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COM(83) 359 final

Brussels, 26 July 1983.

Proposal for a

COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of aid to producers for the 1982 harvest

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(submitted to the Council by the Commission)

COMMISSION REPORT TO THE COUNCIL

on the production and marketing of hops (1982 harvest)

COM(83) 359 final

EXPLANATORY MEMORANDUM

This report, presented each year according to the disposition of Article 11 of Regulation (EEC) No 1696/71 by the Commission to the Council concerns the hops harvest of 1982. It covers particularly:

- the production and market situation:
  a) on the world level
  b) on the Community level,

- medium-term forecasts,

- the development of returns to the producer.

The report is accompanied by a proposal for aid which is assessed by group of varieties. As a result, the average amount of aid passes from 191 ECU/ha in 1981 to 280 ECU/ha in 1982. This increase is necessary due to a decline in returns in most of the Community as a result of a depressed world market situation, compounded by very heavy yields in the Community at the 1982 harvest.

Proposal for a

COUNCIL REGULATION (EEC)

laying down, in respect of hops, the amount of aid to producers for the 1982 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),

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 1982 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;

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

HAS ADOPTED THIS REGULATION:

Article 1

1. For the 1982 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 as set out in the Annex.

Article 2

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

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

Done at Brussels,

For the Council

ANNEX

Aid granted for the 1982 harvest to hop producers in the Community

Group of varieties	Aid (ECU/ha)	
	For the Community as at 31 December 1980	For Greece
Aromatic	350	77,5
Bitter	200	41,0
Others	350	77,5

COMMISSION REPORT TO THE COUNCIL ON THE PRODUCTION AND MARKETING OF HOPS (1982 HARVEST)

CONTENTS

COMMISSION REPORT TO THE COUNCIL ON THE PRODUCTION AND MARKETING OF HOPS (1982 HARVEST)

This report is the twelfth that the Commission has laid before the Council on the production and marketing of hops of each successive crop since the adoption of the common organization of the market in hops in 1971, as provided for in Article 11 of Council Regulation (EEC) No. 1696/71.

The conclusions to each report include proposals on aid to hop producers, where necessary, to afford a supplement to the income derived from the previous calendar year's harvest. This report deals with that of 1982.

It is impossible for the Commission, at the outset of this report, to conceal the fact that the outlook on the world market for hops at the time of going to press is very threatening in the short-term. After a 1981 crop which in all main producer countries both inside and outside the Community was broadly in line with overall needs, and thus fully compensated for the shortfall caused by the inadequate harvest of 1980 in the Federal Republic, the world's largest producer, world area in 1982 rose by a further 2%, and production was all of 21% higher than in the previous year.

Following the growing realization that it was fast outstripping demand, a tendency which already characterized the market in the mid-seventies, the increase in area began to be mitigated by a small amount of grubbing and non-harvesting. The danger of runaway expansion had been detected by the Commission as early as 1979, after the substantial reduction in area and consequent re-balancing of the world market achieved by the Community by means of the structural measures adopted by the Council in 1977. The last three Annual Reports have in consequence contained the appropriate warning in their Introductions.

The proportion of forseeable production in the Community committed for disposal under pluriannual contracts (other than in Belgium, and in the United Kingdom after 1985) continues to be satisfactorily high. A goodly proportion of these contracts continue to be at high prices offered in 1979 and particularly following the inadequate 1980 harvest in the Federal Republic. However, a record crop in 1982 in the Federal Republic (28% higher than the five-year average tonnage) caused prices for the consequently large remaining amount of Community hops available on the spot or free market to plunge to levels approximating to those of the last bottom trough of the cycle in 1977. Despite the continuing satisfactory contract price levels, therefore, grower returns have suffered in all Member States except the United Kingdom.

The grave danger is therefore that, since low prices encouraged brewers to purchase the 1982 crop without much hesitation, Community stock levels at the eve of the <u>1983</u> harvest will turn out to be very high and the 1983 crop marketed very sluggishly even if only average in size, with consequent very great pressure on contract prices.

The Commission shares the view that the likely 2000 ha reduction in world area for the 1983 crop is not nearly enough. The current world area now appears to be about 14% greater than the 84000 ha first recommended in the report on the 1979 harvest to be appropriate for 1982. This acreage recommendation may well now appear to have been a little conservative, taking into account better knowledge which since then has become available of the world market, but nevertheless world demand for beer has failed to maintain the levels of annual increase reached in the nineteen-seventies, and the dosage itself of hops in beer is undoubtedly continuing to decline slowly. Taking all available information into account, including the need to fulfill existing contract sales, the Commission takes the view that in the medium-term world acreage should not be allowed to exceed an absolute maximum of 90 000 ha as compared with the estimated 96 000 of the 1982 crop. This area would seem to be perfectly adequate to satisfy overall demand even in the event of under-average harvests, if stock levels are taken into account.

On the world level, it is none the less clear that the exchanges of information and views which the Commission, working in close collaboration with the professional organizations in the sector constituted at both Community and international level has sought to promote over the past few years between the principal producing countries have not remained entirely without effect. This is reflected in the beginnings of voluntary grubbing on both sides of the Atlantic announced for the 1983 crop.

Admittedly, any concept of a rigidly static balance on so inelastic a commodity market as that for hops would be illusory, and the most that can reasonably be sught is rather a dynamic balance, within acceptable limits, as between user (i.e. brewer) demand, and price levels at which production continues to be viable. Thus, in the United States, stagnating prices and contract sales over the past two years have undoubtedly played as large a role as any other element in persuading growers to grub. A large measure of agreement is for the first time discernible as to the causes and location of the problem and the need for urgent adjustment of supply potential to within a reasonable range of demand. It is to be hoped that positive action will follow these expressions of cooperation.

As regards the Community, it continues to maintain its all-important export market, and as stated above the high contract level would seem to preclude the need for more than moderate area reduction. The Commission has therefore not found it appropriate to propose either structural measures or restrictive conditions as to the payment of the aid for the 1982 crop, as provided in Regulation 1696/71. Nevertheless, in the event of a very depressed market following an abundant 1983 crop, it reserves the right to put forward accompanying measures in addition to any aid proposal.

I. WORLD SITUATION

1.1 Structure of the market (Tables 1 & 2, graphs 1 - 4)

Since substantial quantities of hops are traded on the world market, many more countries being consumers (i.e. beer producers) than hop producers, prices are greatly influenced by the relationship between supply and demand at world level. In practice, prices everywhere tend to follow those prevailing on the markets of the main producer countries, except where internally fixed at a central level.

Thus the world market may be said to consist of five relatively homogenous sectors:

1 - Community	: net exporter in 1981-82 of 28% of its production (1980-81 level: 23%)
2 - United States	: net exporter in 1981-82 of 33% of its production (1980-81 level: 53%)
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

1.2. Patterns of international trade

Substantial quantities are, of course, traded within and between each of these sectors, and the Community in particular is very dependant for its outlets on the United States (which is a substantial net exporter of bitter hops but imports large amounts of aromatic hops from the Community) and the third world. Practically all the developing countries are non-producers except the People's Republic of China, which is estimated usually to have about 40 000 Ztr available for export after its domestic requirement. Most of the other state-trading countries increase their area only in line with their own beer production, which for reasons of currency shortage among others is now increasing only very marginally. The exception to this is the People's Republic of China, which currently projects a 20% annual rate of increase in beer production, admittedly from a very small current per capita consumption and a little export (beer production in 1982 was stated by Chinese sources to have been 12.3 mio hl or not yet one eighth that of the Federal Republic, which itself only has one-sixteenth of China's population.)

The Introduction to this report necessarily concentrated on the supply-side aspects of the current situation. On the demand side, it has to be concluded that the overall annual rate of increase in world beer production has decreased from the 3% or more which prevailed in the nineteen-seventies to less than 2%. To visualize what this means for producer countries it should be recalled that at current hopping rates even this one-percent of world beer production means over 23 000 Ztr of hops, in other words almost the entire production of a smaller producer such as France.

Under these conditions, it is necessary once again to refer to the increasing competitiveness of this market not only in terms of hop production, but also by reference to the demand for alpha, i.e. the combination of active ingredients in hops sought after by brewers which give beer its bitter flavour and aid preservation. Prices are increasingly determined not simply by quantity of hops but by their content in alpha or "bittering value". Hops from the United States are becoming increasingly competitive in that an increasing proportion of U.S. area is being replanted with newly developed varieties giving consistent very high alpha content, even within the limits of the overall area reduction taking place in that country. This means that the brewer's bittering requirements can be obtained from a smaller quantity of hops.

Seven countries are normally net exporters of hops: estimates of their surplus of production over requirements are given below:

<u>1982</u>: <u>Ztr (= 50 kg)</u> rounded to nearest 5000

	PRODUCTION	DOMESTIC REQUIREMENT	SURPLUS
F.R. Germany (1)	840 000	225 000	615 000
United States (2)	720 000	380 000	340 000
Czechoslovakia	250 000	110 000	140 000
Jugoslavia	110 000	45 000	65 000
Australia	55 000	25 000	30 000
Poland	45 000	35 000	10 000
China (P.R.)	90 000	50 000	40 000
Total amount of hops potentially available for international trade (i.e. 42% of 1982 production)			1 240 000

(1) Harvest 28 percent over 12-yr. average tonnage, but very low average alpha content (see table 1): in fact the "bittering value" produced is no greater than that of the 1981 crop, which was of broadly average quality and amount.

(2)Based on hopping ratio of 82 grammes per hectolitre (source: U.S. Dept. of Agriculture)

1.3. The International Market in 1982/1983 (Tables 9 and 10; graphs 4,5,7,8)

The Community continued to hold its own on the export market, and indeed net exports of hops and hop products rose once again to 13 240 tonnes (whole hop equivalent) for the marketing year Sept. 1981 - Aug. 1982 after a drop to 10 600 tonnes in the previous year. The Federal Republic attained its highest- ever level of exports if both intra- and extra-Community trade is taken into account. Community gross exports to third countries at 22 682 tonnes were twice their 1973 level, whereas U.S. exports to the Community have multiplied by four. Again since 1973, Community imports from all third countries have risen by 20%, the United States by 23%.

Well over half the total world harvest is now estimated to be processed after harvesting into products - powders and extracts. Their increasing usage over the past two decades has undoubtedly contributed to the worldwide reduction in hopping ratios, which has itself played a major role in slowing down the rise in demand, in conjunction with the stagnation in beer production already referred to. The technological economies in hopping thus achieved have been compounded, as described in previous reports, by public demand, both in the industrialized countries and in the new export outlets represented by the developing and newly industrialized countries, for lighter and less bitter beers. Moreover, the scarcity of hops of certain hitherto particularly sought-after varieties in 1980/81, and corresponding very high spot market prices, seem to have brought about a further reduction in hopping in many cases, which is unlikely to change upwards again with greater availabilty and lower prices.

1.4. The 1982 world harvest (Tables 1 and 5; graphs 5,8,10)

After the broadly average hop yields in most countries in 1981 (1.39 tonnes per hectare overall), the Commission notes an exceptionally high average yield, reflected in most countries, of 1.50 t/ha in 1982. Despite 530 ha grubbed and a further 830 ha left to stand at harvest-time in the United States, almost exactly thesame weight was harvested as in 1981. The very heavy crop in the Federal Republic and most other grower countries has already been referred to. The result is worth underlining: the 1981 world harvest was a quarter-of-a-million Zentner or 10% heavier than that of the preceding year, and this was compounded by an almost exactly identical rise for the 1982 crop.

The immediate result of this was the marked reduction in spot market prices in the Community to very low levels due to the higher quantity thus becoming available on the free market. These now approximate to those which had already prevailed in the United States since 1981, and a disastrous decline in growers' returns in the Community for the 1982 harvest has been avoided only by the relatively large proportion of production (68% even of this very large crop, which would have been 95% if the harvest had been average) guaranteed an outlet by existing satisfactorily priced contracts.

It was noted in the Commission's 1981 report that the harvest of that year had been marketed briskly without spot prices having fallen unacceptably, even if a decline (86%) from the extraordinary levels of 1980 was inevitable. The reason for this apparently balanced situation was undoubtedly that stocks had not thereby increased to abnormally high levels (see Table 3, line 6: before the 1982 harvest (i.e. 1 Sept. 1982) world stocks would appear to have been in fact only slightly over the six-month norm). The 1982 harvest was also marketed more easily, thanks to the cheap spot hops available, and possibly also due to the relative decline in interest rates, in the Community than in the United States, but it is to be feared that a high proportion of it will have been stocked by brewers, and accessorily by merchants, over and above normal requirements. This is reflected in the projected excess of stocks amounting to 26 000 tonnes or 43% over the six-month norm as at 1 Sept. 1983.

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

Price per Ztr (50 KG) in ECU	Free market 1979	1980	1981	1982	Contract price 1981	1982
Varieties:						
Aromatic						
Hallertauer	140.62	557.83	257.47	74.94	155.84	167.75
Tettnanger	171.49	655.95	265.00	104.85	182.84	202.31
Hersbruecker Spaet	145.80	492.05	220.96	52.81	149.06	160.76
Bitter						
Northern Brewer	119.42	477.88	263.49	85.43	132.50	143.68
Brewers Gold	111.50	472.79	190.09	46.60	123.09	134.74

1.5. Medium-term forecasts for the world market

I.5.1. Structure of the International Market

The Commission maintains its remarks made in the report on the 1981 harvest under this same section, in particular as regards the continuing preference on the part of certain large U.S. and developing country brewers for Community hops. However, the availability of cheap alpha acid on the world market in the form of hop extracts, with a very long shelf life, has increasingly come to mean that in those cases where a brewer can simplify his "recipe" and thus save costs and increase security of supply by excluding demands for special varieties, he will do so. The exceptions to this rule are happily formed by many Community brewers, both large and small, in addition to the largest U.S. brewer with 30% of the domestic beer market (70 million hectolitres or two-thirds of the entire output of the Federal Republic in 1981), who continue to purchase a substantial proportion of their requirement in the form of cone hops or products from the Community. The limited supply of certain Community varieties, aromatic in particular, means that a substantial premium over prices prevailing elsewhere will be paid to secure them. But in the long term this advantage cannot be reckoned upon to protect the Community's market share indefinitely, especially at the price differences currently existing between contracts for Community supplies and spot market levels in the U.S.

A word must be added as to growers' tactical approach to committing successive harvests under contract. In the U.S., the very high prices generated by the small Federal Republic harvest of 1980 incited the U.S. Hops Administrative Committee to raise the "saleable" percentage for the crop years up to 1984 to 130% of U.S. total requirement (including contracted exports). This gave many U.S. planters the opportunity to follow the example of those in the Community and sell ahead at these very good price levels. At the same time it was realized on both sides of the Atlantic that such prices were bound to cause the very excess of speculative planting over and above that amount secured by contracts which is at the root of the present imbalance on the world market. A reduction in this U.S. "saleable quantity" has been tentatively announced but only for the harvests as from 1985.

For a combination of reasons more growers reacted correctly to the near certainty of a downturn in the market by signing contracts for at least a basic portion of their potential crops up to 1987 in the Community than did in the United States. The negative aspect of this situation is however that, quite aside from the reduction in grower income brought about by the low 1982 spots, which, as already indicated, will continue or worsen if the 1983 crop is average in quantity let alone higher, lower priced contracts being signed as from now will begin to have their effect on successive years' overall income. This may well mean that even with some further grubbing in 1983, mostly in the United States, an improvement in market balance may not show itself before 1985 or 1986. An examination of sample prices offered for contracts beyond 1984 in fact reveals the danger that, without some element of much higher-priced contract sales and/or reasonable spot prices, overall returns could be inadequate to cover rising costs of production. This would force further grubbing which might otherwise not have taken place and thus further endanger the Community's share of the market.

1.5.2 Medium-term balance of the world market (Tables 3/4 and 7/8: graphs 5,6,7,10)

From estimates announced by the various producer countries, it is clear that there will at least a 2 000 ha or 2% reduction in world area for the 1983 crop. Whether more area will be grubbed or at least not harvested in the United States, over and above the 10% reduction already announced, depends basically on the development of prices over the coming few months: by the time this report is before the Council the U.S. area "strung" for harvest will have been confirmed. A very depressed market situation in that country has persisted to date, with very little interest in contracts beyond 1984 and indeed even lower prices than in the Community for 1982 spot hops, when the latter have been sold at all. (see Tables 2 and 5). As at 1 Sept. 1982 stocks in the United States were 37% higher than a year previously (Community: 29%). The major de-stocking of 1980/81 has therefore been more than compensated on both sides of the Atlantic over the past two years, and the moderate encouragement of higher stock levels deriving from cheap spot hops and, secondarily, lower interest rates than heretofore, which can be detected in the Community, does not appear to have had the same effect in the United States. Moreover, it may be expected that credit will not continue easily to be available for new area development, the produce of which is not guaranteed an outlet under pluri-annual contracts.

It emerges from the alternative forecasts suggested (table 4) that even a very modest yield in 1983 (1.34 t/ha) from an area fully 5 000 ha less than that recorded in the world in 1982, although producing a weight of hops only 1% over projected demand for 1983, would cause a stock level on the eve of the 1984 harvest 31% higher than the conventionally adopted six-month norm. The worst hypothesis (alternative IV) of a high yield (1.46 t/ha - still lower than this year's) on an area reduced only by the 2 000 ha announced to date would result in 55% excess stock.

