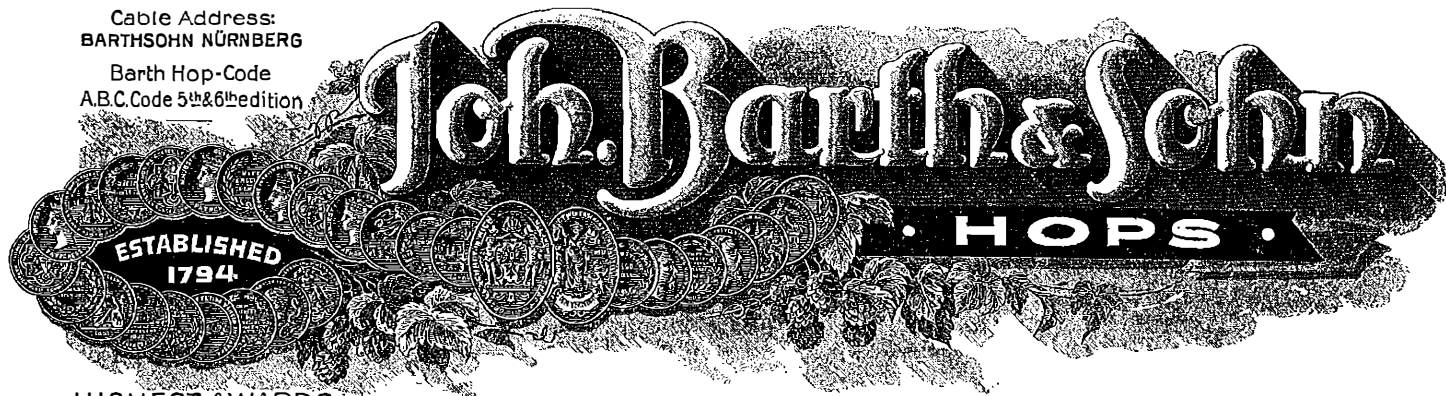


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HIGHEST AWARDS
at all Exhibitions.

Branch House at Saaz.
Hop Farm "Barthhof"
near Wolnzach (Hallertau).

NUREMBERG, BAVARIA,

July 9th 1932.

Hop Report for 1931/32.

The world's economical crisis is persisting with increasing violence; no country whatever has been spared its crushing effects.

The measures taken in order to isolate the countries by means of import prohibitions, augmented custom tariffs, by establishing contingents as to importing goods and foreign money values, are only fit to create ever-increasing confusion as to commercial and financial intercourse. Most of the compulsory measures taken by the governments are only hampering one another and prevent, for the time being, any possibility of a thorough and lasting improvement. Germany's extremely restricted political economy is particularly afflicted with regard to exports and agriculture; in March 1932, unemployment reached the figure of 6,129,000.

Parallel with the aggravating crisis, a more or less considerable regression in beer consumption was to be stated in almost all countries. The following figures re. beer consumption resulted for the year 1931 and for the years — calendar or fiscal — indicated beside the figures stated.

Beer-Production.

Production of Beer.

	1000 hectolitres		1000 hectolitres		1000 hectolitres
*Germany	37 093	*Italy	718	Portugal	80
*Great Britain	26 788	Jugoslavia	540	*Livonia	71
United States of Amer.	25 000	Luxemburg	535	*Ecuador	60
*France	18 577	*New Zealand	523	*Estland	58
Belgium	15 400	*Roumania	418	*Egypt	49
*Czechoslovakia . . .	10 380	*Norway	417	*Bolivia	49
Russia	4 510	*Chili	371	*Bulgaria	48
*Austria	4 385	*Finland	335	Danzig	48
*Irish Free State . . .	3 129	*British South Africa	314	Philippine Islands .	40
*Australia1930	3 025	*Hungary	312	*Turkey	36
*Sweden	2 835	*Cuba	158	*Congo1930	32
Canada1930	2 653	*Uruguay	147	San Salvador	16
*Switzerland	2 621	*Algeria	140	*Paraguay	12
*Netherlands . .1930	2 280	Columbia	130	Costa Rica	12
*Denmark	2 212	*Venezuela	118	Honduras	10
Poland	1 902	Lithuania	113	*Guatemala	10
*Argentina . . .1930	1 828	*Peru	104	Nicaragua	8
*Brazil1930	1 456	*India1930	95	Haiti	4
*Japan	1 368	*Panama1930	91	Jamaica	3
*Spain	744	*Greece	85		
*Mexico1930	719	*China	83		
				*official figures.	

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In 1931 the World's beer production amounted to about 173 million hl (1930: 197,294,000 hl). In the United States of North America the legal beer production is reported to be 98 million gallons. The total production of "real beer" is estimated between 18 to 24 million barrels, with a hop consumption of 18 million pounds (fiscal year).

The reduction of the beer consumption in 1932 seems not yet to have reached its deepest level; countries such as France and Belgium, which in 1931 were scarcely touched by it, have begun to feel also the falling consumption in the course of the last months.

The German Beer Tax.

The effects of the German beer tax which came into force May 1st, 1930, were worse than expected, as in consequence beer consumption diminished by about 43 %. Moreover, the communities put up another tax of RM. 10.— per hectolitre which resulted altogether in such a burden that in addition to the disastrous economical crisis the once flourishing German brewing industry came near to ruin. Agriculture and all industries and trades connected with brewing joined together in an "Emergency League of German Brewery Suppliers" to fight against over-taxation ruinous equally to all of them.

The increased rate of duty not only hindered the expected surplus, but the revenue remained far behind that one of the same period in 1929. In the fiscal year 1931/32, instead of the expected 460 million Reichsmark, it brought only 368,2 million, thus resulting in 91,8 million Reichsmark below the estimate.

The following figures show the receipts of the German beer tax in the fiscal years mentioned:

1928/29:	54,997 million hectolitres	396,8 million Reichsmark
1929/30:	58,078 " "	411,8 " "
1930/31:	48,486 " "	473,3 " "
1931/32:	37,093 " "	368,3 " "

In 1931/32 the sale of beer was declining from one quarter to the other against the same period of 1929/30 by 22 %, 40,8 %, 39,3 % and 43,8 %. The consumption of 1931/32 decreased against 1930/31 by 23,5 %.

