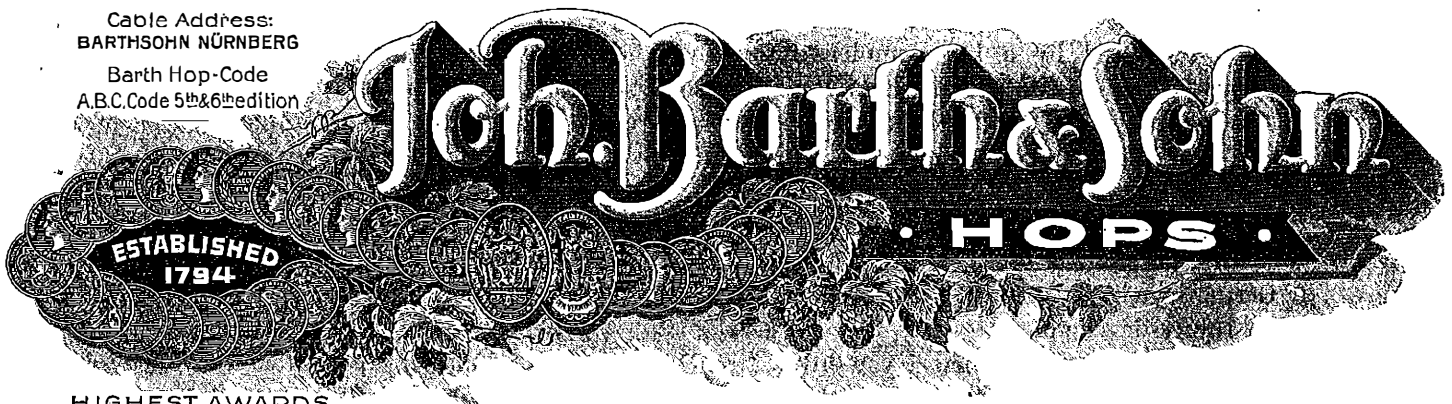


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HIGHEST AWARDS  
at all Exhibitions.

Branch House at Saaz.

NUREMBERG, BAVARIA

12<sup>th</sup> of July 1929.

## Hop Report for 1928/29.

It has proved impossible to stop the downward movement of the german economical situation lasting now since November 1927, the production being heavily loaded with taxes, duties and scarcity of capital. German Agriculture, especially, is strongly in debt and its condition is getting more and more distressing.

Within the last year of increased depression and great unemployment (number of unemployed: 2 460 760 end of February), the competibility of German Industry and Trade was reduced through an increase of wages of about 5½—8 %; their rising tendency is still continuing. Notwithstanding, Germany's export is slightly augmenting, due to a greater capacity of consumption of prosperous foreign states and to the effects of the good German crop in 1928.

The world's beer production in the year 1928 shows an increase to 186,4 millions of hectolitres (1927: 179,6 millions of hectolitres, 1913: 295 millions of hectolitres).

Beer Production.

The production of beer of the various countries given by calendar year or, respectively, per fiscal year is shown on the following table.

### Production of Beer in 1928.

	1000 hectolitres		1000 hectolitres		1000 hectolitres.
*Germany . . . . .	54997	*Roumania . . . . .	1061	Greece . . . . .	103
*Great Britain . . . . .	31460	*Italy . . . . .	1027	Portugal . . . . .	100
*Belgium . . . . .	19500	*Hungary . . . . .	671	*Livonia . . . . .	100
*France . . . . .	16240	Mexico . . . . .	670	*Lithuania . . . . .	100
*Czechoslovakia . . . . .	11055	Spain . . . . .	620	*Estland . . . . .	91
United States of Amer. . . . .	8000	Jugoslavia . . . . .	600	*Bulgaria . . . . .	77
*Austria . . . . .	5256	New Zealand . . . . .	578	*Egypt . . . . .	77
Russia . . . . .	4141	*Norway . . . . .	514	Ecuador . . . . .	75
*Irish Free State . . . . .	3250	Cuba . . . . .	480	Guatamala . . . . .	50
Australia . . . . .	3000	Columbia . . . . .	460	Turkey . . . . .	45
Canada . . . . .	2700	Chili . . . . .	450	China . . . . .	40
*Sweden . . . . .	2578	Finland . . . . .	366	Philippine Islands . . . . .	40
*Poland . . . . .	2482	British South Africa . . . . .	330	Panama . . . . .	40
Argentine . . . . .	2400	India . . . . .	200	Congo . . . . .	30
*Switzerland . . . . .	2338	Peru . . . . .	151	Paraguay . . . . .	20
*Netherlands . . . . .	2273	Uruguay . . . . .	150	Costa Rica . . . . .	18
*Denmark . . . . .	2014	Venezuela . . . . .	124	San Salvador . . . . .	18
*Japan . . . . .	1608	Algeria . . . . .	110	Honduras . . . . .	15
Brazil . . . . .	1500	Bolivia . . . . .	105	* official figures.	

The English beer production in the year 1928 was only 19 252 986 barrels, against 19 962 997 barrels in 1927 and 31 653 144 barrels in 1913. The reduction in the past year has been 710 011 standard barrels or 3,55 %.

Favoured by a hot summer the German beer production increased in the year 1928 to 54 996 643 hectolitres and amounts actually to 83,6 % of the production in 1914.

For the year 1928 the German Trade shows an under-balance of 1200 millions Reichsmark; the figure of unemployment at the middle of June 1929 amounted to 745 000 (against 629 470 on 1st June in 1928.)

The settlement of the Reparation Problem by the Young-Plan means, for the moment, a facilitation for Germany with regard to her payments, but whether the weakened situation of Germany will be able to bear the enormous charges is a question the answer of which depends on future development.