It follows that a greater reduction of area for the 1983 harvest than that already undertaken is absolutely imperative if the balance on this market is not to be so disturbed that a panic reaction to anything except a very small 1983 harvest, and the ensuing failure of spot prices to rise even modestly, force so large an area reduction as to cause insecurity of supply in the short-term once again and with it the beginnings of new ill-considered expansion.

If supply potential can be brought back to within reasonable limits without delay, there is every prospect that a lasting balance, within the natural limits referred to in the introduction, can be achieved and preserved.

In such a situation, firstly, future spot price fluctuations would be confined to the amplitude determined by yield variations. Secondly, the international hop trade, which has to face such rapid and extreme variations in price from year to year whilst being bound, on the other hand, by delivery and price constraints from its brewer customers formalized in pluri-annual commitments, would be spared much of the insecurity under which it has had to labour for many years past. Thirdly, considered expansion of area could take place, by international concertation to the apparent beginnings of which allusion was made in the introduction to this report, only where justified by demand development. The latter is most likely to come about in the developing and newly-industrializing countries and might well not begin until a clear end is seen to the current international recession.

II. The European Community

II.1. Situation in 1982 (Tables 1, 2, 9, and 12 - 17; graphs 2,3,4,7,8,9)

In 1982 the Community accounted for 29% of the world area under hops and 39% of world hops production (but an estimated 37% of the total world alpha acid or bittering requirement). In 1981 it had accounted for 28% of the hop area and 35% of the world harvest. The Commission further notes that, whereas the varieties with high alpha acid content and the aromatic varieties had accounted respectively for 29% and 70% of Community production in 1971, the corresponding figures for 1982 were 50% and 48% respectively (cf. 50% and 48% in 1981, unchanged from 1980).

In 1982 Community production was 1 127 496 Ztr (56 375 tonnes) from an area of 27 566 ha. This area was 800 ha greater than in 1981 and 2 200 ha more than in 1980. The changes over the past two years may be broken down by Member State as follows:

	ha +/-	
	1982 cf 1981	1982 cf 1980
Federal Republic of Germany	+796	+2031
France	-10	-7
Belgium	+14	+37
United Kingdom	0	+153
Ireland + Greece p.m.		
Total area increase EC ("10")	800	2214

Production was up 22% on 1981 and 25% above the average of crops since 1972. In terms of bittering value, however, the very large Federal German crop only produced 7% more alpha acid than in the previous year or 14% more than the average since 1972. Alpha yields in both France and Belgium were also below average, and the result was that despite a good crop in the United Kingdom, the overall alpha content of Community hops was only 5.7% as opposed to the 6.45% of 1981 and the 6.2% average since 1972.

As described under section I.3 above, Community net exports rose satisfactorily once more after a fall in the previous year, gross exports to third countries in 1981-82 having accounted for 49% of the 1981 crop, and imports 21%. 85% of net exports were accounted for by the Federal Republic.

Turning to demand within the Community, beer production continues to stagnate or rise only very modestly in most Member States, whether because of stabilization at a relatively high level (Belgium) or for deeper and more general economic reasons including changing consumption patterns. In the Federal Republic, a slight increase of about 1% seems to be likely for 1982, and it is satisfying to note that in Italy, and to a lesser degree France, the marked decline in table wine consumption is at least being accompanied by a rise in the case of beer. However, for the second year running a marked fall in consumption was registered in the United Kingdom, and the total decrease in that Member State now amounts to 12% since the peak of 1979.

Demand for hops on both a world and a Community basis cannot be exactly calculated, in the absence of precise information as to the amount of hops used by each brewer in his beer, but has to be derived by inferential modelling from the available data on both hops and beer production. In the case of the Community model, this can be done with a relatively greater degree of confidence thanks to the annual declarations by the brewers', merchants', and growers' professional organizations of Community stock levels, and of course also official trade statistics.

Thus, demand in terms of hops within the Community seems to be still declining at a rate of 3.5% annually (1) for 1981 - 1982. This gradual decline continues to reflect the increasing technological economies achieved, inter alia by the use of more and better hop products, in hop usage. The point is reinforced by the apparently steeper decline in demand for alpha acid than for hops within the Community (2). These figures, when compared to the equivalent rates for the world market (Tables 7/8; graphs 5, 5A, 6), further bear out the importance to the Community of the export market if its share of the latter is to be maintained.

On the price front, the most noticeable feature of the 1982 market was the rapid further drop of spot prices to very low levels, as compared with the moderate levels of 1981 and in particular with the extremely hitgh levels of 1980, which reflected the shortage of specific varieties in the last-mentioned crop. These were the clearest indication of the very substantial surplus now present on the world market.

(1) see tables 12/13, line 4.
(2) see tables 14/15, lines 9 and 10

It has to be added, nevertheless, that within the Community, although some hops not committed under contract remained unsold as at 31 March 1983, more especially in Belgium and France, with some in the United Kingdom, average contract prices in fact rose slightly again due to the continuing effect of high-priced contracts from 1979 and especially 1980. This, combined with the relatively rapid sale of the bulk of the spot hops available thanks to the attractive new low prices, helped to avoid an even greater fall in average grower returns. Although the advance contract market in the Federal Republic quietened considerably perhaps fairly early on (end 1982), this was doubtless as much a reflection of the large amount of existing contracts covering much of domestic requirement for the years ahead, as of the fact that brewers had stocked up heavily on cheap 1982 spot hops. Furthermore, spot buying by Producer Groups also helped to maintain a certain firmness in the market.

The quantites sold on the free market in the Community have been as follows in recent years. The comparison with average spot prices in the Federal Republic has been appended to demonstrate the extent to which these are inversely proportional to spot market availability.(1)

	Ztr sold (most important without contract	Weighted average of spot prices varieties) DM
1982	363 795	167
1981	154 754	606
1980	67 385	1400
1979	150 000	533
1978	166 000	290
1977	327 000	128
1976	174 000	264
1975	203 000	221

II.2 Medium-term forecasts for the Community (Tables 12 - 15)

According to the previsions of the producer Member States themselves, Community area to be registered for the 1983 harvest will be 500 ha or nearly 2% less than the 1982 crop area, half of this reduction being in the Federal Republic and almost a further third in the United Kingdom. The resulting total area of 27 058 ha, at average yields, would produce between 48 000 and 52 000 tonnes or about 8% less

(1) See also table 5 and graph 8 for comparison with U.S.)

than in 1982, but nevertheless around 12% more than in 1981, the latter crop being estimated to have been reasonably in line, within the Community, with internal demand plus exports in 1981-82.

Sales under advance contract to date for 1983 are estimated at 39 650 tonnes (see Table 2): therefore, even in the case of an average crop on the above basis, anything up to 13 000 tonnes (260 000 Ztr) might be offered from the 1983 crop. This amount, as will be readily deduced from the spot market volume figures given above, is already 45% higher than the average 1975 - 1981, and of course in the event of a higher-than-average yield in the Community might be still higher. Internal Community demand in the same period can be estimated to have fallen by 8%, although exports have risen by 20%.

According to the Commission's forecasts, a relatively low yield and stationary exports would result in stock of hops (1) at the eve of the 1984 harvest amounting to 105% of estimated annual demand, whereas slightly lower exports and a higher yield would result in a figure of 143%.(2)

(1) Table 13, line 8, alternative 1
(2) ibid., alternative IV; cf.Tab. 15, lines 16/18.

II.3 <u>1982 Community harvest</u>
II.3.1 <u>Area under Hops</u> (Table 1)

In 1982 the area under hops in the Community once again increased from 26 698 ha to 27 566 ha.

There was a reduction in the following varieties:

Hallertauer	W.G.V.	Viking
Hueller	Tutsham (>0)	Strisselspalt
Challenger	Bramling X	Bourgogne
Progress	Saxon	Perle
Saaz	Bullion	Record
Goldings	Keysworth's Midseason	

and an increase in the following:

Tettnanger	Star	Target
Hersbruecker	Northdown	Yeoman
Zenith	N. Brewer	Brewers' gold

Overall, therefore, aromatic varieties have increased by 212 ha, bitter varieties by 524 ha. Of the registered varieties, no plantings of Tutsham or Triploid appear to be extant.

On this area, production was 1 127 496 Ztr or 56 375 tonnes, giving an average yield of 40.9 Ztr or 2.04 tonnes per ha, the highest recorded.

New plantings (1)

In 1981, 1543 hectares in the Community were in their first year of production, having been planted in the previous year. It willbe recalled that European growers expect an average yield of 40% at the first harvest, 65% at the second, a full yield from the third year onwards.

III.3.2 Prices and Contracts (2)

Hop prices for the 1982 harvest were as follows, compared to 1980 and 1981:

	Average Community prices (ECU/Ztr)				
	1980	1981	1982	1982/81%	1982/80%
Contracted	133	163	177	+8.5	+33.1
Non-contract (spot)	469	226	65	-71.2	-86.1

(1)See Table 17, second column.
(2)See Table 16.

Quantities marketed under advanced contracts increased once again for the third year running:

Year	Contracts	%	Spot	%
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
1982	763 701	67.4	363 795	32.3

III.3.3 Returns per hectare (Table 17, 17a)

Returns per hectare fell in 1982 after having risen in each of the four successive years:

ECU/ha for areas in full production
(i.e. from the third year after planting)
(i) by variety group

ECU/Ztr	1980	1981	1982	1982/81%	1982/80%
Aromatic	4 833	6 468	6006	-7.1	+24.3
Bitter	5 139	6 288	6393	+1.7	+24.4
Others	6 801	5793	4663	-19.5	-31.4

(ii) by country

	1980	1981	1982	1982/81%	1982/80%
FR Germany	4 482	5 979	5 505	-7.9	+23
France	6 179	6 261	4 920	-21.4	-20.4
Belgium	10 586	9 119	5 272	-42.2	-50.2
U.K.	5 740	7 255	8 288	+14.2	+44,3
Ireland	3 938	7 079	7 986	+12,8	+102.3

Growers' total returns therefore remained practically unchanged as compared with 1981 and 1980:

	ECU
1978:	94 323 773
1979:	115 510 745
1980:	126 832 608
1981:	158 407 425
1982:	158 736 799

The Commission notes that in 1982 there were 6494 growers in the Community, of whom about 130 were independent. With the formation of a Producer Group in the United Kingdom by all except two of that Member States' growers, and its subsequent recognition, the proportion of Community hop growers who are members of recognized groups rose to 98%.

x-x-x-x-x-x-x-x-x-x-x-x-x-x-x

III

CONCLUSIONS

III.1

In the light of the background and medium-term prospects set out in the foregoing report on the world and Community hop market situations, the Commission, in proposing aid for the 1982 harvest, is seeking to pursue the following aims:

(1) to afford a modest supplement to grower incomes, which fell substantially in all producer Member States with the exception of the United Kingdom, in comparison with the generally adequate revenue obtained from the 1981 harvest. As has been illustrated, this was the result of unusually high yields which produced a corresponding increase in the amount needing to be sold on the free market, prices on which fell to levels which were last seen in 1977. In the two smaller producer Member States - France and Belgium - a very marked fall in returns was registered bringing them below estimated production costs.

(2) to differentiate, in so doing, between the relative income derived from the different groups of varieties: income from

aromatic varieties fell, on the greater part of Community area, while that from bitter varieties stayed almost unchanged. This was not merely the consequence of the prevailing world surplus and the unexpectedly higher yield in 1982: in fact most aromatic hops in the Community would have attracted satisfactory contract prices if it had not been for circumstances affecting trade for which growers were in no way responsible.

It has been shown that the prevailing world surplus is even more marked in terms of bitter hops, and since Community aromatic varieties play an important part on the latter's substantial export market, it has been thought appropriate to demonstrate in the proposal the Commission's wish to continue supporting Community growers, not only in the face of an adverse short-term market, but also particularly in that part of the international market where specific Community hops are particularly sought after.

Bearing in mind these considerations, the level of aid proposed has been carefully judged so as neither to create an incentive for further excessive planting, nor artificially to distort price formation on the world market.

Finally, it is proposed to allocate the higher level of aid also to the third group of varieties ("others"), since it includes promising new varieties with combined aromatic and bitter characteristics still in a relatively early stage of introduction onto the market, and offering good sales prospects, but for which, fortuitously, a substantial fall in income was registered in 1982.

(3) to continue to provide the means whereby voluntary Producer Groups, which now account for practically the whole of Community area, may contribute to the rational management of the market. Community aid has in recent years been deployed by these groups, to this end, in a variety of cost-effective ways, in accordance with the revised provisions of the common organization of the market. Such action was also taken in 1982 with the object of partially relieving the difficult market situation which followed the harvest.

III.2 The Commission therefore proposes the following amounts of aid:

Variety Group	Aid (ECU/ha)
Aromatic	350
Bitter	200
Other	350

The average aid level per hectare, at 280 ECU, would thereby rise in comparison with the 1981 harvest (191 ECU; 1980 = 227 ECU). Average income on established areas (including such aid) would thereby be brought to 6405 ECU/ha (1981: 6567 ECU/ha; 1980: 5470 ECU/ha), and, by variety groups to:

including aid	income ECU/ha	
	1982	1981
Aromatic	6356	6668
Bitter	6593	6468
Other	5013	5993

(The amount of the aid thus proposed represents only 4.9% of the average price per Zentner, given the very high yield in the Community in 1982. (1981 = 3.4%)

The impact of this proposal on the EAGGF budget, Guarantee Section, at exactly 7.7 mio ECU, would thereby rise in comparison with the previous year (1981: 5.9 MIO ECU, 1980: 6.2 MIO ECU, 1978: 10 MIO ECU).

A. UNITS + ABBREVIATIONS USED

ALGO (Tab. 3, 4, 7, 8) = algorhythmn.
Hypothetical world stock position at 1 Sept. (i.e. at eve of a given year's harvest) calculated from production and apparent demand (see above) by iterative mathematical methods.

Note: the stock position given for the Community (Tab. 12, 13, 14, 15) is not thus inferred but is as indicated by the Community professional organizations (for the first time for 1 Sept. 1979).

The same figure is used for EEC stock expressed in bittering value tenus (Tab. 14 - 15, L. 18, 19) simply by multiplication by the alpha content in % of each Community harvest (depreciated to bittering value, see above; and Table 6).

"ALPHA" = ALPHA ACID CONTENT

UNITS
- AS % of Hops weight
- AS Tonnes (T) Alpha Production
- AS KG/HA = KGS Alpha Acid per Hectare (yield)
- AS GM/HL = Grammes per Hectolitre (in beer)

ALTS Alternative (forecasts) (Tab. 4, 8, 13, 15)

BV Bittering value in Tonnes i.e. Alpha Acid content or production depreciated by storage loss (see Tab. 6)

DREG Hypothetical demand estimate arrived at from production (hops, alpha, BV) by a regression method - linear, 1st, 2rd, or 3rd order or autoregressive etc.

GM/HL 1) Hopping ratio (Grammes per Hectolitre in beer)
2) Alpha Acid Dosage (" " " " ")

KT (Kilotons) = 1.000 tonnes = 20.000 Ztr.

L. LINE (e.g. L2/L6 result obtained by dividing Line 2 (of a table) by line 6

MHL Millions of Hectolitres (beer)

T/HA Tonnes per Hectare (yield of hops)

ZTR (Zentner) = 50 kg

Calculation of return/ha EEC (Table 17)

NP - New Plantings (first or second year)

PP - Established planting (third year and older)

TP - Total area i.e. PP + NP (1) + NP (2)

B. PRODUCER MEMBER STATES:

BRD - Federal Republic
UK
B
F
IRL
GR

C. EXCHANGE RATES EMPLOYED FOR RETURN CALCULATION

As at 1 Nov. 1982

1 ECU = NATIONAL CURRENCY		(as at date last monetary change to ECU)
DM	2,57524	22.10.82
£ ST	0,618655	1. 4.80
FB/BF	44,9774	22.10.82
FF	6,37174	22.10.82
£ IRL	0,691011	26. 6.82

List of Tables and Graphs

STATISTICAL TABLES

<u>TAB. 11:</u> World beer production by country 1975 - 1982 (Joh. Barth + Sohn, and other sources)

<u>TAB. 12:</u> <u>EC market balance 1973 - 1983:</u> production and apparent demand with resulting stock levels

<u>TAB. 13:</u> Alternative forecasts for 1 Sept. 1984 based on TAB. 12 result for 1983 and four alternative combinations of area and yield in 1983

<u>TAB. 14:</u> <u>EC market balance 1973 - 1983</u> expressed in terms of apparent stock level in bittering value (basis for next table)

<u>TAB. 15:</u> <u>EEC market 1983 - 1984:</u> alternative forecasts for 1 Sept 1984 stock levels (bittering value) derived from Table 14 (4 alternative yield and export hypotheses)

<u>TAB. 16:</u> <u>EEC market:</u> quantities and price levels contract and spot markets (1982 harvest)

<u>TAB. 17:</u> <u>EEC harvest 1982:</u> synopsis of Member States returns per variety: - area (NP, PP), prices (ECU) spot/contract, returns ECU/HA and ECU total revenue

<u>GRAPHS</u>

1. <u>World Hops area</u> 1969 - 1983

2. <u>World Hops area:</u> percent annual variation <u>US/EEC</u>

3. Percentage of <u>world area by country</u>

4. <u>World Hops market 1969 - 1982:</u> Production, estimated stocks (world); declared stocks (EEC + USA)

5. <u>Alternative demand estimates</u> hops 1969 - 1985

5A: GM/HL hopping ratio world + EEC

6. <u>Alpha Acid:</u> Production and estimated demand 1969 - 1983

7. <u>Hop exports</u> 1969 - 1981 - USA and EEC

8. Hop prices: Fed. Republic + USA spot/contract (nominal)

9. Hop prices: EC producer Member States at constant prices (GDP deflated - 1982 prices)

10. Percentage annual variation: World area cf. Fed. Republic average contract price

11. EC returns ECU

12: EC returns: Percentage annual variation

Note

PRODUCTION FIGURES (TAB. 1)

For the EC Member States' 1982 harvest, these are slightly higher than the official returns (Tab. 16, 17), since quantities registered after 31 March 1983 are included.

