COMMISSION OF THE EUROPEAN COMMUNITIES

COM(79) 213 final

Brussels, 20th April 1979

PROPOSAL FOR A COUNCIL REGULATION (EEC)
LAYING DOWN, IN RESPECT OF HOPS, THE AMOUNT
OF THE AID TO PRODUCERS FOR THE 1978 HARVEST

(presented by the Commission to the Council)

PROPOSAL FOR A

COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of the aid to producers for the 1978 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 (3),

Whereas Article 12 of Regulation (EEC) No 1696/71 provides for the possibility of granting aid 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 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 the study of the results of the 1978 harvest gives rise to the fixing of aid for certain groups of varieties of hops cultivated in the Community;

Whereas Council Regulation (EEC) No 652/79 of 29 March 1979 (4) laid down the coefficient for expressing amounts, fixed in units of account, in ECU;

(1) OJ No L 175, 4.7.1971, p. 1
(2) OJ No L 34, 9.2.1979, p. 4
(3)
(@) OJ No L 84, 4.4.1979, p. 1

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HAS ADOPTED THIS REGULATION :

Article 1

1. For the 1978 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
The President

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ANNEX

Amounts of the aid granted to hop producers for the 1978 harvest

Group of varieties	Aid UA/ha	Aid ECU/ha
Aromatic	± 350	423
Bitter	± 300	363
Others	± 400	484

Commission report to the Council on the situation regarding the production and marketing of hops : 1978 harvest

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 calender year. This report concerns the 1978 harvest.

The main factors affecting the harvest were that 1978 was the first year of implementation of the Community's programme of reorganization of hop-gardens and varietal reconversion coupled with a 40 % reduction in the area planted, and that it was also the first year of certification of hop cones and hop products.

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 20 % of its production
2. USA: net exporter of 33 % of its production
3. COMECON: net importer of 5-10 % of its requirements
4. Other major producer countries:
   net importers of 5-10 % 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 net hop exporters with output in excess of requirements. Estimated figures are as follows:

Ztr (50 kg)	PRODUCTION	OWN REQUIREMENTS	DIFFERENCE
FEDERAL REPUBLIC OF GERMANY	605 000	270 000	335 000
USA	500 000	370 000	130 000
CZECHOSLOVAKIA	202 000	115 000	87 000
YUGOSLAVIA	87 000	30 000	57 000
AUSTRALIA	37 000	21 000	16 000
	1 431 000	806 000	625 000

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It clearly emerges from these figures that there are two major exporting countries, the Federal Republic of Germany and the USA.

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 - 30 %; in 1978: 20 %).

b) 1978 harvest

The Commission notes that, in spite of the reduction in area since the 1974 harvest, some disequilibrium persists at world level because stocks are still high. Even though they were run down to some extent in 1976, stocks are estimated to have been 35 % above normal at the beginning of the 1978 harvest.

In 1978, world production was about 107 800 tonnes from an area of 78 074 ha, or rather less than the quantity required by the world brewing industry. Consequently, there was some depletion of stocks, probably bringing them down to not more than 15 % above normal.

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:

Price/Ztr		Free market	u.a.
VARIETY	1976	1977	1978
Hallertauer	89,0	38,4	99,05
Northern Brewer	72,1	39,1	81,41
Brewers Gold	76,4	40,3	68,80
Hersbrucker Spät	84,7	33,9	95,23
Tettnanger	98,7	44,6	109,04

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c) Medium-term forecasts - World (Table 4)

For the 1979 harvest an increase of about 800 ha in the world area under hops is expected, partly as a result of an increase of about 800 ha in the COMECON countries and 500 ha in the rest of the world, offset by a reduction of about 500 ha in the EEC.

If the yield is normal, production will remain slightly short of the requirements of the world brewing industry and stocks will therefore continue to decline.

On the other hand, if yield were about 5 % above normal, the surplus stock situation would persist.

In the medium term, market balance will depend on strict control of the area under hops. Despite an annual increase of about 3,5 % of world production, demand for hops rises by only 1 - 1,5 % on account of the technical developments in the brewery industry.

