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Hop Report 1949/1950.

Devaluation of the £ Sterling by 30,5 % occurred rather unexpectedly on September 20th, 1949 and had major economic repercussions.

Devaluation of the £ Sterling.

A general re-adjustment of rates of exchange immediately took place in all countries affected by this new situation. In Germany, however, only on September 27th, 1949, a devaluation of not more than 20,72% was authorized. The former rate of exchange (\$ 1.— = DM 3.33) already had been considered as too high a bracket for the D-Mark and not stimulating exports which now received an additional setback by the inadequate devaluation (new rate \$ 1.— = DM 4.20). Losses were sustained on contracts in £ Sterling. There were no possibilities at that time to secure the rate of exchange in advance, although forward exchange operations are now admissible.

The bulk of the trade volume continues to be financed by short term credits. Accumulation of new capital for reconstruction may be stimulated by somewhat alleviated income taxes in effect since January 1st, 1950. Long and medium term investment credits are in prospect which may amend the economic situation and tend to lessen unemployment which decreased by 350.000 from its peak of nearly 2 millions in mid-February.

Economic situation in Germany.

World production of beer is estimated as follows:

World production of beer.

| | |
|-------------------------------------|------------------------|
| AMERICA | 115.005.000 bbl |
| EUROPE | 99.025.000 „ |
| AUSTRALIA and NEW ZEALAND | 6.800.000 „ |
| ASIA | 2.465.000 „ |
| AFRICA | 2.210.000 „ |
| Total | <u>225.505.000 bbl</u> |

According to our compilations, the 1949 hop crop may be placed at a total of abt. 117.450.000 lbs of which abt. 45% were grown in the USA.

World production of hops 1949.

WEIGHTS AND MEASURES.

| |
|--|
| 1 ha = 2,934 bayr. Tagwerk, 1 ha = 2,471 acres, 1 acre = 0,405 ha |
| 1 Liter = 0,2642 gall. (USA.) 1 gall. (USA.) = 3,7853 Liter |
| 0,2201 gall. (Brit.) 1 gall. (Brit.) = 4,5435 Liter |
| 1 hl = 100 Liter = 26,42 gall. = 0,85 bbl (USA.) 1 bbl. (USA.) = 31 gall. = 1,1734 hl |
| 22,01 gall. = 0,6114 barrel (Brit.) 1 barrel (Brit.) = 36 gall. = 1,6356 hl |
| 1 Ztr. = 50 kg = 110,23 lbs = 0,984 cwt (Brit) 1 cwt (Brit) = 112 lbs = 50,8 kg = 1,016 Ztr. |
| 1,102 cwt (USA.) 1 cwt. (USA.) = 100 lbs = 45,36 kg = 0,9072 Ztr. |
| 1 dz = 1 quintal = 220,46 pounds (USA.) |
| DM 1.— = US \$ —.23809 |
| DM 4.20 = US \$ 1.— |
| US \$ 2.80 = DM 11.76 = £ 1.—.— |
| DM-West 1.— = DM-East 6.—/7.—. |