The figures for world hops and alpha production used in Tab. 7 & 8 are for some years also slightly different from the "master" figures given in Tab. 1(+A-C) and Tab.5: this is purely due to rounding.

STATISTIQUES DE LA PRODUCTION (TAB.1)

Les quantités indiquées au Tabl 1. pour les récoltes de 1982 des états membres producteurs de la CEE apparaissent légèrement supérieures aux relevés officiels tels qu'ils figurent aux tabl. 16 et 17; cette différence est due au fait que le tabl. 1 a été mis au jour le plus tard possible et comprend donc les quantités éventuellement enregistrées après le 31 mars 1983.

Les chiffres concernant la production mondiale de houblons et d'acide alpha figurant aux tabl. 7 et 8 peuvent également différer légèrment des indications définitives des tabl. 1 (+a,b,c) et 5 à cause du besoin d'arondissement.

VERMERK zur Produktionsangaben.

Die in der Tabelle 1 enthaltenen endgueltigen Erntemengen 1982 fuer die hopfenerzeugenden EWG-Mitgliedstaaten sind etwas hoeher als die in den Tabellen nr. 16 und 17 zusammengefassten ambtlichen Erhebungen; die erstgenannte Tabelle enthaelt auch die eventuelle nach 31 maerz abgewogene Mengen.

Die in den Tabellen 7 u. 8 verwendeten Angaben fuer die Welthopfen- bzw. Alphasaureproduktion koennen auch wenig von den in den Tabellen 1(+a+b+c) und 5 enthaltenen endgueltigen Angaben abweichen: dies ist auf die Abrundung zurueckzufuehren.

EUROOM-VI-E-3 HOPS/HOPFEN/HOUBLON: WORLD PROD./WELTERZEUGUNG/PROD. MONDIALE (REV.14.1.83)
TAB. 1 (83/6)

I COUNTRY 1982	II AREA HA 1982	IIA AREA HA (+/-) 1982-81	IIB AREA HA (+/-) 1982-1978	III PROD ZTR EST. 1982	IV YIELD T/HA EST. 1982	V PROD ALPHA T EST. 1982	VI PERCENT ALPHA EST. 1982	VII YIELD ALPHA KG/HA 1982	VIII BEER PROD M/HL (BARTH) 1982	IX FORECAST AREA HA 1983	X AREA CHANGE HA 1983 - 82
BUNDESREP DEUTSCHLD	19985	795	2363	849741	2.13	2188	5.15	109.49	94.816	19700	-285
FRANCE	750	-10	-137	34692	2.31	84	4.84	112.00	22.41	703	-47
BELGIUM	859	13	8	40406	2.35	120	5.94	139.70	14.7	834	-25
UNITED KINGDOM	5871	63	34	205747	1.75	811	7.88	138.14	59.78	5721	-150
IRELAND	75	0	10	1755	1.17	7	8.00	93.60	5.59	75	0
GREECE	25	0	0	570	1.14	2	8.00	91.20	2.9	25	0
EEC (INC. IRL + GR)	27565	861	2278	1132911	2.05	3212	5.67	116.54	238 (CEE"10")	27058	-507
UNITED STATES	16874	-549	4349	716876	2.12	2688	7.50	159.30	228.03	15000	-1874
AUSTRALIA	1378	203	463	52540	1.91	263	10.00	190.64	19.682	1400	22
JUGOSLAV.	3331	69	194	114840	1.72	353	6.15	105.97	13.4	3380	49
ESPANA	2003	0	200	47495	1.19	166	6.99	82.88	21.499	2003	0
CZECHO-SLOVAKIA	11759	-68	-77	250960	1.07	517	4.12	43.97	23.911	11772	13
DDR	2210	90	106	66880	1.51	228	6.82	103.17	25	2250	40
POLSKA	2502	57	102	54280	1.08	122	4.50	48.81	10.3	2502	0
HUNGARY	560	-2	10	14500	1.29	30	4.14	53.57	7.825	563	3
TOTAL IHB + EEC	68182	661	7625	2451282	1.80	7579	6.18	111.16	587.647	65928	-2254
JAPAN	1108	-21	-130	29820	1.35	91	6.10	82.13		1050	-58
USSR EST.	17000	500	4000	200000	0.59	450	4.50	26.47		17000	0
ROMANIA "	1800	400	700	34000	0.94	77	4.50	42.50		2000	200
BULGARIA"	1142	81	-248	18272	0.80	37	4.00	32.00		1500	358
CHINA PR"	5000	1000	2000	90000	0.90	225	5.00	45.00		5000	0
OTHERS "	2000	100	0	60000	1.50	180	6.00	90.00		2000	0
WORLD ADDED	96232	2721	13947	2883374	1.50	8638	5.99	89.76	964.15 FORECAST	94478	-1754
WORLD AGREED											

(*)USA TOTAL STRUNG FOR HARVEST: ACTUALLY HARVESTED AREA 1982: 16026 HA
(*)US-GESAMTFLAECHE AUFGELEITET FUER ERNTE: GEERNTET WURDEN 16026 HA
(*) USA: SUPERFICIE EXISTANATE A LA CUEILLETTE: SEULES 16026 HA FURENT RECOLTEES

COMEUR VI-E-3 HOPS/HOUBLON/HOPFEN: TAB. 1A (82/4: REV 1 SEPT 82)

I COUNTRY 1981	II AREA HA 1981	III PROD ZTR 1981	IV YIELD T/HA 1981	V PROD ALPHA T 1981	VI PERCENT ALPHA 1981	VII YIELD ALPHA KG/HA 1981	VIII BEER PROD M/HL (BARTH) 1981
BUNDESREP DEUTSCHLD	19190	674074	1.76	2019	5.99	105.21	93.7
FRANCE	760	28729	1.89	93	6.47	122.37	21.8
BELGIUM	846	31437	1.86	101	6.43	119.39	15
UNITED KINGDOM	5808	186788	1.61	754	8.07	129.82	61.5
IRELAND	75	1537	1.02	7	9.11	93.33	5.8
GREECE	25	800	1.60	3	7.50	120.00	2.9
EEC (INC. IRL + GR)	26704	923365	1.73	2977	6.45	111.48	236.8 ("10")
UNITED STATES	17442	717955	2.06	2520	7.02	144.48	228.9
AUSTRALIA	1175	47538	2.02	228	9.59	194.04	20.2
JUGOSLAV.	3262	108050	1.66	310	5.74	95.03	12
ESPANA	2003	50509	1.26	177	7.01	88.37	20.9
CZECHO-SLOVAKIA	11827	257700	1.09	618	4.80	52.25	23.9
DDR	2120	54608	1.29	182	6.67	85.85	24
POLSKA	2445	56860	1.16	90	3.17	36.81	11.3
HUNGARY	562	15080	1.34	37	4.91	65.84	7.8
TOTAL IHB + EEC	67540	2231665	1.65	7139	6.40	105.70	585.8
JAPAN	1129	25700	1.14	65	5.06	57.57	46.5
USSR	16500	180000	0.55	550	6.11	33.33	65
ROMANIA	1400	22300	0.80	50	4.48	35.71	11.5
BULGARIA	1061	14900	0.70	33	4.43	31.10	5.4
CHINA PR	4000	80000	1.00	220	5.50	55.00	7
"OTHERS"	1900	51000	1.34	153	6.00	80.53	P.M.
WORLD ADDED	93530	2605565	1.39	8210	6.30	87.78	949.9
WORLD AGREED							950

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	

COUNTRY	AREA HA	PROD ZTR	YIELD T/HA	PROD ALPHA T	PERCENT ALPHA	YIELD ALPHA KG/HA	BEER PRO M/HL (J.BARTH)
1979	1979	1979	1979	1979	1979	1979	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	AREA HA	PROD ZTR	YIELD T/HA	PROD ALPHA T	PERCENT ALPHA	YIELD ALPHA KG/HA	BEER PRO M/HL
1978	1978	1978	1978	1978	1978	1978	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	

TAB. 2 (83/2) COMEUR VI-E-3 REV.15.4.83
(SOURCE/QUELLE: IHB ECON. COMMITTEE XII/82 ....

COUNTRY/ LAND/PAYS	EST. FORWARD SALES/ GESCHAETZTE VORVERKAUEFE VENTES ESTIMEES SOUS CONTRAT				
YEAR:	1983	1984	1985	1986	1987
BR DEUTSCHLAND	590000	590000	580000	400000	250000
FRANCE	15216	7176	5760	100	40
BELGIQUE/ BELGIE	10600	6000	5500	0	0
UNITED KINGDOM	175500	123000	77500	0	0
(IRL+ GR P.M.)	2300	2300	2300	2300	2300
EEC/EWG	793616	728476	671060	402400	252340
USA	559100	508182	374545	201819	100909
AUSTRALIA	48000	45000	31500	31500	?
JUGOSLAV.	92010	81000	75200	60060	50050
ESPANA *	50000	50000	50000	50000	?
CSSR *	240000	240000	250000	250000	
DDR	64000	68000	72000	73000	75000
POLSKA	40000	40000	40000	40000	40000
MAGYARORSZAG/HUNG.	15000	15000	15000	0	0
TOTAL IHB	1901726	1775658	1579305	1108779	518299
% CF/VGL. PROD.'82	79	73	65	46	21
% CF/VGL PROD. MOYEN/DURCHSCHNITT IHB 1978-82	92	86	76	53	25

* ESTIMATE

TAB.3 .83/3 HOPS: WORLD PROD. & DEMAND/HOPFEN: WELTERZEUGUNG & NACHFRAGE EC COM VI-E-3 REV 15 4 83

L. NO		1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
1	PRODUCTION T	94946	102536	96050	105172	118301	111176	113502	106760	117796	108497	117234	116774	130278	143413	
2	DEMAND (L12XL10)	94094	95082	98685	104085	105864	109032	113632	114363	118170	118188	116850	116662	118394	121106	120153
															(83/82+%=	-1
3	+(-)	852	7454	-2635	1087	12437	2144	-130	-7603	-374	-9691	384	112	11884	22307	****
4	STOCK 1 SEPT. ALGO.	47517	48369	55823	53188	54275	66712	68856	68726	61123	60749	51058	51442	51554	63439	85746
5	STOCK "NORMAL 6 MONTHS	47047	47541	49343	52043	52932	54516	56816	57182	59085	59094	58425	58331	59197	60553	60077
6	+(-)	470	828	6481	1146	1343	12196	12040	11545	2038	1655	-7367	-6889	-7643	2886	25669
6A	L4=NO MONTHS	6	6	7	6	6	7	7	7	6	6	5	5	5	6	9
7	HA	66982	70666	75042	78015	81247	82083	80527	78206	79262	79170	80439	85680	93511	96232	ALTS
8	+/- SINCE PRE VIOUS YEAR		3684	4376	2973	3232	836	-1556	-2321	1056	-92	1269	5241	7831	2721	
9	YIELD T/HA	1.42	1.45	1.28	1.35	1.46	1.35	1.41	1.37	1.49	1.37	1.46	1.36	1.39	1.49	ALTS
10	BEER PROD MHL (NEXT YR/NAECHSTES J/ ANN. SUIV)	630	658	689	731	771	802	826	848	873	909	938	950	964	978	993
11	% <+> OF PREV YR/ANN. PREC.			4.71	6.10	5.47	4.02	2.99	2.66	2.95	4.12	3.19	1.28	1.49	1.48	1.45
12	GM/HL (DREG)	143	138	135	135	132	132	134	131	130	126	123	121	121	122	121
13	GM/HL:%+/-PREV.YR/A.P		-3.50	-2.17	0.00	-2.22	0.00	1.52	-2.24	-0.76	-3.08	-2.38	-1.63	0.00	0.83	-0.82

TAB. 4:ALT. FORECASTS/PREVISIONS ALTERNATIVES

.83/3 HOPS:		ALT I		ALT II		ALT III		ALT IV	
		1983	1984	1983	1984	1983	1984	1983	1984
L. NO									
1	PRODUCTION T (ALTS: L7 XL9	120600		131400		125960		137240	
2	DEMAND (L12XL10))	120153	120947	120153	120947	120153	120947	120153	120947
3	+(-)	447		11247		5807		17087	
4	STOCK 1 SEPT. ALGO.	85746	86193	85746	96993	85746	91553	85746	102833
5	STOCK "NORMAL 6 MONTHS	60077	66536	60077	66536	60077	66536	60077	66536
6	+(-)	25670	19657	25670	30457	25670	25017	25670	36297
6A	L4=NO MONTHS	9	9	9	10	9	9	9	10
7	HA ALTS	90000		90000		94000		94000	
8	+/- SINCE PRE VIOUS YEAR								
	ALTS. +/-SDEV/ECART TYPE/STANDARDABWEICHUNG								
9	YIELD T/HA	1.34		1.46		1.34		1.46	
10	BEER PROD MHL (NEXT YR/NAECHSTES J./PROCH. ANNEE	993	1008	993	1008	993	1008	993	1008
11	% <+> OF PREV		1.50		1.5		1.5		1.5
12	GM/HL (DREG)	121	120	121	120	121	120	121	120

EURCOM VI-E-3. TAB.5(83/4)
WORLD HOP BASE SERIES 1969-TO DATE EEC/IHB/USDA/COMMERCIAL & VARIOUS SOURCES LAST UPDATE: 15.04.83

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	PRICE US $/LB AVGE ALL VARS.
1969	66982	1898920	94946	1.42	5276	5.56	78.77	605	370	350	.5
1970	70666	2050720	102536	1.45	6038	5.89	85.44	630	367	415	.56
1971	75042	1921000	96050	1.28	5377	5.60	71.65	658	353	622	.65
1972	78015	2103440	105172	1.35	6174	5.87	79.14	689	332	372	.71
1973	81247	2366020	118301	1.46	7468	6.31	91.92	731	331	207	.76
1974	82083	2223520	111176	1.35	6627	5.96	80.74	771	331	235	.79
1975	80527	2270040	113502	1.41	7230	6.37	89.78	802	331	221	.83
1976	78206	2135200	106760	1.37	6137	5.75	78.47	826	327	264	.85
1977	79262	2355920	117796	1.49	7066	6.00	89.15	848	319	128	.9
1978	79170	2169933	108497	1.37	6275	5.78	79.26	873	297	290	.9
1979	80439	2344688	117234	1.46	7266	6.20	90.33	909	324	533	.97
1980	85680	2335482	116774	1.36	6959	5.96	81.22	938	341	1400	1.5
1981	93511	2605565	130278	1.39	8226	6.31	87.97	950	377	606	1.52
1982	96232	2883374	144169	1.50	8638	5.99	89.76	964	390	167	1.75
AVERAGE	80504	2261702	113085	1.40	6768	5.97	83.83	800	342	415	0.94
INDEX 69=	144	152	152	106	164	108	114	159	105	48	350
100 (1982					***			***	***		***
INDEX 77=	121	122	122	101	122	100	101	114	122	130	194
100 (1982											

1982: FORECAST FOR BEER; PRICES VERBAND DEUTSCHER HOPFENPFLANZER + US HOPS ADMIN COMMITTEE
****

EUROM VI-E-3 HOPS /HOUBLON/HOPFEN TAB 6(83/1) REV 15.4.83.