The decision taken by the Hops Administrative Committee in the United States to raise the basic marketing quota from 100 % in 1978 to 105 % in 1979 may be prejudicial to market stability in the medium term. The same is true of the policy adopted by the East European countries to develop production and achieve self-sufficiency now that, with prices hardening on the world market, they are no longer able to obtain their supplies cheaply from outside.

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II. SITUATION IN THE COMMUNITY

a) Situation in 1978 (Tables 5, 6)

In 1978, the EEC accounted for 32 % of the world area under hops and 39 % of world production. The Commission notes that the balance between aromatic varieties and varieties with a high alpha acid content was 70 % against 29 % of EEC production in 1971 and 49 % against 49 % in 1978.

The Community programme of reorganization and varietal conversion coupled with a 40 % reduction in the area planted led to an overall reduction of 1 959 ha, shared between the Member States as follows:

Federal Republic of Germany	1 628	ha
France	120	ha
Belgium	131	ha
United Kingdom	80	ha
Ireland	–	ha

The 1978 harvest is thus lower than the harvest of previous years.

Community exports were lower in 1977/78 than from 1973 to 1975 because of the world surplus and the financial difficulties of Third World countries. Community exports are expected to drop slightly again in 1978/79. Imports are expected to fall because of a fairly poor harvest in the rest of the world.

The Commission estimates that the stocks held by brewers and in trade in the EEC – which were about 45 % higher than usual at the beginning of the 1978 harvest – might be no more than about 20 % above normal as a result of this year's smaller harvest.

Community beer production fell slightly in 1978 and could remain steady in 1979; but, given the effects of technical improvements, demand for hops should contract slightly.

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Advance contract prices remained approximately at the same level as in 1977 while non-contract prices rose. The proportion of hops offered on the open market was much lower than in 1977 on account of the reduction in area in the Federal Republic of Germany. The quantities sold on the open market have been as follows in the past six years:

	(Ztr)
1978	166 000
1977	327 000
1976	174 000
1975	203 000
1974	227 000
1973	309 000

c) Medium-term forecasts - EEC

Following the implementation of the Community restructuring programme, the area under hops for the 1979 harvest is expected to decline by about 500 hectares compared with 1978. Even with this reduction in area and average yield, production may still be in the region of 41 000 tonnes. Sales under advance contract are estimated at about 75 % of production, or 31 000 tonnes. Large quantities of hops (about 10.000 tonnes) will thus be offered on the open market.

It may be expected that in 1980-82 the area under hops will remain steady in the Community and that the stability of the Community market will continue to be very closely dependent on the area under hops in the rest of the world. Consequently, it is essential that the non-member countries keep strict control over areas planted if lasting stability is also to be attained on the world market.

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III. 1978 HARVEST

a) Areá under hops (Table 8)

In 1978 the area under hops in the EEC fell from 27 232 ha to 25 273 ha. The reduction was greatest in Germany and lesser in Belgium and France. In the United Kingdom, however, area remained static.

There has been a reduction in the following varieties:

Hallertauer	Brewers Gold
Spalter	Record
Tettnanger	Strisselspalt
Bramling Cross	
Northern Brewer	

and an increase in the following:

Challenger
Northdown

This means that, overall aromatic varieties have reduced by 1 211 ha since 1977 while bitter varieties have reduced by 668 ha.

b) Yield and production (Table 8)

In 1978 the average yield in the EEC (33,7 Ztr/ha) was lower than in 1977 (34,9 Ztr/ha) but higher than in 1976 (28.56 Ztr/ha).

EEC production in 1978 amounted to 42 600 tonnes compared with 47 600 tonnes in 1977.

c) New plantings

In 1978 466 ha in the EEC had been planted the previous year, and were therefore in their first year of production.