Acreage, yield and production 1948 and 1949

| | Acreage 1948 acres | Yield pounds | Production 1948 pounds | Acreage 1949 acres | Yield pounds | Production 1949 pounds |
|---------------------------|--------------------------|-----------------|------------------------------|--------------------------|-----------------|------------------------------|
| Hallertau | 9.706 | 800 | 7.761.294 | 10.168 | 997 | 10.141.160 |
| Spalt | 1.332 | 625 | 833.339 | 1.332 | 513 | 683.426 |
| Hersbrucker Gebirge | 716 | 758 | 542.883 | 820 | 578 | 473.989 |
| Jura | 99 | 451 | 44.643 | 97 | 568 | 55.115 |
| Bavaria | 11.853 | 774 | 9.182.159 | 12.417 | 914 | 11.353.690 |
| Tettngang | 855 | 454 | 388.450 | 1.013 | 762 | 771.610 |
| R. H. W. | 324 | 885 | 286.818 | 353 | 660 | 233.136 |
| Baden | 50 | 617 | 30.864 | 69 | 288 | 19.841 |
| Rheinpfalz | 27 | 551 | 14.881 | 30 | 919 | 27.558 |
| Germany | 13.109 | 755 | 9.903.172 | 13.882 | 894 | 12.405.835 ¹⁾ |
| Saaz (Zatec) | — | — | 8.487.048 | — | — | 8.295.800 |
| Auscha (Ustek) | — | — | 1.384.930 | — | — | 975.535 |
| Other Districts | — | — | 846.015 | — | — | 488.319 |
| Czechoslovakia | 19.373 | 553 | 10.717.993 | 19.709 | 495 | 9.759.654 |
| Alsace | 1.483 | 580 | 859.794 | 1.483 | 1.115 | 1.653.450 |
| Dep. Côte d'Or | 321 | 536 | 171.959 | 321 | 549 | 176.368 |
| Northern France | 445 | 731 | 325.178 | 741 | 893 | 661.380 |
| France | 2.249 | 603 | 1.356.931 | 2.545 | 979 | 2.491.198 |
| Alost | 296 | — | — | 289 | 1.145 | 330.690 |
| Poperinghe | 828 | — | — | 778 | 1.417 | 1.102.300 |
| Belgium | 1.124 | 1.285 | 1.444.454 | 1.067 | 1.343 | 1.432.990 |
| Slovenia | — | — | — | 2.471 | 803 | 1.984.140 |
| Backa | — | — | — | 445 | 743 | 330.690 |
| Jugoslavia | — | — | — | 2.916 | 794 | 2.314.830 |
| Poland | — | — | — | 1.235 | 491 | 606.265 |
| USSR. | — | — | — | 4.942 | 669 | 3.306.900 ²⁾ |
| Continent | 35.855 | 653 | 23.422.550 | 46.296 | 698 | 32.317.672 |
| Kent | 12.771 | 1.413 | 18.048.912 | 12.349 | 1.353 | 16.707.936 |
| Hants | 673 | 1.372 | 923.440 | 677 | 1.299 | 879.536 |
| Surrey | 143 | 1.201 | 171.808 | 114 | 1.377 | 157.024 |
| Sussex | 2.208 | 1.267 | 2.796.864 | 2.167 | 1.188 | 2.574.992 |
| Hereford | 4.737 | 1.248 | 5.912.816 | 4.666 | 1.118 | 5.217.296 |
| Worcester | 2.200 | 1.230 | 2.706.816 | 2.168 | 1.110 | 2.407.216 |
| Other Counties | 55 | 965 | 53.088 | 55 | 1.430 | 78.624 |
| England | 22.787 | 1.343 | 30.613.744 | 22.196 | 1.262 | 28.022.624 |
| Europe | 58.642 | 922 | 54.036.294 | 68.492 | 881 | 60.340.296 |
| Washington | 13.100 | 1.760 | 23.056.000 | 12.983 | 1.492 | 19.374.429 |
| Oregon | 17.700 | 890 | 15.753.000 | 14.349 | 1.022 | 14.667.329 |
| California | 9.200 | 1.230 | 11.316.000 | 9.153 | 1.671 | 15.293.515 |
| Idaho | 600 | — | — | 848 | 1.639 | 1.390.097 |
| USA. | 40.600 | 1.235 | 50.125.000 | 37.333 | 1.359 | 50.725.370 ²⁾ |
| Quebeck | 50 | 660 | 33.000 | 30 | 667 | 20.000 |
| Ontario | 130 | 677 | 88.000 | 82 | 768 | 63.000 |
| Br. Columbia | 1.635 | 1.229 | 2.009.000 | 1.635 | 1.300 | 2.126.000 |
| Canada | 1.815 | 1.174 | 2.130.000 | 1.747 | 1.264 | 2.209.000 |
| Tasmania | 1.272 | 1.002 | 1.274.896 | 1.339 | 1.494 | 1.999.984 |
| Victoria | 259 | 1.473 | 381.360 | 259 | 1.513 | 392.000 |
| Australia | 1.531 | 1.082 | 1.656.256 | 1.598 | 1.497 | 2.391.984 |
| New Zealand | — | — | 987.000 | — | — | 766.980 |
| Japan | — | — | — | — | — | 220.460 ³⁾ |
| Manchuria | — | — | — | — | — | 330.690 ³⁾ |
| Argentina | — | — | — | 618 | 357 | 220.460 |
| South Africa | 300 | 973 | 292.000 | 320 | 787 | 252.000 |
| Total | 102.888 | 1.062 | 109.226.550 | 110.108 | 1.067 | 117.457.240 |

