COMMISSION OF THE EUROPEAN COMMUNITIES

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COMMISSION REPORT TO THE COUNCIL
ON THE PRODUCTION AND MARKETING OF HOPS
(1981 HARVEST)

Proposal for a
COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of aid to producers
for the 1981 harvest

(submitted to the Council by the Commission)

COMMISSION REPORT TO THE COUNCIL ON THE PRODUCTION AND MARKETING OF HOPS (1981 HARVEST)

The Commission provides the Council with a report on the production and marketing of hops each year in accordance with Article 11 of Council Regulation (EEC) No 1697/71 on the common organization of the market in hops.

The conclusions include proposals on aid to hop producers for the harvest of the previous calendar year. This report deals with the 1981 harvest.

It will be recalled that the 1980 harvest in the Community was very low, causing considerable problems with forward contracts in some producing areas; deliveries were down in some cases, by between 15% and 27% on contracted quantities. These supply shortfalls will have to be offset from the 1981, 1982 and 1983 harvests.

The Commission would like to point out that, while the 1981 harvest was generally marked throughout the Community by more satisfactory yields than in 1980, and hence more acceptable income levels for most producers, the medium-term prospects at world level are already a cause for concern. Although the area under hops in the Community has increased by 2 000 hectares since 1979, new plantings in the United States alone over the same period have totalled 4 600 hectares and almost 6 000 hectares altogether in other non-Community producing countries, so that very low price levels and an almost total drying up of sales have resulted over the last year on the American market. The proportion of the 1981-85 harvest in the Community already committed at satisfactory prices under forward contracts signed in 1980-81 is high, but the collapse of world prices will have a major impact on the quantities offered on the spot market, the volume of which will obviously depend on the size of future harvests.

It appears that the area under hops in the Community will remain more or less constant over the medium term; a major reduction would not be possible because of contracts already entered into in most of the producing Member States. Given this situation, the Commission is not intending to propose any structural slimming down of the sector. However, it would like to draw the attention of the Council to the large surplus on the world market and the probable effects this will have. It is continuing regular and urgent talks with the main producer countries outside the Community in an effort to persuade them of the need to bring supply into line with demand, which is increasing only very slowly.

I. WORLD SITUATION

(a) Structure of the market (Tables 1 and 2)

Since substantial quantities of hops are traded on the world market, prices are greatly influenced by the relationship between supply and demand at world level.

The world market may be said to consist of five fairly homogeneous sectors:

1 - Community	: net exporter in 1980-81 of 23 % of its production (previously 30 %)
2 - United States	: net exporter in 1980-81 of 53 % of its production (previously 30 %)
3 - Comecon	: net importer of 5 - 10 % of its requirements
4 - Other main producer countries	: net importers of 5 - 10 % of their requirements
5 - Other countries, mainly non-producers	: net importers of 95 % of their requirements.

Substantial quantities may, however, be traded within each of these sectors or between sectors, e.g. the EEC-USA-Comecon triangle. Demand is growing a little more strongly only in the developing countries and some of the state-trading countries. Until now the export market has been shared more or less equally between the Community and the United States, but larger areas under hops in the state-trading countries and the size of the 1980 US harvest, together with a 40 % increase in the area under hops in the USA between 1978 and 1982, are making the market steadily more competitive.

Five countries are normally net exporters of hops; estimates of their surplus of production over requirements are given below.

<u>1981</u>

<u>ZTR</u> (to nearest 5 000)	<u>PRODUCTION</u>	<u>DOMESTIC REQUIREMENTS</u>	<u>DIFFERENCE</u>
Federal Republic of Germany	670 000	225 000	445 000
United States of America	720 000	395 000 (1)	325 000
Czechoslovakia	250 000	145 000 (2)	105 000
Yugoslavia	105 000	35 000	70 000
Australia	45 000	20 000	25 000
Poland	45 000	25 000	20.000
	1 835 000	845 000	990 000

(1) Based on hopping rate of 86.45 g/hl; Source: US Department of Agriculture.

(2) Assumed hopping level of 125 g/hl.

(b) The international market in 1981/82

The pattern of international trade in hops has seen rapid and significant changes in the course of the last marketing year. Net Community exports of hops and processed products fell again to about 10 600 tonnes from the record level of 1979/80 (14 200 t), i.e. back to the average over the last 10 years. This drop was probably inevitable after the low Community harvest in 1980 and because a large part of the increase in Community exports in 1979/80 was due to the running down of stocks by breweries, partly as a result of high interest rates and partly because free market prices, after reaching more satisfactory levels in 1980, jumped upward still more markedly again following the generally unsatisfactory European harvest of that year. The sudden but temporary drop in Community output in 1980 partly explains the subsequent rise in imports from non-Community countries. It nevertheless remains a disturbing trend that imports into the Community from the United States have increased almost five-fold between 1974/75 and 1980/81 while Community exports during the same period both to the USA and overall have risen only marginally (see Table 12), if one leaves aside the exceptional 1979/80 marketing year.

(c) 1981 harvest

The Commission notes that the 1981 world harvest can be called normal, with an average yield of 1.38 t/ha; this is only very slightly below the average over 10 years. Free market prices, which always reflect the short-term market trend, fell from the unusually high levels of 1980 to settle at more normal levels, except in the United States where the rapid growth in area under cultivation, continuing even after the record 1980 harvest in that country, has put the domestic market into structural surplus as evidenced by the lack of new contracts mentioned above (more than 90 % of US production is normally sold under multi-annual contracts) and by selling prices which are currently considerably below cost.

The fact that this situation has so far not had repercussions on prices in the other producing countries adds weight to the belief that Community hops are, to some extent at least, not vulnerable to substitution, as indicated by the way the 1981 Community harvest, although 16 % higher than the 1980 harvest, was almost completely marketed very quickly without very abnormal stocks being built up, which would have depressed prices.

In the Federal Republic of Germany, market prices were as set out below.

Price per Ztr (50 kg) in ECU	Free market			Contract price
	1979	1980	1981	1981
Varieties				
Aromatic:				
Hallertauer	140.62	557.83	257.47	155.84
Tettnanger	171.49	655.95	265.00	182.84
Hersbrücker Spät	145.80	492.05	220.96	149.06
Bitter:				
Northern Brewer	119.42	477.88	263.49	132.50
Brewers Gold	111.50	472.79	190.09	123.09

(d) Medium-term forecasts - world market

(i) Structure of the international market

For the first time the Community has ceased to be the world's leading exporter and the Commission feels that the short-term situation as described above should not obscure the fact that the Community will have to make considerable efforts over the medium term if it wants to maintain its position on the international market.

The Community is helped in this by the tendency not only of its own brewers but also a good number of overseas brewers to prefer European varieties. This also applies to breweries in the Third World, which together with those in state-trading countries are almost the only beer producers in the world whose output is expanding at all rapidly. Unfortunately a recent slowing down of this expansion trend in a number of important developing countries (Brazil and Nigeria among others) where in recent years beer production had indeed been rising at a remarkable rate, has coincided with the largely financial problems which the state-trading countries continue to face in pursuing their plans for brewery expansion and the encouragement of beer consumption. These factors, as well as such international beer production statistics for 1981 as have already become available indicate a probable descent in the annual increase in world beer production volume from the 3% or thereabouts of recent years to barely 2%. This conclusion, albeit provisional, when seen against the further background of the continuing reduction of hopping rates, is of those contained in this report, one which gives rise to the most concern. It is however true that, even in the United States, the largest brewery (28% of the market in 1980) continues to buy a sizeable proportion of its requirements in the Community, despite the much higher prices in Europe at present, because there are few substitutes for European aromatic hops.

Against this advantage can be set the fact that the world market seems to be governed more and more by prices expressed in kilograms of alpha acid (the degree of bitterness imparted to beer). The larger scale of operations in the United States, which is beginning to emerge in other countries as well (Oceania, some state-trading countries), gives the USA a competitive edge by reducing alpha acid costs. Although Community hops have a presence of long standing in this market, which has been considerably strengthened by the quality guarantee provided by the certification and import control system, keen competition is bound to appear once price levels move very far apart.

(ii) Medium-term equilibrium of the world market

From estimates announced by the various producer countries by the time this report was compiled, it appears that the area planted worldwide will only increase very slightly for the 1982 crop (forecast 96000 ha). Some reduction is expected in the United States, the size of this depending on movements of American prices in the next few months.

Neverthless, if this area produces a normal yield (1.40 t/ha), production will be a good 10% above the estimated demand from the brewing industry worldwide. This is in fact the situation predicted in the report on the 1980 harvest and, in view of the fact that stocks can be said to have returned to normal after major destocking in 1980/81, a later increase will inevitably cause prices on the free market to fall.

The area under hops round the world is now 11% larger than the 84 000 ha which the Commission suggested as a maximum for the 1982 crop in its report on the 1979 harvest. The annual growth of world demand can be put at 1.3%. While most contracts have been concluded in a majority of countries at adequate prices for the crops up to 1985, a price collapse on the free market would automatically bring contract prices down and result in the effects being felt for several years.

In the light of the above, the Commission would like to repeat the appeal it made in its report on the 1980 harvest for the urgent adoption of restraint in new plantings, particularly in non-Community producer countries where present production potential is well above domestic demand and the capacity of foreign markets.

II. SITUATION IN THE COMMUNITY (tables 12-17)

(a) Situation in 1981

In 1981 the Community accounted for 28% of the world area under hops and 35% of world production (as against 30% and 34% respectively in 1980). The Commission notes that, whereas the varieties with high alpha acid content and the aromatic varieties accounted respectively for 29% and 70% of Community production in 1971, the corresponding figures for 1981 were 50% and 48% (cf. 50% and 48% in 1980).

In 1981 Community production was 922 909 Ztr from an area of 26 698 ha. This area was 1351 ha greater than in 1980 and the increase may be broken down by Member State as follows:

	ha.
Federal Republic of Germany	1 236
France	3
Belgium	23
United Kingdom	89
Ireland	-
	1 351

Production was 16% up on 1980 and 3% above the average of crops since 1972.

Greece joined the Community on 1 January 1981. Greek hop production, which in 1981 amounted to 40t grown on 25ha located entirely in the Ioannina region in the north, will therefore be eligible for Community aid from the 1981 harvest onwards. Greek production on average meets only 20% of the country's brewing requirements.

As predicted in the report on the 1980 harvest, and described under I(b) above, the Community's net exports returned in 1980/81 to the average level of the last ten marketing years after an unusual cyclical peak in the previous year. The Commission notes with a certain degree of concern that, even when account is taken of the delayed effect of the 1980 shortfall, this drop was due to an increase in imports rather than a decrease in the Community's own exports (see table 9).

Turning to demand within the Community, while beer production in Germany for example has grown up by almost 1.5% since the beginning of 1981 after several years without growth, as also in the Netherlands (6%) and in Italy (5%), and there have been modest increases in Denmark (1.0%) and Greece (1.2%), there was at the same time a striking fall of 6% in the United Kingdom affecting its production (28% of Community production) during the same year. The prediction made in previous reports that a significant recovery of beer production should not be expected in the next 2 or 3 years remains valid.

Demand for hops, too, will continue to fall slightly within the Community, even if beer production remains constant or rises slightly in the Community as a whole; this is because of technical progress which, particularly in Europe, is continuing to improve the bittering yield of hops used in the brewing process. Much of this trend in the past has been attributable to the development of products processed from hops; at the present time there are new products in the offing which apparently will combine the advantages of better brewing yield with better preservation of the qualities for which Community varieties, both aromatic and bitter, are particularly valued.