DEMAND OF AREA/DEMANDE VIS-A-VIS SUPERFICIE/NACHFRAGE VGL FLAECHE: IHB

	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	% INCR EST. DEMAND	1983	1984	1985
IHB MEMBER COUNTRIES:														
PRODUCTION	102440	97042	96288	90744	99265	90909	97217	97453	110876	121692				
												INT. DEMAND +32% FOR EXPORT		
INTERNAL DEMAND (DREG)	60784	64253	66564	66229	67076	66031	65859	66455	66540	67761	+0.1% *****	89598	89746	89133
+ (-)	41656	32789	29724	24515	32189	24878	31358	30998	44336	53931				
	(NOTE YRS OF BALANCE (1975, 77, 79, 80: 32% AVAIL. FOR EXPORT IN EACH: THEREFORE 32% ADDED TO DEMAND CALCULATED FOR 1983,4,5)											(NB AVERAGE YIELD/REND.MOY. IHB 1978-82 =1.61 T/HA)		
YIELD I (T/HA)	1.66	1.52	1.52	1.47	1.63	1.5	1.61	1.56	1.64	1.79		1.58	1.59	1.6
ALT I (HA)	62490	63759	63374	61592	61767	60467	60359	62619	67605	68082	(L2*L4)	56708	56444	55708
YIELD II (T/HA)												1.6	1.61	1.62
ALT II (HA)	(HA I & II: 1973-82 ACTUAL, 1983 -85 = L.2/L.4/L.6)										(L2*L6)	55999	55743	55020
HA EST III/83 (IHB PARIS MAR 83)												65928 *****		
OTHER (NON-IHB)														
PRODUCTION	14057	14134	17214	16016	18361	17517	19833	19097	18983	21721				
DEMAND (DREG)	15355	15540	15849	16281	16836	17516	18318	19244	20294	21468	1.06 *********	22763	24183	25558
+ (-)	-1298	-1406	1365	-265	1525	1	1515	-147	-1311					

HOUBLON-HOPS-HOPFEN: WORLD MARKET BALANCE-EQUILIBRE MARCHE MONDIAL-WELTMARKTBILANZ: ALPHA TAB 7(83/2) REV 15.4.83

	LINE NO.	UNIT.	CALC.	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982
PRODUCTION HOUBLON HOP/ERZEUGUNG	1	KILOTONS	DATA	105.17	118.3	111.18	113.5	106.76	117.8	118.5	117.23	116.77	130.28	143.41
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT	DATA	5.87	6.31	5.96	6.37	5.75	6	5.78	6.2	5.96	6.31	6
ALPHA ACID PRODUCTION/ERZEUG.	3	ALPHA T.	L1 X L2	6173	7465	6626	7230	6139	7068	6849	7268	6959	8221	8605
PERTE/AN VERLUST JAHR/ YEAR LOSS	4	PERCENT	V. TAB 6A @6M = 50%	9.28	9.12	8.88	8.56	8.56	7.84	7.84	7.76	7.36	6.56	6.34
MINUS PERTE/LOSS/ VERLUST =	5	BV	L3-0.5XL4	5887	7124	6332	6921	5876	6791	6581	6986	6703	7951	8332
PROD. BEER/BIERE BIERERZEUGUNG	6	M/HL	DATA	731	771	802	826	848	873	909	938	950	964	978
BEER +/- ANNUEL/YEAR	7	PERCENT			5	4	3	3	3	4	3	1	1	2
CONTENU/ANTEIL CONTENT: ALPHA	8	GM/HL	DREG EST (COMEUR)	7.9	7.7	7.7	7.9	7.7	7.6	7.4	7.2	7.1	7.1	7.1
DEMAND/ NACH FRAGE ALPHA	9	ALPHA T.	L6 X L8	5775	5937	6175	6525	6530	6635	6727	6754	6745	6844	6947
BESOIN/BEDARF REQUIRED:B.V.	10	BV: T.	L9 - L4%	5507	5666	5901	6246	6250	6375	6463	6492	6497	6620	6727
SURPLUS(DEFIC) UBERSCH(DEFIZ)	11	BV: T.	L5 - L10	380	1458	431	674	-374	416	118	495	207	1331	1605
STOCKS/BESTAND 1 SEPT.	12	BV: T. (ALGQ)	EC COM.	2559	2939	4411	4842	5516	5142	5558	5676	6171	6377	7890
STOCKS/ BESTAND 6 MOIS (NORMAL	13	BV: T.	0.5 X L10	2753	2833	2951	3123	3125	3187	3231	3246	3248	3310	3363
STOCKS/ BESTAND AS MONTHS SUPPLY	14	MONTHS	L12/L10 X 12	6	6	9	9	11	10	10	10	11	12	14
PERTE A N/VERL. LOSS YE AR	15	BV: T.	@ 1%	-2	1	15	17	24	20	23	24	29	31	45
SUPERF/ FLAECHE AREA	16	000 HA.	DATA	78	81.2	82	80.5	78.2	79.3	79.2	80.4	85.7	93.5	96.2
+(-) PA R AN/ JAHR/YE AR	17	000 HA.			3.20	0.80	-1.50	-2.30	1.10	-0.10	1.20	5.30	7.80	2.70
RENDEME NT/ERTR AG/YIEL D	18	T/HA.	L1/L16	1.35	1.46	1.36	1.41	1.37	1.49	1.50	1.46	1.36	1.39	1.49

TAB 8(83/2)

HOUBLON-HOPS-HOPFEN: ALTERNATIVE FORECASTS

	LINE NO	UNIT.	CALC.	I 1983	I 1984	II 1983	II 1984	III 1983	III 1984	IV 1983	IV 1984
PRODUCTION HOUBLON HOP/ERZEUGUNG	1	KILOTONS	DATA	120.6		131.4		125.29		136.51	
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT	AVERAGE 1969-82	5.97		5.97		5.97		5.97	
ALPHA ACID PRODUCTION/ERZEUG.	3	ALPHA T.	L1 X L2	7200		7845		7480		8150	
PERTE/AN VERLUST JAHR/ YEAR LOSS	4	PERCENT (DREG)	V. TAB 6A @6M = 50%	6.05	5.63	6.05	5.63	6.05	5.63	6.05	5.63
MINUS PERTE/LOSS/ VERLUST =	5	BV	L3-0.5XL4	6982		7607		7254		7903	
PROD. BEER/BIERE BIERERZEUGUNG	6	M/HL NEXT YR/AN PROCH.	EST ECOM/ J. BARTH	993	1008	993	1008	993	1008	993	1008
BEER +/- ANNUEL/YEAR	7	PERCENT	=+ 1.5% PER ANNUM EST/VORSSCHAETZ.								
CONTENU/ANTEIL CONTENT: ALPHA	8	GM/HL	DREG EST (COMEUR)	7.2	7.1	7.2	7.1	7.2	7.1	7.2	7.1
DEMAND/ NACH FRAGE ALPHA	9	ALPHA T.	L6 X L8	7151	7157	7151	7157	7151	7157	7151	7157
BESOIN/BEDARF REQUIRED:B.V.	10	BV: T.	L9 - L4%	6934	6956	6934	6956	6934	6956	6934	6956
SURPLUS(DEFIC) UBERSCH(DEFIZ)	11	BV: T.	L5 - L10	48		673		319		969	
STOCKS/BESTAND 1 SEPT.	12	BV: T. (ALGO)	EC COM.	9495	9542	9495	10168	9495	9814	9495	10463
STOCKS/ BESTAND 6 MOIS (NORMAL	13	BV: T.	0.5 X L10	3575	3579	3575	3579	3575	3579	3575	3579
STOCKS/ BESTAND AS MONTHS SUPPLY	14	MONTHS	L12/L10 X 12	16	16 *********	16	18 *********	16	17 *********	16	18 *********
PERTE A N/VERL. LOSS YE AR	15	BV: T.	@ 1%	59	60	59	66	59	62	59	69
SUPERF/ FLAECHE AREA	16	000 HA.	ALTS.	90		90		93.5		93.5	
				ALTERNATIVVORSCHAETZUZUNGEN/ PREVISIONS ALTERNATIVES							
+(-) PA R AN/ JAHR/YE AR	17	000 HA.		-6.20		-6.20		-2.70		-2.70	
RENDEME NT/ERTR AG/YIEL D	18	T/HA.	ALTS.	1.34		1.46		1.34		1.46	
			SDEV/STANDARD ABWEICHUNGEN /ECART TYPE 1969-82								

EURCOM VI-E-3 HOPS: TAB 9(83/1)
REV.10.2.83

EEC 10 EXTERNAL TRADE IN HOPS AND PRODUCTS
COMMERCE EXTERIEUR HOUBLON ET PRODUITS
HANDEL MIT DRITTLAENDER HOPFEN U. PROD
PERIODE: SEPT 81-AUG. 82 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.	53251	415	759	56364
EXPORT.	80273	66005	16138	209362
FRANCE				
IMPORT.	1546	629	120	2658
EXPORT.	4775	195	0	4990
BELG/LUX.				
IMPORT	13371	2730	209	17106
EXPORT	220	627	734	3479
UN. KING.				
IMPORT	5385	843	511	8101
EXPORT	3077	2461	469	7426
HELLAS				
IMPORT	0	0	0	0
EXPORT	0	0	0	0
IRELAND				
IMPORT	659	1398	632	4409
EXPORT	75	528	259	1562
ITALIA				
IMPORT	77	244	21	419
EXPORT	0	0	0	0
DANMARK				
IMPORT	0	0	7	25
EXPORT	0	1	5	19
NEDERLAND				
IMPORT	0	10	1533	5377
EXPORT	0	0	28	98
TOTAL EEC				
IMPORT	74289	6269	3792	94457
EXPORT	88420	69816	17600	226818
=EEC NET				
EXPORTS.	14131	63547	13808	132361
KILOTONS				13.24

EUROCOM VI-E-3: HOPS/HOUBLON/HOPFEN: WORLD DEMAND TRENDS FOR VARIETY GROUPS TAB10(83/1: REV. 24.4.83)

MARCHE MONDIAL: TENDANCES DE L'OFFRE DES DIVERS GROUPES DE VARIETES

WELTMARKT: TENDENZEN DER NACHFRAGE DER SORTENGRUPPEN (SOURCE/NACH: J. BARTH & SOHN, N'BERG)

L. NO		1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	CUMUL BALANCE	% SLOPE 1982/81:	1983	1984	1985
AROMATIC & FINE AR (OR "A + B"):																				
1 PROD/ERZEUGUNG	T	42260	45205	33931	40230	45005	40589	42670	34611	41452	36549	39002	40767	48897	56550(THEOR)					
2 DEMAND/NACHFRAGE	T(DREG)	44634	42391	40607	39281	38414	38006	38056	38565	39533	40959	42844	45187	47989	51250		6.80	54969	59147	63783
3 +/-	T	-2374	2814	-6676	949	6591	2583	4614	-3954	1919	-4410	-3842	-4420	908	5300	SUM L3= 2				
NOT INTERNAT. TRADED/OHNE WELTMARKT-GELTUNG (OR. "C")																				
4 PROD/ERZEUGUNG	T	27788	28870	27675	23867	25332	29289	30242	30187	30808	32459	41261	40957	25917	26750					
5 DEMAND/NACHFRAGE	T(DREG)	28385	27144	26650	26744	27266	28059	28962	29817	30464	30746	30502	29574	27803	25030		-9.97	21099	15846	9113
6 +/-	T	-597	1726	1025	-2877	-1934	1230	1280	370	344	1713	10759	11383	-1886	1720	SUM L6= 24256				
BITTER/AMER (OR "D")																				
7 PROD/ERZEUGUNG	T	24828	28513	34393	40916	47964	41303	40590	41962	45026	39912	41605	45071	56244	59900					
8 DEMAND/NACHFRAGE	T(DREG)	23722	30845	36049	39603	41780	42849	43081	42747	42118	41465	41058	41167	42065	44021		4.65	47304	52189	58944
9 +/-	T	1106	-2332	-1656	1313	6184	-1546	-2491	-785	2908	-1553	547	3904	14179	15879	SUM L9= 35657				
10 TOTAL= WORLD PR WELTERNTE/MONDE (=A+B+C+D)***	T	94876	102588	95999	105013	118301	111176	113502	106760	117286	108920	121868	126795	131058	143200					
11 DEMAND/NACHFR.	T(DREG)	97792	100068	102344	104621	106897	109173	111450	113726	116002	118279	120555	122831	125108	127384		1.82	129660	131937	
12 +/-	T	-2916	2520	-6345	392	11404	2003	2052	-6966	1284	-9359	1313	3964	5950	15816	SUM L12= 21112				

***NOTE/VERMERK: TOTAL AFTER BARTH: SOME YEARS SLIGHTLY DIFFERENT FROM EUROCOM/IHB OFFICIAL FIGS (TAB. 1,3,5,7)
GESAMTERZEUGUNG NACH ANGABE FA. BARTH; KANN FUER EINIGE JAHREN VON EG/IHB-ANGABEN LEICHT ABWEICHEN
PRODUCTION TOT. D'APRES BARTH: PEUT POUR CERTAINES ANNEES DIFFERER LEGEREMENT DES CHIFFRES OFFICIELLES CE/IHB

PRODUCTION BIERE/ BIERERZEUGUNG/ BEER PRODUCTION

000 HECTOLITRES)

TABL 11 (83 - 1)(WP 0099S
16 APR 1983.

Sources : Joh. Barth u. Sohn CBMC EEC COMMISSION	1974	1975	1976	1977	1978	1979	1980	1981	1982
CEE / EWG / EEC	226 735	229 020	236 507	232 297	232 320	234 878	238 040	237 337 (EST.CEE)	238 037
% + (-) per year	1,2	1,0	3,3	(1,8)	–	1,1	1,3	–	0,3
U S A	182 262	188 420	192 182	200 165	210 135	215 809	227 746	228 950	EST 229
% + (-) per year	4,6	2,8	2,0	4,1	5,0	2,7	5,5	0,05	+ 0
USSR	50 800	60 000	62 500	65 000	65 000	70 000	70 000	65 000	68 000
Romania	5 000	7 449	8 200	7 910	8 150	8 300	8 500	11 500	11 500
Bulgaria	4 000	4 000	5 200	5 200	5 160	5 500	5 400	5 400	6 000
Poland	12 440	12 860	12 318	12 069	11 378	11 127	11 185	11 300	10 300
DDR	19 800	20 200	21 000	22 000	23 000	23 000	24 000	24 000	25 000
CSSR	22 138	22 373	22 500	22 500	22 058	23 610	23 393	23 930	24 921
Hungary	6 458	6 631	6 738	7 003	7 244	7 500	7 800	7 800	7 825
Cuba	1 851	3 300	3 500	3 500	3 000	2 307	2 365	2 400	EST 2 400
TOTAL COMECON	122 987	136 813	141 956	145 182	144 990	151 344	148 128	151 330	155 950
% + (-) per year	+ 4,0	+ 11,2	+ 3,8	+ 2,3	–	+ 4,4	(3) – 1	+ 2,2	+ 3
Australia	18 300	19 340	19 717	19 511	19 511	19 678	19 433	20 170	19 682
Espana	15 481	16 618	17 127	18 600	18 653	19 712	20 027	20 920	21 499
Japan	36 084	39 290	36 393	41 242	44 300	44 758	45 138	46 480	47 335
Canada	19 133	21 238	20 227	20 227	20 389	20 386	20 669	20 500	EST 20 500
Argentina	4 578	4 123	2 680	2 543	2 043	2 100	2 328	2 370	2 237
New Zealand	3 990	4 140	4 095	4 180	4 371	4 200	3 783	3 800	3 900
Jugoslavija	9 429	8 477	8 685	9 588	10 055	11 300	11 712	12 000	3 402
TOTAL GROUP 4	106 995	113 226	108 924	116 053	119 319	122 228	123 090	126 070	128 555
% + (-) per year	+ 1,9	+ 5,8	– 4,0	+ 6,5	+ 2,8	+ 2,4	+ 0,7	+ 2,4	+ 2
Autres/andere/Others	130 615	134 928	138 986	153 694	167 361	185 026	194 400	206 216	212 458
% + (-) per year	8,0	3,3	3,0	10,6	8,9	10,5	5,0	6,0	3
WORLD/MONDE/WELT M/HL	770	802	819	847	873	909	931 404	949 903	EST 964
± %	4	4	2	4	3	4	3	2	1,5

TAB.12 83/1 HOPS/HOPFEN/HOUBLON: CEE/EWG/EEC-MARKET BALANCE/MARKTBILANZ/EQUILIBRE DU MARCHE (COMEUR VI-E-3 REV29 4 83

L. NO		1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
1	PRODUCTION	52.6	47.9	44.6	39.9	47.8	42.7	44.9	39.6	42.1	56.2	
2	NET EXPORT ! SEPT - AUG	10.2	10.6	10.8	9.4	10.5	9.6	14.2	10.6	13.2	13.5	
3	NET SUPPLY EC L1 - L2	42.4	37.3	33.8	30.5	37.3	33.1	30.7	29	28.9	42.7	
4	DEMAND EC DREG EC COMM.	39.1	38.04	32.97	35.91	34.84	33.77	32.7	31.64	30.57	29.5	28.43 -3%PA
5	EXCESS OR DEF (L10 - L13)	3.3	-.74	.83	-5.41	2.46	-.67	-2	-2.64	-1.67	13.2	
6	STOCK 1 SEPT (PROF. ORGS.)	23.53	26.83	26.09	26.92	21.51	23.97	23.3	20.3	15.9	16.4	29.60 EST
7	STOCK "NORM" (6M; =.5 X L4)	19.55	19.02	16.485	17.955	17.42	16.885	16.35	15.82	15.285	14.75	14.22
8	! EXC/DEF OVER (L19-L22) NORM STOCK+/-	3.98	7.81	9.605	8.965	4.09	7.085	6.95	4.48	.615	1.65	15.39
8A	L.6=NO MONTHS	7	8	9	9	7	9	9	8	6	7	12
9	000 HA	29.5	29.3	29	27.8	27.2	25.3	24.6	25.3	26.7	27.6	27 EST
10	YIELD T/HA	1.78	1.63	1.54	1.44	1.76	1.69	1.83	1.57	1.58	2.04	
11	BEER PROD MHL (NEXT YR/NAECHSTES JAHR/ ANN. PROCH.	227	229	237	232	232	233	231	237	238	239	240
12	GM/HL (L11/L4	172	166	139	155	150	145	142	134	128	123	118
13	GM/HL %> P.A.		-4	-16	11	-3	-3	-2	-6	-4	-4	-4