¹⁾ Plus 550.000/1.100.000 lbs not officially weighed. ²⁾ Includes 6.445.581 lbs not harvested. ³⁾ Estimate.

Output of beer in various countries is shown by the following figures relating mostly to 1949:

Production of beer.

| | 1000 bbl | | 1000 bbl |
|-------------------|----------|-------------|----------|
| U. S. A. | 88.273 | Austria | 1.775 |
| Great Britain | 37.817 | Columbia | 1.622 |
| Germany | | Switzerland | 1.590 |
| West | 12.032 | New Zealand | 1.311 |
| East | 2.125 | Poland | 1.360 |
| Belgium | 9.180 | Japan | 1.267 |
| France | 7.055 | Eire | 1.247 |
| Canada | 6.981 | Netherlands | 1.020 |
| Czechoslovakia | 6.902 | Chile | 867 |
| Russia (Estimate) | 6.800 | Finland | 778 |
| Brazil | 4.990 | Italy | 758 |
| Australia | 4.930 | Venezuela | 595 |
| Argentina | 3.060 | Norway | 568 |
| Mexico | 2.878 | Spain | 425 |
| Denmark | 2.720 | Portugal | 145 |
| Sweden | 2.295 | Ecuador | 119 |

Starting in June/July 1949 beers of higher specific gravity appeared on the market for the civilian population. Authorization for beer with a specific gravity of 11—14% followed on September 1st, 1949, and the excise tax was set at DM 24.—/27.— per hl.

Brewing industry in Germany.

Consumer preference in connection with higher specific gravity led to beers with a pronounced aroma of hops, so that hopping rates rose up to 0,91 lbs per bbl. Usage of malt was increased considerably and demand for hops centered especially upon greater quantities of fresh hops crop 1949.

A decrease in the high quotations for barley and malt resulted only from imports at preferential rates of custom. We are informed that foreign exchange has been granted on the basis of liberalized commercial agreements for the import of abt. 10.000 tons of malt between September 1949 and March 15th, 1950. Furthermore, abt. 20.000 tons of malt were imported under special commercial agreements.

A preferential custom duty was intended for the import of hops as well. Unfortunately, however, this will only partially be realized.

A relatively high retailing profit and excessive taxes are increasing the price of beer to the consumer. A substantial decrease in this price has proved necessary to favor beer production. It has been intended to cut the excise tax by DM 12.— per hl and a general lowering of consumer prices should result from a concurrent decrease in the price ex brewery as well as of retailer profits. An agreement about this procedure was not possible and the Bundeswirtschaftsministerium, therefore, ordered a new ceiling on beer prices on February 24th, 1950, to be effective as soon as the decrease of the excise tax will be in operation.

Consumer price of beer.