On the price front, although free market prices have dropped very noticeably from the extremely high levels of 1980 following the normalization of the market in the Community as a result of the good 1981 harvest, most contracts have been concluded at prices which, while reflecting these more normal free market prices, can be considered adequate in relation to production costs.

The quantities sold on the free market have been as follows in recent years (in Ztr = 50 kg):

1981	154 754
1980	67.385
1979	150.000
1978	166.000
1977	327.000
1976	174.000
1975	203.000

(b) Medium-term forecasts for the Community (tables 12 to 15)

It is estimated that the area under hops in 1982 will increase by only 320 ha (1981: + 1 346, 1980: + 699) to give a total area of almost 27 000 ha. If yields are normal, the harvest could produce between 44 000 tonnes and 46 000 t, i.e. the same order of magnitude as in 1981.

Sales under advance contracts are put at about 39 000 t, which is equal to that of 1981. This means that up to some 6 000 t might be offered on the free market from the 1982 crop.

This latter figure could be considered normal, since the mere 3 400 tonnes recorded in 1980 were the result of a major shortfall, particularly in comparison with the 16 350 tonnes in 1977, which was a year of structural surplus and a collapse of prices. However, as well as the gradual decline in consumption by Community breweries, which is still put at a rate between 1.0% and 1.5% a year, there is also the fact that some breweries have already assured the supplies they need for the next two to three years at a time when beer consumption is sluggish in a number of Member States, so that within the Community the free market (non-contract market) is expected to be quiet. The Commission would like to stress once again that although the international hop market is basically one of pluri-annual contracts, even in the state-trading countries, the main factor determining the market is the level of prices on the free market, to which contract prices inevitably adjust fairly quickly. The contract system is certainly a valuable regulator when it comes to the length of the trading cycle but, to judge from experience in the 1970s, it has less influence on the size of the cyclical fluctuations themselves. (see point I d (i) above).

The area of the Community harvest in 1982 will be 1 000 hectares (4%) larger than the area which the Commission, in its 1980 report, said was compatible with maintaining market stability. There are two conclusions to be drawn from this analysis: the need for an adjustment of the area under hops in non-Community producer countries and the need for Community firms to pursue an active export policy. This should be based on the quality of the Community product, including the introduction of new processing methods which, while admittedly allowing a lower hopping rate in beer with a resulting lower net consumption of hops, may well, by their attractiveness to brewers, actually create larger markets.

(c) 1981 Community harvest

Area under hops (table 9)

In 1981 the area under hops in the Community increased from 25 327 hectares to 26 699 hectares.

There was a reduction in the following varieties:

Hallertauer	Tutsham	Keysworth's Midseason
Hüller	Bramling X	Viking
Progress	Bourgogne	
WGV	Saxon	
	Bullion	

and an increase in the following:

Hersbrucker Spat (+13%)	Challenger	Target (+8%)
Spalter	Strisselspalt	Northdown
Tettnang	Perle (+220%)	Record
Fuggles	N. Brewer (+1%)	Yeoman
Goldings	Brewer's Gold (+14%)	Zenith

Overall, therefore, aromatic varieties have increased by 690 hectares over 1980, bitter varieties by 580 hectares.

Yield and production (table 9)

The average yield in the Community in 1981 (34.27 Ztr/ha) was higher than in 1980 (31.3 Ztr/ha) (1979: 36.3 Ztr/ha). Community production in 1981 amounted to 46 146 tonnes, compared with 39 595 tonnes in 1980.

(iii) New plantings

In 1981, 1990 hectares in the Community were in their first year of production, having been planted in the previous year. It will be recalled that European growers expect an average yield of 40% at the first harvest, 65% at the second, and a full yield only from the third year onwards.

(iv) Prices and contracts (table 14)

During the 1981 harvest, hop prices compared to 1979 and 1980 were as follows:

	Average Community prices			ECU/Ztr	
	1979	1980	1981	1981/80%	1981/79%
Contracts	118.3	133	162.78	+ 22	+ 37
Non-contract	182.12	469	225.63	- 52	+ 24

Quantities sold under advanced contracts increased again slightly in the light of market prospects.

Year	Contracts	%	Non-contract	%
1977	623.643	65.6	327.004	34.4
1978	686.210	80.5	166.036	19.5
1979	745.308	83.2	150.109	16.8
1980	723.983	91.5	67.385	8.5
1981	759.433	83.0	154.754	17.0

(v) Returns per hectare (table 17)

Returns per hectare increased again in 1981 (excluding Community aid), although spot prices were generally lower than in 1980 because of better yields and the greater quantity available for sale on the free market.

ECU/ha for areas in full production
(from the third year after planting)
(i) by varieties:

				ECU/Ztr	
	1979	1980	1981	1981/80%	1981/79%
Aromatic	4.866	4.833	6.468	+ 34	+ 33
Bitter	4.821	5.139	6.288	+ 22	+ 30
Others	4.509	6.801	5.793	- 15	+ 28

(ii)by country:

Country	1979	1980	1981	1981/80%	1981/79%
Germany	4.652	4.482	5.979	+ 33	+ 28
France	4.986	6.179	6.261	+ 13	+ 25
Belgium	6.690	10.586	9.119	- 14	+ 58
United Kingdom	4.463	5.740	7.255	+ 26	+ 62
Ireland	4.011	3.938	7.079	+ 80	+ 76
TOTAL	4.683	5.008	6.376	+ 27	+ 36

Growers' total returns rose compared with 1979 and 1980:

ECU	
1978	94,323,773
1979	115,510,745
1980	126,832,608
1981	158.407,425

The Commission notes that in 1981 there were 6 586 producers in the Community (of whom 384 were members of non-recongized groups and 130 were independent) as compared with 6 634 in 1980.

CONCLUSIONS

In the light of the above report, the Commission's support proposals for the 1981 crop are designed to achieve the objectives set out below.

1. The Community should continue to encourage a concentration of supply, normal marketing of production and an adequate quality level by setting aid for area planted at amounts which enable producer groups in particular to initiate or step up programmes designed to stabilize the market; this can be done by efficient management of output within producer groups. Almost all the area under hops in the Community is worked by such producer groups, to which the basic Regulation on the common organization of the market attributes a prime role; it is therefore especially important that the Community should encourage solidarity among producers in a tangible way, which includes supporting their efforts to improve market quality.

2. The Community should continue to encourage the production of Community hop varieties for which there are better market prospects outside the Community by varying aid between groups of varieties. In particular, it is important to maintain the position of aromatic varieties on external markets, as some of these varieties are beginning to attain a bitterness yield that attracts more satisfactory prices as a result of the efforts undertaken by planters and planters' associations in furthering hop research and contributing to the cost of propagating more disease-resistant strains.

However, it must be admitted that these varieties are generally more expensive to cultivate and give yields which are lower than those of varieties rich in alpha acid (bitter varieties).

3. By setting an aid level which will contribute towards offsetting the inadequate returns earned by some growers in 1981, despite the general recovery of the market, as a result of the fact that they were forced to use some of their 1981 crop to make up quantities not supplied under multi-annual contracts because of the shortfall on the 1980 harvest.

On a more general note, it should be pointed out that production and capital costs in the sector, which have always been high, have been particularly affected by inflation in recent years.

4. The Commission therefore proposes the following amounts of aid:

Varieties by group	Aid (ECU/ha)
Aromatic varieties	200
Bitter varieties	180
Other varieties	200

The average level of aid, put at 191 ECU per hectare for the total area eligible, is less than that granted for the 1980 crop (227 ECU).

This level of aid will be sufficient in most cases to maintain adequate income levels. In no way will it encourage an undue expansion of areas planted in view of the high costs of planting.

The impact on the EAGGF budget, Guarantee Section, will therefore again be less than in the previous year (1981: 5.9 million ECU; 1980: 6.2 million ECU).

TABL. 1(82-2)

I COUNTRY 1981	II AREA HA 1981	III PROD ZTR 1981	IV YIELD T/HA 1981	V PROD ALPHA T 1981	VII PERCENT ALPHA 1981	VIII YIELD ALPHA KG/HA 1981	IX BEER PRO M/HL (J.BARTH) 1981
BUNDESREP DEUTSCHLD	19189	673253	1.75	2019	6.00	105.22	93.7
FRANCE	760	29209	1.92	92	6.30	121.05	21.7
BELGIUM	846	31473	1.86	101	6.42	119.39	
UNITED KINGDOM	5803	186637	1.61	752	8.06	129.59	61.55
IRELAND	75	1537	1.02	7	9.11	93.33	
GREECE	25	800	1.60	3	8.00	128.00	
EEC & IRL AND GREEC	26698	922909	1.73	2974	6.45	111.40	232 (EST.)
UNITED STATES	17423	717955	2.06	2520	7.02	144.64	228.95
AUSTRALIA	1175	47538	2.02	228	9.59	194.04	
JUGOSLAV.	3262	108050	1.66	294	5.44	90.13	12
ESPANA	2003	50509	1.26	177	7.01	88.37	20.92
CZECHO-SLOVAKIA	11827	257700	1.09	618	4.80	52.25	23.93
DDR	2120	54608	1.29	162	5.93	76.42	24
POLSKA	2630	47000	0.89	90	3.83	34.22	
HUNGARY	562	15080	1.34	37	4.91	65.84	
TOTAL IHB AND EEC	67700	2221349	1.64	7100	6.39	104.88	
JAPAN	1129	25700	1.14	65	5.06	57.57	
USSR	16500	180000	0.55	550	6.11	33.33	
ROMANIA	1400	22300	0.80	50	4.50	35.84	
BULGARIA	1700	23000	0.68	52	4.50	30.44	
CHINA PR	4000	80000	1.00	220	5.50	55.00	
"OTHERS"	1900	51000	1.34	153	6.00	80.53	
WORLD: ADDED	94329	2603349	1.38	8190	6.29	86.83	
WORLD: AGREED TOTAL		TONNES: 130167					

I COUNTRY 1982	II AREA FORECAST 1982 (IHB 3/82
BUNDESREP DEUTSCHLD	19500
FRANCE	755
BELGIUM	856
UNITED KINGDOM	5810
IRELAND	75
GREECE	25
EEC & IRL AND GREEC	27021
UNITED STATES	17423
AUSTRALIA	1305
JUGOSLAV.	3280
ESPANA	2003
CZECHO-SLOVAKIA	11850
DDR	2200
POLSKA	2450
HUNGARY	560
TOTAL IHB AND EEC	68092
JAPAN	
USSR	
ROMANIA	
BULGARIA	
CHINA PR	
"OTHERS"	
WORLD: ADDED	
WORLD: AGREED TOTAL	

TABL. 1A (82-2)

COUNTRY 1980	AREA HA 1980	PROD ZTR 1980	YIELD T/HA 1980	PROD ALPHA T 1980	PERCENT ALPHA 1980	YIELD ALPHA KG/HA 1980	BEER PRO M/HL (J.BARTH) 1980
BUNDESREP DEUTSCHLD	17954	537849	1.50	1541	5.73	85.83	92.309
FRANCE	757	28181	1.86	74	5.25	97.75	22.009
BELGIUM	823	28646	1.74	90	6.28	109.36	14.5
UNITED KINGDOM	5718	194989	1.71	714	7.32	124.87	66.605
IRELAND	75	1530	1.02	5	6.54	66.67	5.99
GREECE	25	700	1.40	3	8.57	120.00	2.5
EEC & IRL AND GREEC	25352	791895	1.56	2427	6.13	95.73	238.04
UNITED STATES	15003	683120	2.28	2405	7.04	160.30	227.746
AUSTRALIA	1071	40520	1.89	180	8.88	168.07	19.433
JUGOSLAV.	3155	97017	1.54	316	6.51	100.16	11.712
ESPANA	1852	43006	1.16	161	7.49	86.93	20.027
CZECHO-SLOVAKIA	11100	200722	0.90	351	3.50	31.62	23.393
DDR	2156	47270	1.10	138	5.84	64.01	24
POLSKA	2474	34380	0.69	68	3.96	27.49	11.185
HUNGARY	556	13372	1.20	36	5.38	64.75	7.8
TOTAL IHB AND EEC	62719	1951302	1.56	6082	6.23	96.97	583.336
JAPAN	1161	36180	1.56	90	4.98	77.52	45.138
USSR	14000	200000	0.71	400	4.00	28.57	70
ROMANIA	1200	25000	1.04	50	4.00	41.67	8.5
BULGARIA	1600	18000	0.56	36	4.00	22.50	5.4
CHINA PR	3200	55000	0.93	151	5.50	47.27	6
"OTHERS"	1800	50000	2.25	150	6.00	83.33	N/A
WORLD: ADDED	85680	2335482	1.36	6959	5.96	81.22	937.802
WORLD: AGREED TOTAL	85380	2339480	1.37	7055	6.03	82.63	