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In 1977 there were 652 ha of new plantings.

d) Prices and contracts (Table 7)

During the 1978 harvest, hop prices in relation to 1977 and 1976 were as follows:

	Average EEC prices			u.a./Ztr.	
	1976	1977	1978	1978/77 %	1978/76 %
Contracts	100.2	98,2	92,4	- 6 %	- 8 %
Non-contracts	78.8	38.4	87,9	129 %	12 %

Prices for hops not marketed under contract were much higher in 1978 than in 1977 because of the smaller harvest.

The quantities marketed under advance contracts were higher because of the market outlook.

Year	Contracts	%	Non-contract	%
1975	689.378	77,3	202.672	22,7
1976	620.353	78,1	174.172	21,9
1977	623.643	65,6	327.004	34,4
1978	686.210	80,5	166.036	19,5

e) Returns per hectare (Table 9)

In 1978 there was a general improvement in income per hectare compared with 1977 and 1976 (excluding Community aid):

u.a./ha — Areas in full production
(from the third year of production)

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(i) by group of varieties:

	1976	1977	1978	1978/77	1978/76
Aromatic :	2.703	2.781	3.338	20 %	24 %
Bitter :	3.084	2.945	3.011	2 %	- 2 %
Other :	2.244	2.045	2.642	29 %	18 %

(ii) by country:

Country	1976	1977	1978	1978/77	1978/76
Germany	2.737	2.943	3.071	4 %	12 %
France	2.707	2.365	2.689	14 %	- 1 %
Belgium	2.838	1.813	2.926	61 %	3 %
United Kingdom	3.452	2.999	3.598	20 %	4 %
Ireland	2.697	3.431	2.466	- 28 %	- 9 %
Total	2.872	2.844	3.165	11 %	10 %

Grower's total returns rose compared with 1977 and 1976.

u.a.		
	1976	76,052.181
	1977	73,826.338
	1978	78,021.043

The Commission notes that in 1978 there were 7 020 producers in the Community (of whom 403 were members of non-recognized groups and 310 were independent) compared with 7 796 in 1977.

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CONCLUSIONS

I. All in all, the Commission finds that the programme of restructuring and conversion has produced positive results in its first year of effect, achieving an overall reduction of 1 959 ha of Community land under hops, comprising 668 ha under bitter varieties and 1 211 ha under aromatic varieties, and that the Community certification system has been correctly applied from the start in all the Member States.

This brought more stability to the Community market by reducing surplus stocks and improving prices. In addition, certification ensured better quality control and greater transparency of marketing networks.

II. In view of these trends, the Commission's proposal on aid for the 1978 harvest is designed to achieve the following aims:

1. to provide an adequate supplement to growers' incomes which, despite improvements, are still insufficient, and which are further reduced by the expense involved in certification (Article 12(5)(a) of Regulation (EEC) No 1696/71);

2. to steer production in the direction of general and lasting equilibrium 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 of demand.

Lastly, in the present situation the Commission considers that there is no need to apply the provisions of Article 12(6) of Regulation (EEC) No 1696/71 for this harvest and that aid may be granted to all the areas registered.

III. The Commission therefore proposes the following amounts:

Groups of varieties	Aid in ECU/ha	Aid in u.a./ha
Aromatic varieties :	423	± 350
Bitter varieties :	369	± 300
Other varieties :	484	± 400

Thus, average aid per hectare for all areas aided will move from 335 u.a. for the 1977 harvest to ± 326 u.a. for the 1978 harvest, (395,5 ECU).

Average income per hectare (including aid) will therefore move from 3179 u.a. in 1977 to 3491 u.a. in 1978, and per varietal group from:

3156 u.a.	to ± 3688	u.a.	for aromatic varieties
3230 u.a.	to ± 3311	u.a.	for bitter varieties
2545 u.a.	to ± 3042	u.a.	for other varieties.

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FINANCIAL STATEMENT

Date : 5.4.1979

1. BUDGET HEADING : Art. 732 (hops interventions) APPROBIATIONS : 11,- MUCE

2. TITLE : Proposal for a Regulation of the Council laying down in respect of hops, the amount of aid to producers for the 1978 harvest.