The almost continual dry weather from the middle of February permitted the uncovering of the hop gardens as early as in the last days of March. It was generally stated that the plants had wintered well. April brought rains and in some parts snowfalls with cold; in this month there was a quick rise of temperature. At the end of April the cutting of the plants was finished in Bavaria, while in Czechoslovakia it did not come to an end until 10th May, later than usual.

Already at this time of the year tidings began to come in from various hop-growing districts about vermin and diseases. So from Czechoslovakia the appearance of hop fleas was reported; from Belgium that of the Aphids, while first symptoms of the Downy mildew were being traced in Bavaria, Alsace, the Woywodina and Belgium.

Night frosts did not seriously damage the plants but the cold setting in again on 9th May, prevented normal growth. The plague of the fleas did not exceed the normal extent in Germany, but in Czechoslovakia it was worse than it had been for the last 20 years, so that the conditions of the plants up to the second part of May were weak and bad. During the last days of May, the weather became warmer, but night temperatures, down to 5 centigrades above zero prejudiced the

that of former years. In the Saaz district, about this time, in most gardens the plants were able to be bound up, but the fleas, in the meantime having almost disappeared, had much weakened the plants.

The Aphid fly, which had but sporadically been traced in Czechoslovakia, was also noticed in Alsace where it soon multiplied considerably. It appeared to a great extent in parts of England where in some hopgardens both leaves and bines were totally eaten up by these insects. Later on, winged as well as apterous lice were met with in larger or smaller quantities in Auscha, Belgium, Poland, in the Woywodina, and also in parts of Bavaria and Wurttemberg. At the beginning of June, in some parts of Bavaria there appeared another vermin, viz. the tenebrio curling caterpillar, and in Wurttemberg, Bavaria, the but without causing any noticeable damages.

A series of sultry days at the beginning of June accompanied by heavy rainfalls favoured the development of the plants. In the middle of June, temperature fell and more abundant rains set in.

In all hop-growing districts, with the exception of Czechoslovakia and Poland, the pertinacious appearance of the Downy mildew caused serious apprehension from the very beginning of the growing period. Up to July it seemed as if the frequent sprayings effected with great perseverance had been in vain. In the Hallertau, Spalt and Hersbruck districts, in Alsace and the Backa it threatened to become a serious menace, and combating it required great sacrifice of work, time, and money on the part of the growers. It may chiefly be attributed to the constantly hot and dry weather setting in on 22nd July that the disease gradually began to abate, even in the districts where spraying had been done not at all or only very little. Prudent German hop growers continued spraying up to the picking period, in order to secure a sound ripening of their products.

The excessive heat in July, without the soil ever getting thoroughly watered, produced different effects, but on the whole favoured the growth of the plants which up to then had been warped. In some districts, however, the continual dry heat was prejudicial to the growth. Here and there the red spider made its appearance, sporadically in Bavaria, the Saaz district, and the Backa, in which latter district it had caused severe havoc the year before. In the Polepper Platte of the Auscha district, where the said vermin is accustomed to show itself every year whenever the weather is dry, some gardens were ruined.

Growth of the hop plants in 1928.

Diseases and Vermin.

The Aphids.

Downy Mildew.

Tropical heat in July.

At the beginning of July, blooming began in some gardens of the Hallertau and Tettng districts. In good time, thunderstorms brought the necessary rains. Lice in the middle of July expanding in the Saaz and Auscha districts were successfully combated. In the Saaz district, only 10 % of the hop fields were behind in growth but the favourable weather almost equalised their conditions. In the same manner as Saaz, all other hop-growing districts were likewise favoured by warm summer weather, which allowed the plantations, showing a tardy growth, to make up for the damages suffered in early Spring. August brought ideal weather furthering the growth, blossoming, and the formation of the cones.

In German hop-growing regions, picking began on 27th August, here and there a few days before, and was favoured by continual good weather. As a consequence of the hot summer, also in all other Central European hop-growing countries, picking was commenced nearly about the same time, and everywhere was practically completed by the middle of September.

Picking.

The final estimates expressed in the following statement have been compiled in common by the Brewing Industry, Hop Production and Hop Trade.

Estimates.