TABL 1B (82-1)

COUNTRY 1979	AREA HA 1979	PROD ZTR 1979	YIELD T/HA 1979	PROD ALPHA T 1979	PERCENT ALPHA 1979	YIELD ALPHA KG/HA 1979	BEER PRO M/HL (J.BARTH) 1979
BUNDESREP DEUTSCHLD	17305	624202	1.80	1902	6.09	109.91	91.623
FRANCE	768	31182	2.07	87	5.58	113.28	22.793
BELGIUM	803	35457	2.21	107	6.04	133.25	13.681
UNITED KINGDOM	5709	206509	1.81	732	7.09	128.22	67.416
IRELAND	65	1635	1.26	6	7.34	92.31	6.039
EEC (9)	24650	898985	1.82	2834	6.30	114.97	237.078
UNITED STATES	12890	496748	1.93	1746	7.03	135.45	215.809
AUSTRALIA	1006	44560	2.21	224	10.05	222.66	19.678
JUGOSLAV.	3106	88046	1.42	255	5.79	82.10	11.254
ESPANA	1852	51716	1.40	194	7.50	104.75	19.712
CZECHO-SLOVAKIA	11745	236265	1.01	520	4.40	44.27	23.61
DDR	2160	72220	1.67	272	7.53	125.93	23
POLSKA	2447	45000	0.92	137	6.09	55.99	11.127
HUNGARY	568	12448	1.10	34	5.46	59.86	7.5
TOTAL IHB AND EEC	60424	1945988	1.61	6216	6.39	102.87	568.768
JAPAN	1200	36300	1.51	91	5.01	75.83	44.758
USSR	12500	220000	0.88	580	5.27	46.40	70
ROMANIA	1200	22000	0.92	70	6.36	58.33	8.3
BULGARIA	1500	17000	0.57	40	4.71	26.67	5.5
CHINA PR	0	0	0	0	0.00	0.00	5
"OTHERS"	3900	103000	1.32	340	6.60	87.18	N/A
WORLD ADDED:	80724	2344288	1.45	7337	6.26	90.89	909.285
WORLD AGREED:	80724	2366420	1.47	7266	6.14	90.01	

COUNTRY 1978	AREA HA 1978	PROD ZTR 1978	YIELD T/HA 1978	PROD ALPHA T 1978	PERCENT ALPHA 1978	YIELD ALPHA KG/HA 1978	BEER PRO M/HL 1978
BUNDESREP DEUTSCHLD	17622	606602	1.72	1705	5.62	96.75	91.656
FRANCE	887	30027	1.69	95	6.33	107.10	22.781
BELGIUM	851	27727	1.63	86	6.20	101.06	13.83
UNITED KINGDOM	5837	187612	1.61	724	7.72	124.04	65.88
IRELAND	65	1450	1.12	6	8.28	92.31	5.824
EEC & IRL	25262	853418	1.69	2616	6.13	103.55	233.424
UNITED STATES	12525	499496	1.99	1550	6.21	123.75	210.135
AUSTRALIA	915	37180	2.03	186	10.01	203.28	19.511
JUGOSLAV.	3137	87616	1.40	274	6.25	87.34	10.005
ESPANA	1803	41796	1.16	156	7.46	86.52	18.653
CZECHO-SLOVAKIA	11836	201757	0.85	366	3.63	30.92	22.058
DDR	2104	47730	1.13	135	5.66	64.16	23
POLSKA	2400	38840	0.81	80	4.12	33.33	11.378
HUNGARY	550	11800	1.07	37	6.27	67.27	7.244
TOTAL IHB AND EEC	60532	1819633	1.50	5400	5.94	89.21	555.408
JAPAN	1238	44800	1.81	134	5.98	108.24	44.3
USSR	12000	200000	0.83	436	4.36	36.33	65
ROMANIA	1100	22000	1	55	5.00	50.00	8.15
BULGARIA	1500	21000	0.70	47	4.48	31.33	5.16
CHINA PR	0	0	0	0			
"OTHERS"	2800	64000	1.14	216	6.75	77.14	N/A
WORLD: ADDED	79170	2171433	1.37	6288	5.79	79.42	873.079
WORLD: AGREED TOTAL	79170	2171440	1.37	6252	5.76	78.97	

VI-E-3 (0096S)

HOPS :
HOUBLON :
HOPFEN :

FORWARD 'ONTRACTS EEC - IHB
CONTRATS A L'AVANCE CEE - IHB
VORVERTRÄGE EWG - IHB

T)B 2(11/1)

ZTR. (50 kg)

COUNTRY/PAYS/LAND	ESTIMATED FORWARD SALES 1982 - 1986 Source/Quelle: IHB ECON. COMMITTEE XII/81 VENTES ESTIMEES GESCHÄTZTE VORVERKÄUFE				
	82	83	84	85	86
B.R. DEUTSCHLAND	570 000	580 000	580 000	580 000	500 000
FRANCE	14 745	13 654	5 770	5 400	-
BELGIQUE/BELGIE	9 000	8 000	5 000	4 000	600
UNITED KINGDOM	182 129	172 198	118 333	-	-
(IRL + GR p.m.)	(2 300	2 300	2 300	2 300)	
USA	672 225	555 470	362 875	275 966	173 363
AUSTRALIA	51 000	42 000	31 500	31 500	31 500
JUGOSLAVIA	50 840	53 900	50 700	36 420	15 220
ESPANA (EST.)	30 000	30 000	30 000	30 000	30 000
CSSR (EST.)	230 000	230 000	230 000	250 000	250 000
DDR	62 000	64 000	68 000	72 000	73 000
POLSKA	40 000	40 000	40 000	40 000	40 000
HUNGARY	15 000	15 000	15 000	15 000	-
TOTALS IHB	1 929 239	1 806 522	1 539 478	1 342 586	1 113 683
% / : 1981 PROD. (IHB)	87,5	82,0	70,0	61,0	50,5

TABLE 3: (82-1) HOPS WORLD PRODUCTION AND DEMAND / HOPFEN WELTERZEUGUNG UND NACHFRAGE

L. NO.		69	70	71	72	73	74	75	76	77	78	79	80	81	82
1	PRODUCTION T	94946	102536	96050	105172	118301	111176	113502	106760	117796	108572	117214	116774	130093	
2	TREND (Demand) (1)	97754	100137	102457	104715	106912	109046	111118	113128	115077	116963	118787	120549	122249	123887
3	+ (-)	(2808)	2399	(6407)	457	13586	2130	2384	(6368)	2719	(8391)	(1573)	(3735)	7844	
4	STOCK 1 SEPT. (ALGO)	53445	50637	53036	46629	47086	60672	62802	65186	58818	61537	53146	51573	47838	55682
5	(L.2/2) Normal 6 m.	48877	50068	51228	52357	53456	54523	55559	56564	57538	58481	59393	60274	61124	61943
6	+ (-)	4568	569	1808	(5728)	(6370)	6149	7243	8622	1280	3056	(6247)	(8701)	(13286)	(6261)
7	HA	66982	70666	75042	78015	81247	82083	80527	78206	79262	79170	80724	85680	94329	
8	+ (-) YR							(1556)	(2321)	1056	(92)	1554	4956	8649	
9	YIELD T (HA)						1,35	1,41	1,37	1,49	1,37	1,45	1,36	1,38	
							802	819	847	873	909	938	957 EST	976 EST	995 EST
10	BEER PROD*MHL						136	136	133	132	127	127	126	125	124
11	GMS/HL (2)														

*) next year, année prochaine, folgendes Jahr
1. QUADREG 1969-85 on L.I.
2. ASSUMED = L. Q/L.10

HOPS-HOUBLON-HOPFEN: WORLD FORECASTS/PREVISIONS MONDIALES/WECTVORAUSSICHTEN TAB. 4 (82:1) 1 APR. 82

L. NO		CALC. ERR-ECHN.	81	ALT. I 82	ALT. I 83		ALT. II 82	ALT. II 83		ALT. III 82	ALT. III 83		ALT. IV 82	ALT. IV 83
1	PRODUCTION T.	ALTS L.9 x 7	130093	127300			138700			128640			140160	
2	TREND (DEMAND)	REGR.*	122249	123887	125463		123887	125463		123887	125463		123887	125463
3	+ (-)		7844	3413			14813			4753			16273	
4	STOCKS SEPT. 1	ALGO.	47838	55682	59095		55682	70495		55682	60435		55682	71955
5	"NORMAL" = 6 M.	L.2/2	61124	61943	62731		61943	62731		61943	62731		61943	62731
6	+ (-)		(13286)	(6261)	(3636)		(6261)	7764		(6261)	(2296)		(6261)	9224
7	000 HA(82-ALTS)		94,3	95,0			95,0			96,0			96,0	
8	+ (-)/YR/AN		8651	+ 0,7			+ 0,7			+ 1,7			+ 1,7	
9	= T/HA ALTS	± SDEV	1,38	1,34			1,46			1,34			1,46	
10	BEER PROD MHL	EST.												
11	= GM/HL	L2/L.10												

TAB. 5(82-1)

WORLD HOP BASE SERIES 1969-TO DATE   EEC/IHB/USDA/COMMERCIAL & VARIOUS SOURCES LAST UPDATE: 24 III 82

YEAR	AREA HA	PROD ZTR =	PROD. TONNES	YIELD T/HA	PR ALPHA TONNES	PERCENT ALPHA	ALPHA KG/HA	BEER PROD MHL	PRICE DM CONTRACT BRD	PRICE DM SPOT BRD	PR. $/LB AV SP/CON CLUSTERS
1969	66982	1898920	94946	1.42	5276	5.56	78.77	605	370	350	.72
1970	70666	2050720	102536	1.45	6038	5.89	85.44	634	367	415	.68
1971	75042	1921000	96050	1.28	5377	5.60	71.65	650	353	622	.7
1972	78015	2103440	10[illegible]172	1.35	6174	5.87	79.14	679	332	372	.75
1973	81247	2366029	113301	1.46	7468	6.31	91.92	742	331	207	.8
1974	82083	2223520	111176	1.35	66[illegible]7	5.96	80.74	770	331	235	.6
1975	80527	2270040	113502	1.41	72[illegible]0	6.37	89.78	802	331	221	.6
1976	78206	2135200	106760	1.37	6137	5.75	78.47	819	327	264	.8
1977	79262	2355920	117796	1.49	7066	6.00	89.15	848	319	128	.73
1978	79170	2171440	108572	1.37	6252	5.76	78.97	873	297	290	.89
1979	80724	2344288	117214	1.45	7337	6.26	90.89	909	324	533	1.42
1980	85680	2335482	115774	1.36	6959	5.96	81.22	938	341	1400	3.7
1981	94329	2603349	130167	1.38	8190	6.29	86.82	957 (est)	377	606	0.95
1982 EST	(96000)										
AVERAGE				1.39		5.97	83.30		338	434	1.03