LINES 1 TO 8: UNIT IS KILOTONS (= 1000 T, 20 000

COMEUR VI-E-3: HOPS/HOUBLON/HOPFEN. ALT. FORECASTS/ALTERNATIVE VORAUSSCHAETZUNGEN/PREVISIONS ALT.
TAB.13 83/1 REV 15 APR 83

L. NO		ALT I 1983	ALT I 1984	ALT II 1983	ALT II 1984	ALT III 1983	ALT III 1984	ALT IV 1983	ALT IV 1984
1	PRODUCTION	41		50.49		41		50.49	
2	NET EXPORT ! SEPT - AUG	12.5 ALT. ESTS		12.5		13.5		13.5	
3	NET SUPPLY EC L1 - L2	28.81		37.99		27.81		36.99	
4	DEMAND EC DREG EC COMM.	28.4	27.4	28.4	27.4	28.4	27.4	28.4	27.4
5	EXCESS OR DEF (L10 - L13)	0.41		9.59		-.59		8.59	
6	STOCK 1 SEPT CARRYOVER= 82+ L5(82)	29.6	30.01	29.6	39.19	29.6	29.01	29.6	38.19
7	STOCK "NORM" (6M; =.5 X L4	14.2	13.7	14.2	13.7	14.2	13.7	14.2	13.7
8	EXC/DEF OVER NORM STOCK+/-	15.4	16.31	15.4	25.49	15.4	15.31	15.4	24.49
8A	L19=NO MONTHS STOCK	13	13	13	17	13	13	13	17
9	000 HA	27		27		27		27	
	ALTS. +/-SDEV/ECART TYPE/STANDARDABWEICHUNG								
10	YIELD T/HA	1.53		1.87		1.53		1.87	
11	BEER PROD MHL FORECAST (NEXT YR/NAEC PREVIS.	240	241	240	241	240	241	240	241
12	GM/HL (L11/L4	118	114	118	114	118	114	118	114
13	GM/HL %> P.A. LINES 1 TO 8:	-4	-4						

HOUBLON-HOPS-HOPFEN:CEE/EWG ALPHA BALANCE/BILAN ALPHA ALPHAVERSORGUNGSBILANZ

TAB 14(83/1)
REV 23.4.83

	LINE NO.	UNIT.	CALC.	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982
PRODUCTION HOUBLON HOP/ERZEUGUNG	1	ZTR TONNES	DATA L1/20	1056022 52801	959182 47959	893587 44679	797988 39899	956763 47838	853418 42671	898985 44949	791895 39595	922909 46145	1132911 56646
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT	L3/L1	7.30	6.47	6.55	5.70	6.25	6.13	6.30	6.13	6.44	5.65
ALPHA ACID PRODUCTION/ERZEUG.	3	ALPHA T.	L1 X L2	3854	3102	2928	2274	2988	2616	2834	2427	2974	3200
PERTE/AN VERLUST JAHR/ YEAR LOSS	4	PERCENT	V. TAB 6A @6M = 50%	9.12	8.88	8.56	8.56	7.84	7.84	7.76	7.36	6.56	6.34
MINUS PERTE/LOSS/ VERLUST =	5	BV	L3-0.5XL4	3678	2964	2803	2177	2871	2513	2724	2338	2876	3099
PROD. BEER/BIERE BIERERZEUGUNG	6	M/HL	DATA	227	229	237	232	232	233	231	237	238	239 PREV
NEXT YR/NAECHSTES JAHR/ANNEE PROCHAINE: J. BARTH													
BEER +/- ANNUEL/YEAR	7	PERCENT		2205	1	3	-2	0	0	-1	3	0	0
CONTENU/ANTEIL CONTENT: ALPHA	8	GM/HL	L10/L6	9.71	7.83	6.19	6.34	5.40	5.63	4.62	5.81	5.13	4.88
DEMAND/ NACH FRAGE ALPHA	9	ALPHA T.	DREG EST (COMEUR)	3022	2520	2191	2003	1927	1929	1978	2042	2091	1929
BESOIN/BEDARF REQUIRED:B.V.	10	BV: T.	L9 - L4%	2884	2408	2097	1917	1851	1853	1901	1967	2022	1868
EXPORT/AUSFUHR @ ALPHA% EEC/EWG(L2)	11	KT HOPS ====	EUROSTAT/ NIMEXE	17.5	18.7	20	18.4	17.5	17.5	22.5	20.3	22.7	
IMPORT/EINFUHR @ ALPHA% WORLD/MONDE	11A	KT HOPS ====	EUROSTAT/ NIMEXE	7.3	8.1	9.2	9	7	7.9	8.2	9.7	9.4	
EXPORTS NET	12	KT HOPS ====	L11-L11A	10.2	10.6	10.8	9.4	10.5	9.6	14.3	10.6	13.3	13.5 PREV.
EXPORTS NET	13	T ALPHA =====	L11-L11A	817	727	725	531	673	616	910	666	870	763
EXPORTS NET	14	T B.V	IDEM - L5	779	694	694	508	647	592	875	642	841	739
SURPLUS(DEFIC) UBERSCH(DEFIZ)	15	BV: T.	L5 - (L10 +L14)	-123	-250	-82	-335	297	-8	-129	-346	-56	431
STOCKS/BESTAND 1 SEPT.	16	BV: T.	EC PROF.	1641	1517	1267	1185	850	1148	1140	1011	903	988
		STAT 80-XORGS(PREVIOUS YEAR'S ALPHA)											
STOCKS/ BESTAND 6 MOIS NORMAL	17	BV: T.	0.5 X L10	1442	1204	1049	959	926	927	951	983	1011	934
STOCKS/ BESTAND AS MONTHS SUPPLY	18	MONTHS/ MOIS	L16/L10 X 12	7	8	7	7	6	7	7	6	5	6
PERTE ANNUEL/VERLUST/ YEAR'S LOSS	19	BV: T.	@ 1%	2	3	2	2	0	2	2	0	0	1
SUPERF/ FLAECHE AREA	20	000 HA.	DATA	29333	29153	29045	27821	27232	25262	24650	25352	26698	27565
+/- PAR AN/PR JAHR SINCE LAST YEAR	21	000 HA.			-180.00	-108.00	-1224.00	-589.00	-1970.00	-612.00	702.00	1346.00	867.00
RENDEMENT/ERTRAG/YIELD	22	T/HA.	L1/L20	1.80	1.65	1.54	1.43	1.76	1.69	1.82	1.56	1.73	2.05

HOUBLON-HOPS-HOPFEN: ALTERNATIVE FORECASTS ALPHA EEC/EWG TAB. 15(83/1: REV 23.4.83)

	LINE NO	UNIT.	CALC.	I 1983	I 1984	II 1983	II 1984	III 1983	III 1984	IV 1983	IV 1984
PRODUCTION HOUBLON HOP/ERZEUGUNG	1	T	DATA	41399		50598		41399		50598	
CONTENU/ANTEIL CONTENT: ALPHA	2	PERCENT	AVERAGE EC/EWG 72-82	6.01		6.01		6.01		6.01	
ALPHA ACID PRODUCTION/ERZEUG.	3	ALPHA T.	L1 X L2	2488		3041		2488		3041	
PERTE/AN VERLUST JAHR/ YEAR LOSS	4	PERCENT (DREG)	V. TAB 6A @6M = 50%	6.05	5.63	6.05	5.63	6.05	5.63	6.05	5.63
MINUS PERTE/LOSS/ VERLUST =	5	BV	L3-0.5XL4	2413		2949		2413		2949	
PROD. BEER/BIERE BIERERZEUGUNG	6	M/HL	EST EUROOM	240	241	240	241	240	241	240	241
BEER +/- ANNUEL/YEAR	7	PERCENT	FORECAST PER ANNUM		1.00						
CONTENU/ANTEIL CONTENT· ALPHA	8	GM/HL	DREG EST (COMEUR)	5.11	5.11	5.11	5.11	4.86	5.11	4.86	5.11
DEMAND/ NACH FRAGE ALPHA	9	ALPHA T.	DREG EST EUR COMM	1979	2043	1979	2043	1979	2043	1979	2043
BESOIN/BEDARF REQUIRED:B.V.	10	BV: T.	L9 - L4%	1919	1986	1919	1986	1919	1986	1919	1986
EXPORT/AUSFUHR @ ALPHA% EEC/EWG(L2)	11	KT HOPS ====									
IMPORT/EINFUHR @ ALPHA% WORLD/MONDE	11A	KT HOPS ====									
EXPORTS NET	12	KT HOPS ====	PREV ALTS =========	12.5	13.5	12.5	13.5	13.5	13.5	13.5	13.5
EXPORTS NET	13	T ALPHA =====	@ AV72-82	751	811	751	811	811	811	811	811
EXPORTS NET	14	T B.V	IDEM - L5	729	789	729	789	787	789	787	789
SURPLUS(DEFIC) UBERSCH(DEFIZ)	15	BV: T.	L5 - (L10 +L14)	-294		242		494		1030	
STOCKS/BESTAND 1 SEPT.	16	BV: T.	L15 + L16 ('82) =83	1419	1125	1419	1661	1419	1913	1419	2449
STOCKS/ BESTAND 6 MOIS (NORMAL	17	BV: T.	0.5 X L10	989	1022	989	1022	989	1022	989	1022
STOCKS/ BESTAND AS MONTHS SUPPLY	18	MONTHS	L16/L10 X 12	9	7 *********	9	10 *********	9	12 *********	9	15 *********
PERTE ANNUEL/VERLUST/ YEAR'S LOSS	19	BV: T.	@ 1%	4	1	4	6	4	9	4	14
SUPERF/ FLAECHE AREA	20	HA	PREVISION V. TAB 1:(IHB/EC)	27058		27058		27058		27058	
+/- PAR AN/PR JAHR SINCE LAST YEAR	21	HA		-507.00		-507.00		-507.00		-507.00	
RENDEME NT/ERTR AG/YIEL D	22	T/HA.	L1/L20	1.53		1.87		1.53		1.87	

STANDARD ABWEICHUNG/ECART TYPE/STANDARD DEVIATION 1972-82

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

	hors contrat Freihopfen without contract 50 kg	sous contrat Vertragshopfen under contract 50 kg	% sous contrat % Vertragshopfen % under contract	hors contrat Freihopfen without contract ECU/50 kg		sous contrat Vertragshopfen under contract ECU/50 kg	
	1	2	3	4		5	
A) CE							
1975	202.672	689.378	77	72,80		114,13	
1976	174.172	620.353	78	95,18		121,49	
1977	327.043	623.643	66	46,45		118,76	
1978	166.036	686.210	81	106,29		111,73	
1979	150.109	745.308	83	182,12		118,30	
1980	67.385	723.983	91	469,00		133,00	
1981	154.754	768.155	83	225,63		162,78	
1982	363.795	763.131	68	65,18		176,93	
B) CE (1982)				81	82	81	82
BR Deutschland	288.580	555.746	66	228	65	142	154
France[1]	17.702	16.990	49	205	58	140	155
Belgique/België	27.450	12.956	32	215	66	252	195
United Kingdom[1]	30.063	175.684	85	192	69	217	249
Ireland	-	1.755	100	-	-	325	338
Greece/Hellas	-	570	100	-	-	-	-

[1]Noch unverkauft am 31.3.83 / Still unsold as at 31.3.83 / Toujours invendus au 31.3.83 : Ztr = F ± 4.000; B ± 2.000; UK 13.315

1982		1 TP/ha 1982	2 NP/ha 1982 (x 0,40)	3 NP/ha 1981 (x 0,65)	4 PP/ha 1982 (x 1,00)	5 TP ECU/ha 1982	6 PP ECU/ha 1982 (1)	7 Production (50 kg) 1982
Hallertauer	D	2 638,0	35,0	94,0	2 509,0	4 958	5 009	89 174
	F							
	B	124,6	5,2	6,3	113,1	4 895	5 114	5 426
	CEE	2 762,6	40,2	100,3	2 622,1	4 947	5 055	94 600
Hersbrucker	D	4 921,0	309,0	520,0	4 092,0	5 447	5 780	227 932
	B							
	CEE	4 921,0	309,0	520,0	4 092,0	5 447	5 780	227 932
Huller	D							
	CEE	1 379,0	8,0	11,0	1 360,0	4 487	4 511	50 109
Spalter	D	295,0	4,0	11,0	280,0	5 272	5 338	9 737
	B	9,4	0,9	0,2	8,3	6 385	6 828	399
	CEE	304,4	1,3	11,2	288,3	5 307	5 381	10 136
Tettnanger	D	940,0	36,0	36,0	868,0	5 350	5 538	29 222
	B	0,7	–	–	0,7	2 686	2 686	20
	CEE	940,7	36,0	36,0	868,7	5 348	5 536	29 242
Progress	UK							
	CEE	129,1	–	1,2	127,9	4 951	4 967	4 416
Fuggles	B	9,3	–	–	9,3	2 063	2 063	215
	UK	590,4	18,7	25,6	546,1	7 379	7 640	17 763
	IR	12,1	–	–	12,1	6 310	6 310	238
	CEE	611,8	18,7	25,6	567,5	7 276	7 524	18 216
Goldings	UK							
	CEE	532,9	17,3	32,0	483,6	9 405	9 802	19 620
W.G.V.	UK							
	CEE	244,6	1,4	2,3	240,9	5 946	5 986	7 757
Bramling	UK							
	CEE	320,8	–	–	320,8	4 494	4 494	11 288
Challenger	B	1,1	0,4	0,4	0,3	6 945	10 685	38
	UK	855,0	38,8	62,0	754,2	8 941	9 437	34 290
	CEE	856,1	39,2	62,4	754,5	8 939	9 439	34 328
Saaz	B							
	CEE	11,9	–	–	11,9	2 687	2 687	361
Strisselspalt	F							
	CEE	181,7	1,2	6	174,5	4 819	4 895	6 569

(1) Col. 6 = $\frac{\text{col. 2-4 } \Sigma}{\text{col. 1 } \Sigma}$ = x: col. 5 Σ

1982		8	9	10	11	12	13	14	15
		Rendem.	Production		P R I X		RETURN/GESAMTERLÖS (ECU)		
		50 kg/ha (7:1)	"contrat" (50 kg)	"spot" (50 kg)	"contrat" ECU/50 kg	"spot" ECU/50 kg	"contrat" (9 x 11)	"spot" (10 x 12)	Total (13 + 14)
Hallertauer	D	33,9	68 639	20 535	167,75	74,94	11 519 603	1 535 679	13 055 281
	F								
	B	43,5	1 380	4 046	239,76	69,02	330 854	279 268	610 122
	CEE	34,2	70 019	24 581	169,25	73,84	11 850 457	1 814 947	13 665 403
Hersbrucker	D	46,3	136 604	91 328	160,76	52,81	21 973 153	4 833 327	26 806 480
	B								
	CEE	46,3	136 604	91 328	160,76	52,81	21 973 153	4 833 327	26 806 480
Huller	D								
	CEE	36,3	34 000	16 109	156,10	54,75	5 302 659	884 767	6 187 426
Spalter	D	33,0	6 259	3 478	192,21	100,96	1 203 421	351 777	1 555 197
	B	42,4	198	201	213,65	88,66	42 303	17 820	60 123
	CEE	33,3	6 457	3 679	192,93	100,46	1 245 724	369 597	1 615 320
Tettnanger	D	31,3	20 174	9 048	202,31	104,85	4 080 329	948 829	5 029 158
	B	30,2	-	20	-	88,95	-	1 779	1 779
	CEE	31,1	20 174	9 068	202,31	104,83	4 080 329	950 608	5 030 937
Progress	UK								
	CEE	34,2	2 135	2 281	232,70	62,34	496 802	142 403	639 205
Fuggles	B	23,2	-	215	-	88,95	-	19 124	19 124
	UK	30,1	15 434	2 329	269,02	87,69	4 152 042	204 230	4 356 272
	IR	12,1	238	-	319,46	-	76 031	-	76 031
	CEE	29,8	15 672	2 544	269,79	87,80	4 228 073	223 354	4 451 427
Goldings	UK								
	CEE	36,8	16 879	2 741	281,38	95,77	4 749 614	262 506	5 012 120
W.G.V.	UK								
	CEE	31,7	5 593	2 164	231,44	73,95	1 294 439	160 028	1 454 467
Bramling	UK								
	CEE	35,2	6 128	5 160	192,08	51,26	1 177 071	264 502	1 441 573
Challenger	B	34,0	35	3	212,34	111,18	7 432	333	7 765
	UK	40,1	30 765	3 525	241,07	64,72	7 416 622	228 138	7 644 760
	CEE	40,1	30 800	3 528	214,04	64,76	7 424 054	228 471	7 652 525
Saaz	B								
	CEE	30,3	-	361	-	88,70	-	32 022	32 022
Strisselspalt	F								
	CEE	36,2	5 528	1 040	146,05	65,40	807 403	68 034	875 437