January 29th, 1932, the Price-Commissioner decreed the reduction of the beer-price by 2 Reichsmarks per hectolitre for the breweries, and an additional reduction of between 2 and 6 Reichsmark, in echelons, for the public houses. The looked-for result failed, as the reduction was insufficient. In Hamburg and Berlin, the passive resistance of the licensed trade brought about a beer strike which lasted several weeks and by degrees assumed a political, threatening character.

March 22nd, 1932, the problem was solved by reducing the rate of duty by 7 Reichsmark on an average, moreover the formerly ordered reduction of the beer-price was changed to RM. 2,25 for breweries as well as for the beer trade, thus permitting a general reduction of the beer price by RM. 11,50 on an average. Only in certain impoverished districts of Bavaria, Wurttemberg, Baden and Hessen, were the breweries granted special advantages. In many cases the reduction of RM. 2,25 enforced on the breweries, will take away any profit and so accelerate the progress of amalgamation to economise cost and expenses, which from the point of view of political economy is not at all desirable.

Beer Taxes in Foreign Countries.

In Austria, on Juli 23rd, 1930, the beer-price was augmented by 4 shillings per hectolitre, causing a fall of the consumption from 5,3 million hectolitres in 1929/30 to 4,3 million hectolitres in 1931/32.

In England, the beer tax was increased in September 1931 by 31/— per standard barrel which caused the consumption of beer to decrease by about 22,75 % (March 26 %, April 27,81 % against the same months of 1931). Since 1914 with a production of 36,057,913 standard barrels resulting in a revenue of £ 13,622,971 the English output of beer has decreased until 1931 to 18,460,591 standard barrels in consequence of over-taxation bringing a revenue of £ 69,269,299. It continues to fall and therefore it is doubtful if the new rate of duty will yield the expected additional £ 8,000,000, as a further reduction of the beer consumption to 14,500,000 standard barrels in 1932 is awaited.

It would lead too far to enumerate all the countries which tried to increase their revenues by raising the beer tax. Considering the diminished purchasing power of the consumers, this measure proved a failure every-where. Not only the revenues on beer tax were reduced but the general political economy of these countries was prejudiced by reducing the incomes of the brewing industry, their suppliers, and the licensed trade. On the other hand, considerable funds had to be bestowed on agriculture, to help the barley and hop farmers which suffer from the impossibility of sale and the decline of prices caused by lack of demand. Furthermore large sums had to be spent for unemployment in the brewing industry, the connected agriculture and trades.

Prohibition.

Prohibition appears to have passed its culminating point. The nuisance of boot-leeing and its deplorable consequences have increased the desire amongst a great part of U. S. A. to return to beer and light wines; moreover, a revival of the brewing industry is expected to diminish unemployment and to increase revenues whilst at present large sums are absorbed by illegal purposes connected with the liquor law.

In Finland, where prohibition had been enforced on June 1th, 1919, its abolition was decided April 5th, 1932, in consequence of a plebiscite with 70,5 % of votes against 29,5 %.

Growth of the 1931 Hops.

In consequence of a very long winter and unfavourable weather, the uncovering of the plants took place at the beginning of April, viz. with 2—3 weeks' delay. The plants had wintered well. The retarded growth was more than made up in a warm June and July. The appearance of fleas in May

was of little consequence. Downy mildew showed itself in the Hallertau and the mountainous districts, in which latter the gardens were also infected by vermin and black blight.

On June 20th, a violent hailstorm damaged a part of the Hallertau hop district; favourable weather in July made the plants recover better than expected. In the Hallertau hard work in the gardens and favourable weather until shortly before the picking period, brought about a good development of the plants, although partly impaired by fleas and red spider. In the Hersbruck, Spalt and Aisch districts, especially on the borders one could state as early as the beginning of August serious damages of downy mildew.

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
	1929	1930	1931	1929	1930	1931	1929	1930	1931	1931
Hallertau	7708	6790	5363	24,2	22,4	19	178	152,1	102,1	—
Spalt	1715	1641	1390	9,3	13,7	8,4	16	22,5	11,7	—
Hersbruck	2276	1737	1189	15,3	6,1	2,2	35	10,7	2,6	—
Aischgrund	578	331	202	13,9	9,3	3,4	8	3,1	0,7	—
Jura		117	92		7,6	4,3		0,9	0,4	—
Bodensee	569	26	20	12,3	11,5	10	7	0,3	0,2	—
Other districts		471	357		11,4	8,4		5,4	3,0	—
Bavaria	12846	11113	8613	19,1	17,5	14	244	195	120,7	136,6
Wurttemberg	1755	1485	1286	22,2	13,6	10,2	39	20,2	13,1	15,4
Baden	550	437	331	23,6	21,7	6,6	13	9,5	2,2	3,4
Prussia etc.	73	39	19	20,5	15,3	10,5	1,5	0,6	0,2	0,2
Germany	15224	13074	10249	19,5	17,2	13,2	297,5	225,3	136,2	155,6
Saaz	13362	11751	9449	15,1	18,4	18,2	190	215	172	175,1
Auscha	1736	1678	1384	18,4	20,8	24,5	32	35	33,9	33,9
Dauba-Raudnitz	1742	1514	1174	12,6	16,5	18,7	22	25	22,0	21,8
Moravia etc.	424	617	417	14,7	11,8	9,9	6	5	4,1	4
Czechoslovakia	17264	15560	12424	15,1	18	18,6	250	280	232	234,8
Alsace	2816	2028	1838	32,8	14,7	2,7	92	30	5	—
Burgundy and Lorraine	1308	974	573	24,4	6,1	7,8	32	6	4,5	—
Northern France	450	332	194	41,4	7,5	12,8	17	2,5	2,5	—
France	4574	3334	2605	30,8	11,5	4,6	141	38,5	12	12
Poland	3600	3000	2500	20,8	12,5	14,4	75	37,5	36	—
Wojwodina	7000	1200	1000	5	10,8	11	35	13	11	—
Slovenia	3000	1380	1300	16	20	17	48	27,6	22	—
Jugoslavia	10000	2580	2300	8,3	15,7	14,3	83	40,6	33	31,7
Russia	5000	2000	2000	6	12,5	12,5	30	25	25	—
Belgium	1235	765	700	32,3	20,9	15	40	16	10,5	—
Various countries	600	500	400	15	10	10	9	5	4	—
Continent	57497	40813	33178	16,4	16,3	14,7	925,5	667,9	488,7	—
England	9706	8092	7906	41,5	33,8	24	400	274	190	171,7
Europe	67203	48905	41084	19,7	19,2	16,5	1325,5	941,9	678,7	—
United States of America	10076	7891	8700	29,7	29,5	31	300	233	245,3	234,5
Canada	471	384	375	35,3	27,3	29,8	15	10,5	11,2	—
Australia and New Zealand	808	700	650	34,6	28,5	30,7	28	20	20	—
World's production	78558	57880	50809	21,1	20,8	18,7	1668,5	1205,4	955,2	—

The German crop was gathered almost entirely in the Hallertau and Spalt districts, whilst in the Hersbruck hills and the Aisch district picking was mostly left undone, because shortly before and during the picking period, downy mildew severely deteriorated the hops by discolouring. The crop of the Hersbruck Hills, which, before picking, had been estimated at 7000 cwts, only yielded 2620 cwts.