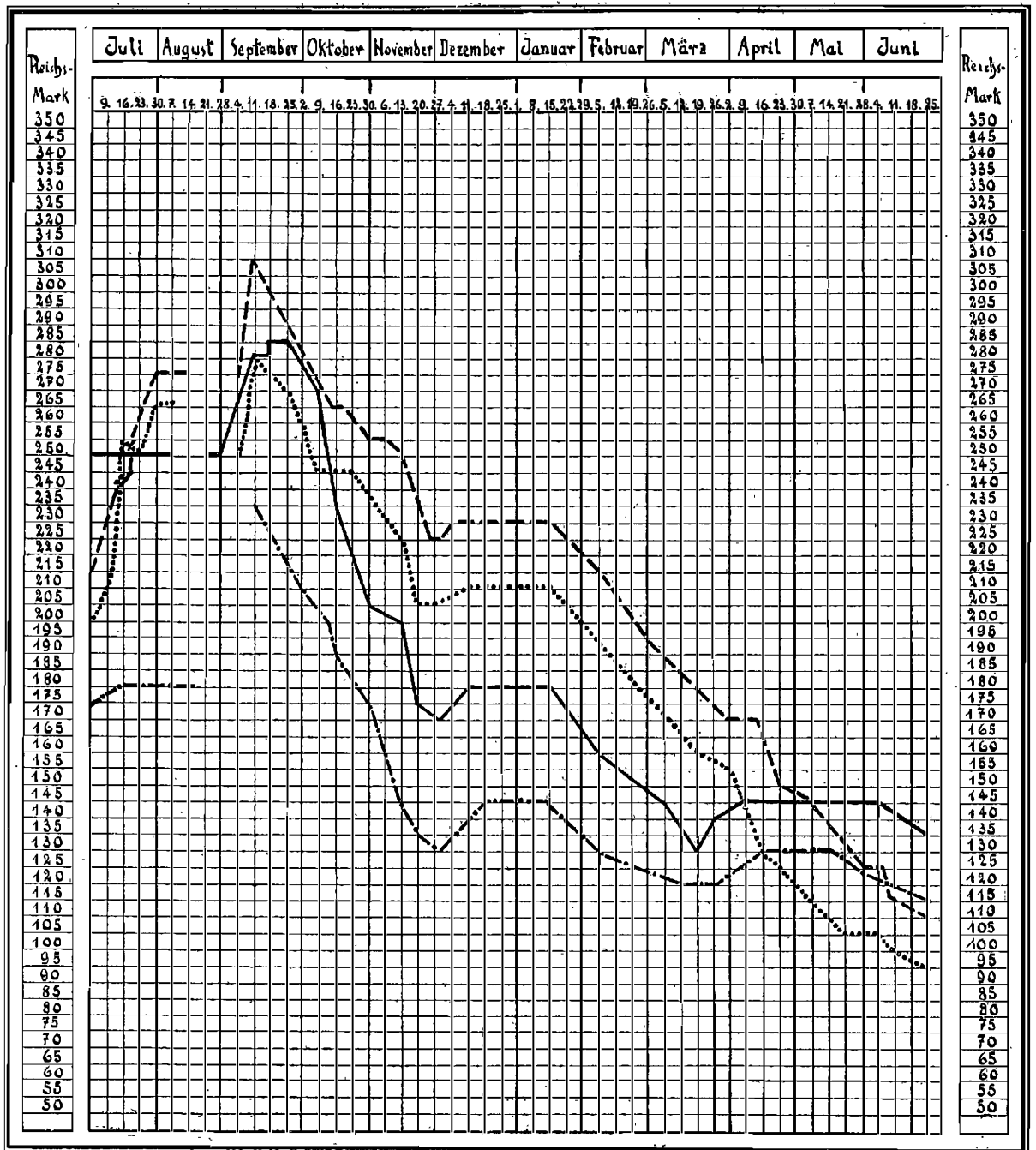
In the following we bring the compiled picking results of the world's crop 1928 and add the figures of the years 1926 and 1927.

## World's Hop Acreage and Production.

Producing countries	Acreage Hectares			Yield per hectare in cwts. of 50 Kilos each			Our estimate of the yields in 1000 cwts. of 50 Kilos each			Official estimates in 1000 cwts. of 50 Kilos each
	1926	1927	1928	1926	1927	1928	1926	1927	1928	1928
Hallertau . . . . .	6508	7099	7351	5,8	19	20,8	33,8	124	147,8	96,6
Spalt . . . . .	1515	1669	1753	9,4	9,2	10,5	13	14	17,6	17,5
District of Hersbruck . . .	2792	2785	2400	6,3	8,9	8,5	16	25	20,4	15,7
Valley of the Aisch . . . .	723	758	652	4,6	6,9	8,4	2,8	5	5,5	4,4
Various countries . . . . .	471	577	580	4,7	7	6,9	1,8	3,3	4	4,8
<b>Bavaria</b>	<b>12009</b>	<b>12888</b>	<b>12736</b>	<b>6,3</b>	<b>14,2</b>	<b>15,3</b>	<b>67,4</b>	<b>171,3</b>	<b>195,3</b>	<b>139</b>
Württemberg . . . . .	1682	1909	1803	6,4	13,6	11	9	23	20	19,7
Baden . . . . .	366	613	628	15,2	27,3	11,4	4	10	7	7,3
Prusia etc. . . . .	112	97	106	15,4	15,5	13,4	1,5	1,5	1,3	1,3
<b>Germany</b>	<b>14169</b>	<b>15507</b>	<b>15273</b>	<b>6,5</b>	<b>14,5</b>	<b>14,6</b>	<b>81,9</b>	<b>205,8</b>	<b>223,6</b>	<b>167,3</b>
Saaz . . . . .	10042	12590	12579	18,8	16,8	10,9	155	169	137,5	118,8
Auscha-Dauba-Raudnitz . .	2540	3211	3522	22,9	20,8	16,7	43,4	53	53,7	45,4
Moravia etc. . . . .	275	557	407	13,6	14,5	13,4	1,3	4	5,5	3,1
<b>Czechoslovakia</b>	<b>12857</b>	<b>16358</b>	<b>16508</b>	<b>19,5</b>	<b>17,5</b>	<b>12</b>	<b>199,7</b>	<b>226</b>	<b>196,7</b>	<b>167,3</b>
Wojwodina . . . . .	4500	9500	9000	14,6	16,6	8,6	41	75	78	
Slovenia . . . . .	2000	3700	3000	19,3	25	18,6	18	50	56	
<b>Jugoslavia</b>	<b>6500</b>	<b>13200</b>	<b>12000</b>	<b>15,8</b>	<b>19,2</b>	<b>11,1</b>	<b>59</b>	<b>125</b>	<b>134</b>	
<b>Austria</b>	<b>113</b>	<b>313</b>	<b>300</b>	<b>8</b>	<b>26,5</b>	<b>10</b>	<b>0,9</b>	<b>3</b>	<b>3</b>	
<b>Hungary, Roumania</b> and var. countries . . . .	<b>175</b>	<b>300</b>	<b>300</b>	<b>10,4</b>	<b>11,4</b>	<b>10</b>	<b>1,8</b>	<b>2</b>	<b>3</b>	
<b>Poland</b>	<b>2500</b>	<b>3250</b>	<b>3875</b>	<b>18,4</b>	<b>20</b>	<b>16,3</b>	<b>35</b>	<b>50</b>	<b>53</b>	
Alsace . . . . .	2726	3084	3040	18,9	27,5	16,4	51,8	75	50	43,7
Burgundy and Lorraine . .	1201	1289	1360	10,1	20,8	11,6	9,9	25	15	14,8
Northern France . . . . .	424	474	410	29,1	47,1	48,8	12,7	20	20	14,7
<b>France</b>	<b>4351</b>	<b>4847</b>	<b>4810</b>	<b>17,9</b>	<b>27,5</b>	<b>17,6</b>	<b>74,4</b>	<b>120</b>	<b>85</b>	<b>73,2</b>
<b>Belgium</b>	<b>1417</b>	<b>1480</b>	<b>1470</b>	<b>32,8</b>	<b>39,5</b>	<b>29,7</b>	<b>42</b>	<b>56</b>	<b>43</b>	
<b>Russia</b>	<b>2400</b>	<b>3000</b>	<b>3000</b>	<b>16,6</b>	<b>25</b>	<b>10</b>	<b>25</b>	<b>60</b>	<b>30</b>	
<b>Continent</b>	<b>44482</b>	<b>58255</b>	<b>57536</b>	<b>14,6</b>	<b>19</b>	<b>13,7</b>	<b>519,7</b>	<b>847,8</b>	<b>771,3</b>	
England . . . . .	10360	9309	9615	31,7	27,9	28,4	330	287	265	246
<b>Europe</b>	<b>54842</b>	<b>67564</b>	<b>67151</b>	<b>18,4</b>	<b>20,6</b>	<b>15,4</b>	<b>849,7</b>	<b>1134,8</b>	<b>1036,3</b>	
United States of America .	8417	9955	10562	34,8	33	28,9	285,9	278,1	290	
Canada . . . . .	240	420	650	53,7	21,4	21,4	8,7	12,9	9	297
Australia . . . . .	700	700	700	25,7	25,7	25,7	18	18	18	8,8
<b>World's production</b>	<b>64199</b>	<b>78639</b>	<b>79063</b>	<b>21</b>	<b>22,4</b>	<b>17,2</b>	<b>1162,3</b>	<b>1443,8</b>	<b>1353,3</b>	

