Hopsteiner

GUIDELINES 2026

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Introduction and Market Report

We are pleased to present Hopsteiner's 2026 Guidelines for Hop Buying. Global hop production has exceeded demand for several years, prompting acreage reductions. However, as global beer consumption continues to decline, further reductions remain necessary. This edition of *The Guidelines* highlights areas that warrant caution and those where a more measured approach may be appropriate until the market stabilizes.

The recently concluded 2026 hop harvest presents a mixed market picture. On one hand, warehouses around the world hold enough past-crop inventory to justify additional acreage reductions in 2027, yet exceptionally low yields from the European crop have constrained supplies of aroma and noble hops. A hot, dry summer combined with severe regional storms significantly reduced yields and alpha acid levels. Current estimates indicate that the German crop is considerably smaller than in 2025, with similar declines in Czechia and Slovenia. Nevertheless, past-crop inventories should enable the industry to meet brewers' overall volume and quality requirements.

The principal risk for the coming years is that an overly broad view of the hop market may create complacency. Although the market is generally oversupplied, conditions vary significantly by variety and must be evaluated individually. A clearer understanding of these differences should encourage forward contracting, enabling growers to maintain the varieties the market needs and helping to stabilize the supply chain.

Without forward contracts at sustainable price levels, growers lack the commercial certainty needed to keep sought-after varieties in the ground. Rising costs and variable yields also make growers increasingly reluctant to produce for uncertain spot-market demand.

Our message to the brewing industry is clear: secure foreseeable demand for specific varieties through forward contracts. These commitments are practical risk-management tools that protect future supply and support stability across the hop market.

The introduction of new hop varieties is another essential component of the industry's future. Hopsteiner's advanced breeding program continues to develop varieties that combine disease resistance, weather resilience and desirable brewing characteristics.

Akoya™ and Nobella™, for example, are gaining market acceptance, while the high alpha varieties Eureka!™ and Helios™ continue to expand in both the United States and Europe.

Even after new varieties meet agronomic objectives, they still require successful brewing trials and brewer confidence to achieve commercial adoption. Given the pressures facing hop growers, brewers should proactively conduct trials and establish practical variety-acceptance policies. Doing so can support forward contracting and strengthen supply-chain stability.

Growers, merchants, and brewers must work together to preserve critical acreage, enable resilient varieties, and support long-term market stability.

Louis S. Gimbel 4th und Pascal Piroué, Management

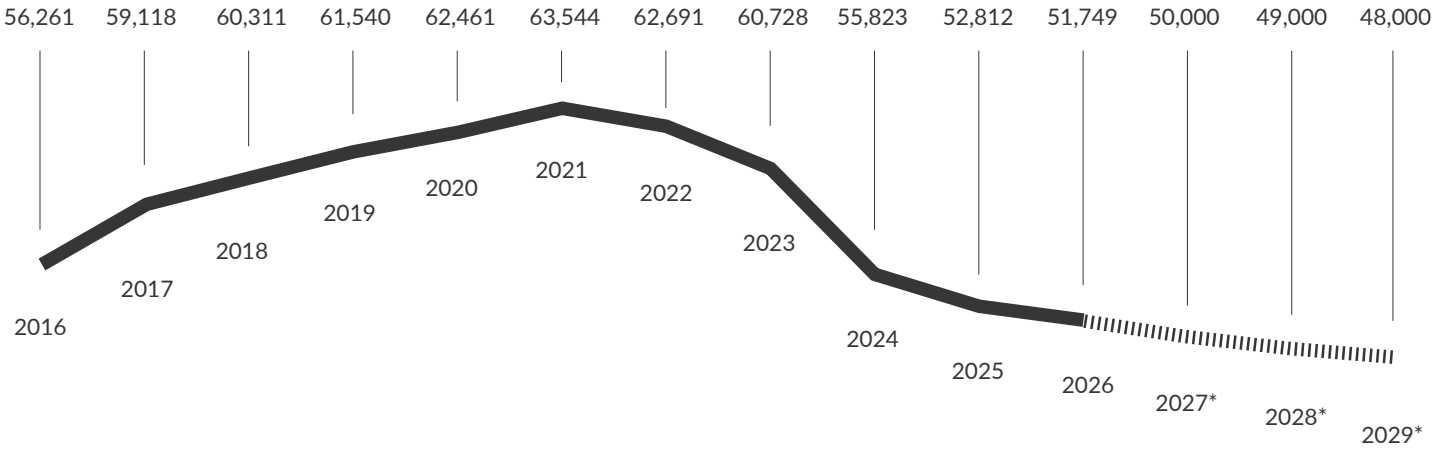


Florian Perschel, Ed Kentish-Barnes, Louis S. Gimbel 4th, Pascal Piroué



Hop Acreage

Total Hop Acreage in ha (2016–2029)