DEMAND + AREA IHB/NON-IHB '73-'84 TAB 6 (82:1) 1 APR 82

L. NO		73	74	75	76	77	78	79	80	81	+% APPAR. DEMAND	82	83	84
	IHB MEMBER COUNTRIES													
1	PRODUCTION	102440	97042	96288	90744	99265	90909	97217	97453	110876				
2	DEMAND (TREND)	95559	96176	96793	97409	98026	98643	99259	99876	100493	0,6	101109	101726	102343
3	+ (-)													
4	YIELD I T/HA	1,66	1,52	1,52	1,47	1,63	1,50	1,61	1,56	1,64		1,60	1,60	1,61
5	ALT I HA	62490	63759	63374	61592	6 767	60467	60359	62619	67605	(L2xL4)	63193	63578	63567
6	YIELD II											1,64	1,65	1,67
7	ALT II HA										(L2xL6)	61651	61652	61283
			(HA I & II: 1973-81 ACTUAL, 1982-84 = L.2 ÷ L 4/6								(ALTS)			
8	HA EST III/82	(IHB PARIS)									CF/VGL	68092(!)		
	OTHER (NON-IHB)													
9	PRODUCTION	14057	14134	17214	16016	18361	17517	19833	19097	18983				
10	DEMAND (TREND)	14688	15323	15979	16634	17290	17946	18601	19257	19913	3 °/°	20568	21224	21879
11	+ (-)	(631)	(1189)	1235	(618)	1071	(429)	1232	(160)	(930)				

HOUBLON-HOPS-HOPFEN: WORLD MARKET BALANCE-EQUILIBRE MARCHE MONDIAL: ALPHA TAB. 7(82:1)

	LINE NO	UNIT	CALC.	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
PROD. HOUBLON/ HOP/ERZEUGUNG	1	000 T.	16 X 18	105.30	118.55	110.70	113.51	107.13	118.16	108.37	117.02	116.55	130.13
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT		5.87	6.31	5.96	6.37	5.75	6	5.76	6.26	5.96	6.29
PROD/ERZEUGUNG ALPHA	3	T.	1 X 2	6181	7481	6598	7230	6160	7089	6242	7325	6946	8185
PERTE/AN VERL. JAHR/YEAR LOSS	4	PERCENT		4.64	4.56	4.44	4.28	4.28	3.92	3.92	3.88	3.68	3.6
- PERTE/LOSS/ VERLUST	5	T.	3 - 4	5894	7140	6305	6921	5897	6812	5997	7041	6691	7891
PROD. BIERE BIERERZEUGUNG	6	MIO HL.		742	770	802	819	848	873	909	938	957	975
+(-) PER YR./ ANNUEL/YEAR	7	PERCENT			4	4	2	4	3	4	3	2	2
CONTENU/ANTEIL CONTENT: ALPHA	8	GM/HL.	9 / 6	8	8	8	8	8	8	8	8	8	8
DEMAND/DEMANDE NACHFR. ALPHA	9	T.		6149	6308	6466	6625	6784	6942	7101	7259	7418	7577
BESOIN/BEDARF REQUIRED:ALPHA	10	T.	9 - 4	5864	6020	6179	6341	6494	6670	6823	6977	7145	7304
SURPLUS(DEFIC) UEBERSCH(DEFIZ)	11	BV: T.	5 - 10	31	1119	126	579	-597	142	-825	64	-454	587
STOCKS/BESTAND 1 SEPT.	12	: T.	ALGO. BV EC COM.	3073	3104	4223	4349	4928	4331	4473	3648	3711	3257
STOCKS/BESTAND 6 MOIS (NORMAL	13	BV: T.	0.5 X 9	3075	3154	3233	3313	3392	3471	3551	3630	3709	3789
STOCKS/BESTAND + (-)	14	BV: T.	12 - 13	-1	-50	990	1037	1536	860	922	97	2	-532
PERTE AN/VERL. LOSS YEAR	15	BV: T.	@ 1%	0	-1	10	10	15	9	9	1	0	-5
SUPERF/FLAECHE AREA	16	000 HA.		78	81.2	82	80.5	78.2	79.3	79.1	80.7	85.7	94.3
+(-) PAR AN/ JAHR/YEAR	17	000 HA.			3.20	0.80	-1.50	-2.30	1.10	-0.20	1.60	5.00	8.60
RENDEMENT/ERTR AG/YIELD	18	T/HA.		1.35	1.46	1.35	1.41	1.37	1.49	1.37	1.45	1.36	1.38

HOUBLON-HOPS-HOPFEN: ALTERNATIVE FORECASTS TAB. 8(2:1)

	LINE NO	UNIT	CALC. L	I 1982	I 1983	II 1982	II 1983	III 1982	III 1983	IV 1982	IV 1983
PROD. HOUBLON HOP/ERZEUGUNG				128.64		140.16		129.98		141.62	
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT		5.97		5.97		5.97		5.97	
				AVGE/MOYEN/DURCHSCHNITT: 69-81.							
PROD/ERZEUGUNG ALPHA	3	T.	1 X 2	7680		8368		7760		8455	
PERTE/AN VERL. JAHR/YEAR LOSS	4	PERCENT		3.48	3.48	3.48	3.48	3.48	3.48	3.48	3.48
- PERTE/LOSS/ VERLUST	5	T.	3 - 4	7413		8076		7490		8160	
PROD. BIERE BIERERZEUGUNG	6	MIO HL.		995 EST.		995 EST.		995 EST		995 EST	
+(-) PER YR./ ANNUEL/YEAR	7	PERCENT		2		2		2		2	
CONTENU/ANTEIL CONTENT: ALPHA	8	GM/HL.	9 / 6	8		8		8		8	
DEMAND/DEMANDE NACHFR. ALPHA	9	T.	LINREG 1969-81	7735	7894	7735	7894	7735	7894	7735	7894
BESOIN/BEDARF REQUIRED:ALPHA	10	T.	9 - 4	7466	7619	7466	7619	7466	7619	7466	7619
SURPLUS(DEFIC) UEBERSCH(DEFIZ)	11	BV: T.	5 - 10	-53		611		24		695	
STOCKS/BESTAND 1 SEPT.	12	BV: T.	ALGO. EC COM.	3844	3790	3844	4454	3844	3867	3844	4538
STOCKS/BESTAND 6 MOIS (NORMAL	13	BV: T.	0.5 X 9	3868	3947	3868	3947	3868	3947	3868	3947
STOCKS/BESTAND + (-)	14	BV: T.	12 - 13	-24	-157 *******	-24	507 *******	-24	-80 *******	-24	591 *******
PERTE AN/VERL. LOSS YEAR	15	BV: T.	@ 1%	0		0	5	0		0	6
SUPERF/FLAECHE AREA	16	000 HA.		96		96		97		97	
				ALTERNATIVE FORECAST/ALT. VORSCHAETZUNGEN/PREVISIONS ALTERNATIVES.							
+(-) PAR AN/ JAHR/YEAR	17	000 HA.		1.70		1.70		2.70		2.70	
RENDEMENT/ERTR AG/YIELD	18	T/HA.		1.34		1.46		1.34		1.46	
				+/- S.DEV/STANDARD ABWEICHUNG/ ECART TYPE							

TAB. 9(82-1)

EEC 10 EXTERNAL TRADE IN HOPS AND PRODUCTS
COMMERCE EXTERIEUR HOUBLON ET PRODUITS
HANDEL MIT DRITTLAENDER HOPFEN U. PROD
PERIODE: SEPT.80-AUG.81. SOURCE: EC(NIMEXE)

*********	CONES	POWDERS	EXTRACT	TOT. EQUI
X100 KG	DOLDEN	POUDRES	EXTRAITS	HOP/CONES
*********		PULVER	AUSZUEGE	DOLDEN*
CCT/TDC>	12.06.10	12.06.90	13.03.16	(GZT NR)
BR DEUTSC				
IMPORT.	50940	342	687	53721
EXPORT.	67253	52502	15031	177614
FRANCE				
IMPORT.	3082	1430	10	4690
EXPORT.	3109	79	0	3196
BELG/LUX.				
IMPORT	13727	5554	296	20872
EXPORT	1376	360	484	3466
UN. KING.				
IMPORT	PROVISIONAL ESTIMATE/ESTIMA			7500
EXPORT	TION PROVISOIRE/VORLAUE			17500
	FIGE SCHAETZUNG.			
HELLAS				
IMPORT	0	0	0	0
EXPORT	0	0	0	0
IRELAND				
IMPORT	587	1791	571	4556
EXPORT	208	432	166	1264
ITALIA				
IMPORT	0	0	21	74
EXPORT	0	0	0	0
DANMARK				
IMPORT	0	0	5	18
EXPORT	0	1	0	1
NEDERLAND				
IMPORT	0	0	1683	5891
EXPORT	0	0	0	0
TOTAL EEC				
IMPORT	68336	9117	3273	97322
EXPORT	71946	53373	15681	203040
=EEC NET				
EXPORTS.	3610	44256	12408	105718
KILOTONS				10.57

HOPS - WORLD SUPPLY AND DEMAND TRENDS - TENDANCES OFFRE ET DEMANDE - HOUBLON (JOH. BARTH + SOHN)

TAB. 10
13/7/81

No		1973	1974	1975	1976	1977	1978	1979	1980	Stock Balance 1973-80 + (-) t. Σ	% Dreg 80/79 + (-)	1981	1982	1983
	AROMATIC													
1	Production (t)	45005	40589	42670	34611	41452	36549	39002	37776					
2	Demand (t)	41621	41002	40383	39765	39146	38527	37909	37290		(1,6)	36672	36053	35434
3	+ (-)	3384	(413)	2287	(5154)	2306	(1978)	1093	486	2011				
	NOT INTER. TRADED													
4	Production (t)	25332	29289	30242	30187	30808	32459	41261	40957					
5	Demand (t)	25448	27498	295[illegible]	31600	33651	35702	37753	39804			41855	43906	43956
6	+ (-)	(116)	1791	693	(1413)	(2843)	(3153)	3508	1153	(2686)	5,4			
	BITTER													
7	Production (t)	47964	41303	40590	41962	45026	39912	41605	45071					
8	Demand (t)	42746	42732	42719	42705	42692	42679	42665	42652		= stable	42639	42625	42612
9	+ (-)	5218	(1429)	(2129)	(743)	2334	(2767)	(1060)	2419	1843				
	WORLD ALL													
10	Production (t)	118301	111176	113502	106760	117376	108920	121867	123803					
11	Demand (t)	109818	111239	112659	114080	115500	116920	118341	119761		1,2	121182	122602	124022
12	+ (-)	8483	(63)	843	(7320)	1876	(8000)	3526	4042	3387				
Σ														

PRODUCTION BIERE/ BIERERZEUGUNG/ BEER PRODUCTION

TABL II (82 - 1)
16 APR 1982.