In Baden and Wurttemberg, particularly in the districts of Rottenburg, Herrenberg and Weilderstadt, the gardens were ravaged by bad weather shortly before the harvest, so that in Wurttemberg about 2—3000 cwts and in Baden about the same quantity remained unpicked; downy mildew had damaged the crop in quite an extraordinary way, not only concerning the quantity, but also as to colour and quality. The Tettwang district was favoured, although the equality of its produce left to be desired.

The Hallertau district, with a yield of 19 cwts per hectare, gave a very satisfactory result. The best product came from Au and Wolnzach, owing chiefly to the indefatigable care of the growers.

The German
1931 Crop.

A great part of the Spalt hops, for fear of discolouring, were picked too soon, i. e. unripe; they were impaired in colour for want of spraying, so that the 1931 Spalt product, sold badly apart from a few exceptions.

Quality was judged as follows	first-rate	middle	inferior
	%	%	%
Hallertau	25	60	15
Spalt	10	30	60
Hersbruck Hills	10	30	60
Aisch district	—	20	80
Tettang and Lake of Constance districts	50	30	20
Remaining Wurttemberg and Baden districts	—	20	80

	Imports to Germany	Exports from Germany
Oct. 1st, 1929—Sept. 31st, 1930:	55,964 cwts.	46,332 cwts.
Oct. 1st, 1930—Sept. 31st, 1931:	59,344 cwts.	81,592 cwts.
Oct. 1st, 1931—May 31st, 1932:	19,260 cwts.	51,926 cwts.

Estimates.

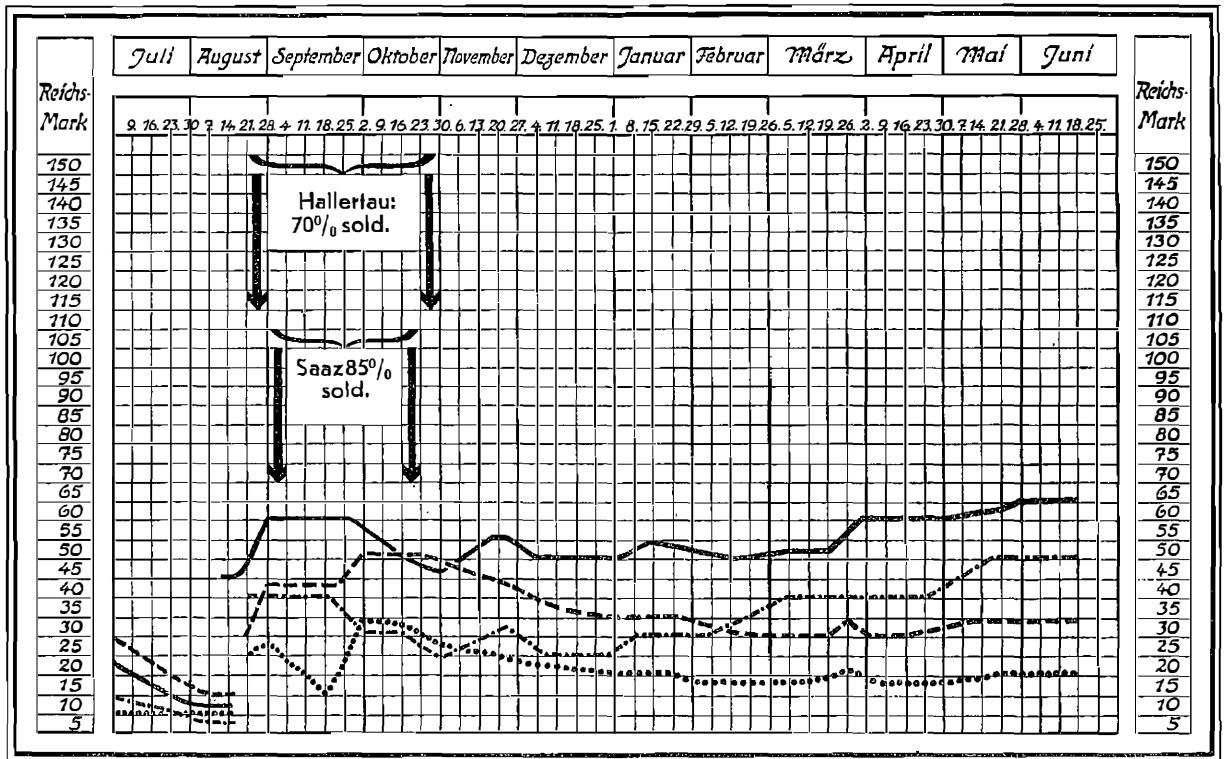
The official estimates of January 1932 stated 136,600 cwts. in Bavaria and 155,600 cwts. in Germany against a definite estimate calculated on 12th May by the united producers, hop merchants, brewers and the official Statistical Office which shows 120,700 cwts. for Bavaria and 136,200 cwts. for entire Germany.

In England an official estimate of 171,000 cwts. stands against 185,000 cwts. of the trade, in USA. 25,852,000 lbs. against 27,072,000 lbs.

We may point out at this occasion that every estimate of the hop crop should be accompanied by its date of collection and say if the given figures mean the grown or picked crop in order to avoid errors.

Prices for 1931 Hops.

In the following we publish a table showing the movement of prices for 1930 hops in July 1931 and of 1931 hops. Prices to be understood per 50 kilos of best available and of middling quality Hallertau and Saaz hops.



