

2025 SUPPLY SITUATION



We are pleased to present, for the first time, an overview of the current supply situation.

Despite the acreage reductions of recent years, the cuts have not yet been sufficient to return supply levels to a “balanced market.”

For the 2025 crop, we are again expecting an oversupply of approximately 1,400 mt of alpha acids worldwide.

Current spot market prices will likely trigger further acreage reductions in the coming year.

In the Hallertau alone, we anticipate a decline of around 2,000 hectares, which will significantly support a stabilization of the market.

We hope this overview will continue to support you in your decision-making processes.

Alpha Production

Harvest	Acreage (ha)	Hop Volume (mt)	Alpha Average (%)	Alpha Acid Volume (mt)
2022	62690	106300	8.98%	9550
2023	60500	118140	8.89%	10500
2024	55800	113500	9.30%	10550
2025	52100	105200	9.50%	9996

Alpha Demand

Brewing Year	Beer Production (million hl)	g Alpha (per hl)	Alpha Acid Demand (mt)
2023	1885	4.8	9050
2024	1875	4.7	8813
2025	1875	4.6	8625
2026	1874	4.6	8620

Supply Situation (Comparison)

Harvest	Alpha Acid Volume (mt)	Brewing Year	Alpha Acid Demand (mt)	Alpha Balance
2022	9550	2023	9050	+500
2023	10500	2024	8813	+1688
2024	10550	2025	8625	+1925
2025	9996	2026	8620	+1376