	Acreage in ha			+/– %
	2024	2025	2026	25/26
Europe	31,830	30,436	29,022	–4.6
Austria	270	270	271	+0.4
Belgium	177	167	161	–3.6
Czechia	4,845	4,815	4,786	–0.6
England	536	484	497	+2.7
France	635	608	552	–9.2
Germany	20,289	18,962	17,861	–5.8
Elbe-Saale	1,532	1,379	1,213	–12.0
Hallertau	16,815	15,680	14,765	–5.8
Spalt	396	360	349	–3.1
Tettnang	1,528	1,526	1,518	–0.5
Other areas	17	17	15	–11.7
Poland	1,571	1,576	1,606	+1.9
Romania	280	280	280	0
Russia	500	600	600	0
Slovenia	1,644	1,603	1,451	–9.5
Spain	573	561	480	–14.4
Turkey	180	180	180	0
Ukraine	130	130	130	0
Other European countries[1]	200	200	167	–16.5
USA	18,400	17,055	17,359	+1.8
Pacific Northwest	18,138	16,871	17,175	+1.8
Other regions	262	184	184	0
Other countries	5,594	5,321	5,368	+0.9
Argentina	178	178	178	0
Australia	758	580	510	–12.1
Japan	106	106	106	0
New Zealand	1,135	916	916	0
P.R. China	2,550	2,674	2,791	+4.4
South Africa	404	404	404	0
Other states[2]	463	463	463	0
TOTAL	55,823	52,812	51,749	–2.0

Warehouses around the world still hold substantial stocks of hops from previous crops. Consequently, additional acreage reductions will be necessary for 2027.

Data source: IHGC

* Estimate

–2.0%



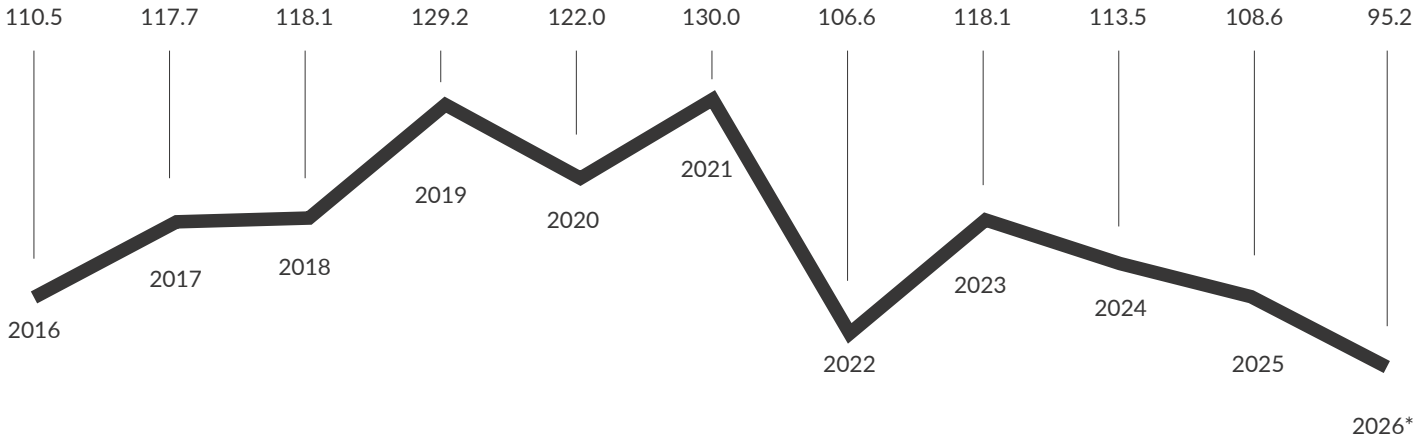
LESS WORLD HOP ACREAGE COMPARED TO 2025

[1] Belarus, Bulgaria, Croatia, Hungary, Italy, Portugal, Serbia/Montenegro, Slovakia, Switzerland