This regulation is now scheduled for September 1st, 1950, although some minor difficulties remain still unsettled.

| Output of beer | total | Specific Gravity | | | |
|---------------------|------------|------------------|--|-----------|--------------|
| | | up to 2% | 4 ¹ / ₂ —5 ¹ / ₂ % | 7—8% | more than 8% |
| 1949 | hl | hl | hl | hl | hl |
| April | 1.200.632 | 9.746 | 28.200 | 1.139.268 | 23.418 |
| May | 968.588 | 7.906 | 18.819 | 916.565 | 25.298 |
| June | 1.139.623 | 10.254 | 19.958 | 1.047.062 | 62.349 |
| July | 1.488.530 | 15.006 | 22.386 | 1.184.815 | 266.323 |
| August | 1.632.288 | 14.229 | 20.378 | 556.082 | 1.041.599 |
| September | 1.561.476 | 7.869 | 15.728 | 105.070 | 1.432.809 |
| October | 1.121.864 | 3.423 | 7.384 | 48.594 | 1.062.463 |
| November | 874.143 | 2.501 | 4.239 | 19.829 | 847.574 |
| December | 1.130.279 | 3.785 | 5.412 | 18.399 | 1.102.683 |
| 1950 | | | | | |
| January | 869.388 | 2.800 | 4.194 | 10.087 | 852.307 |
| February | 1.039.361 | 3.388 | 4.919 | 11.698 | 1.019.356 |
| March | 1.128.853 | 4.332 | 5.806 | 24.187 | 1.094.528 |
| Total | 14.155.025 | 85.239 | 157.423 | 5.081.656 | 8.830.707 |

Output of beer. (Western Germany)

Exports of beer during the period specified amounted to 98.093 hl (including sales against foreign currency within Germany). Taxfree deliveries to the occupation forces against payment in D-Mark totalled 244.007 hl during the same period.

Export of beer. (Western Germany)

Russian Zone.

Breweries receive materials according to allocations. The problem of unused capacities in the industry is being solved by shut-downs if the brewery is not advantageously located for distribution of beer. Supplies of malt have been sensibly increased by imports of barley from the U. S. S. R. Bavarian hops were obtainable only in limited quantities by reason of short supply and high prices. Demand for hops was covered by imports from the USA., England and the Ukraine.

The following table shows the qualities brewed together with prices and taxes:

| | Specific Gravity | Excise tax per hl | Price ex brewery per hl *) | Consumer price per liter |
|-----------------------------------|------------------|-------------------|----------------------------|--|
| Top fermented | 3 % | DM 39.— | DM 65.— | DM —.80 |
| Lagerbeer | 4 1/2 % | DM 58.— | DM 100.— | DM 1.44 / DM 1.75 |
| Weissbeer, Caramel-Beer | 12 % | DM 259.— | DM 320.— | DM 3.80 / DM 4.— |
| Export-Beer | 14 % | DM 355.— | DM 430.— | DM 4.80 / DM 5.— |
| Bock-Beer | 16 % | DM 428.— | DM 510.— | For HO-shops and forces of occupation only |
| Porter | 18 % | DM 498.60 | DM 590.— | |

*) in barrels, bottled plus DM 15.— (all prices D-Mark East)

Growth of hop crop 1949.

The plants emerged in good condition after the mild winter of 1948/49 which brought ample precipitation. Spring work progressed under mild and dry weather conditions throughout practically all centers of production. Wireworms and grubworms appeared locally and were controlled.

The growth of crop 1949 was marked by exceptionally good advances of early uncovered gardens under a dry and warm spring with soil moisture abundantly present. Weather during May was too cold, so that late uncovered gardens could not attain the same growth. humid weather during June furthermore was not appropriate to equalise the difference in development between late and early gardens.

Continual sunny weather during July through August with scant precipitation did stimulate flowering, but the formation of the cones was retarded by dry conditions. Hops generally remained smaller than normal which had great influence upon quantities harvested.

DOWNY MILDEW had to be controlled in all areas of production since the beginning of the growth but was no menace. Shortly before the harvest there appeared some APHIDS and CLADIASPORIUM in the Hallertau and RED SPIDER caused small damage in Tettngang.