Hop prices 1928/29.

In the following we publish a table showing the movement of hop prices of the 1928 crop for best available and middle qualities of Hallertau and Saaz hops; cost prices per 50 kos. at the producers'.



— Hallertau choice quality      - - - - Saaz choice quality  
 - · - · - ·      „      fair average quality      ·········      „      fair average quality

Development of the prices from July 1927 up to the new harvest. Prices for 1928 hops.

In consequence of the increased demand occasioned by the drought in July, the prices for 1927 hops moved on a rising scale in this month.

An increased crop being generally expected, prices for the new hops set in somewhat below the final prices for the old crop, viz.:

- at Tettnang, 17th August with . . . . . Mk. 240.—
- in the Hallertau district,
- somewhat later with . . . . . Mk. 250.—
- in the Saaz district, end of
- August with . . . . . Kc. 2000.— per 50 kilos.

The official agricultural estimates of the new crop having been very low, the growers persisted in withholding their produce which caused prices to rise, especially in the Hallertau and still more in Saaz. In the Spalt district the growers were content with the prices obtained and willingly sold their crops at running prices from Mk. 220.— to Mk. 300.— per 50 kilos, so that by 3rd October this district was considered to be sold out. Already before this date, the Hallertau Producers had begun to realize that the price of Mk. 300.— fixed by them, was not to be obtained; some of them started selling cheaper, and about 20th September prices began to sink, which tendency, except for short interruptions, kept on until middle of March.

The continental brewing industry disposed of large stocks at the beginning of the crop 1928 which were estimated as follows: Germany 57,3 %, Denmark 55,6 %, Sweden 59,3 %, Czechoslovakia 25,1 %, Estland 25 %, Switzerland 44,3 %, Netherlands 76,9 %.

The German brewers being informed on 20th Sept. by their competent reporters of the abundant crop, were rather reserved in their purchases, so that Trade had no reason to interfere. Only in October, when prices had sunk to a certain extent, most German and Foreign Breweries began buying. But also the increased demand proved not sufficient for the pressing offers of the large quantities of the crop which had by far been underrated.

The causes of the strong decline in prices are to be seen in the inexact estimate from the part of the Growers and in the fact that owing to the high initial prices of Germany and Czechoslovakia many consumers, especially foreign ones, acquired cheaper hops from other countries.

From the very beginning of the 1928 harvest, the demand on the part of the Breweries who still disposed of rather large stocks, had set in slowly, thus permitting to purchase quietly without any hurry in all regions. The Brewers availed themselves of the opportunity of purchasing at reduced prices in order to buy considerable stocks of 1928 hops, which partly still amount to an entire year's consumption.

The decrease of acreage in Germany against that of 1927 amounts to 234 ha. Quality is judged as follows:

	good	middle	inferior
	%	%	%
Hallertau . . . . .	65	25	10
Spalt district . . . . .	35	35	30
Hersbruck & Aischgrund . .	15	40	45
Württemberg . . . . .	60	35	5
Baden . . . . .	15	60	25

1928 Crop  
in Germany.

Quality.

The Hallertau hops were of excellent quality and of a rare fine colour. In general, the growers in this district, with laudable zeal, have carried on the struggle against downy mildew. The yield in the Hallertau district, with 20,8 cwts. per ha, is far above the average of 11,2 cwts., a few particularly experienced growers have been able to obtain as much as 45 ctws. per ha. As in the said district Hallertau seedlings are almost exclusively grown, one may speak of a standardisation in this largest of all German hop-growing territories, the Hallertau plantations comprising 7351 ha.