During the summer months of the year 1931, the Czechoslovakian Hop Syndicate stocked 60,700 cwts. of the 1930 crop at prices from Kc. 200—300 per 50 kilos without offering them for sale. Prices for hops dropped — parallel with those for German hops — to Kc. 130—300 for Saaz hops, to Kc. 125—150 for the Auscha product.

The German Hop Traffic

creditors, were not permitted to withhold their stocks of 1930 hops from the market, but were made to sell. Even prices as low as RM. 10 to 20, offered in August 1931 before the new harvest, were not able to create any demand proving the saturation of the brewing industry with hops.

Under these circumstances only low prices could be expected for the 1931 crop. In the Nuremberg market hops of the new crop began to fetch prices below cost of production viz. Hallertaus RM.

50—60, Gebirgs RM. 35—40, Tettnangs RM. 60—65, Spalts RM. 55—60. After picking, hops could be bought at RM. 45 to 55 in the Hallertau and at RM. 35 to 60 in the Spalt districts. From October to December purchases were slow, for lack of demand, so that the prices fell as low as RM. 20 to 40.

In January 1932, the D. H. V. G. began buying the remaining stocks of the German crop at prices from RM. 30—50, 25 % held back for later payment.

In **Czechoslovakia**, prices set in with Kc. 240 for **Saaz hops**. The initial prices rose to Kc. 250 and 425 in consequence of a lively demand suddenly setting in from France and Belgium. They fell again later to a level of Kc. 180—260 from November to February 1932. This level is still maintained. **Auscha hops** set in with Kc. 200, transitorily to rise to Kc. 300, and to fall again to Kc. 125 after the superior qualities being exhausted. **Dauba hops** for which there was little demand brought Kc. 120—220.

The analyses of 1931 hops as to their amount of bitter principle, made by the **Governmental Station for Brew-Technical Experiments at Weihenstephan** and at the **Station for Scientific Research in Munich** have produced the following figures to which we add those obtained in the three previous years:

Bitter Principle
Analyses of 1931
hops.

Origin	1928	1929	1930	1931
	Bitter substance without water	Bitter substance without water	Bitter substance without water	Bitter substance without water
	%	%	%	%
Hallertau	11,5—16,4	13,5—17,0	15,0—19,1	14,2—19,7
Spalt	15,1—16,3	13,5—17,5	15,9—19,5	15,6—19,6
Aischground	13,0	13,5	15,0	15,0
Hersbrucker Gebirge	12,3—15,2	15,1—16,8	14,1—17,7	15,3—16,4
Wurttemberg	13,8—15,0	14,4—17,9	15,2—18,3	15,9—18,7
Baden	15,2	13,7—15,6	14,3—20,2	14,5—18,2
Auscha	13,0—16,4	12,5—15,8	14,7—15,8	12,5—15,8
Saaz	13,4—15,2	12,9—14,6	14,4—15,8	13,7—16,7
Alsace-Lorraine	13,5—14,1	15,3	15,3	—
Styria (Goldings)	10,6—12,4	13,9—15,4	15,6—16,7	12,4—13,5
Backa	7,5—16,4	14,8—14,9	14,9	12,6—14,0
Poland	13,1—14,6	15,7—15,8	15,7—16,4	13,0—14,5
Russia (Volhynia)	13,3—13,6*	14,0	—	—

* air dry.

The **Aphid flies**, which had appeared at the beginning of June 1931, disappeared again, whilst hot and dry weather towards the end of July allowed the **red spider** to spread, endangering the gardens particularly in the Goldbach valley, in the lower Eger valley, and in the Horosedl-Herrndorf countryside. The cool, rainy weather setting in August 9th, stopped a further spreading of this most dangerous pest. The damp weather came just in time to bring about an **astonishingly good result**.

Czechoslovakia.
Saaz district.

Picking lasted from August 15th to September 10th. The beginning of this period was rainy; later on dry weather prevailed. The conditions of the gardens were best in the valleys of the German and Bohemian woodland. 30 % of the crop remained unpicked. 85 to 90 measures were required to make up 1 ctw.

The **rapid discolouring of the cones** in some parts occasioned premature picking, so that at the beginning of the harvest, light often unripe hops were taken down, whilst on the whole, the feature of the 1931 crop was that of a **heavier quality** than in the year before, although the cones were unequal in size.

The crop grown in the Saaz district may have reached almost **260,000 cwts.**; the crop harvested was of 172,000 cwts. Numerous cases of a yield up to 40 cwts. per hectare could be stated by us. The pickers were somewhat lacking in care, as their pay was only Kc. 1,20 per measure, against Kc. 1,50 in the year before.

We traced downy mildew in almost each of the Czechoslovakian gardens. Although the frequently discolouring of the cones of the 1931 crop has been attributed in this country to other reasons such as red spider or rainy weather, hop growers must be on their guard against downy mildew, also for their varieties of hops up to the present apparently immune. We may here call to mind that Spalts and Fuggels resisted the infection longer than the Hallertau hops; but then they likewise became infected. It is believed that the *Pseudo Peronospora Humuli* (Downy mildew) bred a variety of its fungus to which the above resisting sorts succumbed.

Although it may be hoped that the dry climate of Czechoslovakia in years with few rainfalls will hinder the development of downy mildew or render combating superfluous, we draw universal attention to the fact that since the year 1924, when downy mildew first appeared in Wurttemberg, it has up to the present infected all hop-growing countries with the exception of Czechoslovakia, Australia and New Zealand, which alone have been spared **visible damages**.

The **Auscha district** suffered particularly from fleas and the **Aphid fly**. Downy mildew was traced frequently. During the harvesting period of this record crop, beginning August 8th and ending Sep-

Auscha.

tember 12th, the red spider spread to such an extent that 20 % of the crop of about 8,500 cwts. became deteriorated and remained unpicked. In general the cones were well developed but not so fine as in the year before. Hops of green colour were relatively seldom met with. The discolouring of the cones, which in some places, such as Drahobus and Wedlitz, rapidly progressed during the picking period, was attributed solely to the red spider which opinion as we believe is wrong. 50 measures of 50 litres each, or 200 plants, made up 1 cwt. of dry hops. Most favoured were the gardens in the hills, less those in the valleys.

Raudnitz. In the Raudnitz district, 7 % or 1300 cwts. remained unpicked; colour and quality turned out to be somewhat inferior against 1930. The low-lying fields gave a better product than those situated higher.