Picking of early hops started in Tettngang on August 20th. General harvest began on the 27/28th August in Spalt and the Hallertau and was finished within three weeks of hot and dry weather.

Quality crop 1949.

Cones remained smaller than normal under the long dry spell during their period of formation and lupulin was not too amply present. As a distinctive sign of crop 1949, cones contained numerous small grains.

Aroma was mostly fine and mild though not very strong.

In consequence of the dry and warm weather during harvest time, the color of crop 1949 was almost uniformly of a fine, lustrous and spotless green.

Bitter value.

Analyses by the "Wissenschaftliche Station für Brauerei", München showed the following results for hops crop 1949:

| Origin | Total resin content anhydric | Soft Resins % | Humulon % | Lupulon Fractions of % soft resins | Hard Resins % |
|---------------------------|------------------------------|---------------|--------------|------------------------------------|---------------|
| Hallertau/Au | 16,05 | 14,97 = 93,27 | 6,44 = 40,1 | 8,53 = 53,17 | 1,08 = 6,73 |
| „ /Wolnzach | 16,2 | 13,9 = 85,80 | 6,55 = 40,4 | 7,35 = 45,4 | 2,2 = 14,2 |
| „ /Mainburg | 17,34 | 15,14 = 87,4 | 6,78 = 39,13 | 8,36 = 48,27 | 2,20 = 12,6 |
| Hersbr. Gebirge | 16,12 | 13,90 = 86,3 | 6,56 = 40,7 | 7,34 = 45,6 | 2,22 = 13,7 |
| Wurtemberg | 16,00 | 13,4 = 83,7 | 5,85 = 36,55 | 7,55 = 47,15 | 2,6 = 16,3 |
| Tettngang | 19,63 | 14,96 = 76,2 | 6,76 = 34,4 | 8,20 = 41,8 | 4,67 = 23,8 |
| Spalt | 16,92 | 13,86 = 81,91 | 6,11 = 36,11 | 7,75 = 45,8 | 3,06 = 18,09 |
| Spalt | 17,6 | 14,7 = 83,5 | 6,65 = 37,8 | 8,06 = 45,7 | 2,9 = 16,5 |
| Fuggles | 16,24 | 13,50 = 83,13 | 2,27 = 13,96 | 11,23 = 69,17 | 2,74 = 16,87 |
| Goldings | 15,3 | 13,15 = 85,95 | 4,07 = 26,60 | 9,08 = 59,35 | 2,15 = 14,05 |
| Yakima | 18,26 | 16,11 = 88,23 | 7,4 = 40,5 | 8,71 = 47,73 | 2,15 = 11,77 |

Percentages refer to Total Resin Content.

Although prices for crop 1948 had been fixed by the hop board, keen demand during that season resulted in quotations exceeding official limits, and both apprehensions as well as great expectations were felt regarding developments for crop 1949. Administrative measures for hops had

Regarding exports of hops, a minimum price of \$ 112.— per 50 kilos free German border or fob. German seaport was set under the auspices of J.E.I.A. (Joint Export Import Agency) on September 3rd, 1949. No export licenses were to be approved at lower quotations.

Competent circles indicated at that time, that this was a precipitate measure, as a real price level for export had not yet been found. Crop 1949 having been considerably bigger than the preceding crop, supplies were considered adequate both for home consumption and export purposes.

While quotations for 1949 hops found their initial level slowly around DM 300.— at the end of August in Tettwang and at the beginning of September in the Hallertau, in this latter region farmers were influenced by the Hop Growers Association calling for higher prices as soon as the above mentioned quotation of \$ 112.— was set. The first advances in the market thus originated. Only a short time later it became known that considerable quantities had been contracted on account of foreign dealers. Purchases to cover these contracts as well as demands from domestic breweries made for continued advances and competition for hops increased constantly. There still seemed to be a chance to normalise the market. A general stop of purchasing was attempted but had to fail as a number of firms continued to buy.