[2] Brazil, Canada, India

Crop Quantities and Average Yield

Total Hop Crop in mt (2016–2026)



	Crop quantities in mt			+/– %	+/– % yield in mt/ha 10-year-average
	2024	2025	2026*	25/26*	16-25/26*
Europe	62,846	59,503	46,866	–21.2	–15.3
Austria	330	477	452	–5.2	–2.0
Belgium	266	246	235	–4.5	–1.7
Czechia	6,494	6,909	5,313	–23.1	–17.5
England	776	651	600	–7.8	–13.3
France	960	854	680	–20.4	–20.4
Germany	46,536	43,142	33,907	–21.4	–12.5
Elbe-Saale	2,569	2,505	2,100	–16.2	–7.9
Hallertau	40,302	37,250	29,000	–22.1	–12.5
Spalt	717	615	430	–30.1	–28.1
Tettnang	2,908	2,725	2,350	–13.8	–11.7
Other areas	40	47	27	–42.6	–2.9
Poland	2,953	2,648	2,100	–20.7	–33.3
Romania	208	200	200	0	–6.1
Russia	500	550	550	0	–21.3
Slovenia	2,245	2,345	1,500	–36.0	–35.3
Spain	963	861	770	–10.6	+0.3
Turkey	230	230	230	0	+5.3
Ukraine	158	158	158	0	+1.8
Other European countries[1]	227	232	171	–26.3	–11.5
USA	39,608	37,602	38,102	+1.3	+6.8
Pacific Northwest	39,529	37,523	38,023	+1.3	+6.8
Other regions	79	79	79	0	–14.5
Other countries	11,025	11,494	10,231	–11.0	0
Argentina	360	380	350	–7.9	+16.7
Australia	1,508	1,500	1,250	–16.7	+8.4
Japan	160	160	160	0	–13.7
New Zealand	1,760	1,420	1,597	+12.5	0
P.R. China	5,810	6,607	5,447	–17.6	–15.5
South Africa	682	682	682	0	–4.4
Other states[2]	745	745	745	0	+13.3
TOTAL	113,480	108,599	95,199	–12.3	–6.9

A hot, dry summer and regional severe weather events have significantly impacted yields and alpha acid contents across Europe.

Data source: IHGC

* Estimate

–12.3%



LESS WORLD HOP CROP COMPARED TO 2025

[1] Belarus, Bulgaria, Croatia, Hungary, Italy, Portugal, Serbia/Montenegro, Slovakia, Switzerland

[2] Brazil, Canada, India

Growing Hops in a Changing Climate





Comparison: Hallertauer Mittelfrüh and Hopsteiner's Nobella™ in August 2026.

WHAT ARE THE BIGGEST CHALLENGES CURRENTLY FACING THE HOP INDUSTRY?

In addition to beer sales volumes, two external factors significantly affect our operations: climate change and regulatory restrictions on crop protection products, which increase exposure to disease and pest infestations. The Climate Risk Index underscores Europe's vulnerability, particularly in Germany's hop-growing regions. Rising average temperatures and insufficient rainfall threaten hop production because without irrigation, hops depend heavily on intermittent rain and moderate temperatures.

Because hops are grown as a perennial monoculture, they are particularly vulnerable to yield losses caused by pests and diseases. Crop protection products therefore remain an important component of integrated pest management. At the same time, the EU's Farm to Fork Strategy, part of the European Green Deal, targets a 50% reduction in the use of chemical plant protection products and at least a 20% reduction in fertilizer use by 2030.

Against this backdrop, hop yields have fluctuated significantly in recent years and quality has become less consistent. The impact was especially pronounced in 2026, when heat waves and insufficient rainfall contributed to the lowest hop harvest on record.

Hopsteiner anticipated these developments early. Since 2013, we have operated a dedicated hop breeding program at our Mainburg facility, drawing on decades of expertise from the United States. The program focuses on developing resilient varieties that deliver consistent performance under challenging environmental conditions.

HOW IS HOPSTEINER RESPONDING TO THESE CHANGES?