1982		1	2	3	4	5	6	7
		TP/ha 1982	NP/ha 1982 (x 0,40)	NP/ha 1981 (x 0,65)	PP/ha 1982 (x 1,00)	TP ECU/ha 1982	PP ECU/ha 1982 (1)	Production (50 kg) 1982
Bourgogne	F							
	CEE	4,8	–	–	4,8	1 784	1 784	121
Star	B							
	CEE	4,6	1,0		3,6	4 896	5 630	205
Perle	D	77,1	243,0	264,0	264,0	4 195	5 896	29 695
	B	0,1	0,1	0,1	0,0	1 438	3 384	2
	CEE	771,1	243,1	264,1	264,0	4 194	5 896	29 697
Saxon	UK							
	CEE	58,3	–	–	58,3	5 438	5 438	1 905
Sunshine	UK							
	CEE	0,9	–	–	0,9	1 885	1 885	21
Aroma	D	10944,0	635,0	936,0	9 373,0	5 107	5 389	435 869
	F	186,5	–	6,0	179,3	4 740	4 825	6 689
	B	161,7	7,6	7,0	147,2	4 661	4 871	6 666
	UK	2 732,0	76,2	123,1	2 533,0	7 610	7 865	97 060
	IR	12,1		–	12,1	6 310	6 310	238
	GR			–				
	CEE	14 036,3	718,8	1 072,0	12 065,3	5 584	6 006	546 522
Nt. Brewer	D	5788,0	160,0	151,0	5 477,0	5 448	5 586	251 789
	F	106,9			106,9	4 802	4 802	3 716
	B	310,7	3,0	7,7	300,0	6 064	6 153	13 089
	UK	250,9		27,1	223,8	7 574	7 872	7 802
	IR	48,6			48,6	4 871	4 871	1 084
	CEE	6 505,1	163,0	185,8	6 156,3	5 561	5 704	277 480
Brewer's Gold	D	2863,0	349,0	454,0	2 060,0	5 282	5 919	144 869
	F	451,3	1,3	1,5	448,5	4 963	4 977	24 112
	B	349,1	15,8	11,1	322,2	4 220	4 388	19 141
	UK	28,1			28,1	5 588	5 588	1 159
	CEE	3 691,5	366,1	466,7	2 858,8	5 145	5 740	189 281
Bullion	UK	255,7	5,5	11,7	238,5	4 714	4 854	9 725
	IR	0,2			0,2	6 874	6 874	6
	CEE	255,9	5,5	11,7	238,7	4 717	4 857	9 731

1982		8	9	10	11	12	13	14	15
		Rendem.	Production		P R I X		RETURN/GESAMTERLÖS (ECU)		
		50 kg/ha (7:1)	"contrat" (50 kg)	"spot" (50 kg)	"contrat" ECU/50 kg	"spot" ECU/50 kg	"contrat" (9 x 11)	"spot" (10 x 12)	Total (13 + 14)
Bourgogne	F								
	CEE	25,3	–	121	–	70,62	–	8 546	8 546
Star	B								
	CEE	44,3	80	125	155,68	81,79	12 453	10 224	22 677
Perle	D	38,5	13 251	16 444	173,96	56,31	2 307 154	927 093	3 234 247
	B	21,6	–	2	–	66,71	-	133	133
	CEE	38,5	13 251	16 446	173,96		2 307 154	927 226	3 234 370
Saxon	UK								
	CEE	32,6	1 496	409	197,09	54,25	294 841	22 188	317 029
Sunshine	UK								
	CEE	23,3	–	21	–	50,00	–	1,697	1 697
Aroma	D	39,8	278 927	156 942	166,25	60,34	46 386 318	9 481 472	55 867 790
	F	35,9	5 528	1 161	146,06	65,96	807 403	76 580	883 983
	B	41,2	1 693	4 973	232,16	72,53	393 042	360 703	753 745
	UK	35,5	78 430	18 630	249,66	65,00	19 580 834	1 210 950	20 791 784
	IR	12,1	238	–	319,46	–	76 034	–	76 031
	GR								
	CEE	38,9	364 816	181 706	184,32	61,25	67 243 628	11 129 705	78 373 333
Nt. Brewer	D	43,5	172 450	79 339	143,68	85,43	24 752 135	6 781 701	31 533 835
	F	34,7	1 486	2 230	195,95	99,72	291,187	222 366	513 553
	B	42,1	6 674	6 415	203,73	81,70	1 359 686	524 118	1 883 804
	UK	31,1	7 498	304	251,04	59,13	1 882 300	17 976	1 900 276
	IR	22,3	1 084	–	316,03	-	342 577	–	342 577
	CEE	42,7	189 192	88 280	151,32	85,48	28 627 885	7 546 161	36 174 046
Brewer's Gold	D	50,6	94 919	49 950	134,74	46,60	12 796 703	2 324 772	15 121 475
	F	53,4	9 826	14 286	153,62	51,16	1 509 389	730 542	2 239 931
	B	54,8	4 380	14 761	167,24	51,19	732 554	740 740	1 473 294
	UK	41,3	1 159	–	135,47	–	157 013	-	157 013
	CEE	51,3	110 284	78 997	137,79	48,05	15 195 659	3 796 054	18 991 713
Bullion	UK	38,0	8 937	788	128,10	47,54	1 144 855	60 553	1 205 408
	IR	26,9	6		274,99	–	1 650	–	1 650
	CEE	38,0	8 943	788	128,20	47,54	1 146 505	60 553	1 207 058

1982		1	2	3	4	5	6	7
		TP/ha 1982	NP/ha 1982 (x 0,40)	NP/ha 1981 (x 0,65)	PP/ha 1982 (x 1,00)	TP ECU/ha 1982	PP ECU/ha 1982 (1)	Production (50 kg) 1982
Target	B	0,7	0,6	0,0	0,0	3 499	3 768	21
	UK	1 246,2	63,3	108,6	1 074,3	9 111	9 703	46 714
	CEE	1 246,9	63,9	108,6	1 074,3	9 107	9 702	46 735
K. Midseason	UK							
	CEE	100,8	–	–	100,8	4 294	4 294	4 233
Northdown	B	0,0	0,0	–	0,0	2 143	2 143	1
	UK	1 001,0	33,3	45,9	921,8	9 345	9 694	36 546
	IR	14,0		1,1	12,9	12 243	12 587	427
	CEE	1 015,0	33,3	47,0	934,7	9 386	9 736	36 974
Amer	D	8 651,0	509,0	605,0	7 537,0	5 393	5 688	396 658
	F	558,2	–	1,5	556,7	4 574	4 578	27 828
	B	660,5	19,4	18,9	622,2	5 089	5 234	32 252
	UK	2 882,7	102,1	193,3	2 587,3	8 459	8 855	106 179
	IR	62,8		1,1	61,7	6 520	6 560	1 517
	GR			–				
	CEE	12 815,2	630,5	819,8	11 364,9	6 061	6 393	564 434
Record	D	390,0	14,0	29,0	347,0	4 550	4 701	11 799
	F	5,7	–	–	5,7	5 992	5 992	175
	B	36,8	–	–	36,8	4 100	4 100	1 485
	CEE	432,5	14,0	29,0	389,5	4 531	4 734	13 459
Viking	UK							
	CEE	3,8	–	–	3,8	6 577	6 577	122
Yeoman	UK							
	CEE	199,6	143,6	54,3	1,7	1 876	3 965	1 605
Zenith	UK							
	CEE	48,4	32,1	15,9	0,4	3 238	6 648	764

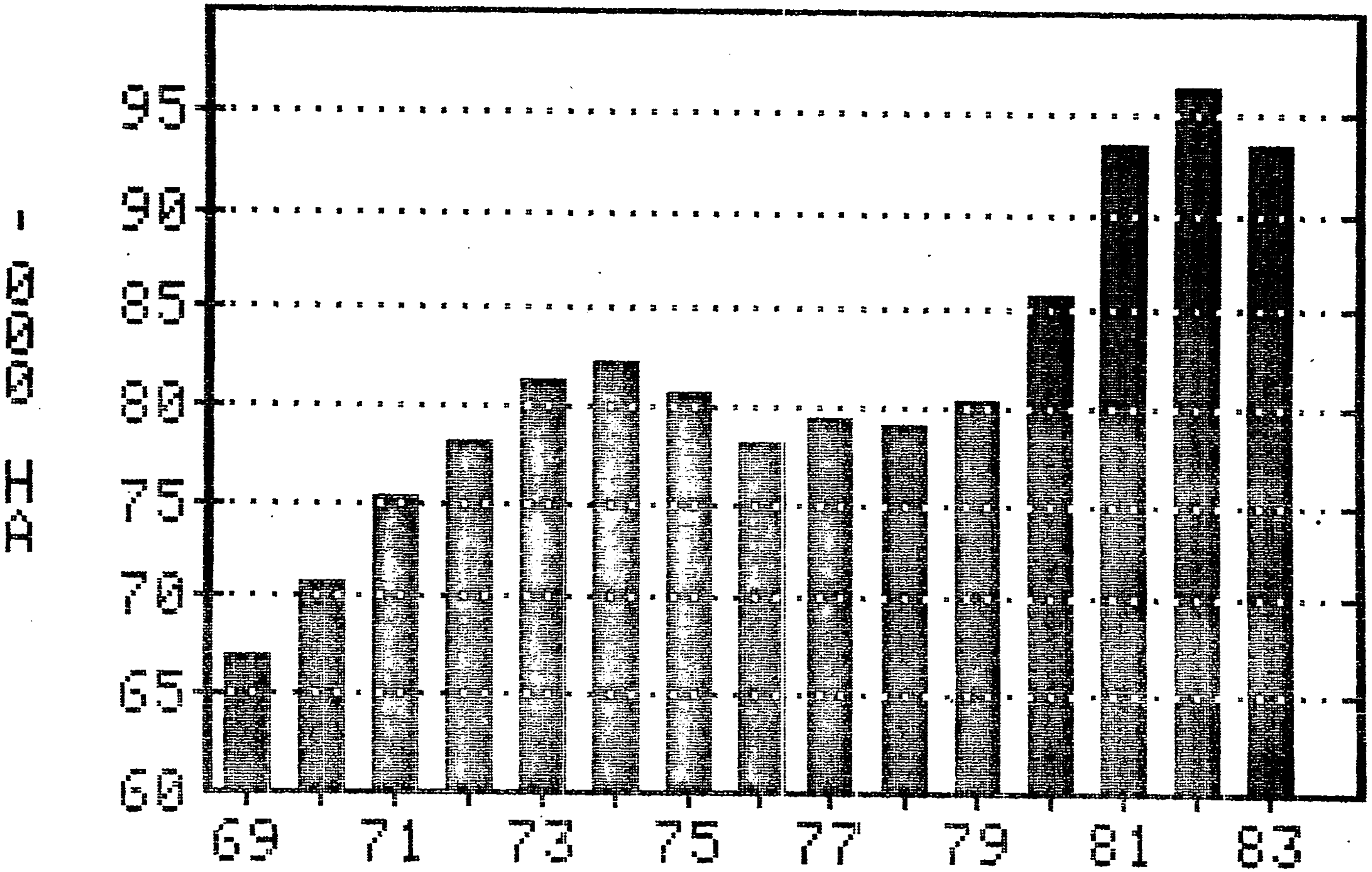
1982		8	9	10	11	12	13	14	15
		Rendem.	Production		P R I X		RETURN/GESAMTERLÖS (ECU)		
		50 kg/ha	"contrat"	"spot"	"contrat"	"spot"	"contrat"	"spot"	Total
		(7:1)	(50 kg)	(50 kg)	ECU/50 kg	ECU/50 kg	(9 x 11)	(10 x 12)	(13 + 14)
Target	B	30,7	21	–	113,85	–	2 391	–	2 391
	UK	37,5	40 916	5 798	266,01	81,00	10 884 131	469 638	11 353 769
	CEE	37,5	40 937	5 798	265,93	81,00	10 886 522	469 638	11 356 160
K. Midseason	UK								
	CEE	42,0	3 300	933	118,73	44,03	391 771	41 080	432 851
Northdown	B	24,1	–	1	–	89,00	–	89	89
	UK	36,5	33 560	2 986	273,01	64,49	9 162 226	192 567	9 354 793
	IR	30,5	427	–	404,38	–	172 670	–	172 670
	CEE	36,4	33 987	2 987	274,66	64,50	9 334 896	192 656	9 527 552
Amer	D	45,6	267 369	129 289	140,51	70,43	37 548 838	9 106 472	46 655 310
	F	47,3	11 312	16 516	159,17	57,70	1 800 576	952 908	2 753 484
	B	48,8	11 075	21 177	189,28	59,73	2 096 281	1 264 947	3 361 228
	UK	36,8	95 370	10 809	247,69	70,55	23 622 195	762 575	24 384 770
	IR	24,2	1 517	–	340,74	–	516 897	–	516 897
	GR								
	CEE	44,0	386 643	177 791	169,62	67,98	65 584 787	12 086 902	77 671 689
Record	D	30,3	9 450	2 349	170,86	68,34	1 614 141	160 253	1 774 394
	F	30,1	150	25	225,21	17,26	33 782	432	34 213
	B	40,4	188	1 297	213,14	85,46	40 071	110 841	150 913
	CEE	31,1	9 788	3 671	172,46	73,97	1 687 994	271 526	1 959 520
Viking	UK								
	CEE	32,0	122	–	204,86	–	24 993	–	24 993
Yeoman	UK								
	CEE	8,0	1 303	302	266,42	90,13	347 139	27 219	374 358
Zenith	UK								
	CEE	15,8	442	322	298,50	76,91	131 937	24 765	156 702

1982		1 TP/ha 1982	2 NP/ha 1982 (x 0,40)	3 NP/ha 1981 (x 0,65)	4 PP/ha 1982 (x 1,00)	5 TP ECU/ha 1982	6 PP ECU/ha 1982 (1)	7 Production (50 kg) 1982
- autres	D							
	F							
	B	0,1	-	-	0,1	2 154	2 1524	3
	UK	4,4	-	-	4,4	777	777	17
	IR							
	GR							
	CEE	4,5	-	-	4,5	819	819	20
AUTRES	D	3,9	1,4	29,0	347,0	4 550	4 701	11 799
	F	5,7	-	-	5,7	5 992	5 992	175
	B	36,9	-	-	36,9	4 097	4 097	1 488
	UK	256,2	175,7	70,2	10,3	2 183	4 432	2 508
	IR	-	-	-	-	-	-	-
	GR							
	CEE	688,8	189,7	99,2	399,9	3 657	4 663	15 970
GRAND TOTAL	D	19 985,0	1 158,0	1 570,0	17 257,0	5 219	5 505	844 326
	F	750,4	2,5	7,5	740,4	4 893	4 920	34 692
	B	859,5	27,0	25,8	806,7	5 117	5 272	40 406
	UK	5 870,9	354,0	386,6	5 130,5	7 797	8 288	205 747
	IR	74,9	1,1	-	73,8	7 916	7 986	1 755
	GR							
	CEE	27 540,7	1 542,6	1 990,0	24 008,1	5 764	6 125	1 126 926

Grèce 25 ha = 570 Ztr.