The market was beginning to calm down somewhat during the third week in November, when news of the devaluation of the £ Sterling caused another upswing.

Purchases that were said to be for account of the Russian Zone further disrupted the market as prices seemed to be only of secondary importance to these buyers.

The bulk of purchasing was finished by the end of September/beginning of October in all markets except the Hallertau, which was sold out abt. four weeks later. Until then, prices had risen to DM 650/700.— per 50 kilos first cost. The scant supplies still available, estimated at abt. 5% of the aggregate crop, where the basis of constant manipulation. Prices jumped at times by DM 100.— per 50 kilos per day and attained a staggering peak of DM 2.000.— in January 1950, never before held possible in the history of hops.

In February, quotations which were mostly nominal for lack of supplies went back to DM 1500.— as more English hops were imported. A slowly decreasing demand induced manipulators to realise their profits and prices fell to DM 1400/1450.—. Further development depended upon prospects for beer sales which were stimulated by the hot and dry weather in May, June and July. Demand later again picked up somewhat and prices rose again to DM 1600.—.

The hop trade found itself in a most difficult situation under such an unruly development. As prices rose practically daily, delivery of hops purchased from farmers often was only partially effected and repurchases at higher prices became a necessity. It is even said that unreliable purchasing agents speculated to their own advantage at the expenses of their principals.

The necessity for effective delivery of hops sold became more important to the trade than prices and often led to sacrifices.

The market's development in October 1949 pointed to a short supply and only imports of hops seemed able to mend the situation. The necessary formalities took more time than anticipated and the first quota of \$ 500.000.— became free only in the beginning of November.

Imports had to be limited to English hops. An additional quota of \$ 500.000.— was granted for such imports in February 1950.

In the meantime supplies had become short on the English market as well so that qualities and quotations advanced. Deliveries for the second quota had to take place to a greater extent in hops crop 1948 and 1947. These qualities did not always have the customer's approval.

There is no doubt that the pronounced shortage of hops has been alleviated by these imports. Necessary formalities for these imports caused regrettable delays which in turn had unfavourable consequences in a rising market in England. The extent of the first quota was too limited so that practically no impression was made on speculators in the German market. Prices in Germany receded only after the second quota as German breweries changed their initial reserve with regard to English hops.

These cannot be directly compared to German being on bitter value while the aroma is of secondary importance. Experience has shown that these hops may be used together with German hops without affecting the taste

Owing to the dollar scarcity, hops from the USA. were only occasionally obtainable as ERP. imports were impossible. Occasional deliveries came from Belgium and the Netherlands where imports had been facilitated by liberalization. Hops from Yugoslavia were not available. Total imports into Germany may be placed at:

| | |
|-------------------------|-----------------------|
| English hops | 1.157.500 lbs. |
| Other origins | 165.500 „ |
| total | <u>1.323.000 lbs.</u> |

Hop imports
1949.

Export 1949:

Export of hops was bound to be considerably hampered by such a situation. Early contracts at § 112.— could only have been realisable as sellers benefitted from the rate of exchange after devaluation.

As the market situation in Germany was in contrast to all other world markets, it became increasingly difficult to reliably inform customers abroad and to give an understandable picture of the situation. Exports developed as follows:

| Destination | Export Certificates approved | Statistics of Exports Oct. 1949 — April 1950 |
|------------------------------------|------------------------------|--|
| USA. | 2.483.702 lbs. | 2.371.488 lbs. |
| Belgium | 610.674 „ | 592.596 „ |
| Belg. Congo | — | 22.046 „ |
| Netherlands | 256.285 „ | 233.247 „ |
| Luxembourg | 54.123 „ | 57.540 „ |
| Denmark | 392.419 „ | 402.780 „ |
| Switzerland | 295.196 „ | 300.707 „ |
| Austria | 579.038 „ | 554.236 „ |
| France | 632.500 „ | 680.119 „ |
| French Colonies | 53.021 „ | 94.577 „ |
| Norway | 99.538 „ | 98.546 „ |
| Italy | 430.669 „ | 378.089 „ |
| Sweden | 316.360 „ | 204.366 „ |
| Poland | 399.584 „ | 392.198 „ |
| Other European Countries | 184.745 „ | 176.148 „ |
| South America | 107.584 „ | 21.164 „ |
| Near East | 4.409 „ | 4.409 „ |
| Far East | 132.607 „ | 130.292 „ |
| Africa | 13.227 „ | 20.062 „ |
| Total | 7.045.681 lbs. *) | 6.734.610 lbs. |

*) Latest informations place the total at 7.175.422 lbs.

The above official statistical figures cover the period inclusive April only and are subject to adjustments up to September 1950.

Czechoslovakia.

Acreage was 19.708 acres in 1949 as compared with 19.373 acres in 1948, while production amounted to 9.759.654 lbs. in 1949 as against 10.717.994 lbs. in 1948. Yields dropped to 495 lbs. per acre in 1949 (1948 = 553 lbs.) in consequence of constant dry weather conditions which seem to prolong themselves during 1950.

Home consumption of hops in Czechoslovakia amounts to abt. 3.968.000 lbs. of which abt. 2.865.000 lbs. are said to have been provided in domestic hops.

The net exported balance of hops is estimated at 7.716.100 lbs. and seems to have been shipped principally to the USA. (2.866.000 lbs.), USSR. (1.102.300 lbs.), England and Belgium.

England.

The English hop market 1949 was sensibly influenced by the unexpected demand from Germany and tendency was at times unusually firm. Quotations for export rose from about 30 to 35 % during the season.

Exports from England for the period September 1949 until March 1950 amounted to 5.291.040 lbs. of which 1.013.000 lbs. to Germany and 816.000 lbs. to Czechoslovakia.

Applications totalling 315.000 cwts (of 112 lbs each) of crop 1950 have been submitted to the Hops Marketing Board both for domestic and export purposes.

USA. crop 1949.

Following extensive preparations, a Hop Marketing Agreement became effective shortly before the harvest 1949. In November, the Hop Control Board fixed the salable quantity at 77 %, so that 23 % remained surplus, part of which already had been left of this measure.

| | Aeres | Harvested | Unharvested | Total |
|------------------------|---------------|-----------------------|----------------------|-----------------------|
| California | 9.153 | 13.293.237 lbs | 2.000.278 lbs | 15.293.515 lbs |
| Oregon | 14.349 | 11.082.802 „ | 3.584.527 „ | 14.667.329 „ |
| Washington | 12.983 | 18.544.198 „ | 830.231 „ | 19.374.429 „ |
| Idaho | 848 | 1.359.552 „ | 30.545 „ | 1.390.097 „ |
| Total | 37.333 | 44.279.789 lbs | 6.445.581 lbs | 50.725.370 lbs |

There were some expectations that the surplus hops, as far as they had been picked, would be released wholly or in part later in the season, but this measure was not taken. USA.

Quotations for seedless hops in USA rose during the season from 66 c to 86 c per lb. Practically the whole prospective crop 1950 has been contracted at rising quotations which finally reached 85 c per lb.

Exports from the USA for the period September 1949 to February 1950 amounted to 7.825.889 lbs and include shipments to Austria (447.424 lbs) Czechoslovakia (371.806 lbs) Netherlands (131.945 lbs) and Denmark (110.230 lbs).

The Hop Marketing Agreement in USA may influence the world market as well as the domestic market by reducing the salable quantities.

Exports of German hops in 1949/50 were not materially higher than in the preceding year (7.041.052 lbs) This seems to indicate bigger purchases by domestic breweries as the reason for the hops shortage in 1949/1950. Free markets.