The same cannot be said about the Spalt district, where an excessive variety of sorts is grown. In 1928 only a limited number of gardens yielded a product up to the high value of former years. Probably the want of rain during the growing period was the cause of such a product which was bought only on account of its name and perhaps of its flavour, but every buyer was disappointed with the light quality.

The hops of the bavarian mountainous regions and the Aisch-Valley — which formerly had yielded a good product — mostly proved a failure in 1928. If these districts cannot succeed in improving the quality of their hops, they will no longer be able to compete with foreign ones which are offered in large quantities of superior quality and at cheaper prices.

The Wurttemberg product was able to secure new buyers owing to the abundance of its lupuline.

**Imports of hops into Germany**

1st Sept. 1926 — 31st Aug. 1927	151 344 cwts.
1st Sept. 1927 — 31st Aug. 1928	99 098 cwts.
1st Sept. 1928 — 31st May 1929	81 620 cwts.

**Exports of hops from Germany**

1st Sept. 1926 — 31st Aug. 1927	11 846 cwts.
1st Sept. 1927 — 31st Aug. 1928	39 673 cwts.
1st Sept. 1928 — 31st May 1929	36 307 cwts.

## Czechoslovakia.

The plants, behind in growth on account of low temperature were heavily befallen by fleas in May, later on they suffered from drought, so that the crop in Czechoslovakia did not come out satisfactorily. Exaggerated demands on the part of the producers caused slack business throughout the whole season. The prices which in Saaz had set in with Kc. 2300.— to Kc. 2500.— per 50 Kilos, fell to Kc. 700. — to Kc. 950.—. In Auscha and Raudnitz prices set in with Kc. 1700.— to Kc. 1850.— and went down as low as Kc. 450.— to Kc. 600.—. The Czechoslovakian Brewing Industry covered 10,000 cwts. or about 20 % of their need with foreign hops, because the prices of Czechoslovakian hops conformed themselves too late to those of the World Market.

**Saaz.** The picking took place in dry and hot weather, from 24. 8—12. 9, with only one rainy day at the beginning of the harvest. The product was less uniform in colour, more unequal in size, and, in general, lighter than in former years. Picking and drying was done with greater care than usually. Quality was judged as follows: 10 % first-class, 70 % middle, 20 % inferior. The best hops came from the Bohemian forest district and from some places, such as Tuchorschitz and Litschkau. Though in 1928 the acreage had been increased by 25 %, the crop turned out 30 % less than in 1927. The plants bearing for the first time proved a failure.

The preliminary sales of 1928 Saaz hops were more frequent than ever. 20—25 000 ctws. of hops are said to have been contracted at loss prices from growers to trade before the beginning of the harvest. An action started by the Saaz Union of Hop Growers had the result that a majority of producers, with the exception of a few outsiders, pledged their word to desist in future from making preliminary sales.

**Auscha-Raudnitz.** In the Auscha territory, picking took place between 23. 8 and 20. 9. On the Polepper Platte, in some communities the gardens were infected by the red spider. The harvested product had smaller cones but was richer in lupuline than in the preceding year, and was satisfactory as to colour. Quality was judged: 35 % first-class, 55 % middle, 10 % inferior. The best hops came from Geltersseite with Kuttendorf, as far as the best sites are concerned; as regards sites producing middle quality, those of Kelch in the mountains, and those of Raschowitz in the forest district, were most favoured. Picking at Raudnitz lasted from 18. 8 to 13. 9. The produce was small and good; the best hops were produced by the low sites on the banks of the Elbe and Moldau. The quality of Raudnitz hops was judged as follows: 25 % first-class, 50 % middle, 25 % inferior.

### Imports of hops into Czechoslovakia:

1st Sept. 1926 — 31st Aug. 1927 12 251 cwts.  
1st Sept. 1927 — 31st Aug. 1928 12 083 cwts.  
1st Sept. 1928 — 31st May 1929 10 310 cwts.

### Export of hops from Czechoslovakia:

1st Sept. 1926 — 31st Aug. 1927 158 417 cwts.  
1st Sept. 1927  
1st Sept. 1928 — 31st May 1929 124 791 cwts.

## Jugoslavia.

The lack of exactness in statistics of Jugoslavia demands rectification of figures formerly given. The acreage in Jugoslavia in 1927 proves to have been about 13 200 ha against 10 900 ha published last year.

**Wojwodina.** Downy mildew showing itself up into June, was combated in a very few cases. Only the dry and intense heat setting in after that time caused the disease to disappear, for almost 3 months there being no rain. Drought prejudiced the development of the plants and considerably reduced the crop. In the Backa, almost the whole harvest proceeded in very fine weather (only 2 rainy days), between 26. 8 and 13. 9; in Syrmia between 2. 9 and 20. 9. Backa hops were better than they had been the year before, both in regard to quality and colour, while Syrmian hops, which the year before had been superior to Backa, proved to be less good, being mostly smaller; as to colour, little was left to be desired except with those picked after the rain. Syrmia produced mostly hops with small cones of yellowish freckled colour. Hops from Petrovac, from the close environs of Novisad and Subotica turned out better. Quality was judged as follows: 40 % first-class, 30 % middle, 30 % inferior; in Syrmia: 15 % first-class, 50 % middle, 35 % inferior.

In the Wojwodina, prices set in with Dinar 1500—1550 per 50 kilos, then began slowly to sink, and after the election of the American President, the result of which was not favourable for hop-production, they rapidly went down as low as 200—400 Dinar.