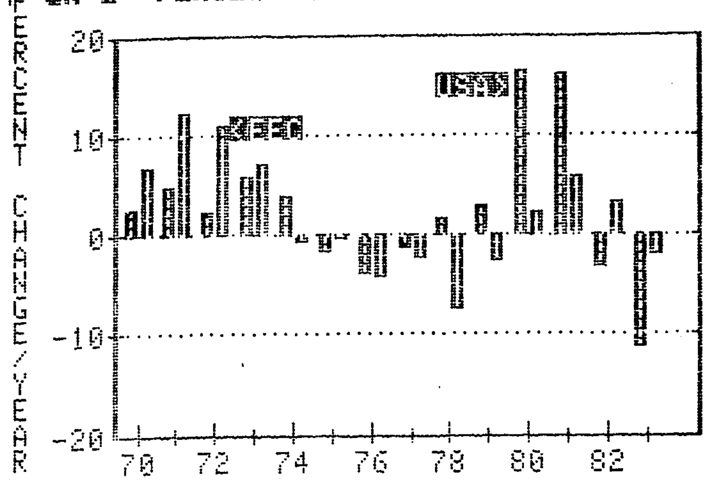
1982		8	9	10	11	12	13	14	15
		Rendem.	Production		P R I X		RETURN/GESAMTERLÖS (ECU)		
		50 kg/ha (7:1)	"contrat" (50 kg)	"spot" (50 kg)	"contrat" ECU/50 kg	"spot" ECU/50 kg	"contrat" (9 x 11)	"spot" (10 x 12)	Total (13 + 14)
- autres	D								
	F								
	B	24,2	–	3	–	88,85	–	267	267
	UK	3,9	17	–	201,19	–	3 420		3 420
	IR								
	GR								
	CEE	4,4	17	3	201,19	89,00	3 420	267	3 689
AUTRES	D	30,3	9 450	2 349	170,86	68,34	1 614 141	160 253	1 774 394
	F	30,1	150	25	225,21	17,26	33 782	432	34 213
	B	40,3	188	1 300	213,14	85,47	40 071	111 108	151 180
	UK	9,8	1 884	624	269,37	83,17	507 493	51 898	559 391
	IR	–	–	–	–	–	–	–	–
	GR								
	CEE	23,2	11 672	4 298	188,10	75,31	2 195 487	323 691	2 519 178
GRAND TOTAL	D	42,2	555 746	288 580	153,77	64,85	85 549 295	18 748 197	104 297 492
	F	46,2	16 990	17 702	155,48	58,18	2 641 761	1 029 920	3 671 680
	B	47,0	12 956	27 450	195,11	65,78	2 527 743	1 809 992	4 397 736
	UK	35,0	175 684	30 063	248,81	68,69	43 711 936	2 065 027	45 776 963
	IR	23,4	1 755	–	337,85	–	592 928	–	592 928
	GR								
	CEE	40,9	763 131	363 795	176,93	65,18	135 023 663	23 713 136	158 736 799

GR.1: WORLD HOPS AREA



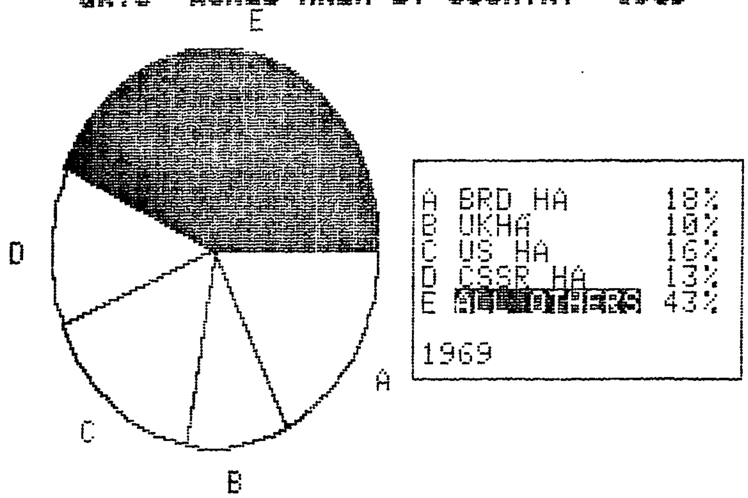
SOURCE: EC COMMISSION/IHB
1983: ESTIMATE IHB MARCH 1983

GR 2: PERCENT ANNUAL VARIATION IN AREA

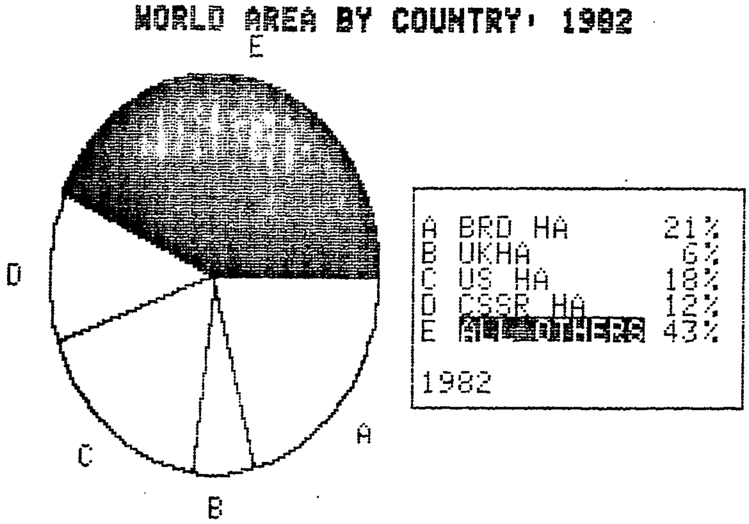


PERCENTAGE CHANGE IN AREA
OVER PREVIOUS YEAR
SOURCE: EEC COMMISSION

GR.3: WORLD AREA BY COUNTRY: 1969



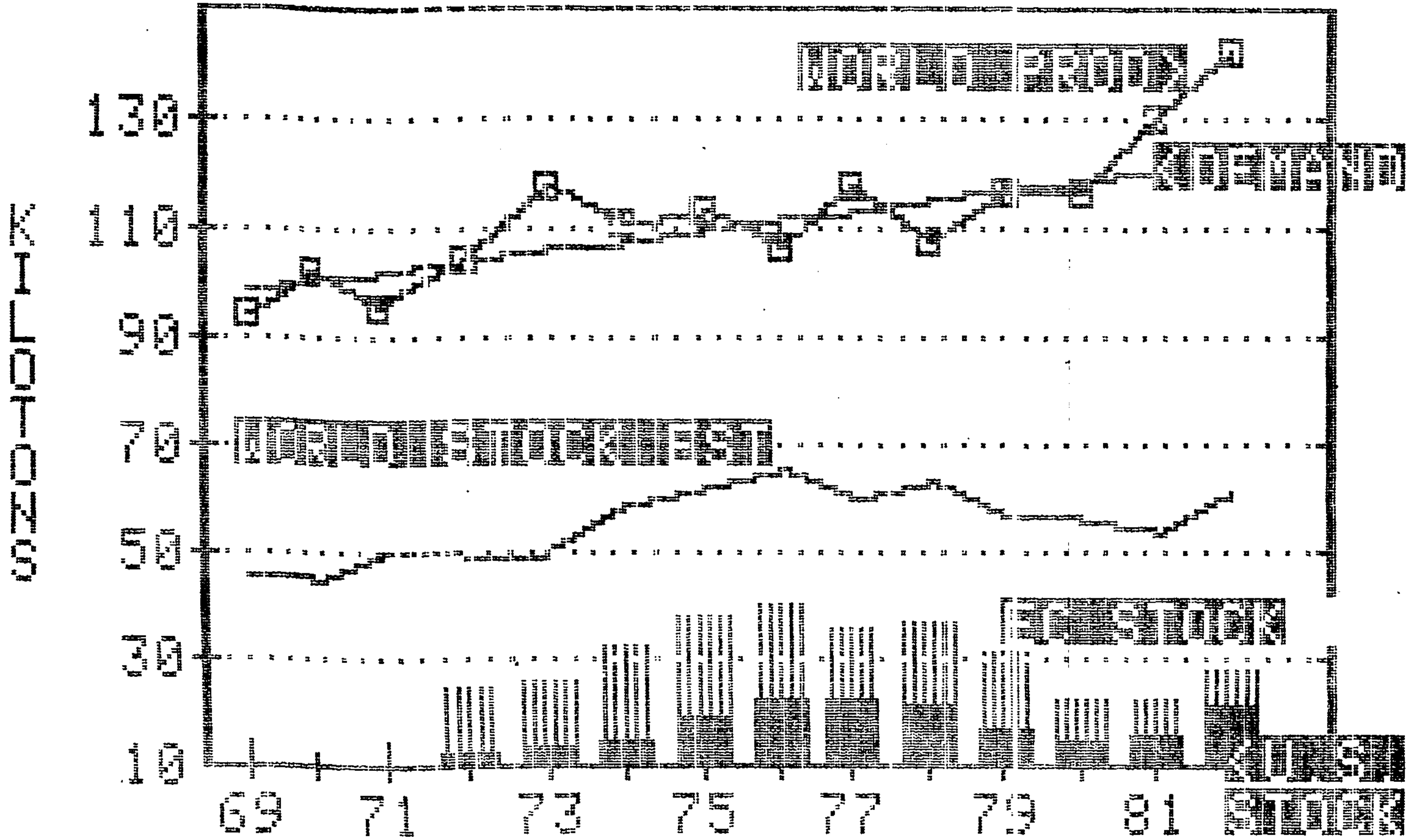
WORLD AREA BY COUNTRY: 1982



SOURCE: EC COMMISSION/ IHB

EURCOM
VI-E-3
GR.4 20 FEB 83

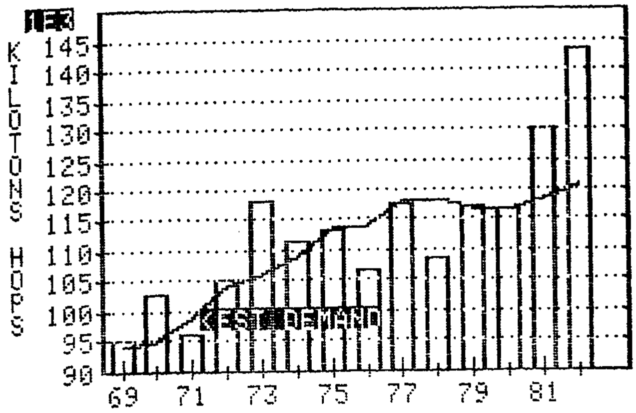
WORLD HOPS PRODUCTION & STOCKS



DEMAND & STOCK ESTIMATES: v. TAB. 3 (world)

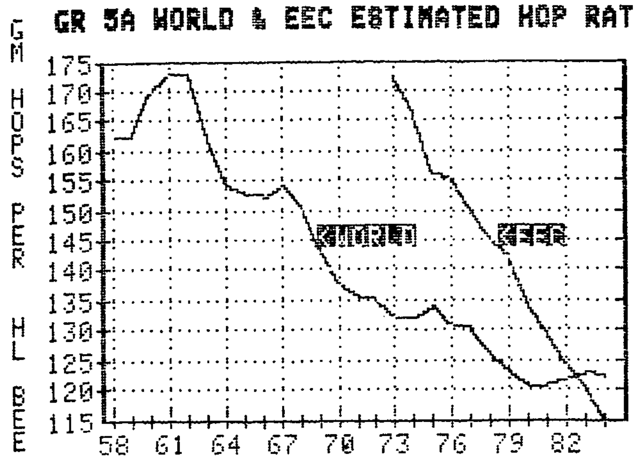
SOURCES: EC COMMISSION (DEMAND & WORLD STOCK ESTIMATES. US STOCK: USDA EC STOCK: PROFESSIONAL ORGANIZATIONS

GR.5: WORLD HOPS PRODUCTION & DEMAND



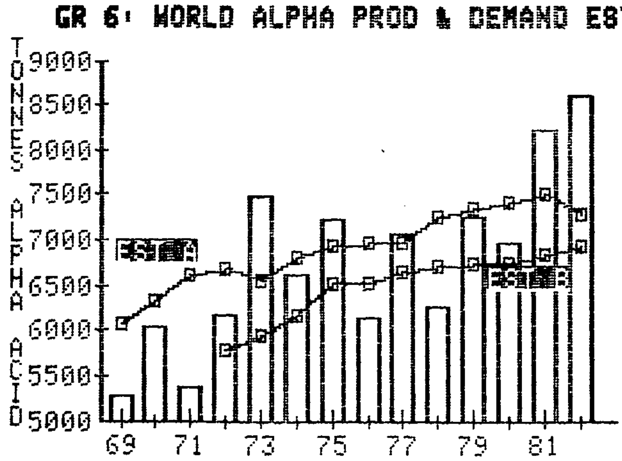
DEMAND EST: TAB. 3, L2 - BASIS:
AUTO-REGRESSIVE 4YR MOVING AVERAGE ON
WORLD PROD SINCE 1950/BEER M/HL

GR 5A WORLD & EEC ESTIMATED HOP RATE



EC COM VI-E-3 ESTIMATES
(SEE TABS. 3/4 & 12/13)
POLYNOMIAL AUTOREGRESSIVE MOVING AVGES

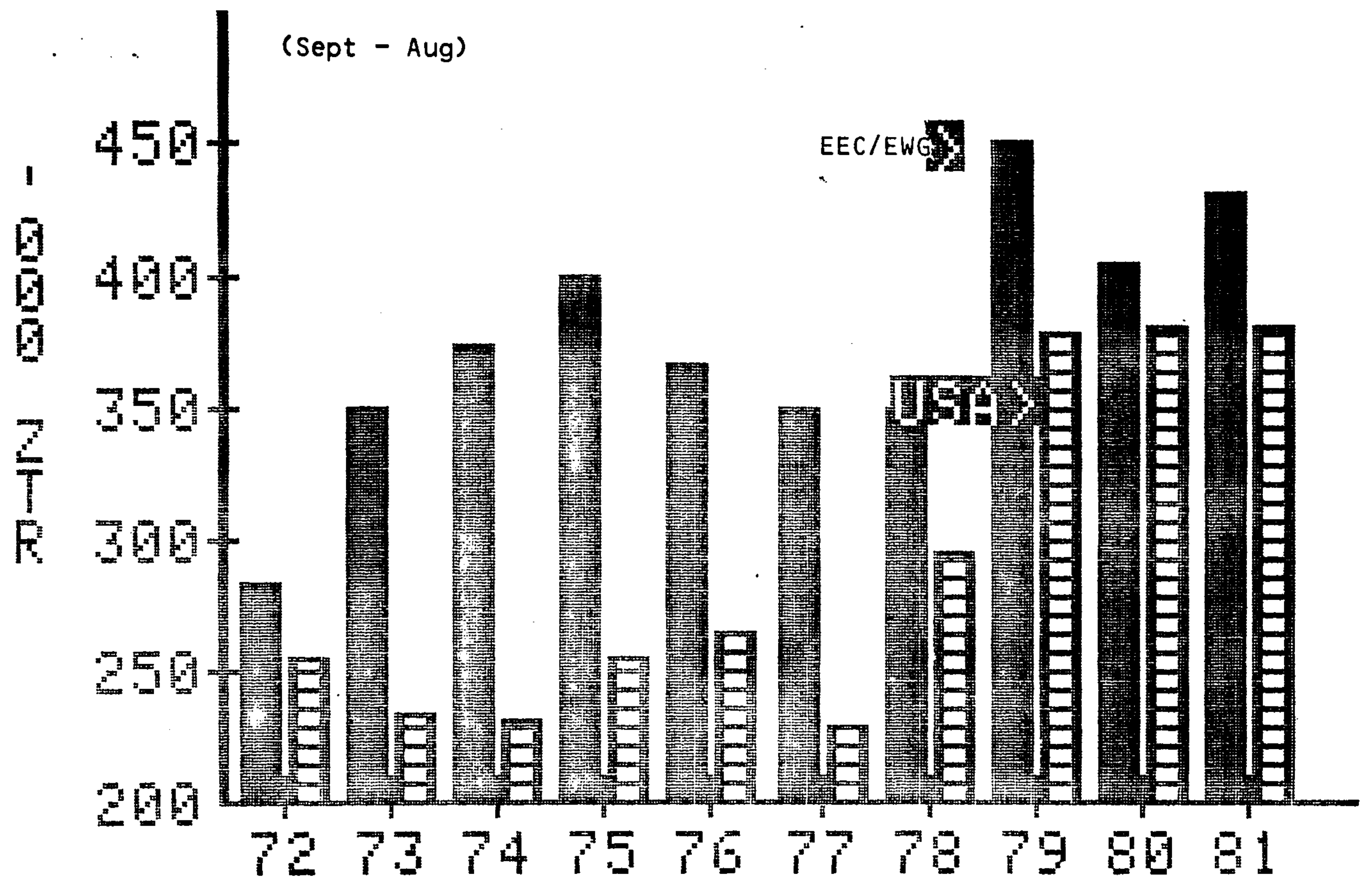
GR 6: WORLD ALPHA PROD & DEMAND ESTS



DEMAND ESTIMATES: A- EURCOM (TAB 7,L9)
B- BARTH REPORTS
(A = GM/HL HOPS X AVGE ALPHA 5.99%)