Sources : Joh. Barth u. Sohn CBMC EEC COMMISSION	1974	1975	1976	1977	1978	1979	1980	1981
CEE / EWG / EEC	226 735	229 020	236 507	232 297	232 320	234 878	238 040	236 739 (EST.CEE)
% + (-) per year	1,2	1,0	3,3	(1,8)	-	1,1	1,3	(0,6)
U S A	182 262	188 420	192 182	200 165	210 135	215 809	227 746	228 950
% + (-) per year	4,6	2,8	2,0	4,1	5,0	2,7	5,5	0,5
USSR	50 800	60 000	62 500	65 000	65 000	70 000	70 000	
Romania	5 000	7 449	8 200	7 910	8 150	8 300	8 500	
Bulgaria	4 000	4 000	5 200	5 200	5 160	5 500	5 400	
Poland	12 440	12 860	12 318	12 069	11 378	11 127	11 185	
DDR	19 800	20 200	21 000	22 000	23 000	23 000	24 000	24 000
CSSR	22 138	22 373	22 500	22 500	22 058	23 610	23 393	23 930
Hungary	6 458	6 631	6 738	7 003	7 244	7 500	7 800	
Cuba	1 851	3 300	3 500	3 500	3 000	2 307	2 365	
TOTAL COMECON	122 987	136 813	141 956	145 182	144 990	151 344	148 128	
% + (-) per year	4,0	11,2	3,8	2,3	-	4,4	(1)	
Australia	18 300	19 340	19 717	19 511	19 511	19 678	19 433	
Espana	15 481	16 618	17 127	18 600	18 653	19 712	20 027	20 920
Japan	36 084	39 290	36 393	41 242	44 300	44 758	45 138	
Canada	19 133	21 238	20 227	20 227	20 389	20 386	20 669	20 500
Argentina	4 578	4 123	2 680	2 543	2 043	2 100	2 328	2 200
New Zealand	3 990	4 140	4 095	4 180	4 371	4 200	3 783	
Jugoslavija	9 429	8 477	8 685	9 588	10 055	11 300	11 712	12 000
TOTAL GROUP 4	106 995	113 226	108 924	116 053	119 319	122 228	123 09.	
% + (-) per year	1,9	5,8	(4,0)	6,5	2,8	2,4	.7	
Autres/andere/Others	130 615	134 928	138 986	153 694	167 361	185 026	798	
% + (-) per year	8,0	3,3	3,0	10,6	8,9	10,5	8,5	
WORLD/MONDE/WELT M/HL	770	802	819	847	873	909	938	957
± %	4	4	2	4	3	4	3	2

VI-E-3: EEC - EWG - CEE MARKET '73 - '80 T.12 (82-1) HOUBLON - HOPS - HOPFEN 7.4.82

L. NO.			1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	TREND
1	PRODUCTION	OOOT	52,6	47,9	44,6	39,9	47,8	42,7	45,0	39,6	46,1			
2	EXPORT NETTE (Sept-Août)	OOOT	lo,2	lo,6	lo,8	9,4	lo,5	9,6	14,2	lo,6	/11,0 EST/			
3	OFFRE CEE	OOOT	42,4	37,3	33,8	30,5	37,3	33,1	30,8	29,0	35,0			
4	DEMANDE CEE (1)	OOOT	36,4	36,0	35,6	35,1	34,7	34,2	33,8	33,4	32,9	32,5	32,1	>1,3%
5	+ (-)	OOOT	6,0	1,3	(1,8)	(4,6)	2,6	(1,1)	(3.0)	(4,4)	2,1			
6	STOCKS 1 SEPT.	OOOT	20,9	26,9	28,2	26,4	21,8	24,4	23,3	20,3	15,9	18,0		
7	STOCKS "NORMAUX" (73-79: 6M; 80-4 1/2M)	OOOT	18,2	18,0	17,8	17,5	17,3	17,1	16,9	12,5	12,3	12,2	12,0	
8	+ (-)	OOOT	2,7	8,9	10,4	8,9	4,5	7,3	6,4	7,8	3,6	5,8		
9	000 HA		29,5	29,3	29,0	27,8	27,2	25,3	24,7	25,3	26,7	27,0		
10	+ (-)		1,9	(o,2)	(0,3)	(1,2)	(0,6)	(1,9)	(0,6)	0,6	1,4			
11	RENDEMENT/YIELD/ GRTRAG	T/HA	1,79	1,64	1,54	1,44	1,76	1,69	1,82	1,56	1,73			
12	PROD. BIERRE (3)	MHL	227	229	237	232	232	233	231	237	237	237	237	ESTS.
13	GM/HL (2)	HOP	160	157	150	151	149	147	146	141	139	137	135	

(1) LINREGX L.3. ((2) L.4/L.12) (3) ANNEE PROCHAINE-NEXT YEAR-FOLGENDES JAAR.

(0097S)

(VI-E-3) EEC-EWG-CEE TAB. 13 (82-1) ALTERNATIVE/VORAUSSCHAU FORECASTS/PREVISIONS ALTERNATIVES 14 APR 1982

L. NO.		UNIT	1981	ALT. I 1982	ALT. I 1983	ALT. II 1982	ALT. II 1983	ALT. III 1982	ALT. III 1983	ALT. IV 1982	ALT. IV 1983
1	PRODUCTION	L.9XII 000T	46,1	42,4		48,9		42,4		48,9	
2	EXPORT NETTE SEPT-AOUT ALTS.	"	11,0 (EST.)	11,0		11,0		12,0		12,0	
3	1-2 = OFFRE CE	"	35,0	31,4		37,9		30,4		36,9	
4	DEMANDE CE	" REGR.	32,9	32,5	32,1	32,5	32,1	32,5	32,1	32,5	32,1
5	+ (-)		2,1	(1,1)		5,4		(2,1)		4,4	
6	STOCKS 1 SEPT.	STAT(2)	15,9	18,0	16,9	18,0	23,4	18,0	15,9	18,0	22,4
7	STOCKS NORM.	41/2 N.	12,3	12,2	12,0	12,2	12,0	12,2	1[illegible],0	12,2	12,0
8	+ (-)		3,6	5,8	4,9	5,8	11,4	5,8	3,9	5,8	10,4
9	000 HA		26,7	27,0		27,0		27,0		27,0	
10	+ (-)		1,4	0,3		0,3		0,3		0,3	
11(1)	RENDEMENT/YIELD	T/HA	1,73	1,57		1,81		1,57		1,81	

1) (= AVGE-MOYEN-DURCHSCHNITT 1970-81 (1.69 T/HA) + / SDEV-ECART TYPE - STANDARDABWEICHUNG (0,12))
2) INFO: ORGANISATIONS PROFESSIONELLES CEE (COPA/COGECA, CBMC, COMMERCE)

HOUBLON – HOPFEN – HOPS	CEE/EWG/EEC	H = HOUBLON/HOPS/HOPFEN

TAB. 14 (82-1) ALPHA DATE/DATUM : 15 APR 1982

	ANNEE JAHR YEAR		1974	1975	1976	1977	1978	1979
1	PRODUCTION ERZEUGUNG : H	000 T	47,9	44,6	39,9	47,8	42,7	45,0
2	CONTENU/ANTEIL CONTENT : ALPHA	%	6,37	6,56	5,70	6,25	6,13	6,3
3	PRODUCTION ERZEUGUNG : ALPHA	T	3051	2926	2274	2988	2616	2834
4	PERTE/LOSS/VERLUST/AN/YEAR/JAHR 50% = 6 M.	%	(4,44)	(4,28)	(4,28)	(3,92)	(3,92)	(3,88)
5	– PERTE/LOSS/VERLUST : BV	T	2915	2801	2177	2871	2316	2724
6	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION	* M HL	229	237	232	232	233	231
7	± PAR AN/ JE JAHR/ PER YEAR	%	1,0	3,5	(2,1)	–	(0,5)	1,2
8	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL	10,0	9,5	9,5	9,0	9,0	8,5
9	DEMAND/DEMAND/ NACHFRAGE : INTERNE. ALPHA	T	2312	2257	2201	2146	2091	2036
10	BESOIN/BEDARF/ REQUIREMENT : BV L.9-4	T	2209	2160	2107	2062	2009	1957
11	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) L.5-10 : BV	T	706	641	70	809	307	767
12	EXPORTATIONS/AUSFUHR/ EXPORTS at EC ALPHA % : H	000 T	18,7	20,0	18,4	17,5	17,5	22,5
13	IMPORTATIONS/EINFUHR/ IMPORTS at WORLD % : H	000 T	8,1	9,2	9,0	7,0	7,9	8,2
14	EXPORTATIONS/AUSFUHR/ EXPORT : H : NET	000 T	10,6	10,8	9,4	10,5	9,6	14,3
15	NET : ALPHA	T	707	726	532	672	619	895
16	– PERTE/LOSS/VERLUST : BV	T	675	694	509	646	595	860
17	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	31	(53)	(439)	163	(288)	(93)
18	STOCKS BESTÄNDE : 1 SEPT : BV	T	1913	1944	1891	1452	1615	1327
19	STOCKS BESTÄNDE 73-79: 6M. 80- 41/2 M. BV	T	1104	1080	1053	1031	1005	978
20	STOCKS BESTÄNDE : + (–) : BV	T	809	864	838	421	610	349
21	– PERTE/LOSS/VERLUST 1% BV	T	8	9	8	4	6	3
22	SUPERFICIE/FLÄCHEN/AREA	000 T	29,3	29,0	27,8	27,2	25,3	24,7
23	RENDEMENT/ERTRAG/YIELD	T/HA	1,64	1,54	1,44	1,76	1,69	1,82

* ANNEE SUIVANTE / FOLGENDES JAHR / FOLLOWING YEAR

BV = BITTERING VALUE/VALEUR AMERISANTE/BITTERWERT

HOUBLON – HOPFEN – HOPS	CEE/EWG/EEC	H = HOUBLON/HOPS/HOPFEN

TAB. 14 (82-1) ALPHA DATE/DATUM : 15 APR 1982

	ANNEE JAHR YEAR		1974	1975	1976	1977	1978	1979
1	PRODUCTION ERZEUGUNG : H	000 T	47,9	44,6	39,9	47,8	42,7	45,0
2	CONTENU/ANTEIL CONTENT : ALPHA	%	6,37	6,56	5,70	6,25	6,13	6,3
3	PRODUCTION ERZEUGUNG : ALPHA	T	3051	2926	2274	2988	2616	2834
4	PERTE/LOSS/VERLUST/AN/YEAR/JAHR 50% = 6 M.	%	(4,44)	(4,28)	(4,28)	(3,92)	(3,92)	(3,88)
5	– PERTE/LOSS/VERLUST : BV	T	2915	2801	2177	2871	2316	2724
6	PRODUCTION BIERE/BIERERZEUGUNG/BEER PRODUCTION	* M HL	229	237	232	232	233	231
7	± PAR AN/ JE JAHR/ PER YEAR	%	1,0	3,5	(2,1)	–	(0,5)	1,2
8	CONTENU/ANTEIL CONTENT : ALPHA	GRMS/HL	10,0	9,5	9,5	9,0	9,0	8,5
9	DEMAND/DEMAND/ NACHFRAGE : INTERNE. ALPHA	T	2312	2257	2201	2146	2091	2036
10	BESOIN/BEDARF/ REQUIREMENT : BV L.9-4	T	2209	2160	2107	2062	2009	1957
11	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) L.5-10 : BV	T	706	641	70	809	307	767
12	EXPORTATIONS/AUSFUHR/ EXPORTS at EC ALPHA % : H	000 T	18,7	20,0	18,4	17,5	17,5	22,5
13	IMPORTATIONS/EINFUHR/ IMPORTS at WORLD % : H	000 T	8,1	9,2	9;0	7,0	7,9	8,2
14	EXPORTATIONS/AUSFUHR/ EXPORT : H : NET	000 T	10,6	10,8	9,4	10,5	9,6	14,3
15	NET : ALPHA	T	707	726	532	672	619	895
16	– PERTE/LOSS/VERLUST : BV	T	675	694	509	646	595	860
17	SURPLUS/(DEFICIT) UBERSCHUSS/(DEFIZIT) : BV	T	31	(53)	(439)	163	(288)	(93)
18	STOCKS BESTANDE : 1 SEPT : BV	T	1913	1944	1891	1452	1615	1327
19	STOCKS BESTANDE 73-79: 6M. 80- 41/2 M. BV	T	1104	1080	1053	1031	1005	978
20	STOCKS BESTANDE : + (–) : BV	T	809	864	838	421	610	349
21	– PERTE/LOSS/VERLUST 1% BV	T	8	9	8	4	6	3
22	SUPERFICIE/FLÄCHEN/AREA	000 T	29,3	29,8	27,8	27,2	25,3	24,7
23	RENDEMENT/ERTRAG/YIELD	T/HA	1,64	1,54	1,44	1,76	1,69	1,82