We mitigate supply risk through expert guidance on cultivation and crop protection, investment in research and product innovation, and a breeding program focused on future-ready hop varieties. These varieties can withstand drought stress with limited yield loss and offer strong resistance – or at least good tolerance – to plant diseases and pests. As a result, they require less water and fewer crop protection inputs. From the field to their use in the brewery, these varieties support more stable yields and provide a stronger basis for planning and cost management.

Our aroma varieties Akoya™, Nobella™, Lemondrop™ and Contessa™; dual-purpose varieties like Bravo™, Calypso™ and Sultana™; and high-alpha varieties Eureka!™ and Helios™ are prime examples of this approach.

WHAT ENVIRONMENTAL MEASURES IS THE COMPANY ITSELF TAKING?

Because our business is heavily affected by climate change, we are equally committed to reducing our own environmental impact. To identify the principal sources of greenhouse gas emissions, we have calculated both our Corporate Carbon Footprint (CCF) and Product Carbon Footprints (PCFs) for Hopsteiner's product groups. We are also working to calculate and improve the water-use footprint of all our varieties.

LOOKING AHEAD: HOW WILL THE HOP MARKET EVOLVE?

Brewers are increasingly willing to incorporate new varieties into their portfolios and recipes, particularly as poor harvests become more frequent. This shift creates an opportunity in a challenging market: varieties that no longer deliver consistent yields can be systematically replaced with more weather- and disease-resilient alternatives.

Over time, this transition will enable the variety portfolio to adapt to changing conditions and become more resilient.

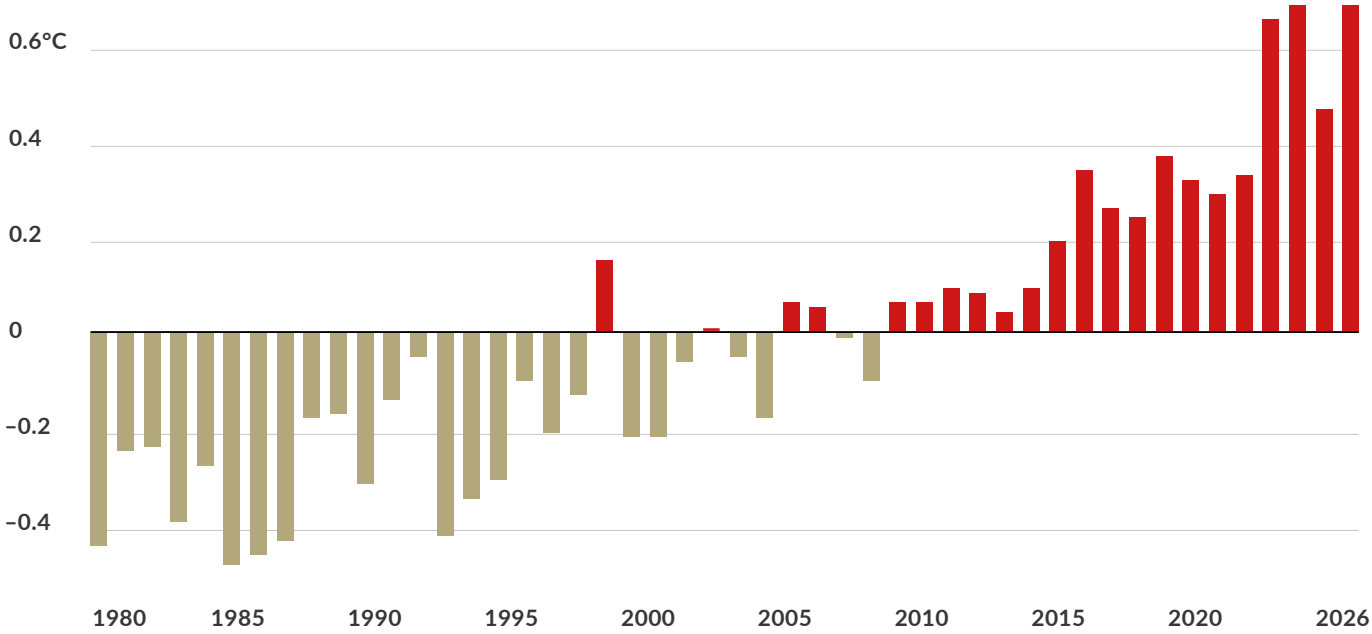


Pascal Piroué

Since 2013, he has served as Managing Director of Hopsteiner Europe, headquartered in Mainburg. He also oversees the subsidiaries Hopsteiner España, S.A. (HSE, Spain), Žatec Hop Company a.s. (ZHC, Czechia), Hopsteiner Si d.o.o. (INB, Slovenia), and Brewpark (France).