GR 7

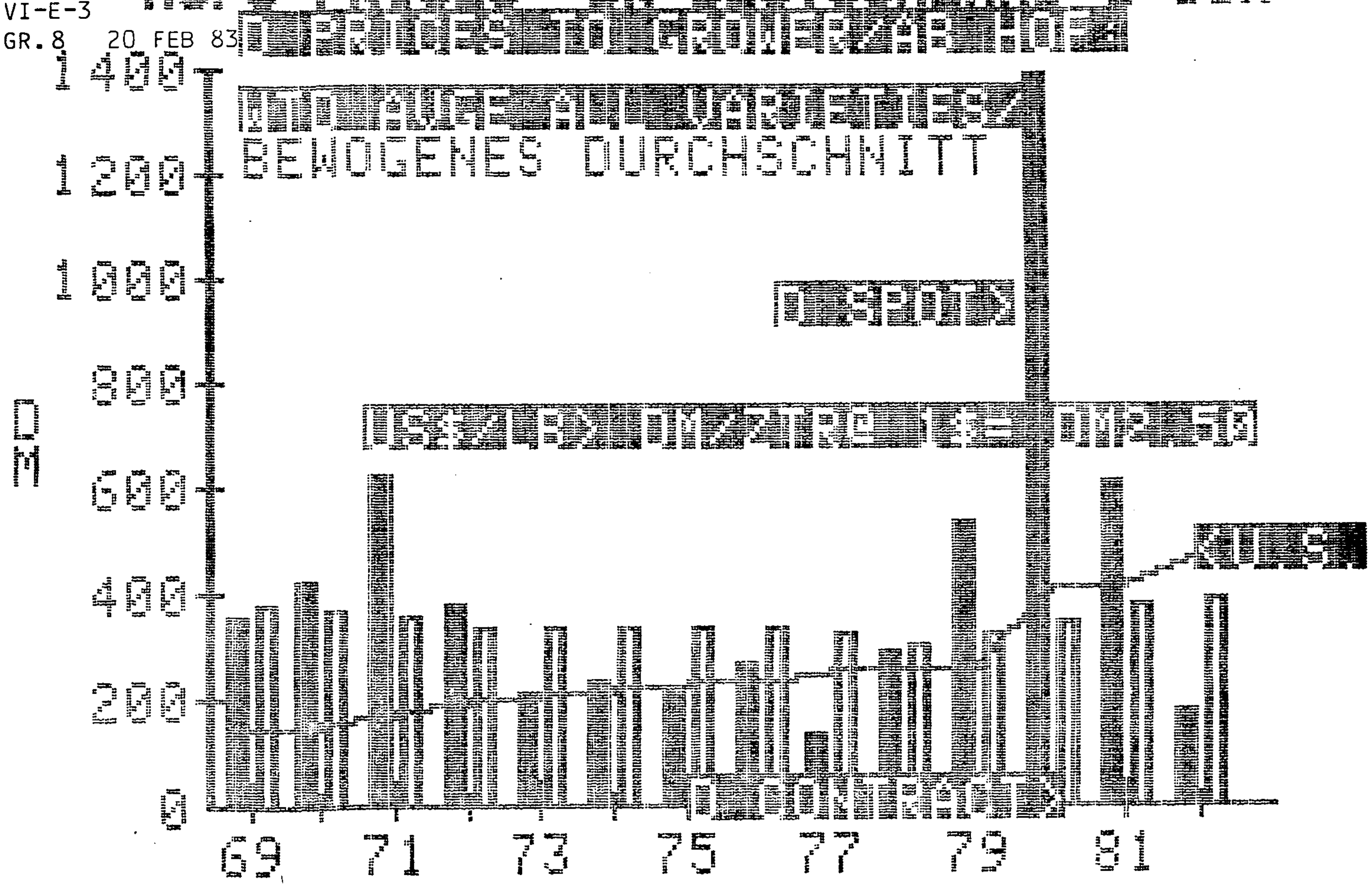
WORLD HOP EXPORTS: EEC CF. USA



ROUNDED TO NEAREST 1000 ZTR (= 50 MT)
TOTAL EXPORTS OF HOPS & PRODUCTS
CONVERTED TO HOP EQUIVALENT (EC EXTRA)

EURCOM
VI-E-3
GR.8 20 FEB 83

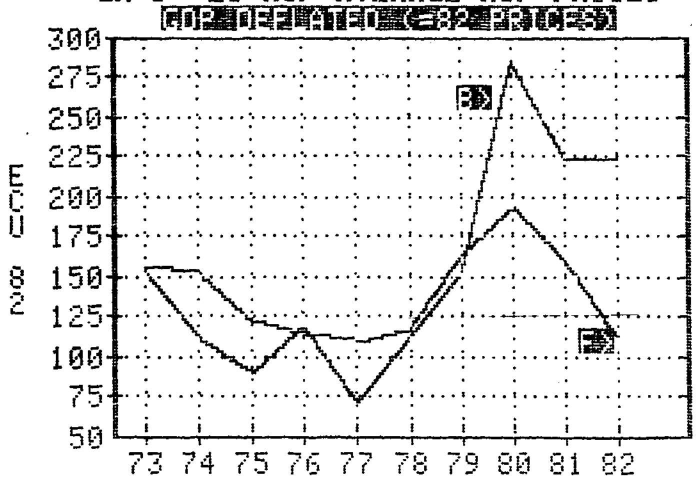
HOPS PRICES: BR DEUTSCHLAND & USA



SOURCES: EC COMMISSION & USDA/HAC.

GR 9: EC HOP AVERAGE HOP PRICES

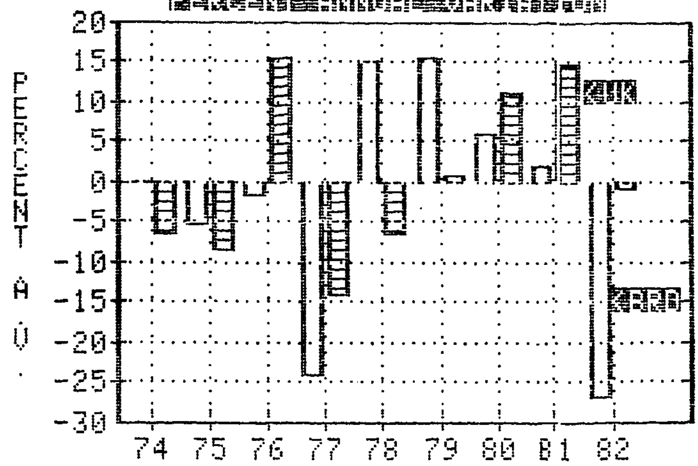
GDP DEFLATED (82 PRICES)



PRIX EN MONNAIE CONSTANTE (PRIX 82)
INFLATIONSKORRIGIERT AUF 82ER WERT

GR 9B: EC AVERAGE PRICES GDP DEFLATED

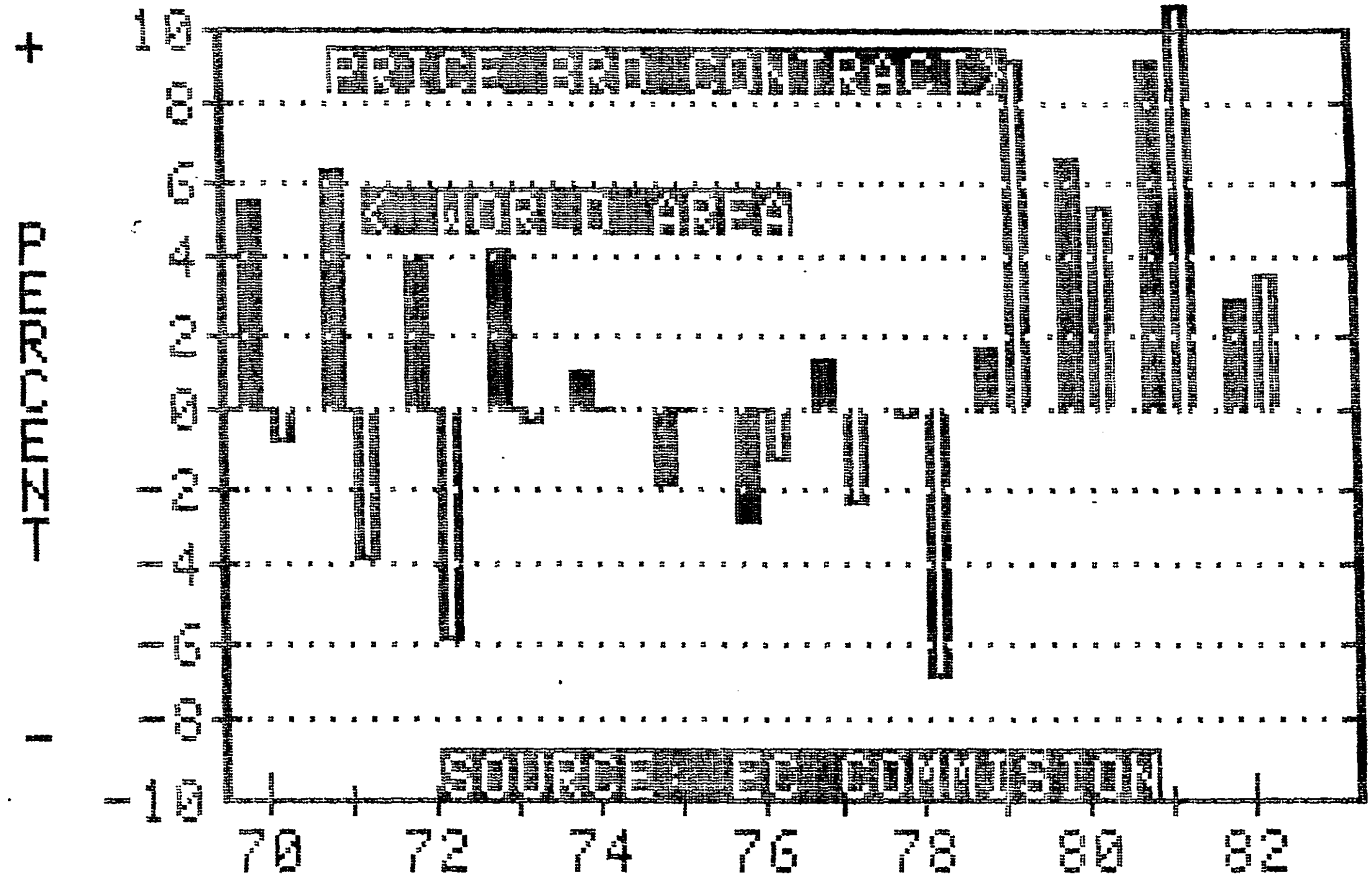
PERCENT ANNUAL VARIATION



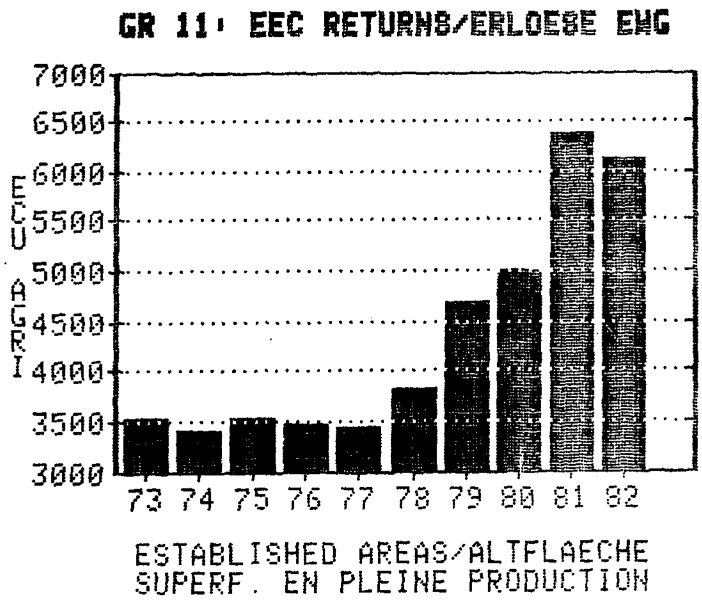
PRIX MONN. CONSTANTE: CHANGEMENT SUR ANNEE PRECEDENTE EEN %+/-; INFLATIONS-KORRIGIERTE PREISEN: %+/- JAEHRLICH

EURCOM
VI-E-3
GR.10 20 FEB 83

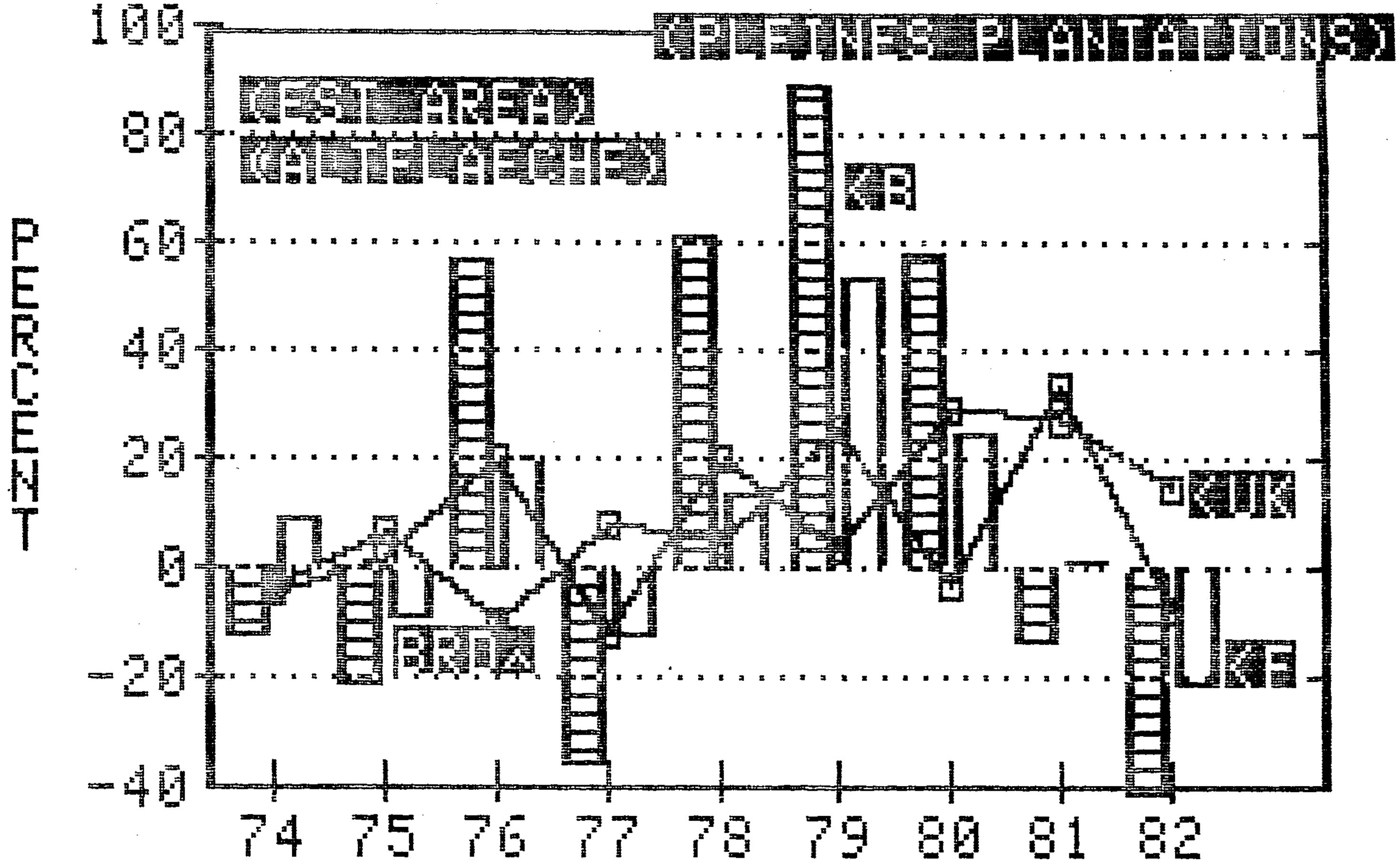
ANNUAL CHANGE WORLD HOP AREA CF PRICE



PERCENTAGE CHANGE OVER PREVIOUS YEAR
POURCENTAGE DE VARIATION ANNUELLE
JAEHRLICHE AENDERUNG IN V.H.


GR 11: EEC RETURNS/ERLOESE EWG
7000
6500
6000
5500
5000
4500
4000
3500
3000
ECU AGRI
73 74 75 76 77 78 79 80 81 82
ESTABLISHED AREAS/ALTFLAECHE
SUPERF. EN PLEINE PRODUCTION

GR 12 : EEC RETURNS-% ANNUAL CHANGE



% CHANGE OVER PREVIOUS YEAR/PROZENT AENDERUNG UEBER VORJAHR/POURCENTAGE VARIATION SUR ANNEE PRECEDENTE

FINANCIAL STATEMENT	Date :

1. BUDGET HEADING : Art. 181 (Hop)	APPROPRIATIONS : 1983 : 6 Mio ECU

2. TITLE : Proposal for a Council regulation fixing the amount of the aid to producers for the 1982 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 1982 harvest to hop producers in order to guarantee an equitable income level. The average return declined in 1982 making it necessary to increase the the amounts of aid for the variety groups "aromatic" and "others".

5. FINANCIAL IMPLICATIONS	PERIOD OF 12 MONTHS	CURRENT FINANCIAL YEAR (83)	FOLLOWING FINANCIAL YEAR (84)
5.0 EXPENDITURE - CHARGED TO THE EC BUDGET ~~(REFUNDS~~/INTERVENTIONS)	8,5 Mio ECU	8,5 Mio ECU	-
~~- NATIONAL ADMINISTRATION~~			p.m. (1)
~~- OTHER~~			
~~5.1 RECEIPTS~~ - OWN RESOURCES OF THE EC (LEVIES/CUSTOMS DUTIES) - NATIONAL			
5.0.1 ESTIMATED EXPENDITURE 5.1.1 ESTIMATED RECEIPTS	only concerns the 1983 budget[1]		

5.2 METHOD OF CALCULATION

Groups	Area (ha)	Aid level per ha	Total Mio ECU
Aromatiques	14.036	350 ECU	4.91
Amères	12.815	200 ECU	2.56
Autres	689	350 ECU	0.24
Total	27.540	-	7.71 (A)
		i.e.	8.5 (B)

6.0 CAN THE PROJECT BE FINANCED FROM APPROPRIATIONS ENTERED IN THE RELEVANT CHAPTER OF THE CURRENT BUDGET ? (2) YES/NO

~~6.1 CAN THE PROJECT BE FINANCED BY TRANSFER BETWEEN CHAPTERS OF THE CURRENT BUDGET~~ ~~YES~~

6.2 IS A SUPPLEMENTARY BUDGET BE NECESSARY ? (2) NO

~~6.3 WILL FUTURE BUDGET APPROPRIATIONS BE NECESSARY ?~~ ~~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 1983.

(2) It is likely that the expected shortfall in the appropriation for Article 181 will be met out of the total funds for Chapter 18 (56 Mio ECU). If this were not so, the necessary adjustments will be proposed by the Commission in the 1983 supplementary budget.