Dauba. The Dauba crop was impaired by bad weather. 16 % or 500 cwts. were left ungathered. The hops picked later on were most unequal in colour. Picking lasted from August 29th until the end of September.

The reduction of the acreage of Czechoslovakia in 1931 to 12,424 hectares, amounts to 3136 tares, i. e. by 20 % against 1930 and 4840 hectares, viz. by 28,03 % in comparison with 1929.

The right to exclude from sealing red hops and very inferior quality has seldom been used. The transaction tax was reduced to 1 % from May 1st, 1932 onwards. — The Hop Syndicate is still holding about 60,000 cwts. of 1930 hops, the destruction of which is desired by the producers.

It is planned to apply in future the Czechoslovakian law of origin also for hops destined for home consumption, and to oblige the hop growers to declare their acreage every year no later than at the end of June. It appears necessary that Czechoslovakian hop statistics should thus give a proof of their exactness, as they cannot expect to be considered reliable as long as the figures of the official statements differ from those established by the Associations.

By the projected law, the Minister of Agriculture will become entitled to prescribe the acreage and to determine the quantity to be sealed. This provision will create great uncertainty in the traffic. As to the clauses with regard

The hop growers organisations intend the forming of cooperative associations for the purpose of marketing. Every grower shall become partner in proportion to his acreage. They hope that the necessary means shall be given by the state.

Quality	first-r	middle	inferior
	%	%	%
Saaz	15	65	20
Auscha	10	60	30
Raudnitz	10	70	20
Dauba	5	50	45

	Imports to Czechoslovakia	Exports from Czechoslovakia
1st Sept. 1929—31st Aug. 1930 . . .	170 cwts.	183,769 cwts.
1st Sept. 1930—31st Aug. 1931 . . .	22 cwts.	181,317 cwts.
1st Sept. 1932—30th Apr. 1931 . . .	—	181,449 cwts.

France. The gard
 vation of inferior sorts. Up to the middle of August a middling crop was expected, but then the rapidly-spreading downy mildew discoloured the cones, so that, between September 7th and 22nd, of the 30,000 cwts. grown, only 5,000 cwts. were gathered, a product small and unequal in size, impaired in colour and of bad quality. As in Bavaria in 1926, this bad result was due to the carelessness of the growers who had neglected spraying. The average pri

In the Departement du Nord, hop culture is gradually giving place to the more profitable growing of green peas.

By a decree of October 8th, 1931, the French duty on hops was augmented from ffrs. 125 per 100 kilos to ffrs. 400 (most-favoured tariff), and to ffrs. 300 (general tariff).

At the same time, the yearly contingent of imports from Czechoslovakia was fixed at 16, at the reduced tariff of ffrs. 200 per 100 kilos which contingent was later on increased to 18,000 cwts. of the 1931 crop. The distribution of the contingents is submitted to a triple commission consisting of two r

Those countries which are interested in hop imports to France, also try to obtain contingents at reduced duty tariffs that are supposed to be granted on condition that the country of origin is guaranteed by official seal and certificate.

Quality	first-rate	middle	inferior
	%	%	%
Alsace	5	15	80

	Imports to France	Exports from
1929:	41,736 cwts.	31,184 cwts.
1930:	40,970 cwts.	24,218 cwts.
1931:	76,290 cwts.	3,192 cwts.

Slovenia. Favoured by good weather, the plants were able to develop rapidly and free of vermin and disease. As early as in July they began to blossom. Picking proceeded from 10th to 31st August; 20% were not harvested on account of the cones having become brown. 75 bushels (of 28 litres each) of undried hops made up 50 kilos of dry Goldings, whilst of late hops 65 bushels were sufficient to make up this weight. By the middle of September, 80% of the crop had been sold at prices with a rising tendency of from 300—575 dinars. The prices for hops from the Sann valley in Styria, paid by the Export Trade for England, strange to say, were higher than those paid for any other hops in 1931, which may attest the predilection for this product. First-rate, green hops were rare.

Notwithstanding the above high prices, some producers obstinately refused to sell, so that about 700 cwts. are still on their hands — a good lesson for the future! About 85% of the total acreage of 1000 hectares falls to the Sann Valley.

Wojwodina. During the period of growth, the plants suffered from drought, but remained sound. Only 65% of the grown crop was picked between August 24th and September 5th. Colour and quality proved somewhat inferior to that of 1930; the cones were middle-sized. A local price of about 300 dinars per 50 kilos was paid. The introduction of optional sealing was decided upon. Three districts of origin have been created: Valley of the Sann, Drau Banat and Backa.

Quality	first-rate	middle	inferior
	%	%	%
Slovenia	60	35	5
Backa	55	35	10
	Imports to	Exports from	
	Jugoslavia		
1929:	1,975 cwts.	65,945 cwts.	
1930:	1,516 cwts.	54,125 cwts.	
1931:	1,900 cwts.	26,000 cwts.	

Since 1927, the acreage has been decreased by 70%. The crop grown was of about 600 cwts., of which only half was gathered, as colour and quality had been impaired by continual rain.

Favourable weather shortened the period of growth by about 20 days; but lice and red spider prevented an equal development of the plants. The *Peronospora* was not combated.

Picking was prejudiced by rainy weather. It lasted in Volhynia, from August 10th till September 5th, with 15% of the crop left unpicked; in Congress Poland, from August 1st till September 1st, with 30% unpicked; in Great Poland, from August 30th till September 15th, 20% unpicked. **Quality and colour may be declared normal.** The selling opportunities are particularly bad in Galicia, where frequently the crops of several years lie unsold at the producers'.

Congress Poland and Volhynia have established the **optional sealing** of hops; certificates are to be obtained through the Chamber of Commerce at Lublin. Since 1/1/32, the import of hops has been forbidden:

Quality	first-rate	middle	inferior
	%	%	%
Volhynia	15	65	20
Congress Poland	40	50	10
Galicia	30	30	40
Neutomischel (Great Poland)	40	50	10
	Imports to	Exports from	
	Poland		
1st Sept. 1929—31st Aug. 1930	4,450 cwts.	49,298 cwts.	
1st Sept. 1930—31st Aug. 1931	6,012 cwts.	32,698 cwts.	
1st Sept. 1931—30th Apr. 1932	918 cwts.	27,284 cwts.	

The plants were not able to recover from their continuous damages by Aphid flies, throughout May and June up to July, so that, with a yield of 15 cwts. per hectare, the crop was very poor.