3. LEGAL BASIS : Art. 12 of Regulation 1696/71 of the Council

4. AIMS OF PROJECT :

Granting of an aid to hop producers for the 1978 harvest that they may receive a fair income

5. FINANCIAL IMPLICATIONS	PERIOD OF 12 MONTHS	CURRENT FINANCIAL YEAR (79)	FOLLOWING FINANCIAL YEAR (80)
5.0 EXPENDITURE - CHARGED TO THE EC BUDGET [illegible] [illegible] [illegible] [illegible] [illegible] [illegible]	10 Mio ECU = 10,5 MUCE	10 Mio ECU = 10,5 MUCE	-
5.0.1 ESTIMATED EXPENDITURE [illegible]	Measure concerning 1979 budget		

5.2 METHOD OF CALCULATION

Groups	Area/ha	Amount Aid	Total Mio ECU
Aromatics	12.347	423 ECU	5,2
Bitters	12.249	363 ECU	4,5
Others	666	484 ECU	6,3
TOTAL	25.262	-	10,0

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

[illegible] [illegible]

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

[illegible] [illegible]

OBSERVATIONS : With regard to financial considerations, it should be noted that the application regulation requires that the request for aid is presented by the producer during a period of five months following the date of publication in the O.J. of the regulation fixing the amount of the aid.
As a result, the full amount of the aid for the 1978 harvest will be totally covered by the 1979 budget. The forecasts for the 1979 budget took account of this.

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TAB. I

PAYS/LAND/COUNTRY	HA 1976	ZTR 1976	ALPHA T 1976	HA 1977	ZTR 1977	ALPHA T 1977	HA 1978	ZTR 1978
BR. DEUTSCHLAND	19680	567747	1428	19250	738736	2253	17622	605430
FRANCE	1083	34124	116	1010	34287	125	890	30027
BELGIE/BELGIQUE	1068	35424	133	982	36003	120	851	27727
UNITED KINGDOM	5925	159473	593	5925	144662	484	5845	187612
IRELAND	65	1220	4	65	1674	6	65	1450
CEE/EWG/EEC	27821	797988	2274	27232	955362	2988	25273	852246
U.S.A.	12505	524118	1861	12344	496930	1789	12525	499596
AUSTRALIA	1086	39000	215	950	42000	221	915	37180
JUGOSLAVIJA	3373	86000	222	3240	89710	250	3100	86560
ESPANA	1841	51206	192	1803	40942	143	1803	41796
CSSR	10074	194227	321	10200	244236	488	10400	201757
DDR	2130	53410	169	2175	58892	190	2104	47730
POLSKA	2305	50840	115	2328	49460	128	2168	38820
HUNGARY	481	7934	18	504	10256	24	550	11800
IHB + IRELAND	61616	1804723	5387	60776	1987788	6221	58838	1817485
JAPAN	1307	44400	123	1286	45740	121	1236	43000
USSR	11500	205000	410	12000	230000	489	12000	200000
ROMANIA	1100	13200	30	1600	17000	38	1700	18000
BULGARIA	1220	19400	44	1400	15000	34	1500	19000
OTHERS	2179	48500	143	2700	52000	164	2800	58000
MONDE/WELT/WORLD	78922	2135223	6137	79762	2347528	7067	78074	2155485
PRODUCTION ERZEUGUNG 000 m		106,8			117,4			107,8
RENDEMENT/YIELD ERTRAG T/HA		1,35			1,47			1,38
			5,75			6,02		