As Managing Director of Hopsteiner Europe, Pascal Piroué discusses the challenges facing the hop industry and how Hopsteiner is shaping the future of hop cultivation through innovative breeding.

Global surface air temperature anomalies for June to August
Data source: ERA5 • Reference period: 1991–2020 • Credit: C3S/ECMWF



48 DAYS OF EXTREME HEAT
in the Hallertau region

25 Gt OF WATER
missing in Germany

NO. 1
Europe is warming the fastest

Figures for 2026 – Data Source: Agrarmeteorologie Bayern, Deutsches GeoForschungsZentrum (GFZ), Copernicus Climate Change Service

Breeding Program and Hop Varieties

Hopsteiner's breeding program is a cornerstone of the company's long-term innovation and sustainability strategy. Our varieties combine superior agronomic performance, disease resistance, and resource efficiency, and have demonstrated their value even under the exceptionally dry conditions of 2026. We will continue building on this foundation to support the long-term viability of hop production while providing brewers with greater supply security and brewing consistency.

Conducting field trials across multiple locations increases confidence in variety selection. Our science-based approach improves breeding precision and efficiency, accelerating the development of hop varieties adapted to changing climatic conditions and brewer requirements.

We calculate the carbon footprint of individual hop varieties to demonstrate measurable improvements achieved through genetic advancement. Akoya™, Alora™, Erebus™ and Nobella™, for example, generate up to 28% fewer CO_2 emissions compared to the industry average of commercially grown aroma hops. Helios™ and Eureka!™ exhibit 17–18% lower CO_2 intensity than traditional high-alpha varieties such as Herkules. Hopsteiner's portfolio reflects continuous genetic progress: Apollo™ established a new benchmark for high-alpha efficiency. Eureka!™ improved yield stability, and Helios™ advanced these traits further through exceptional vigor and disease resistance. Our latest aroma varieties, Akoya™, Alora™, Erebus™ and Nobella™, boast more advanced agronomic and brewing performance.

Source: Hopsteiner calculation based on Audsley, E., Stacy, K., Parsons, DJ. & Williams, A. (2009): „Estimation of greenhouse gas emissions from agricultural pesticide manufacture and use."



Data for 2026 and compared to 2025

Aroma Hop Varieties	Acreage in ha	+/– %	Crop Quantities* in mt	+/– %	Availability current crop	pre-contracts
Germany	**7,688**	**–8.5**	**10,958**	**–29.9**		
Akoya™	94	+6.9	172	–20.1	🔴	🟡
Hallertauer	585	–6.6	686	–21.8	🟢	🟢
Hallertauer Tradition	1,718	–14.8	2,624	–34.4	🟢	🟢
Hersbrucker	755	–4.1	1,110	–22.7	🟢	🟢
Nobella™	8	+433.3	5	–19.4	🔴	🟢
Perle	2,006	–14.4	3,030	–35.5	🔴	🟡
Saphir	296	+6.7	440	–23.5	🔴	🟡
Spalter Select	523	+6.9	676	–26.8	🔴	🟢
Others	1,703	–3.8	2,215	–22.9		
USA	**12,992**	**+2.5**	**26,188**	**+5.5**		
Amarillo®	760	+0.2	1,189	–22.9	🟡	🟡
Cascade	994	–3.9	2,379	+5.1	🟢	🟢
Centennial	1,082	+3.6	2,092	+17.6	🟢	🟢
Chinook	459	–5.2	958	–9.7	🟢	🟢
Citra®	3,240	+5.6	6,067	+7.1	🟢	🟢
Mosaic®	1,336	–5.8	3,518	–3.6	🟢	🟢
Willamette	236	–0.3	366	–16.5	🟡	🟢
Others	4,885	+5.5	9,619	+14.3		