* ANNEE SUIVANTE / FOLGENDES JAHR / FOLLOWING YEAR

BV = BITTERING VALUE/VALEUR AMERTUME BITTERWERT

TAB. 16

Pourcentage de houblon vendu sous contrat et relation prix hors contrat - sous contrat
Prozentsats von Vertragshopfen und Verhältnis Preise Freihopfen - Vertragshopfen
Percentage of hops sold under contract and relation prices without contract - under contract

<table>
<tr><th></th><th>hors contrat
Freihopfen
without contract
50 kg</th><th>sous contrat
Vertragshopfen
under contract
50 kg</th><th>% sous contrat
% Vertragshopfen
% under contract</th><th colspan="2">hors contrat
Freihopfen
without contract
ECU/50 kg</th><th colspan="2">sous contrat
Vertragshopfen
under contract
ECU/50 kg</th></tr>
<tr><td></td><td>1</td><td>2</td><td>3</td><td colspan="2">4</td><td colspan="2">5</td></tr>
<tr><td>A) CE</td><td></td><td></td><td></td><td colspan="2"></td><td colspan="2"></td></tr>
<tr><td>1975</td><td>202.672</td><td>689.378</td><td>77</td><td colspan="2">72,80</td><td colspan="2">114,13</td></tr>
<tr><td>1976</td><td>174.172</td><td>620.353</td><td>78</td><td colspan="2">95,18</td><td colspan="2">121,49</td></tr>
<tr><td>1977</td><td>327.043</td><td>623.643</td><td>66</td><td colspan="2">46,45</td><td colspan="2">118,76</td></tr>
<tr><td>1978</td><td>166.036</td><td>686.210</td><td>81</td><td colspan="2">106,29</td><td colspan="2">111,73</td></tr>
<tr><td>1979</td><td>150.109</td><td>745.308</td><td>83</td><td colspan="2">182,12</td><td colspan="2">118,30</td></tr>
<tr><td>1980</td><td>67.385</td><td>723.983</td><td>91</td><td colspan="2">469,00</td><td colspan="2">133,00</td></tr>
<tr><td>1981</td><td>154.754</td><td>768.155</td><td>83</td><td colspan="2">225,63</td><td colspan="2">162,78</td></tr>
<tr><td>B) CE (1981)</td><td></td><td></td><td></td><td>80</td><td>81</td><td>80</td><td>81</td></tr>
<tr><td>BR Deutschland</td><td>133.603</td><td>539.650</td><td>80</td><td>504</td><td>228,15</td><td>125</td><td>142,1</td></tr>
<tr><td>France[1]</td><td>8.299</td><td>19.310</td><td>66</td><td>341</td><td>205,43</td><td>110</td><td>140,15</td></tr>
<tr><td>Belgique/België</td><td>11.653</td><td>19.820</td><td>63</td><td>412</td><td>214,61</td><td>182</td><td>252,03</td></tr>
<tr><td>United Kingdom[1]</td><td>1.199</td><td>178.336</td><td>95</td><td>562</td><td>192,01</td><td>154</td><td>216,5</td></tr>
<tr><td>Ireland</td><td>-</td><td>1.537</td><td>100</td><td>-</td><td>-</td><td>196</td><td>325,09</td></tr>
<tr><td>Greece/Hellas</td><td>-</td><td>800</td><td>100</td><td>-</td><td>-</td><td>-</td><td>-</td></tr>
</table>

[1] Noch unverkauft am 31.3.82
Still unsold as at 31.3.82 : F 1600 Ztr; UK 7122 Ztr.
Toujours invendus au 31.3.82

TABLE 17 (0094S)

Calcul de la recette :
Berechnung Ertragserlöse : 1981 ECU
Calculation or the return :

Variétés / Sorten / Varieties	HA + TP 1981	HA - NP 1981	HA NP 1980	HA PP 1981	RCT/HA TP 1981 ECU	RCT/HA PP 1981 ECU
Hallertaueur	3,015.09	100.27	77.36	2,837.46	5,023	5,167
Hersbrucker Spät	4,589.06	520.06	490.00	3,579.90	6,425	7,183
Huller	1,402.00	11.00	40.00	1,351,00	6,178	6,215
Spalter	302.83	11.15	7.34	284.34	6,577	6,786
Tettnanger	935.66	36.00	300.00	599.66	6,537	7,560
Progress	146.90	1.20	9.20	136.50	4,728	4,825
Fuggles	607.72	25.60	25.10	557.02	6,262	6,649
Goldings	534.60	32.00	43.30	459.30	7,715	8,224
W G V	271.90	2.30	16.80	252.80	5,130	5,269
Tutsham	3.50	-	-	3.50	2,931	2,931
Bramling Cross	356.50	-	2.20	354.30	4,689	4,692
Challenger	859.30	62.40	67.86	729.04	7,884	8,498
Saaz	12.89	-	-	12.89	7,161	7,161
Strisselspalt	187.00	6.00	5.50	175.50	3,744	3,856
Bourgogne	5.02	-	-	5.02	4,628	4,628
Star	3.54	-	-	3,54	10,093	10,093
Perle	505.10	264.06	104.04	137.00	4,731	7,116
Saxon	84.60	-	1.60	83.00	4,634	4,669
Sunshine	0.90	-	-	0.90	5,368	5,368
AROMA	13,824.11	1,072.04	884.30	11,867.77	6,028	6,468
Northern Brewer	6,418.57	185.79	68.26	6,164.52	5,256	5,365
Brewers Gold	3,335.64	466.63	203.14	2,665.87	6,277	7,043
Bullion	296.04	11.70	3.10	281.24	5,375	5,549
Target	1,181.03	108.63	91.50	980.90	6,682	7,482
K. Midseason	110.60	-	-	110.60	4,290	4,290
Northdown	997.74	45.90	76.63	875.21	8,726	9,238
AMER/BITTER	12,339.62	818.65	442.63	11,078.34	5,944	6,288
Record	427.79	29.00	12.00	386.49	5,480	5,785
Viking	10.10	-	-	10.10	6,099	6,099
Triploid	-	-	-	-	-	-
Yeoman	56.60	54.30	2.30	-	558	1,360
Zenith	16.30	15.90	0.40	-	1,506	3,708
AUTRES/ANDERE/OTHERS	510.49	99.20	14.70	396.59	4,820	5,793
CEE-EWG-EEC	26,674.22	1,989.89	1,341.63	23,342.70	5,966	6,376

NP = New plantings (in first or second year)
Neupflanzorgen
Nouvelles Plantations

PP = Pleines plantations (à partir de la 3ème année)
Full plantations (third year and older)
Altfläche (ab dem dritten Jahr)

TP = Toutes plantations - Gesamtfläche - Total area

TABLE 17A (00943)

Calcul de la recette :
Berechnung Ertragserlöse : 1981 ECU
Calculation of the return :

Variétés / Sorten / Varieties	BR Deutschland	France	België/ Belgique	United Kingdom	Ireland
Hallertaueur	4,875	6,752	8,485		
Hersbrucker Spät	6,425				
Huller	6,178				
Spalter	6,495		9,318		
Tettnanger	6,538		4,456		
Progress				4,728	
Fuggles			6,906	6,247	6,512
Goldings				7,715	
W G V				5,130	
Tutsham				2,931	
Bramling Cross				4,689	
Challenger			5,515	7,886	
Saaz			7,161		
Strisselspalt		3,744			
Bourgogne		4,628			
Star			10,093		
Perle	4,371				
Saxon				4,634	
Sunshine				5,368	
AROMA	5,884	3,790	8,336	6,585	6,512
Northern Brewer	4,935	6,988	9,450	6,257	6,310
Brewers Gold	5,830	7,019	8,691	5,741	
Bullion				5,376	4,421
Target				6,682	
K. Midseason				4,290	
Northdown			4,340	8,735	8,158
AMER/BITTER	5,210	7,013	9,057	7,108	6,681
Record	5,226	6,435	7,797		
Viking				6,099	
Triploid					
Yeoman				558	
Zenith				1,506	
AUTRES/ANDERE	5,226	6,435	7,797	1,418	-
TOTAL/INSGESAMT	5,583	6,187	8,863	6,770	6,653

NP = New plantings (in first or second year)
Neupflanzorgen
Nouvelles Plantations

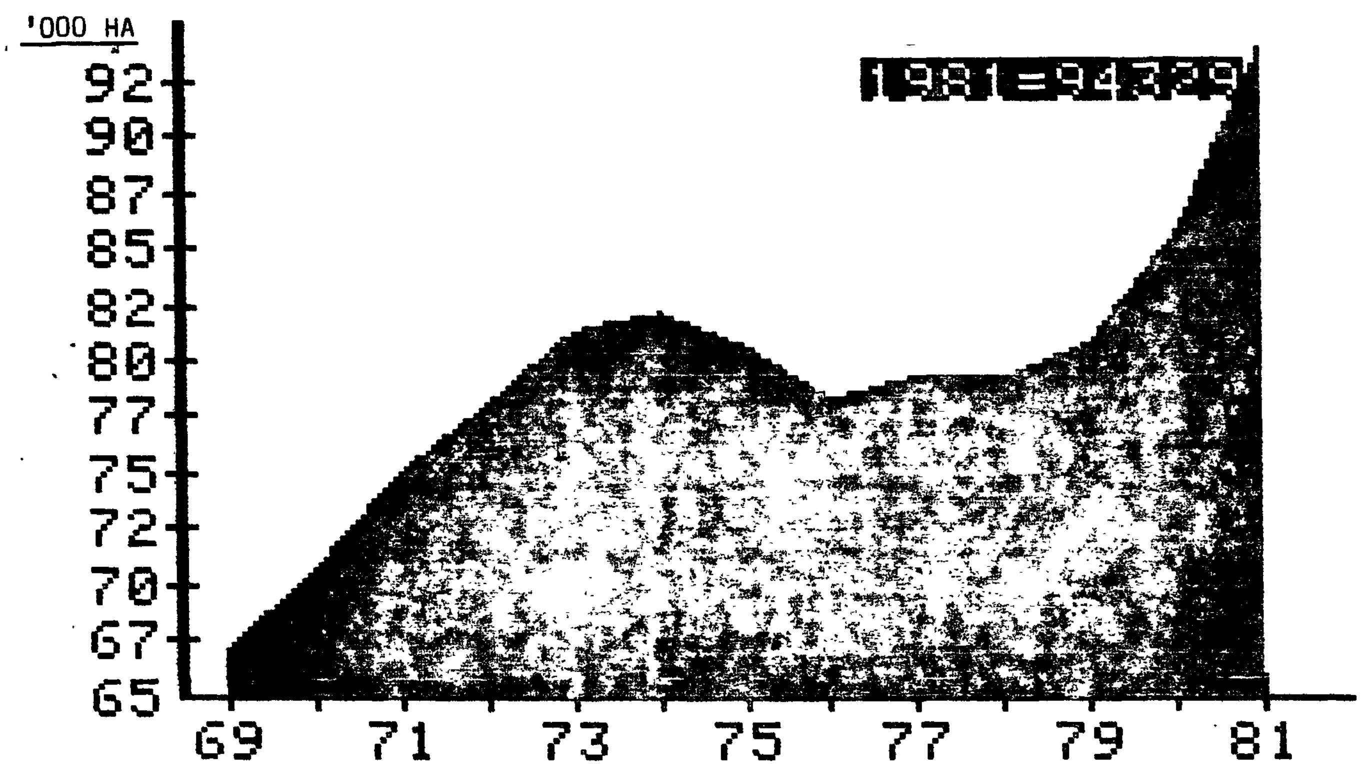
PP = Pleines plantations (à partir de la 3ème année)
Full plantations (third year and older)
Altfläche (ab dem dritten Jahr)