TAB. 2

PAYS/LAND/COUNTRY	HA 1978	ZTR 1978	ALPHA T 1978	% ALPHA		HA 1979		
BR. DEUTSCHLAND	17622	605430	1705	5,6		17270		
FRANCE	890	30027	95	6,3		850		
BELGIE/BELGIQUE	851	27727	86	6,3		800		
UNITED KINGDOM	5845	187612	724	7,7		5825		
IRELAND	65	1450	6	7,5		65		
CEE/EWG/EEC	25273	852246	2616	6,1		24810		
U.S.A.	12525	499596	1550	6,2		12800		
AUSTRALIA	915	37180	186	10		915		
JUGOSLAVIJA	3100	86560	274	6,3		3100		
ESPANA	1803	41796	156	7,5		1903		
CSSR	10400	201757	366	3,5		10400		
DDR	2104	47730	135	5,7		2200		
POLSKA	2168	38820	80	4,1		2400		
HUNGARY	550	11800	37	6,25		550		
IHB + IRELAND	58838	1817485	5400	5,94		59078		
JAPAN	1236	43000	118	5,5		1200		
USSR	12000	200000	400	4		12250		
ROMANIA	1700	18000	41	4,5		1800		
BULGARIA	1500	19000	43	4,5		1600		
OTHERS	2800	58000	177	6,1		3000		
MONDE/WELT/WORLD	78074	2155485	6179	5,73		78928		
PRODUCTION ERZEUGUNG 000 T		107,8						
RENDEMENT/YIELD ERTRAG T/HA		1,38						

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MARCHE DE HOUBLON - HOPFENMARKT - HOP MARKET 1972 - 78

Following Year/Année suivante/Folgendes Jahr *	BV = BITTERING VALUE/VALEUR AMERTUME/BITTERWERT			HOUBLON - HOPF - HOPS	MONDE - WELT - WORLD							TAB 3	
		Année/Jahr/Year		72	73	74	75	76	77	78	79		
1	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION *	* M HL		742	770	802	819	846	867	890	917		
2	+ PAR AN/JE JAHR/ (-) PER YEAR	%			3,8	4,2	2,1	3,3	2,5	2,7	3,0		
3	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL		8,5	8,3	8,2	8,0	7,8	7,7	7,6	7,5		
4	BESOIN/BEDARF/ REQUIREMENT : ALPHA	T	(1 x 3)	6307	6391	6576	6552	6602	6676	6783	6878		
5	PERTE/LOSS/VERLUST/AN/YR/JAHR	%		(9,76)	(8,88)	(8,4)	(8,26)	(8,56)	(7,84)	(7,6)	(7,36)		
6	- PERTE/LOSS/VERLUST BV	T	(4 - 5)	5691	5823	6024	6012	6037	6153	6267	6372		
7	PRODUCTION HOUBLON / HOP ERZEUGUNG HOPFEN	T	(16x18)	105	118,3	111	113,5	106,8	117,4	107,8			
8	CONTENU/ANTEIL/ CONTENT : ALPHA	%		5,88	6,31	5,97	6,37	5,75	6,02	5,73			
9	PRODUCTION ERZEUGUNG : ALPHA	T	(7 x 8)	6174	7468	6627	7230	6137	7067	6179			
10	- PERTE/LOSS/VERLUST BV	T	(9 - 5)	5571	6805	6070	6634	5612	6513	5709			
11	SURPLUS (DEFICIT) UBERSCHUSS (DEFIZIT): BV	T	(10 - 6)	(120)	982	46	622	(425)	360	(558)			
12	STOCKS BESTANDE : 1 SEPT : BV	T		2846	2726	3708	3747	4362	3924	4276	3707		
13	STOCKS BESTANDE : 6 MONTHS : BV	T		2846	2912	3012	3006	3019	3077	3134	3186		
14	STOCKS BESTANDE : + (-) : BV	T	(12-13)	–	(186)	696	741	1343	847	1142	521		
15	- PERTE/LOSS/VERLUST BV	T	1 %	–	–	(7)	(7)	(13)	(8)	(11)			
16	SUPERFICIE/FLACHEN/AREA	000 HA		78	81,3	82	80,6	78,9	79,8	78,1			
17	+ PAR AN/JEJAHR - PER YEAR	000 HA			3,3	0,7	(1,4)	(1,7)	0,9	(1,7)			
18	RENDEMENT/ERTRAG/YIELD	T/HA		1,35	1,46	1,35	1,41	1,35	1,47	1,38			