Variety: Akoya™

High Alpha Hop Varieties	Acreage in ha	+/– %	Crop Quantities* in mt	+/– %	Availability current crop	pre-contracts
Germany	**10,173**	**–3.2**	**22,949**	**–16.6**		
Eureka!™	16	+34.3	43	+13.0	🟢	🟢
Helios™	22	+16.2	50	+114.1	🟢	🟢
Herkules	7,646	–2.6	18,210	–18.2	🟡	🟢
Magnum	1,049	–21.0	2,114	–19.7	🟢	🟢
Polaris	545	–5.5	1,025	–16.8	🟢	🟢
Titan	718	+28.1	1,250	+28.9	🟢	🟢
Others	177	–21,9	257	–30.5		
USA	**4,368**	**–0.3**	**11,914**	**–0.4**		
Apollo™	121	–46.3	432	–40.0	🟢	🟢
Bravo™	46	0	151	–3.7	🟢	🟢
CTZ	1,540	–22.2	5,325	–12.6	🟢	🟢
Eureka!™	349	+14.2	1,140	+18.8	🟢	🟢
Helios™	780	+41.2	2,486	+51.5	🟢	🟢
Others	1,532	+20.6	2,380	+2.8		



Variety: Helios™

🟢 available 🟡 still available 🔴 limited availability

Older aroma and noble hop varieties are under increasing lifespan pressure due to variable yields and declining forward contracting levels. For brewers, a differentiated, long-term procurement strategy is therefore essential. For hop growers, merchants, and processors, the introduction of new hop varieties is equally critical to securing a sustainable future.

Data source: IHGC, USBA

* Estimate

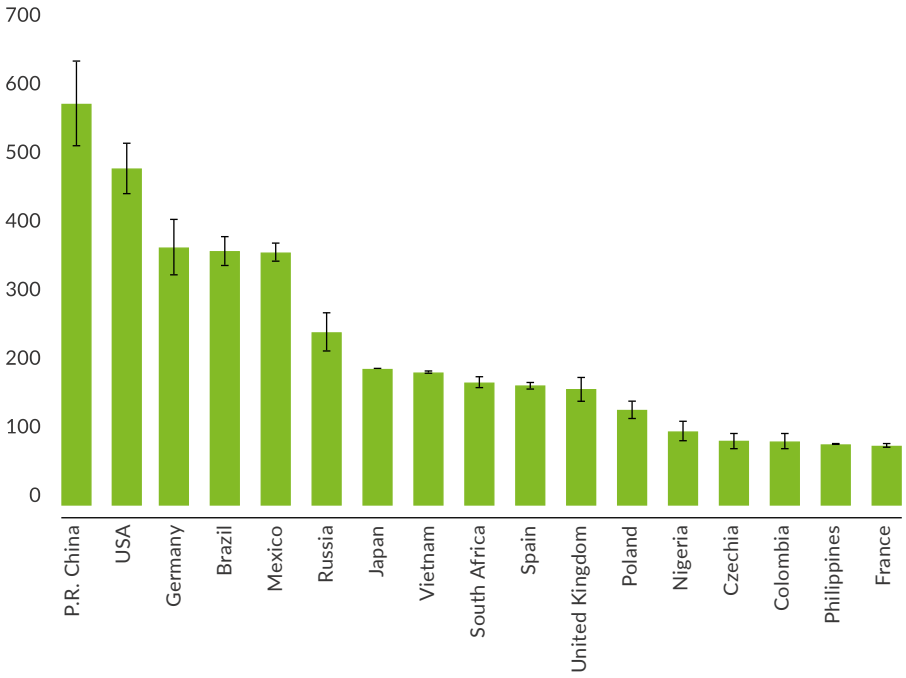
▶ More information about the Hopsteiner Breeding Program

Hop Alpha Demand

Hop Alpha Acid Demand

	Beer Production Total (in Mio. hl)			Alpha Dosage Total (in g/hl)			Alpha Demand Total (in t)		
2024	1,863			4.6			8,531		
2025	1,847			4.5			8,292		
2026*	1,802			4.4			7,929		
	Mainstream (in Mio. hl)	US Craft (in Mio. hl)	Other Craft (in Mio. hl)	Mainstream (in g/hl)	US Craft (in g/hl)	Other Craft (in g/hl)	Mainstream (in t)	US Craft (in t)	Other Craft (in t)
2024	1,818	26.3	19.0	3.7	53.4	21.3	6,723	1,403	405
2025	1,804	25.2	18.3	3.6	54.5	21.1	6,533	1,372	387
2026*	1,761	24.0	17.5	3.5	53.3	21.0	6,283	1,275	371

mt Alpha Demand Mainstream per Country with Variance



Global alpha acid demand varies considerably by country because beer-market trends differ by region: Beer markets in P.R. China, the United States, and Germany are contracting, while markets in Africa, Latin America, and the Pacific Rim are expanding.