The number of Belgian breweries, from 3200 in 1914, has sunk to about 1400. Low-fermenting lager beer, for which home-grown hops are not demanded, is more and more taking the place of the old high-fermenting sorts of beer. The experimental station at Waton is trying to breed hops fit for the production of the above two classes of beer.

Belgium is about to establish contingents of imports. After being dissolved from obligation towards France and Czechoslovakia, Belgium is said to intend a quintuple augmentation of the import duty on hops, from bfrs. 60 to bfrs. 300 per 100 kilos, but at the same time will grant certain contingents at the reduced tariff of bfrs. 120. In Belgium foreign hops are required for the production of high quality beers. An increase of the import duty on hops will fall on the shoulders of the brewing industry which not long ago was already burdened by an increase of the beer tax.

	Imports to	Exports from	
	Belgium		
1929:	58,462 cwts.	4,076 cwts.	
1930: (1 cwt. = 50 kilos)	65,060 cwts.	3,360 cwts.	
1931:	78,936 cwts.	2,412 cwts.	

Austria.

Poland.

Belgium.

England.

From the very beginning of the growing period, the plants suffered from the downy mildew, much rain, cold weather and storms. The Aphid flies which made their first appearance in June, could be combated.

The downy mildew proved to be worse than ever, causing an intensive discolouring of the cones in the second part of August, so that picking was hurriedly begun 10—14 days before full ripeness. It lasted from 20th August till 30th September. Many unripe hops were picked, therefore quality and colour of the 1931 crop gave but little satisfaction and was even judged to be the worst since 1888.

The Fuggles, in former years considered immune, were infected by downy mildew as all other sorts. The hops grown on 500 acres (against 3500 acres in 1930) remained unpicked. The cost price of production is supposed to be about £ 75—90 per acre; in the Midlands, where the crops are smaller and picking wages higher, £ 85—105 per acre.

The 1931 crop was the smallest since 1882, which was then 140,000 cwts. and necessitated no less than 319,620 cwts. imports. The average yield in 1931 was 9,5 cwts. per acre against the ten years' average of 12,2 cwts. Fuggles, Mathons and Goldings from East-Kent, Worcestershire and Herefordshire were again judged as best quality of the crop; but all the hops showed the lack of sunshine during the growing and ripening period.

Notwithstanding the smallness of the crop, the market showed a permanently quiet tendency. Sales set in only towards the middle of October; the prices fluctuated between 75/— and 220/— and fell slowly to 42/— to 170/— at present with a dead market.

Since the augmentation of the beer tax by 31/— per standard barrel, in September 1931, beer production decreased heavily and therefore large hop stocks remained in the breweries. The demand for the new crop was not sufficient to fetch paying prices. The acreage of round 19,000 acres, with an average yield of 12,2 cwts. per acre, gives a normal crop of 235,000 cwts. which is considered too large against a falling consumption of 150 to 200,000 cwts. per year. The light beers brewed at present on a larger scale require a smaller hop dose than those generally brewed before the new tax was levied.

In spite of the bad experiences with the Hop Growers Limited, liquidated in 1929, it is intended to centralise again the marketing of hops, in order to improve the prices, but this time by means of legal compulsion. A Central Agency conducted by a board will be created through the Agricultural Marketing Act 1931 in order to take up and sell the hop crop with certain modifications. The scheme after being passed in Parliament, is to be put to the vote of the 1500 English hop growers. Every one of them must be registered and has the right to deliver a certain determined lot corresponding to the amount of his 1931 crop, called quota. This quota being valued by the board will be paid in proportion to the total proceeds from the sales. The non-quota hops, i. e. hops harvested beyond the assigned share, shall be taken over only on demand and then a surplus of 10 sh paid per cwt. as compensation. The projected bill shows the modern endeavours to replace individual liberty by collective economy. In the long run, cooperative selling will be forced to submit to the eternal law of offer and demand just as any single individual and cannot be eluded by compulsory measures. From such compulsive bureaucratic organisations, which in their proceedings cannot substitute the natural ability of the individual undertaker, unforeseen drawbacks and all kinds of losses will arise, thus in the end enforcing the re-establishment of a natural state and course of things. — The planned bill partly meets with strong opposition among English producers; a particular blame is laid on the provision that a producer of inferior hops will be paid in proportion to the proceeds of the total sale, even if the board cannot sell this producer's quota hops. The improvement of methods and qualities might be unfavourably influenced by the new law.

Middle of May English hop stocks on the market were estimated to be 20,000 pockets of 1929, 7000 of 1930, 30,000 of 1931, i. e. a total of almost 100,000 cwts.

In Spring 1932, the acreage, by far too large, has not been decreased sufficiently, as the growers are looking forward to better prices in consequence of the new law which is expected to come into force for the new crop. Unless the acreage be strongly reduced we do not believe that the present acreage will be profitable.

Quality	first-rate	middle	inferior	worthless
	% 10	% 40	% 25	% 25
	Imports to		Exports from	
	England			
1st Sept. 1929 to 31st Aug. 1930.	. . .	52,393 cwts.	28,113 cwts.	
1st Sept. 1929 to 31st Aug. 1931.	. . .	42,569 cwts.	29,056 cwts.	
1st Aug. 1931 to 31st May 1932.	. . .	51,888 cwts.	11,820 cwts.	

U. S. A.

Wet and cold weather in June 1931 was followed by dry heat right into September. In Western Washington, downy mildew damaged the early Clusters more than any other variety so that they have to be replaced. Also in Oregon, the Peronospora manifested itself here and there. The farmers confine themselves to eliminate the spikes and in general do not wash, as the summer heat, which hardly ever fails, is expected to stop the disease.

In California, the entire crop was harvested, between August 15th and September 20th. In Sacramento and Mendocino, the gardens suffered from drought; Sonoma was favoured. The hops showed a finer green colour than in 1930, but they were less rich in quality. The improved picking deserves mentioning.

In Oregon, the picking lasted from August 20th to October 1st, by excellent weather conditions. The cones proved to be better in colour but somewhat inferior in quality against 1930. The acreage is expected to become increased by about 500 acres for the coming crop.

In Western Washington, picking proceeded from August 25th to September 25th. The crop was only 30% of a normal one; as to colour and quantity, it was inferior to 1930 on account of downy mildew. In Yakima, the red spider caused damages.

Prices fluctuated between 9—16 cts. a pound; lowest quality hops sold still cheaper.