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PREVISIONS - VORAUSSCHÄTZUNGEN - FORECASTS : 1979

Following Year/Année suivante/Folgendes Jahr *

BV = BITTERING VALUER/VALEUR AMERTUME/BITTERWERT

HOUBLON - HOPFEN - HOPS

MONDE - WELT - WORLD

TAB 4

		Année/Jahr/Year		1978	1979	1980		1979	1980		1979	1980	
1	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION *	* M HL		890	917	937		917	937		917	937	
2	+ PAR AN/JE JAHR/ (-) PER YEAR	%			3,0	2,2		3,0	2,2		3,0	2,2	
3	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL		7,6	7,5	7,4		7,5	7,4		7,5	7,4	
4	BESOIN/BEDARF/ REQUIREMENT : ALPHA	T	(1 x 3)	6783	6878	6934		6878	6934		6878	6934	
5	PERTE/LOSS/VERLUST/AN/YR/JAHR	%		(7,6)	(7,36)	(7,12)		(7,36)	(7,12)		(7,36)	(7,12)	
6	- PERTE/LOSS/VERLUST BV	T	(4 - 5)	6267	6372	6440		6372	6440		6372	6440	
7	PRODUCTION HOUBLON / HOP ERZEUGUNG HOPFEN	T	(16x18)	107,8	108,1			110,5			112,8		
8	CONTENU/ANTEIL/ CONTENT : ALPHA	%		5,73	5,92			6,05			6,18		
9	PRODUCTION ERZEUGUNG : ALPHA	T	(7 x 8)	6179	6400			6685			6971		
10	- PERTE/LOSS/VERLUST BV	T	(9 - 5)	5709	5929			6193			6458		
11	SURPLUS (DEFICIT) UEBERSCHUSS (DEFIZIT) : BV	T	(10 - 6)	(558)	(443)			(179)			86		
12	STOCKS BESTANDE : 1 SEPT : BV	T		4276	3707	3259		3707	3522		3707	3788	
13	STOCKS BESTANDE : 6 MONTHS : BV	T		3134	3186	3220		3186	3220		3186	3220	
14	STOCKS BESTANDE : + (-) : BV	T	(12-13)	1142	521	39		521	302		521	568	
15	- PERTE/LOSS/VERLUST BV	T	1 %	(11)	(5)			(5)			(5)		
16	SUPERFICIE/FLACHEN/AREA	000 HA		78,1	78,9			78,9			78,9		
17	+ PAR AN/JEJAHR - PER YEAR	000 HA		(1,7)	0,8			0,8			0,8		
18	RENDEMENT/ERTRAG/YIELD	T/HA		1,38	1,37			1,40			1,43		