According to recent reliable reports, a normal crop in the Wojwodina produces a yield of 13—14 cwts. per catastral yoke = 22,5 to 24,3 cwts. per ha; a good middle crop 16 cwts. per catastral yoke = 27,7 cwts. per ha, and a good crop 17 cwts. and more per catastral yoke = 29,5 cwts. per ha and more.

The Hop Growers Associations in the Wojwodina have joined together on the basis of co-operation, constituting a Union, intended taking over the sale of the hops grown by its members, and, if desired, to give cash-advance. For hops to be exported sealing is intended to be introduced. An improvement of quality is aspired at.

**Slovenia.** Damp weather setting in just in time secured a good yield of the plantations which had somewhat suffered from the heat. Picking was favoured by sunny, dry weather and lasted from 18. 8 to 1. 9. The hops were unequal, lighter, and with less lupuline, but of better colour than the year before. Quality was judged: 50 % first-class, 35 % middle, 15 % inferior. The prices set in with Dinar 1600—1750 per 50 kilos and sunk down to Dinar 250—500.

**Alsace.** Up to the beginning of July, downy mildew and vermin necessitated repeated sprayings as often as 6 times. The harvest was brought in from 3rd to 20th Sept., under ideal weather conditions. The best yield came from heavy soils; as to light soils, those of Wantzenau gave good results. Colour as well as ripeness of the product were very good; the cones small or middle-sized; the quality generally superior to that of 1927 hops. Quality was judged as follows: 35 % first-class; 50 % middle; 15 % inferior. Basing upon a yield of 21 cwts. per ha, Alsacian hop-growers calculate their cost of production at ffrs. 15 102.— per 50 kilos, while the French brewers declare it not to exceed ffrs. 10 000.—

France.

In September prices set in with ffrs. 1000.— to 1200.— per 50 kilos, and then fell to ffrs. 300.— to 500.—

In Burgundy, downy mildew disappeared in the middle of July. Picking took place in good weather from 1st to 10th Sept. As in Alsace, also in Burgundy the yield was considerably inferior in quantity to that obtained the preceding year. The product was fully grown, of a fine green colour. The campaign for the elimination of male plants having been rigorously continued, hops have had fewer grains than in the past.

**North Department (Flanders).** Lice and downy mildew had to be fought harvest, which took place between 28th August and 15th September, brought an unequal product. Quality was judged as follows: 30 % first-rate, 50 % middle, 20 % inferior.

The sale of French hops since the harvest has been slow; hop production did not sufficiently take into consideration that the product had to compete with the prices on the World Market. The French Brewing Industry hesitates to use certain sorts of hops grown in France on account of the peculiar "bitter", and requires improvement of quality in order to remedy the bad sale which growers are complaining of. An Interparliamentary Hop Commission is examining the problems engendered by the hop crisis.

**Import to France in the calender years**

1926 . . . . .	35 662 cwts.
1927 . . . . .	48 420 „
1928 . . . . .	39 216 „

**Export from France in the calender years**

1926 . . . . .	55 876 cwts.
1927 . . . . .	51 520 „
1928 . . . . .	32 768 „

The climatic conditions during the year 1928 unfavourably influenced the developiment of the plants in Poland, so that in spite of the increased acreage the crop was little larger than that of 1927. The yield per ha in Volhynia was about 30—35 %, in Congress-Poland about 25—30 % smaller than the year before. The curling-up of the leaves and the downy mildew in every year prejudice the Polish hops. The fighting against these diseases has been as slack as ever.

Poland.

Growth in Volhynia was disturbed by a severe fleaplague, by lice, and by drought. Scarcity of hands prolonged picking from 25. 8 to 30. 9 which in many places caused the hops to get overripe and become impaired in colour. The cones were smaller than usual. Quality was judged: 15 % first-class, 25 % middle, 60 % inferior.

**Congress-Poland:** The plants suffered from lice, from the curling-up of the leaves, the red spider, and the drought. The picking took place in excellent weather from the middle of August until 20th September. During the ripening and the picking periods fleas again appeared in large numbers, reducing the crop by 10—15 %. The cones were smaller-sized and of less fine colour than in 1927. Quality was judged: 40 % first-class, 30 % middle, 30 % inferior.

In **Galicja** picking was effected from 15. 8 to 15. 9. The quality, less good than in 1927, was judged: 25 % first-class, 50 % middle, and 25 % inferior.

In the territories of **Neutomischl** (Great Poland) the crop was larger than in the preceding years, in consequence of the increased acreage especially on the part of the large land-owners. It is to be regretted that for the new plantations mostly seedlings from Volhynia and Congress-Poland were planted instead of home-grown hops. Before 1914 the home-produce had secured a general good renown on account of its mild flavour. The picking lasted from 3. 9 to 20. 9 and yielded unequally sized cones of uniform yellowish green colour, lighter in quality than the 1927 hops.

**German Austria.**

The picking of a healthy product proceeded from 25. 9 to 28. 10. Quality is judged: 40 % first-rate, 40 % middle, 20 % inferior. The treatment of the hops on the part of the producers left somewhat to be desired.

The Government is endeavouring to encourage the cultivation of hops by subvention, the quality of German-Austrian hops not satisfying the national breweries. The acreage is supposed to be decreased, as the producers could scarcely realise the wages for picking.

Imports	Exports
to German-Austria in the calendar years	from German-Austria in the calendar years
1927 . . . . . 26 141 cwts.	1927 . . . . . 549 cwts.
1928 . . . . . 27 568 „	1928 . . . . . 1793 „

**Belgium.**

**Vermin and a strong appearance of the Peronospora (downy mildew)** hampered the development of the plants during the first three months of its growing period. Picking took place during very fine weather at Poperinghe from 27. 8 to 18. 9. The hops were slightly freckled. Quality was judged: ½ first-class, ½ middle and inferior. In Alost the picking proceeded from 15. 9—15. 10. The produce was full ripe, of a greenish colour and middle-sized cones; quality was judged: 30 % first-class, 60 % middle, 10 % inferior.