At the end of May, the free market stocks amounted to about 14,000 bales of 1931 hops and about 8000 bales of former crops.

Quality	first-rate	middle	inferior
	%	%	%
California	65	20	15
Oregon	65	25	10
Western Washington	30	55	15
Yakima	25	45	30

	Imports to U. S. A.	Exports from
1929:	764,000 lbs.	7,677,000 lbs.
1930:	1,098,000 lbs.	7,640,000 lbs.
1931:	1,077,339 lbs.	3,797,047 lbs.

Downy mildew is unknown in Tasmanian gardens; but in hot and dry weather the red spider shows itself. In Tasmania, hop growing is done mostly by small farmers, in Victoria by large ones exclusively. In 1930, 92% of the Tasmanian hop growers engaged themselves for three years to sell their product to three Australian hop merchants at the prices of 1/9 per pound. One of these firms regularly acquires about 85% of the entire crop. Since 1931, the producers have agreed to reduce their acreage by one sixth, over production being stated and old stocks depressing prices. — As to the acreage and crop in New Zealand, reliable reports are not on hand.

Australia.

The picking of the 1931 crop proceeded from February 28th to April 2nd. The producers picked only two thirds. In consequence of cold weather during the picking, the cones frequently turned out unequal in size and small-clustered.

The beer tax assessed by the Commonwealth Government is 2/— per gallon; in New South Wales a further 6d per gallon is added. Beer drinking has become impossible to the majority of the working classes, as the beer price has become too high, for which reason the beer and hop consumption have decreased by one third since 1928/29.

The distressed condition of hop culture, due to large stocks in the breweries and to regressive beer consumption, is illustrated by the unprofitable hop prices and the progressive reduction of the acreage since 1929, which is still going on. In 1931, the acreage was reduced against 1930, in

Distressed hop culture.

Germany	by 21,6% to 10,249 ha
Czechoslovakia	by 20,1% to 12,424 ha
England	by 2,3% to 7,906 ha
the Continent of Europe	by 18,7% to 33,187 ha
the World	by 12,2% to 50,809 ha

Since the 1931 crop, a further considerable reduction of the acreage has been stated, so that a European acreage of about 27,000 ha (including Russia) and a World's acreage of about 44,000 ha has to be reckoned upon, with regard to the new crop.

German beer production, from 1929/30 when it was at its highest with 58,078 million hectolitres, had sunk to 37,093 million hectolitres in 1931/32, i. e. by 36,1%; the German hop acreage, from 15,500 hectares in 1927, at present is reduced to about 8,800 hectares, i. e. by 43,2%. The World's beer production, which in 1928 amounted to 206,6 million hectolitres (including 28 million hectolitres in U. S. A.), in 1931 was stated to have fallen to 173 million hectolitres, i. e. by 16%. The World's hop acreage, from its highest figure in 1928, viz. round 81,000 ha, has decreased to about 44,000 ha, i. e. by 45,6%.

Germany, with a home consumption of 147,000 cwts. of hops for 32 million hectolitres must not reduce the actual acreage of about 8,800 hectares any further for, with a normal yield of 15 cwts. per ha, it promises a crop of round 132,000 cwts. The countries with over-production viz. Czechoslovakia, England, Jugoslavia and Poland must conform their acreage to the diminished demand, should hop culture become profitable again. The figures referring to these countries speak well for themselves.

Country	Acreage hectares			Probable Acreage hectares	Acreage Yield per hectare in cwts of 50 kilos each	Probable normal Yield in cwts of 50 kilos each	Home Consumption in cwts of 50 kilos each	+ = Excedent - = Deficit in cwts of 50 kilos each
	1921	1929	1931					
Germany	11279	15224	10249	aprox. 8800	15	132.000	147.000	- 15.000
Czechoslovakia	8640	17264	12424	„ 9600	15	144.000	55.000	+ 89.000
England	10179	9706	7906	„ 6900	30,6	235.000	200.000	+ 35.000
Jugoslavia	1450	10000	2300	„ 1900	17	32.000	3.000	+ 29.000
Poland	3000	3600	2500	„ 2000	14	28.000	9.000	+ 19.000

Support for
German
Hop Culture.

The German Hop Traffic Company Ltd. (D. H. V. G.), bought the 1930 hops at prices between RM. 70 and 100, with money put at their disposal by the Government. They were sold at cheapest prices down to RM. 15. These clearance sales radically spoiled the initial prices for the 1931 crop, which set in with RM. 50 i. e. below the cost of production. Moreover, the demand for the new crop was thereby diminished.

End of November 1931, the German Government caused the Deutsche Getreidehandels-Gesellschaft m. b. H. to grant the D. H. V. G. a loan-credit of 1,5 million Reichsmark until June 25th, 1932, for the purpose of buying the rest of the 1931 crop. The producers were paid three quarters of the purchasing price and were to receive the remaining quarter if possible.

The D. H. V. G. started with the purchasing action beginning of January, buying about 21,000 cwts. of hops, assorted in 5 classes, at prices from RM. 30 to 50, deducting 25%, which hops were sorted, cured and stocked. Inferior sorts were paid still less. Middle of February, the purchases were not yet finished. Thus the available stocks of German hops were withheld for 6 weeks from the markets.

A steady but slow demand permitted the D. H. V. G. to sell — end of May their stocks still amounted to 15,000 cwts. — at gradually rising prices.

In May 1932, steps were taken in order to obtain from the Government the prorogation of the loan-credit for another year, for the purpose of influencing the prices of the new crop. Governmental subsidies for produces always result in losses. The failures of such interventions speak a plain language.

Cereals in U. S. A.	1931/1932 total loss about 250 million dollars
Cotton in U. S. A.	1931/1932 total loss about 115 million dollars
Coffee in Brasil	1931/1932 total loss about 150 million dollars
Hops in England	1924/1928 total loss above 3 million £ sterling
Hops in Czechoslovakia	1930 total loss above 15 million Kc.
Hops in Germany	1930 total loss about 320,000 RM.

The German Hop Growers Association has been able to obtain further valuable advantages in the course of this year.

By a decree of August 21st, 1931, compulsory hop consumption came into force on September 1st, 1931, by which the German breweries are obliged of using 75% inland hops for their needs.