HOUBLON - HOPFEN - HOPS	CEE/EWG/EEC.	BV = BITTERING VALUE/VALEUR AMERTUME/BITTERWERT

MARCHE DE HOUBLON - HOPFENMARKT - HOPS MARKET 1972 - 77 TAB 5

	ANNEE JAHR YEAR		1972	1973	1974	1975	1976	1977
1	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION	*M HL	224	227	229	237	232	230
2	± PAR AN/ JE JAHR/ PER YEAR	%		0,8	1,0	3,5	(2,1)	(1,0)
3	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL	10,2	10	9,8	9,6	9,4	9,2
4	BESOIN/BEDARF REQUIREMENT : ALPHA	T	2285	2270	2244	2275	2174	2116
5	PERTE/LOSS/VERLUST/AN/YR/JAHR	%	(9,76)	(8,88)	(8,4)	(8,26)	(8,56)	(7,84)
6	- PERTE/LOSS/VERLUST BV	T	2062	2068	2056	2088	1988	1950
7	PRODUCTION ERZEUGUNG : ALPHA	000 T	42,8	52,6	47,9	44,6	39,9	47,8
8	CONTENU/ANTEIL CONTENT : ALPHA	%	6,26	6,86	6,37	6,56	5,7	6,25
9	PRODUCTION ERZEUGUNG : ALPHA	T	2679	3608	3051	2926	2274	2988
10	- PERTE/LOSS/VERLUST : BV	T	2418	3288	2795	2685	2079	2754
11	SURPLUS/(DEFICIT) UBERSCHUB/(DEFIZIT : H	T	356	1220	739	597	86	804
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	7
14	EXPORTATIONS/AUSFUHR EXPORT : H : NET	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	388	674	648	666	486	619
17	SURPLUS/(DEFICIT) UBERSCHUB/(DEFIZIT) : ALPHA BV	T	(32)	546	91	(69)	(400)	185
18	STOCKS BESTANDE : 1 SEPT : BV	T	859	827	1373	1459	1384	978
19	STOCKS BESTANDE : 5 M : BV	T	859	862	857	870	828	813
20	STOCKS BESTANDE : + (-) : BV	T	–	(35)	516	589	556	165
21	- PERTE/LOSS/VERLUST BV	T	–	–	(5)	(6)	(6)	(2)
22	SUPERFICIE/FLACHEN/AREA	000 T	27,6	29,5	29,3	29	27,8	27,2
23	RENDEMENT/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 AMERTUME BITTERWERT

HOUBLON - HOPFEN - HOPS	CEE/EWG/EEC.	H = HOUBLON/HOPS/HOPFEN

PREVISIONS - VORAUSSCHÄTZUNGEN - FORECASTS : 1979 TAB 6

			M				H	
	ANNEE JAHR YEAR		1978	1979	1980		1979	1980
1	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION	*M HL	230	230	230		230	230
2	± PAR AN/ JE JAHR/ PER YEAR	%		0,5	0,5		0,5	0,5
3	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL	9,1	9,0	9,0		9,0	9,0
4	BESOIN/BEDARF REQUIREMENT : ALPHA	T	2093	2070	2070		2070	2070
5	PERTE/LOSS/VERLUST/AN/YR/JAHR	%	(7,6)	(7,36)	(7,12)		(7,36)	(7,12)
6	- PERTE/LOSS/VERLUST BV	T	1934	1918	1923		1918	1923
7	PRODUCTION ERZEUGUNG : ALPHA	000 T	42,6	40,9			41,7	
8	CONTENU/ANTEIL CONTENT : ALPHA	%	6,1	6,0			6,1	
9	PRODUCTION ERZEUGUNG : ALPHA	T	2616	2454			2544	
10	- PERTE/LOSS/VERLUST : BV	T	2417	2279			2357	
11	SURPLUS/(DEFICIT) UBERSCHUB/(DEFIZIT : H	T	483	361			439	
12	EXPORTATIONS/AUSFUHR EXPORTS : H	000 T	18,5	17,0			18,0	
13	IMPORTATIONS/EINFUHR IMPORTS : H	000 T	7,0	9,0			9,0	
14	EXPORTATIONS/AUSFUHR EXPORT : H : NET	000 T	11,5	8,0			9,0	
15	NET : ALPHA	T	729	475			553	
16	- PERTE/LOSS/VERLUST BV	T	674	441			512	
17	SURPLUS/(DEFICIT) UBERSCHUB/(DEFIZIT) : ALPHA BV	T	(191)	(80)			(73)	
18	STOCKS BESTANDE : 1 SEPT : BV	T	1161	966	884		966	891
19	STOCKS BESTANDE : 5 M : BV	T	806	799	801		799	801
20	STOCKS BESTANDE : + (-) : BV	T	355	167	83		167	90
21	- PERTE/LOSS/VERLUST BV	T	(4)	(2)			(2)	
22	SUPERFICIE/FLACHEN/AREA	000 T	25,3	24,8			24,8	
23	RENDEMENT/ERTRAG/YIELD	T/HA	1,68	1,65			1,68	

