.619	0	679.619	166	0	2.265	2.265
Hallertauer	B		13	1	7	4	9	387	31	0	387	0	0	55.525	55.525	0	144	4.437	6.071
Magnum	D		1.850	504	352	994	1.424	51.367	28	40.039	11.328	0	8.128.957	1.877.937	10.006.894	203	166	5.409	7.025
	ES		5	4	1	-	2	44	9	9	35	0	1.495	5.826	7.321	166	166	1.494	3.351
	FR		6	2	4	0	3	100	16	62	38	0	9.814	5.818	15.633	158	151	2.567	4.488
		EC	1.874	511	364	998	1.439	51.898	28	40.110	11.788	0	8.140.266	1.945.106	10.085.373	203	165	5.383	7.008
Northdown	IRL		8	-	-	8	8	206	27	206	-	0	59.220	0	59.220	287	0	7.681	7.681
	UK		360	5	24	330	348	10.382	29	9.897	432	53	2.733.812	120.538	2.864.701	276	279	7.968	8.232
		EC	367	5	24	338	356	10.588	29	10.103	432	53	2.793.032	120.538	2.923.921	276	279	7.962	8.220
North.Brewer	B		61	2	2	57	59	1.564	26	581	983	0	101.286	107.526	208.813	174	109	3.450	3.553
	D		4.211	13	27	4.171	4.194	134.807	32	109.402	25.405	0	20.260.055	3.638.501	23.898.556	185	143	5.675	5.699
	FR		6	0	0	6	6	166	26	50	106	10	8.598	11.124	20.454	172	105	3.257	3.303
	UK		3	0	0	3	3	33	13	33	0	0	9.632	0	9.632	292	0	3.853	3.853
		EC	4.280	15	30	4.236	4.261	136.570	32	110.066	26.494	10	20.379.571	3.757.151	24.137.454	185	142	5.639	5.664
Nugget	B		8	0	3	5	7	226	29	83	143	0	14.686	12.248	26.933	177	85	3.405	3.986
	D		668	137	124	407	542	22.590	34	16.291	6.299	0	2.914.357	862.487	3.776.845	179	137	5.654	6.963
	ES		60	57	1	1	25	400	7	-	346	54	0	57.598	63.852	0	166	1.067	2.539
	FR		27	2	6	19	24	1.159	43	35	69	1.055	5.513	8.163	100.502	157	118	3.735	4.230
	P		121	11	20	91	108	2.533	21	2.533	-	0	335.406	0	335.406	132	0	2.763	3.110
		EC	884	207	153	523	708	26.907	30	18.941	6.858	1.108	3.269.961	840.496	4.303.537	173	137	4.868	6.097
Omega	UK	EC	3	0	0	3	3	80	26	50	30	0	9.865	8.090	17.955	197	270	5.792	5.792
Orion	D	EC	110	-	-	110	110	3.993	36	3.134	859	0	603.401	109.507	712.907	193	127	6.481	6.481
Target	B		182	19	42	121	156	6.964	38	2.502	4.462	0	414.260	548.257	962.517	166	123	5.298	6.183
	D		101	9	7	85	93	4.154	41	2.852	1.302	0	535.640	181.008	716.648	188	139	7.096	7.693
	FR		16	1	3	13	15	443	27	310	133	-0	48.222	16.863	65.086	155	127	3.971	4.331
	OE		0	-	-	0	0	1	39	1	-	0	261	0	261	261	0	10.157	10.157
	UK		1.242	10	9	1.223	1.233	38.413	31	31.100	4.268	3.045	5.257.459	640.277	6.217.501	169	150	5.006	5.044
		EC	1.541	39	60	1.442	1.496	49.975	32	36.765	10.165	3.045	6.255.843	1.386.406	7.962.012	170	136	5.166	5.320
Yeoman	B		24	0	2	22	23	702	29	376	326	0	65.608	37.129	102.737	175	114	4.293	4.400
	FR		5	0	0	5	5	92	20	40	52	0	6.656	6.633	13.289	166	129	2.947	2.947
	UK		44	0	0	43	43	991	23	578	355	58	82.652	50.977	139.459	143	144	3.206	3.209
		EC	72	0	2	70	71	1.784	25	994	732	58	154.916	94.739	255.485	158	129	3.551	3.582
TOTAL	B		291	22	56	213	258	9.957	34	3.556	6.401	0	597.358	768.134	1.365.492	168	120	4.693	5.292
BITTER	D		8.127	663	515	6.949	7.549	268.900	33	202.234	66.666	0	36.771.176	8.173.006	44.944.181	182	123	5.530	5.954
	ES		1.102	63	20	1.018	1.057	33.842	31	32.009	2.409	-576	4.607.062	278.257	4.838.720	144	116	4.392	4.579
	FR		77	5	13	59	69	2.884	38	1.109	505	1.271	140.945	60.826	309.005	127	121	4.025	4.448
	IRL		8	-	-	8	8	206	27	206	-	0	59.220	0	59.220	287	0	7.681	7.681
	OE		0	-	-	0	0	1	39	1	-	0	261	0	261	261	0	10.157	10.157
	P		121	11	20	91	108	2.533	21	2.533	-	0	335.406	0	335.406	132	0	2.763	3.110
	UK		1.651	16	33	1.602	1.630	49.900	30	41.659	5.085	3.156	8.093.420	819.882	9.269.504	194	161	5.616	5.688
		EC	11.376	780	657	9.940	10.679	368.222	32	283.306	81.066	3.851	50.604.847	10.100.106	61.040.778	179	125	5.366	5.716