The decrease in the production of high fermenting beers caused a diminished demand for Poperinghe hops, which in that district aggravates the international hop crisis owing to over-production. Notwithstanding a diminished crop, the prices obtained by the producers were below their own expenses, which will probably have as consequence a further reduction of the acreage. The Minister of Agriculture has appointed a Commission for studying the hop crisis and the possibilities of avoiding it.

**Russia.**

It is impossible to get reliable figures about yield and consumption. The crop, supposed to be of about 30 000 cwts., as well as the quantities exported, were below those of the preceding year. The product shows that downy mildew has found its way also to Russia.

**England.**

Favourable weather and rains setting in propitiously in July improved the condition of English hop gardens which before had severely suffered from downy mildew and vermin, requiring to be sprayed as often as 10 times.

The picking lasted from August up to the first week of October — a shorter period than in the preceding years — and brought a yield good in colour and excellent in quality, which was judged: 60 % first-class, 30 % middle and 10 % inferior. The best hops came from **Kent and Hereford districts**.

The prices were fixed by the “**Hop Growers Ltd.**,” which controls about 90 % of the crop, from £ 7.10.— to £ 14.—.— In August 1928 the continuation for another 2 years of the “**Hop Growers Ltd.**” was resolved upon, though the discontentment with their non-economical methods is increasing generally. In spite of the order to reduce the acreage by 20 %, it has been increased, especially by outsiders.

The high duty of £ 4.—.— per cwt. on imported hops with a preference rate for hops from british dominions comes to an end on the 16th August 1929. Under its protection the surplus of 4 or 5 crops has been annihilated without having been able to prevent overproduction.



If growers will not reduce their acreage in proportion to the possibilities of sale a renewal of the protective duty would mean nothing else than a permittance on the part of the English government and the English brewing industry to the „Hop Growers Ltd.” to continue its methods which arouse the ridicule of the world.

Also last year the stocks left from the 1926 and 1927 crops were sold as manure, the same as had been done in the year before with the stocks of 1924 and 1925, in order to avoid the high storing fees. Of the 1928 hops about 25 % remained unsold, which stocks probably will encounter the same fate. The English Breweries were prejudiced in their production by the arctic cold and by the influenza in winter and seem to prefer high beer-prices to increased sales.

The imports of English hops within the time from 1st Sept. 1928 to 31st May 1929 amounted to 80 481 cwts. against an export of 13 039 cwts.

<b>Imports:</b>	<b>Exports:</b>
1st Sept. 1926 — 31st August 1927 51 456 cwts.	1st Sept. 1926 — 31st August 1927 72 013 cwts.
1st Sept. 1927 — 31st August 1928 97 247 cwts.	1st Sept. 1927 — 31st August 1928 29 482 cwts.

The actual acreage in British Columbia amounts to 1600, besides 4 acres in Ontario. The Statistical Office Ottawa estimates the Canadian acreage to be 1049 acres only.

Canada.

In Summer 1928, downy mildew appeared for the first time quite suddenly and considerably reduced the crop. The Hop Production in British Columbia, which up to now has had to deal with vermin only, will in future have to reckon also with this hop pest. Goldings and Bramblings proved almost immune against the disease.

<b>Import to Canada in the calendar years</b>	<b>Export from Canada in the calendar years</b>
1926 . . . . . 2 713 205 lbs.	1926 . . . . . 261 466 lbs.
1927 . . . . . 2 251 097 „	1927 . . . . . 257 897 „
1928 . . . . . 2 068 895 „	1928 . . . . . 868 877 „

In Australia, hops are grown almost exclusively in Tasmania and in some temperate districts of the Province of Victoria. The convention between producers and breweries forcing the latter to cover at least 85 % of their needs with homegrown produce, prejudices imports.

Australia.

The development of the plants was but little disturbed by vermin. At the beginning of August, there was a slight appearance of the red spider. In California, the picking took place from 20. 8 to 10. 10; in Oregon and Washington from 1. 9 to 10. 10, in good weather. The acreage having been increased by 1500 acres = 607 ha, the 1928 crop exceeded that of 1927, but did not quite come up to the estimates. The stocks of 1927 and older hops being smaller than ever before the prices, paid to the producers after the new crop, set in with 21—22 cts. per lb. (sales to Breweries 27—28 cts.). But the fact that the elections had given America a “dry President” caused the prices to decline, and by May they had gone down as low as 10—13 cts. per lb.

U. S. A.

In the three States of Oregon, California, and Washington, the Hop Growers, with George Hewlett at their head, started a co-operative movement aiming at reducing the acreage in order to obtain higher prices. The production expenses, said to be about 18 cts. per lb., are often not covered on account of overproduction. The Growers partaking in this movement bind themselves by signature to leave unpicked the yield of the third of their acreage.

Within the U.S.A. hops are consumed by Breweries, by producers of distilled spirits, home brewers and the Package Trade.

The following table shows the figures of hop-crops, imports and exports in the years 1920—1927:

	Crops	Imports	Exports
	lbs.	lbs.	lbs.
1920	34 280 000	4 807 998	22 206 028
1921	29 340 000	893 324	19 521 647
1922	27 744 000	1 294 644	13 497 183
1923	19 751 000	761 174	20 460 705
1924	27 670 000	438 996	16 121 978
1925	28 573 000	581 009	14 997 974
1926	31 522 000	470 286	13 369 268
1927	30 658 000	753 368	11 812 434
	<b>229 538 000</b>	<b>10 000 799</b>	<b>131 987 217</b>

U. S. A.

The official figure referring to hops consumed by breweries and distillers in the U.S.A. is slowly declining showing an actual consumption of round 3 000 000 lbs. a year.