* ANNEE SUIVANTE / FOLGENDES JAHR / FOLLOWING YEAR

BV = BITTERING VALUE/VALEUR AMERTUME BITTERWERT

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TAB. 7 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	sous contrat Vertragshopfen under contract	% sous contrat % Vertragshopfen % under contract	hors contrat Freihopfen without contract	sous contrat Vertragshopfen under contract
	1	2	3	4	5
				U.C.	U.C.
A) CE					
1974	227.190	731.351	76	65,56	91,94
1975	202.672	689.378	77	60,22	94,40
1976	174.172	620.353	78	78,73	100,49
1977	327.043	623.643	66	38,42	98,23
1978	166.036	686.210	81	87,92	92,42
B) CE					
R.F.A.	121.387	484.043	80	88,24	88,14
France	13.985	16.042	53	82,98	76,5
Belgique/België	24.130	3.597	13	88,33	91,01
Royaume Uni	6.534	181.078	97	90,04	107,69
Irlande	-	1.450	100	-	110,64

Source : OSCE/Quelle : SAEG/Origin : SOEC TAB. 8

Evolution des superficies, du rendement et de la production du houblon dans la C.E.E
Entwicklung der Flächen, Erträge und der Erzeugung von Hopfen in der E.W.G.
Evolution of area, yelds and production of hops in the E.E.C.

ANNEE JAHR YEAR	1976	1977	1978
		SUPERFICIE / FLÄCHEN / AREA (ha)	
Deutschland	19 680	19 250	17 622
France	1 083	1 010	890
België/Belgique	1 068	982	851
United Kingdom	5 925	5 925	5 845
Ireland	65	65	65
Eur. - 9	27 821	27 232	25 273
		RENDEMENT / ERTRAG / YIELD (50 kg)	
Deutschland	28,67	38,2	34,4
France	31,54	33,4	33,7
België/Belgique	33,17	36,7	32,6
United Kingdom	26,92	24,3	32,1
Ireland	18,77	25,8	22,3
EUR. - 9	28,56	34,9	33,7
		PRODUCTION / ERZEUGUNG / PRODUCTION (Ztr.)	
Deutschland	564 284	735 024	605 430
France	34 124	33 761	30 027
België/Belgique	35 424	36 003	27 727
United Kingdom	159 473	144 161	187 612
Ireland	1 220	1 674	1 450
EUR. - 9	794 525	950 623	852 246

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TAB. 9 CALCUL DE LA RECETTE :
ERTRAGSERLÖSE BERECHNUNG : 1978
CALCULATION OF THE RETURN :

VARIETES SORTEN VARIETIES	HA TP 1978	HA NP 1978	HA NP 1977	HA PP 1978	RCT TP 1978	RCT PP 1978
Hallertauer	3645	42	32	3571	3212	3244
Hersbrucke Spät	2974	137	95	2742	3368	3504
Huller	1563	38	26	1499	2900	2961
Spalter	303	-	4	299	3709	3726
Tettnanger	840	-	-	840	3258	3258
Progress	142	5	2	135	3061	3159
Fuggles	613	13	12	588	3093	3155
Goldings	478	16	29	433	4353	4558
W G V	332	12	18	302	3108	3203
Tutsham	5	-	-	-	2224	2224
Bramling Cross	453	-	-	453	2763	2764
Challenger	744	40	77	627	3766	4070
Saaz	15	-	-	15	2724	2724
Strisselspalt	227	1	-	226	2843	2851
Bourgogne	9	-	-	9	1542	1542
Star	4	-	-	4	4346	4346
Aroma	12347	304	295	11748	3267	3338
Northern Brewer	6590	45	35	6510	2786	2803
Brewers Gold	3158	22	60	3076	2869	2900
Bullion	400	4	1	395	3381	3404
Target	997	18	91	888	4028	4155
K. Midseason	163	-	-	163	2605	2605
Northdown	941	43	71	827	3530	3731
Amer/Bitter	12249	132	258	11859	2983	3011
Record	446	4	4	438	2711	2734
Viking	23	6	8	9	1289	1514
Saxon	197	20	87	90	1699	2322
Autres	666	30	99	537	2363	2642
Non couvertes	11	-	-	-	-	-
CEE/EWG/EEC	25273	466	652	24144	2947	3165