After Germany's dissolving the agreement re. hops with France and Belgium, the German import duty was raised on October 12th, 1931, quicker than was expected, to RM. 150 per 100 kg. Czechoslovakia was granted a contingent at the reduced tariff of RM. 70 per 100 kg until August 31st, 1932.

International
Negotiations.

From February 22nd—24th, 1932, a Conference of the delegates of the Hop Growers Associations from Germany, Czechoslovakia, France, Belgium, Poland and Jugoslavia together with the Economical Committee of the League of Nations took place in Geneva. It was suggested to regulate production by controlling the acreage and conforming it to need. The countries with overproduction should reduce their acreage as much as possible. Increased attention should be paid to the problem of marketing in order to raise the prices to a profitable level. It was further suggested to create centres destined to take up the hops from the producers. The already existing Central European Hop Office should be changed into an International Hop Office, which shall safeguard all common interests.

Before and after the Geneva Conference repeated negotiations took place between German and Czechoslovakian hop growers dealing with far-reaching plans such as buying up and annihilating the stocks of former crops, reducing the acreage and establishing elastic contingents of the remaining acreage; conforming mutually the laws of origin, normalizing the varieties and organizing the marketing by compulsory regulation of the offers of the producers.

Profitable prices must return to guarantee the existence of hop growers. Then, many of these questions will have lost their importance.

The German brewing industry was covered per 1/9/1931 with 200,000 cwts. or 105,4 %, a figure which rose later on account of sinking consumption.

Stocks of the 1931 crop.

By end of May 1932 the fine quality hops of the 1931 crop viz. of Austria, Czechoslovakia, Germany, France, Jugoslavia and Poland, unsold on the markets, amounted to 31,000 cwts. against 86,000 cwts. the year before. In England, the stocks of 1931 hops are estimated at 50,000 cwts., those of older growth at about 46,000 cwts., in USA 30,000 cwts. of 1931 and about 15,000 cwts. of former years.

In the English and German Brewing Industries, the stocks are considered very large. In the other countries which partly bought last year already with a certain reserve, a better demand can be expected although in some countries, such as France and Belgium, the beer consumption has begun to sink and needs less raw materials than before.

The considerable reduction of the hop acreage in Europe shows that in the near future higher prices will have to be looked for, therefore it may be wise not to reduce the stocks too much.

Reduction of the hop acreage.

Some countries, such as Italy and Denmark, are still trying to build up own hop industries. In other countries, where other products give a better rent, one can note a falling interest for hop culture, e. g. vegetables and tobacco in Baden, Alsace and Belgium, potatoes in Wojwodina.

The regular but troublesome work of washing against downy mildew which is necessary to safeguard a sound crop, alienates even old growers from the hop culture especially in times of no profit.

Since the crop 1931, the acreage has been heavily reduced with exception of USA. Up till now, the following figures of the actual acreage have been published:

Saaz cultivates about 650,000 Schock = 7300 ha; Auscha cultivates 1,131 ha and 106 ha not worked; Raudnitz cultivates 750 ha and 121 not worked; Dauba 127 ha; Belgium about 500 ha; Alsace 1550 ha; Jugoslavia 1815 ha; Poland about 2000 ha.

The following table of the World's hop consumption in 1931/32 is calculated on known figures.

World's Hop Consumption.

World's Hop Consumption 1931/32.

	Beer-Production 1931 hectolitres	Dose of hops per hectolitres in pounds of 1/2 kilo	Hop Consumption in 1000 cwts. of 50 kilos each
Germany	37.093.000	0,46	170,62
Austria and Hungary	4.697.000	0,52	24,42
Czechoslovakia	10.380.000	0,60	62,28
Poland and Danzig	1.950.000	0,60	11,70
Roumania, Jugoslavia	958.000	0,60	5,74
Baltic States	577.000	0,55	3,17
Balkan	169.000	0,50	0,84
France	18.577.000	0,35	65,01
Belgium and Luxemburg	15.935.000	0,45	71,70
Netherlands	2.280.000	0,43	9,80
Norway	417.000	0,43	1,79
Denmark, Sweden	5.047.000	0,33	16,65
Switzerland	2.621.000	0,40	10,48
Spain, Portugal, Italy	1.542.000	0,50	7,71
Russia	3.000.000	0,50	15
Continent	105.243.000		476,91
Great Britain	26.788.000	1,00	267,88
Irish Free State	3.129.000	1,50	46,93
Europe	135.160.000		791,72
United States of North America	25.000.000	—	200
Canada	2.653.000	0,75	19,89
Central America	900 000	0,55	4,95
South America	3.800.000	0,60	22,80
Eastern Asia	1.491.000	0,50	7,45
India	95.000	0,90	0,85
Australia and New Zealand	3.300.000	0,90	29,70
Africa	538.000	0,70	3,76
World's consumption	172.937.000		1,081,12

On account of the still regressive movement of beer production in almost all countries with the sole exception of U. S. A. — hop consumption, for the time being, may be estimated by 10—20 % below the above figures.

Contracts.

The distressed conditions of hop growers forced them to anticipate contracts this year to a greater extent than in 1931 in order to procure the necessary means for culture. The following prices are to be understood per 50 kilos:

1932

Saaz:	April/May	Kc. 300/350
Auscha:	April/May	Kc. 225/250
Alsace:	April	ffcs. 400/425
Belgium:	May	bfrs. 390.—
U.S.A.:	May	11/14 cents per lb.

**Growth of the
New Crop.**

In **Jugoslavia**, only a few sales were contracted at prices of Dinars 350/400, as a law of July 2nd, 1931 dispenses the producers from delivery of anticipated contracts.

Continuous cold and dry weather impeded work in the hop gardens until the beginning of April. The plague of fleas was everywhere worse than in former years. Only in the middle of May the plants were able to somewhat make up their growth, which again was retarded by wet and cold weather from the end of May and June causing a severe infection by downy mildew. Aphid flies appeared in some districts since the beginning of June.

The conditions of the gardens in the main hop-growing countries may at present be called good middling, and allover unequal. Favourable weather is required to remedy the damages and to make up the retarded growth.

**Hop-Farm
"Barthhof".**

We acquired in March several farms situated in the best parts of the Hallertau, in the renowned seal districts of Au and Wolzsch uniting them to one of the largest hop farms in Germany. We have thereby been able to bring about a long thought-of idea to take an actual part in the production of hops.

We have placed our hop-farm "Barthhof" at the disposal of the government for trial purposes.

Joh. Barth & Sohn.