The crops plus quantities imported, minus quantities exported between 1st July 1920 and 30th June 1927 are calculated to be 107 551 582 lbs.

The stocks before the 1920 harvest are estimated to have amounted to 500 000 lbs., those existing before the 1928 harvest to 2 000 000 lbs.; old olds have not been taken into consideration. A year's hop consumption is therefore 13 256 447 lbs. or 118 368 cwt. on an average i. e. below what up to now had been estimated.

Under the Jones law, recently passed, it is a felony to manufacture home brew, and the Federal Government may restrict the sale of hops except to those having a license to make legal beer.

Owing to diminished exports of the 1928 crop and to reduced consumption, the present stocks are larger than those of the year before; on 1st March 1928 they amounted to 21 500 bales, on 1st March 1929 to 45 000 bales of 200 lbs. each.

In the following statement we bring the figures of the presumptive consumption of hops in 1929/30.

### World's Hop Consumption 1929/30.

	Estimated Beer Production 1929/1930 hectolitres	Dose of hops per hectolitre in pounds of 1/2 kilo	Hop Consumption in 1000 cwt. of 50 Kilos each
Germany . . . . .	55.000.000	0,47	258,50
Austria and Hungary . . . . .	5.930.000	0,50	29,65
Czechoslovakia . . . . .	11.000.000	0,50	55
Poland . . . . .	2.500.000	0,60	15
Roumania, Jugoslavia . . . . .	1.660.000	0,60	9,9
Baltic States . . . . .	660.000	0,55	3,63
Balkan . . . . .	225.000	0,50	1,12
France . . . . .	16.200.000	0,40	64,8
Belgium . . . . .	19.500.000	0,33	64,4
Netherlands . . . . .	2.270.000	0,45	10,2
Norway, Sweden . . . . .	3.280.000	0,41	13,45
Denmark . . . . .	2 600.000	0,33	6,6
Switzerland . . . . .	2.340.000	0,425	9,95
Spain, Portugal, Italy . . . . .	1.700.000	0,50	8,5
Russia . . . . .	4.200.000	—	25
<b>Continent</b>	<b>128.465 000</b>		<b>575,70</b>
Great Britain . . . . .	31.400.000	1,05	329,70
Irish Free State . . . . .	3.250.000	1,05	34,12
<b>Europe</b>	<b>163.115.000</b>		<b>939,52</b>
United States of North America . . . . .	8.000.000	—	120
Canada . . . . .	2.700.000	0,75	20
Central America . . . . .	1.275.000	0,55	7
South America . . . . .	5.435.000	0,60	32,60
Eastern Asia . . . . .	1.680.000	0,50	8,4
India . . . . .	200.000	0,90	1,80
Australia and New Zealand . . . . .	3.600.000	0,90	32,40
Africa . . . . .	550.000	0,80	4,4
<b>World's consumption</b>	<b>186.555.000</b>		<b>1,166,12</b>

The reduction of acreage in the Woywodina (Jugoslavia) in spring 1929 is indicated to be about 20 % or 1800 ha more or less. The reduction is strongest in Syrmia and in the Banat, whilst in the most important hop growing territories, such as Petrovac, Kulpin, Subotica, it is about 10%. It is caused by the low prices which did not even cover the production expenses which amount including picking, to about Dinar 700.— per 50 kilos, calculating a yield of 20 cwts. per ha. In Slovenia (Jugoslavia) the reduction runs up to 5 % or about 150 ha.

Alterations of  
acreage.

From reliable sources, the acreage in spring 1929 was stated to be as follows in Poland:

Volhynia . . . . .	1620	ha
Congress-Poland . . . . .	1100	„
Small-Poland . . . . .	501	„
Great-Poland . . . . .	175	„
in totality about . . . . .	3396	ha

which figure shows a reduction of 479 ha against 1928.

The acreage of the Hallertau district in Bavaria was enlarged by about 10 %. The alterations of the Czechoslovakian districts are not yet known. The following reductions have been published: Austria 10 % = 30 ha, Northern France 80 ha, Burgundy and Lorraine have reduced, figures yet unknown. A certain reduction is reported also from the U. S. A., but its extent is not definite. Mendocino and Sacramento are said to have effected a reduction of about 10 %; the Sonoma district of about 15 %. The reductions in California seem to be greater than in Oregon and Washington.

The remaining stocks still unsold of the 1928 crops of Germany, Czechoslovakia, Yugoslavia, Austria, Alsace, Poland, and Russia are estimated up to the middle of June at 50 000 cwts. These countries altogether have harvested round 700 000 cwts. in 1928. In consequence of the cheap prices, the consumption of first-class hops is supposed to have increased to 580 000 cwts. a year. Taking into consideration that the stocks in the Breweries in August 1928 were sufficient to cover the needs of about 6 months, it results that before the beginning of the coming harvest these stocks will have increased by a further 70 000 cwts.

Stocks of the  
1928 crop.

The extraordinarily cold winter nowhere damaged deep-rooted plants. The uncovering was effected later than usual and was completed within the first days of May. On account of the cold weather, the growth proceeded but slowly, and in the initial period was about a fortnight behind normal years. Excellent warm weather during the second part of May uncommonly furthered the growth, so that by the end of the month the aforesaid difference was almost balanced. From the beginning of June there has been rainy weather, partly with high temperatures, so that the development of the plants is continuing under favourable conditions. On the whole, the plants are healthy and strong and give hopes for a good harvest, although here and there downy mildew and the Aphids are existing.

Growth of the  
new crop.

Joh. Barth & Sohn.