Data source: Hopsteiner

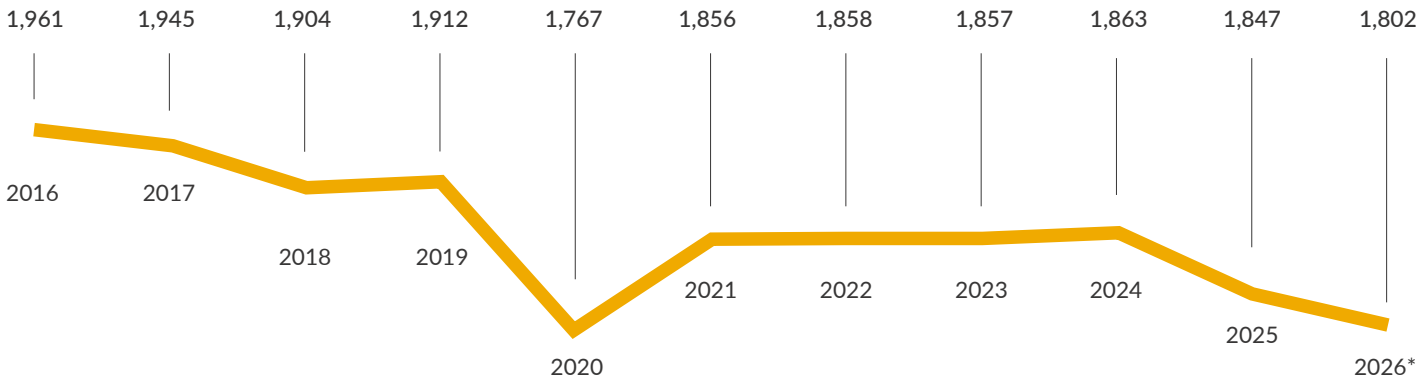
* Estimate



Despite acreage reductions and significantly lower European hop production in 2026, global alpha acid supply continues to exceed demand. Global demand for 2026 is estimated at approximately 7,900 metric tons, while production remains higher. The principal drivers are weaker beer sales and lower hopping rates in the mainstream segment. Although higher hopping rates sustain hop usage in craft beer, craft sales continue to be sluggish at best. These trends are reshaping the global hop market and reinforce the urgent need for further acreage adjustments.

World Beer Production

Total Beer Production in Mio. hl (2016–2026)



Bierproduktion in Mio. hl				+/– %
	2024	2025	2026*	25/26*
America	606.0	593.0	583.0	–1.7
USA	185.0	175.0	166.0	–5.1
Brazil	155.5	147.8	148.0	+0.2
Mexico	142.0	136.9	137.0	+0.1
Colombia	29.7	30.0	30.3	+1.0
Other states	93.8	103.3	101.7	–1.5
Europe	515.0	511.0	477.3	–6.6
Germany	82.5	78.0	74.0	–5.1
Russia	88.0	90.1	70.5	–21.8
Spain	41.2	41.5	41.0	–1.3
United Kingdom	34.0	36.0	32.0	–11.1
Poland	34.6	34.0	32.0	–5.9
Other states	234.7	231.4	227.8	–1.6
Asia	560.0	559.7	554.2	–1.0
P.R. China	352.0	353.6	346.0	–2.1
Japan	42.4	40.0	39.0	–2.4
Vietnam	34.0	36.0	35.0	–2.8
India	26.0	28.0	29.5	+5.4
Other states	105.6	102.1	104.7	+2.5
Africa	161.0	163.0	168.0	+3.1
South Africa	35.0	37.0	38.0	+2.7
Other states	126.0	126.0	130.0	+3.2
Oceania	21.0	20.4	19.6	–3.9
TOTAL	1,863	1,847	1,802	–2.4



Correction of 2024 figures: America (Brazil, Colombia, Other states), Europe (Other states)



Global beer sales are expected to decline by 2.4%. Each percentage point of global beer sales represents 3.303 metric tons alpha. By contrast, the non-alcoholic beer segment continues to grow, reaching a market share of over 2%.

Data source: Hopsteiner, IWSR

* Estimate

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