TP = Toutes plantations - Gesamtfläche - Total area

No price information for Greece (800 Ztr Brewers Gold)
Keine Preisangabe für Griechenland
Absence d'infoirmations sur le prix grèc

GR. 1

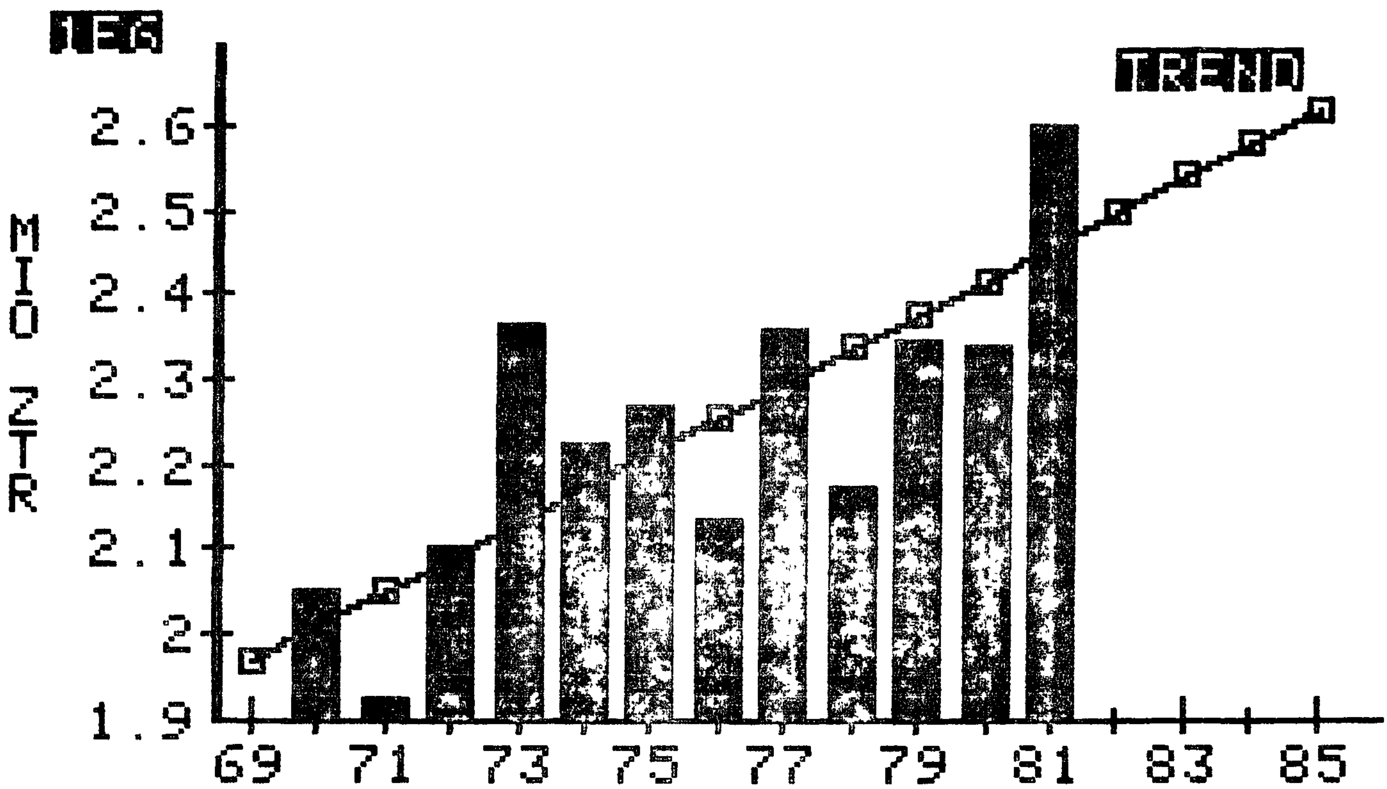
WORLD AREA/SUPERF./FLAECHE HA



SOUCES/QUELLEN: EC COM/IHB/COMMERCE

GR. 2

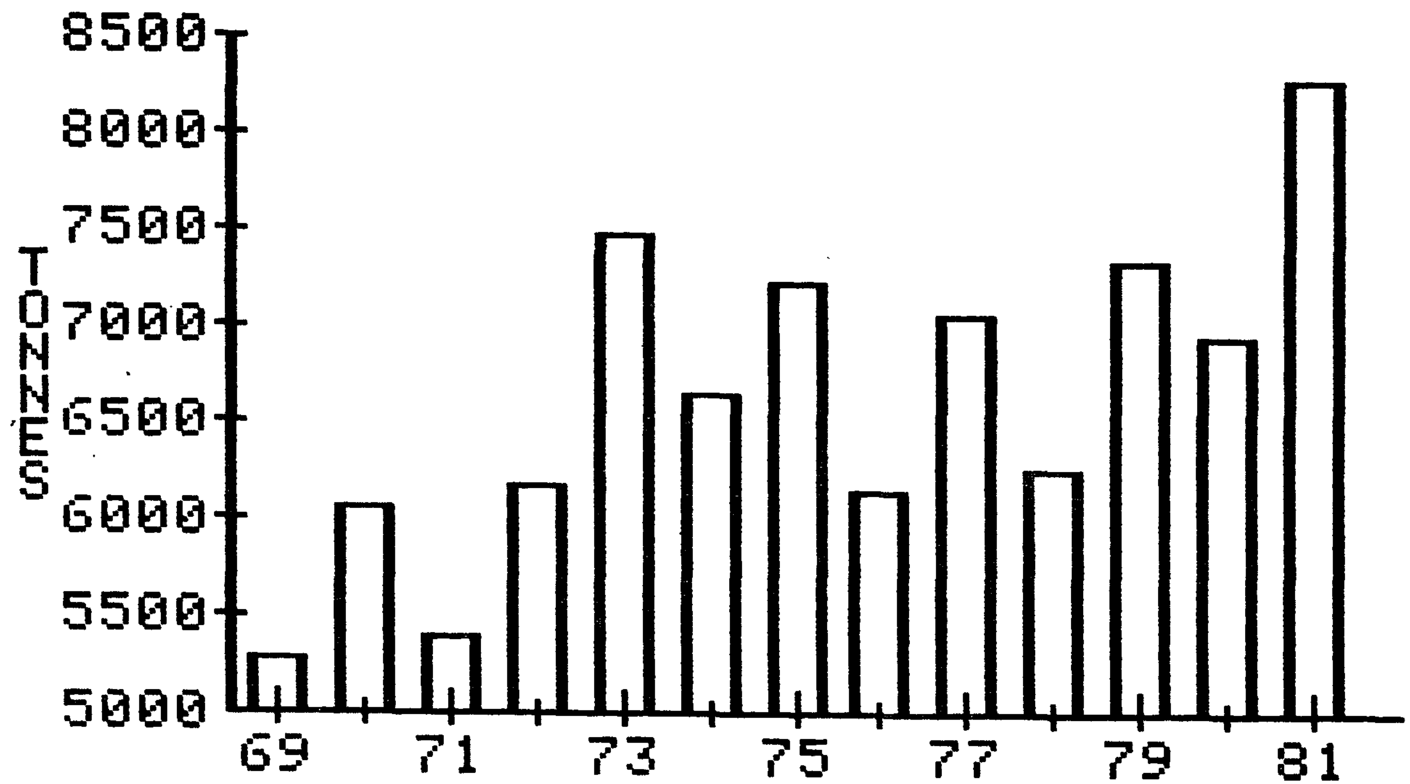
WORLD PRODUCTION HOPS & TREND



SOURCES/QUELLEN: EC COM & IHB
TREND = LINEAR REGRESSION
= ASSUMED DEMAND (NON-ADJ)