TABLE 6 MEMBER STATE RETURNS - HOPS 1995 (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	
			A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
OTHER			Total	New	New	Previous to	Full Production (B*0,4)+ (C*0,65)	Production	Yield 50kg/ha	Contract	Spot	Not sold	Contract	Spot	Total	Contract	Spot	Total Planted	Full Production
Variety	Origin		B+C+D	1995	1994	1994	+ D		F / A			F - (H+I)	N * H	O * I	K + L + (J * 0,7 * O)	S / R	T / R	M / A	M / E
Record	B		2	0	0	2	2	44	24	0	44	0	0	4.317	4.317	0	98	2.321	2.321
	D		79	1	1	77	78	2 310	29	2.063	247	0	409.102	37.189	446.291	198	151	5.649	5.718
		EC	81	1	1	79	80	2.354	29	2.063	291	0	409.102	41.507	450.609	198	143	5.573	5.639
Zenith	UK	EC	3	-	-	3	3	86	31	83	3	0	18.701	644	19.346	225	215	6.909	6.909
Other incl.	D		16	6	1	9	12	348	22	303	45	0	59.768	7.011	66.780	197	156	4.174	5.542
experimental	OE		9	-	0	9	9	223	25	223	-	0	65.600	0	65.600	294	0	7.321	7.452
varieties	UK		68	18	18	29	48	823	13	302	405	115	65.332	101.575	187.082	216	251	2.851	3.879
		EC	91	24	20	47	69	1.394	15	829	460	115	190.700	108.587	319.462	230	241	3.527	4.624
TOTAL	B		2	0	0	2	2	44	24	0	44	0	0	4.317	4.317	0	98	2.321	2.321
OTHERS	D		95	7	2	86	90	2.658	28	2.366	292	0	468.870	44.201	513.071	198	151	5.401	5.694
	OE		9	-	0	9	9	223	25	223	-	0	65.600	0	65.600	294	0	7.321	7.452
	UK		68	18	18	32	51	909	13	385	408	115	84.033	102.220	206.407	218	250	3.017	4.045
		EC	174	25	21	128	152	3.834	22	2.975	744	115	618.504	150.738	785.541	208	202	4.509	5.175
GRAND	B		373,95	31	57	286	335	12.069	32	4.371	7.699	0	754.436	916.037	1.670.473	173	119	4.467	4.980
TOTAL	D		21.885,00	1.366	1.394	19.125	20.578	681.081	31	550.122	130.949	10	107.020.832	18.077.658	125.099.456	195	138	5.716	6.079
	ES		1.102,00	63	20	1.019	1.057	33.845	31	32.013	2.409	-576	4.607.700	278.257	4.839.357	144	116	4.391	4.578
	FR		669,71	25	31	614	644	22.075	33	19.186	1.204	1.685	4.154.321	171.734	4.494.367	217	143	6.711	6.978
	IRL		7,71	-	-	8	8	206	27	206	-	0	59.220	0	59.220	287	0	7.681	7.681
	OE		243,71	0	7	237	241	6.716	28	6.716	0	0	1.839.124	0	1.839.124	274	0	7.546	7.620
	P		121,40	11	20	91	108	2.533	21	2.533	-	0	335.406	0	335.406	132	0	2.763	3.110
	UK		3.095,28	148	178	2.769	2.944	81.560	26	70.705	7.554	3.301	16.283.155	1.516.416	18.263.410	230	201	5.900	6.203
		EC	27.498,75	1.643	1.707	24.148	25.915	840.085	31	685.850	149.815	4.420	135.054.193	20.960.102	156.447.176	197	140	5.689	6.037

Agricultural conversion rate: 1.1.1996

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FINANCIAL STATEMENT

1. BUDGET HEADING: 181 — APPROPRIATIONS: ECU 18 million

2. TITLE:
Proposal for a Council Regulation fixing the amount of producer aid in the hops sector for the 1995 harvest.

3. LEGAL BASIS:
Article 43 of the Treaty

4. AIMS OF PROJECT:
Fixing area aid per hectare for some hop varieties harvested in 1995.

5. FINANCIAL IMPLICATIONS	PERIOD OF 12 MONTHS million ecu	CURRENT FINANCIAL YEAR (96) million ecu	FOLLOWING FINANCIAL YEAR (97) million ecu
5.0. EXPENDITURE - CHARGED TO THE EC BUDGET (REFUNDS/INTERVENTION) - NATIONAL ADMINISTRATION - OTHER 5.1. REVENUE	12.2	6.1	6.1

		1998	1999	2000
5.0.1. ESTIMATED EXPENDITURE		-	-	-
5.1.1. ESTIMATED REVENUE		-	-	-

5.2. METHOD OF CALCULATION:

	ha		ECU/ha		ECU million			
Aromatic varieties	15 948	x	444	=	7.08			
Bitter varieties	11 376	x	416	=	4.73			
Other varieties	174	x	298	=	0.05		(DT)	
	-------		-----		------			
	27 498				11.87	x	1 030	= ECU(B) 12.2 m

6.0. CAN THE PROJECT BE FINANCED FROM APPROPRIATIONS ENTERED IN THE RELEVANT CHAPTER OF THE CURRENT BUDGET? YES/~~NO~~

6.1. CAN THE PROJECT BE FINANCED BY TRANSFER BETWEEN CHAPTERS OF THE CURRENT BUDGET? ~~YES/NO~~

6.2. IS A SUPPLEMENTARY BUDGET NECESSARY? ~~YES/NO~~

6.3. WILL FUTURE BUDGET APPROPRIATIONS BE NECESSARY? YES/~~NO~~

OBSERVATIONS: The new measure represents a saving of ECU 2.7 million over the 1996 budget proposal for the 1995 harvest.

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