As long as a free market existed for German hops in relation to exports only, this must be considered as the main reason for the unbridled development of prices. Imports were hampered and these supplies could increase the offerings only too late in the season.

Considering the importance of hop exports from Germany we are glad to inform that on July 21st 1950 a meeting sponsored by the Ministerium für Ernährung, Landwirtschaft und Forsten rejected proposals for curtailments of deliveries abroad. It is intended only to set a minimum export price as soon as a reliable level has been found.

Furthermore, free imports of hops into Germany will be possible as soon as EPU agreements (European Payment Union) will make possible the liberalisation of trade. This will tend to curb speculative influences in our market.

Laying out of new hop gardens is subject to an authorization according to instruction No 6108a22 of the Bavarian Ministerium für Ernährung, Landwirtschaft und Forsten. It is intended to stabilize the acreage at the 1939 level. Actually, the hop acreage is indicated as follows: Acreage in Germany.

| | 1939 | 1949 | | 1950 |
|---------------------------|---------------------|---------------------|--------------------|---------------------|
| | Acreage | Producing acreage | New gardens | Total acreage |
| Hallertau | 11.317 acres | 10.168 acres | 1.134 acres | 11.302 acres |
| Spalt | 2.276 " | 1.332 " | 494 " | 1.826 " |
| Hersbruck | 2.118 " | 820 " | 376 " | 1.196 " |
| Jura-Kinding | 200 " | 99 " | 30 " | 129 " |
| Württemberg | 1.223 " | 353 " | 161 " | 514 " |
| Tett nang | 1.636 " | 1.013 " | 247 " | 1.260 " |
| Pfalz/Baden | 591 " | 101 " | 25 " | 126 " |
| Other districts | 180 " | — | — | — |
| TOTAL . . | 19.541 acres | 13.886 acres | 2.467 acres | 16.353 acres |

Acreages in all districts were markedly extended in the spring of 1950 as well. Producers are stimulated to further increases by the development of prices.

Tendencies to institute new methods of sales by auction or co-operatives seem to have been shelved as unpracticable.

Hop plants have attained full height and the cones are in good development. It is evident that late uncovered gardens as well as new plantings are retarded mostly in consequence of the drought which is a distinctive sign of the summer of 1950. Growth 1950.

The HALLERTAUE was most affected by insufficient precipitation in the early summer and within this area the districts of Wolnzach and Siegenburg especially so. It seems doubtful whether these two districts will be able to compensate the second half of July. Persistent attacks by red spider are controlled with sulphur detergent. Discolorations of foliage from downward up are observed, supposedly a result of this summer's unusual dry heat. Hallertau.

There is a certain menace of red spider in TETTANANG as well, where identical methods of control are applied. Picking is expected to start during the week August 6th/12th. Tett nang.

Spält. SPALT shows a favorable and uniform stand. The plants have reached their normal height and show promising laterals. The cones are forming. Some aphids are showing up and are being controlled. Gardens are very well tended.

Hersbruck. Vigorous growth is apparent in the HERSBRUCKER GEBIRGE which received repeated rainfalls. There were some signs of Downy Mildew against which sprayings of Wackerkalk are applied. The plants have reached the height of the trellises everywhere. Numerous laterals are evident. Hails did severe damage in the district of Schnaittach on July 2nd.

General outlook. The present development of the hop crop in Germany will be extensively influenced by precipitations received the second part of July. Red spider doubtless constitutes a menace even shortly before picking and must be carefully observed and controlled if the result of the crop is to reward the farmer by adequate yields for his constant work and care.

Joh. Barth & Sohn.

We have the satisfaction to announce that

Heinrich Johannes Barth,

son of our senior Heinrich Th. Barth and representing the sixth generation of our family entered our firm as a partner on March 2nd, 1950.

Joh. Barth & Sohn.