GR. 3

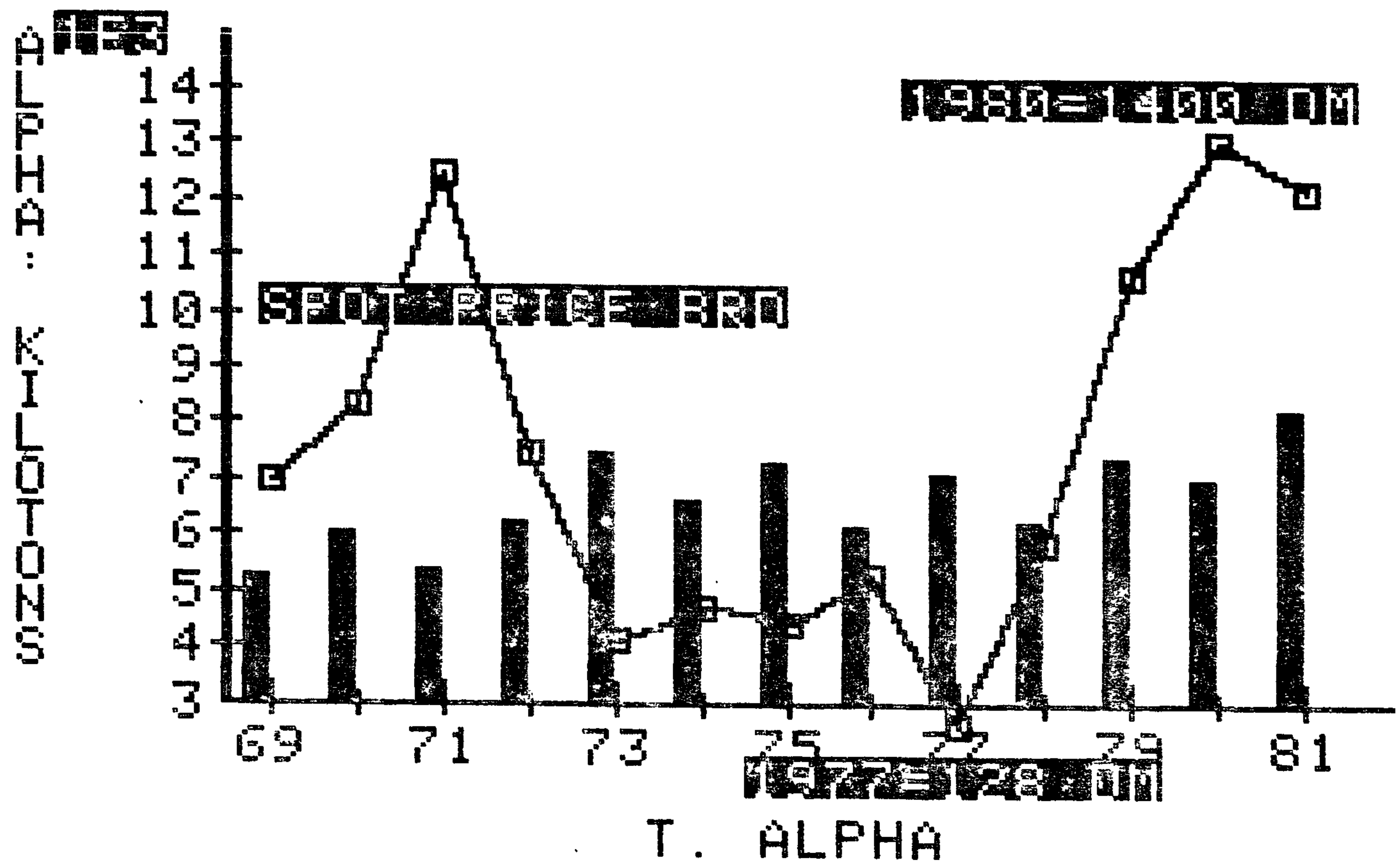
WORLD ALPHA PRODUCTION



SOURCES/QUELLEN: ECCOM/IHB/COMMERCE

GR. 4

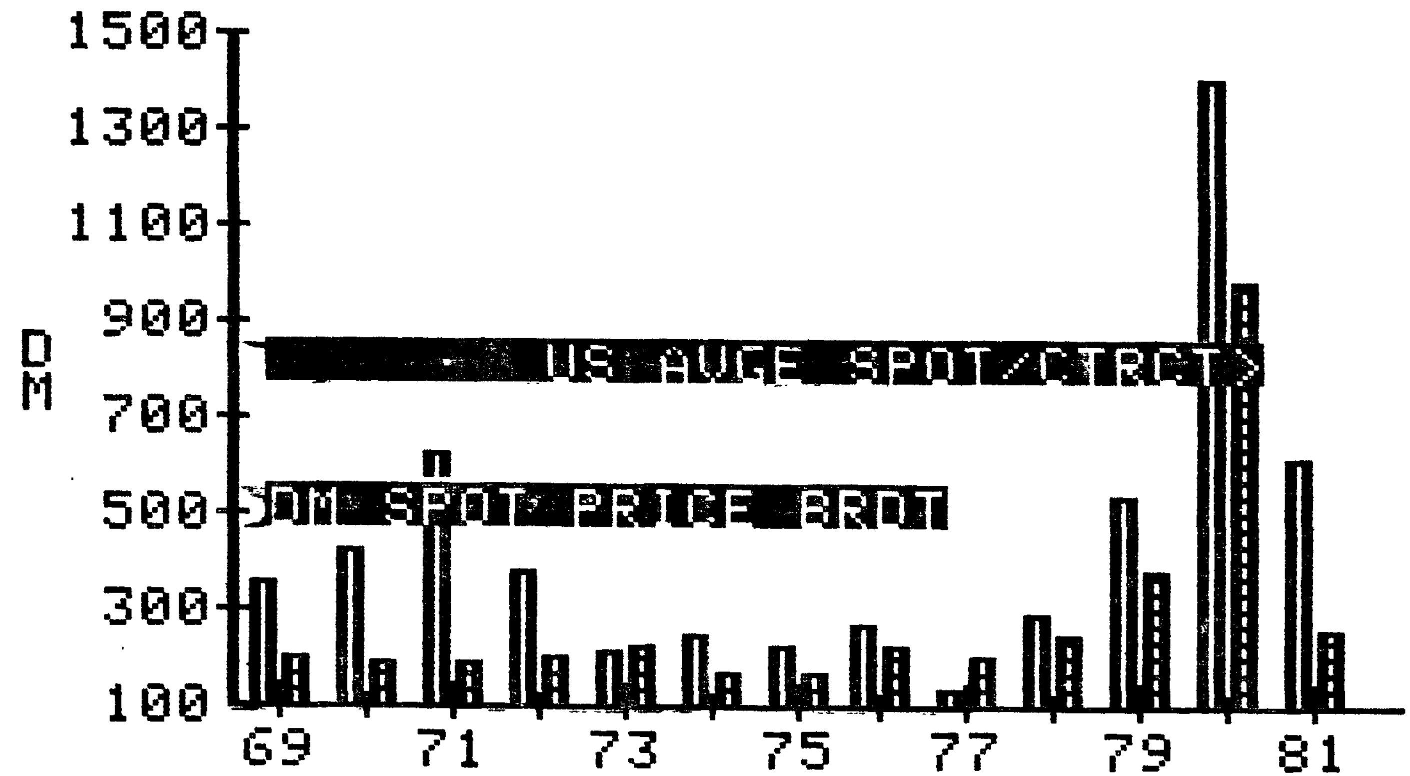
WORLD ALPHA PROD. AND BRD SPOT PRICES



SCALE: PRICE = X20 DM

GR. 5

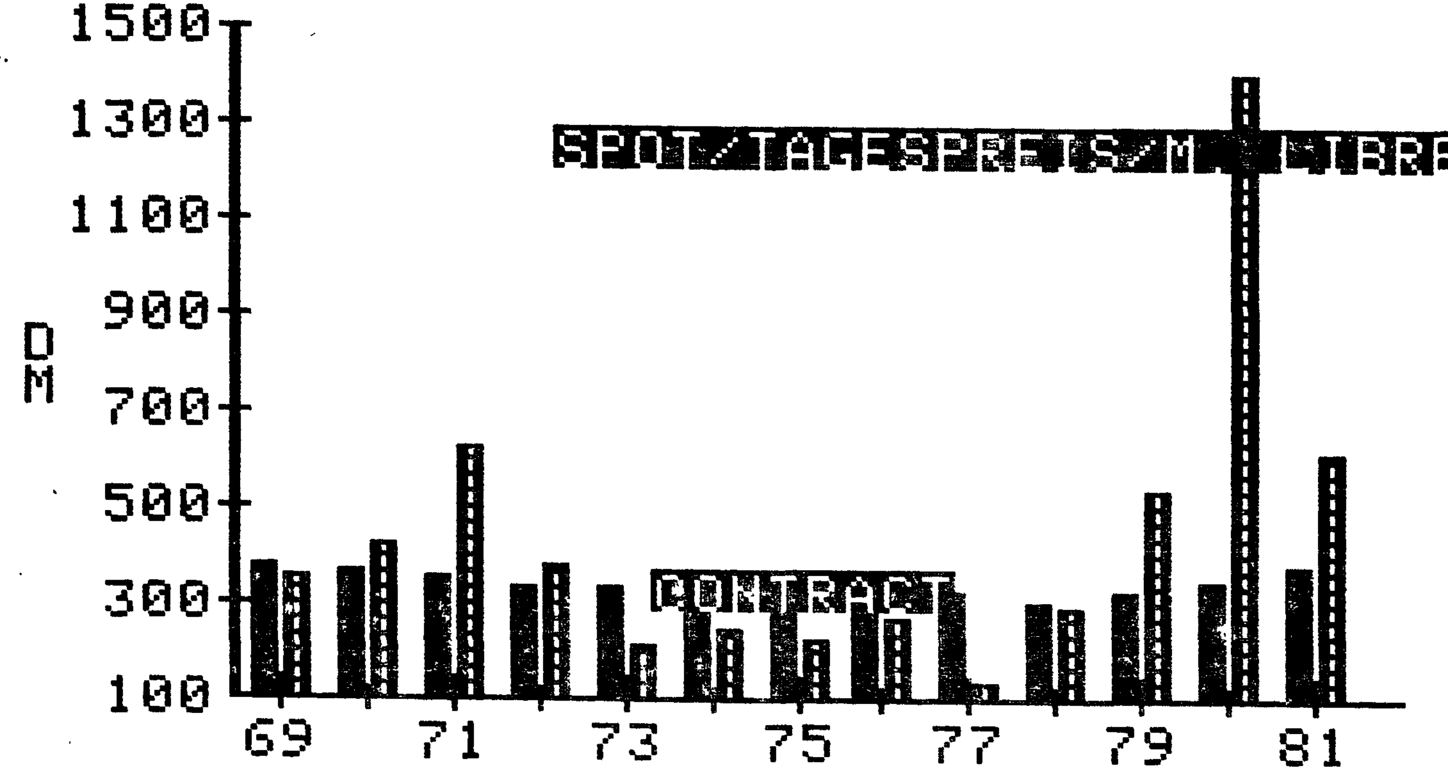
COMPARISON US AUGE & GERMAN SPOT PRICE



PRICES PER ZTR., AT $1 = DM2.6566
SOURCES/QUELLEN: BMLF (BRD) & USDA (US

GR. 6

HOPS PRODUCER PRICES BRD/RFA/W. GERMAN



ALL VARS. SPOT/CONTRACT WTD. AVGE.
SOURCE/QUELLE: BMLF-MIN. AGRICULTURE
COMP: COMEUR DG VI-E-3 APR 1982

Proposal for a

COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of aid to producers for the 1981 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 the 1979 Act of Accession, and in particular Article 12 (7) thereof,

Having regard to the proposal from the Commission,

Having regard to the opinion of the European Parliament (2),

Having regard to the opinion of the Economic and Social Committee (3),

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 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 1981 harvest shows the need to fix aid for certain groups of varieties of hops cultivated in the Community;

Whereas hops cultivated in Greece are eligible for aid as from the 1981 harvest; whereas, pursuant to Article 90 of the 1979 Act of Accession, Article 68 of that Act should apply for purposes of calculating the amount of the aid for hops harvested in Greece; whereas, since such aid was not granted in Greece prior to Accession, the amount of the aid to producers in respect of hops cultivated in Greece should be equal to one-fifth of the amount laid down for the Community as at 31 December 1980,

---

1) OJ No L 175, 4.8.1971, p. 1.

HAS ADOPTED THIS REGULATION:

Article 1

1. For the 1981 harvest, aid shall be granted to 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 as set out in the Annex.

Article 2

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

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

Done at Brussels,

For the Council

ANNEX

Aid granted for the 1981 harvest to hop producers in the Community

Group of varieties	Aid (ECU/ha)	
	For the Community as at 31 December 1980	For Greece
Aromatic	200	40
Bitter	180	36
Others	200	40

FINANCIAL STATEMENT

Date : 22.4.82.

1. BUDGET HEADING : Art. 181 (Hop) APPROPRIATIONS : 1982 : 9 Mio ECU

2. TITLE : Proposal for a Council regulation fixing the amount of the aid to producers for the 1981 harvest in the hop sector.

3. LEGAL BASIS : Article 12 of R.1696/71 of the Council.

4. AIMS OF PROJECT : Fixing of the aid for the 1981 harvest to hop producers in order to guarantee an equitable income level.

5. FINANCIAL IMPLICATIONS	PERIOD OF 12 MONTHS	CURRENT FINANCIAL YEAR (82)	FOLLOWING FINANCIAL YEAR (83)
5.0 EXPENDITURE - CHARGED TO THE EC BUDGET ~~X~~(~~REFUNDS~~/INTERVENTIONS)	5,1 Mio ECU	5,1 Mio ECU	-
- ~~XXXXXXXXXXXXXXXXXX~~			
- ~~XXXX~~			
~~5.1 XXXXXXX~~ - OWN RESOURCES OF THE EC (LEVIES/CUSTOMS DUTIES)			
- NATIONAL			
5.0.1 ESTIMATED EXPENDITURE 5.1.1 ESTIMATED RECEIPTS	only concerns the 1982 budget[1]		

5.2 METHOD OF CALCULATION

Groups	Area (ha)	Aid level per ha	Total Mio ECU
Aromatiques	13 824	200 ECU	2.76
Amères	12 339	180 ECU	2.22
Autres	510	200	0,10
Total	26 673	-	5.09

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

~~XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX~~ ~~YES/NO~~

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

~~XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX~~ ~~YES/NO~~

OBSERVATIONS : [1] The application for aid must be lodged within 5 months of the publication of this Regulation in the OJ: it may be expected that the whole amount of the aid will be paid out during the course of 1982.