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LUPEX MARKET REPORTS

Annual Report

2026

Hop acreage · Growing conditions · Harvest estimate
Alpha values · Supply balance



OCTOBER 2026

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ANNUAL REPORT 2026

The hop year at a glance

The reports follow the course of the season: from hop acreage and growing conditions to the harvest estimate, alpha values and supply balance.

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Hop acreage in Germany 2024–2026

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Hallertau · May, June, July and August

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Lupex GmbH

As of October 2026

JUNE 2026 · HALLERTAU & GERMANY

HOP ACREAGE

Hop acreage development in Germany 2024–2026

GERMANY 2025	HALLERTAU 2025	GERMANY 2026	HALLERTAU 2026
18,962 ha	**15,680 ha**	**17,861 ha**	**14,765 ha**
▼ −1,327 ha · −6.5 %	▼ −1,135 ha · −6.7 %	▼ −1,101 ha · −5.8 %	▼ −915 ha · −5.8 %

Germany's hop acreage continued its decline in 2026: a total of **17,861 ha** were planted — around **1,101 ha** (−5.8 %) less than in 2025. Since 2024, the total area has shrunk by approximately **2,428 ha** or **12.0 %**.

In the Hallertau, Germany's largest growing region, the area declined by **915 ha** to **14,765 ha** in 2026 (−5.8 %). The steepest declines were again recorded for Perle (−294 ha), Hallertauer Tradition (−279 ha), Herkules (−170 ha) and Hallertauer Magnum (−151 ha).

Against the trend, Titan (+140 ha), Spalter Select (+32 ha), Tango (+23 ha) and Saphir (+15 ha) gained ground. Among the other German growing regions, Elbe-Saale (−166 ha), Spalt (−10 ha) and Tettnang (−8 ha) declined slightly; Bitburg remained virtually unchanged at 15 ha.

		ACREAGE (HA)			CHANGE (HA)	
REGION	VARIETY	2024	2025	2026	2024/25	2025/26
Hallertau	Ariana	49.08	40.05	43.10	− 9.03	+ 3.05
	Callista	28.46	23.95	32.98	− 4.51	+ 9.03
	Cascade	53.69	53.35	48.60	− 0.34	− 4.75
	Hallertauer Blanc	72.62	48.11	21.60	− 24.51	− 26.51
	Hallertauer Mittelfrüher	425.01	451.03	414.88	+ 26.02	− 36.15
	Hallertauer Tradition	2,257.20	1,820.43	1,541.17	− 436.77	− 279.26
	Hersbrucker	767.39	779.56	747.39	+ 12.17	− 32.17
	Huell Melon	37.35	60.77	68.70	+ 23.42	+ 7.93
	Mandarina Bavaria	142.85	99.18	71.10	− 43.67	− 28.08
	Northern Brewer	67.94	64.03	52.07	− 3.91	− 11.96
	Opal	118.20	108.33	49.39	− 9.87	− 58.94
	Perle	2,437.93	1,984.35	1,690.80	− 453.58	− 293.55
	Saphir	217.78	205.43	220.32	− 12.35	+ 14.89
	Smaragd	42.01	37.74	32.47	− 4.27	− 5.27
	Spalter Select	389.70	386.48	418.85	− 3.22	+ 32.37
	Tango	80.91	64.87	88.05	− 16.04	+ 23.18
	Hallertauer Magnum	1,029.03	832.66	681.42	− 196.37	− 151.24
	Hallertauer Taurus	111.61	87.38	48.13	− 24.23	− 39.25
	Herkules	7,408.52	7,323.94	7,154.05	− 84.58	− 169.89
	Nugget	89.53	77.35	62.11	− 12.18	− 15.24
	Polaris	423.67	423.44	410.09	− 0.23	− 13.35
	Titan	279.02	500.15	640.55	+ 221.13	+ 140.40
	Other varieties	285.28	207.66	227.52	− 77.62	+ 19.86
Hallertau total		**16,814.78**	**15,680.24**	**14,765.34**	− 1,134.54	− 914.90
Bitburg		17.10	17.10	15.10	± 0.00	− 2.00
Elbe-Saale		1,532.38	1,379.30	1,213.32	− 153.08	− 165.98
Spalt		395.98	359.65	349.29	− 36.33	− 10.36
Tettnang		1,528.28	1,525.67	1,517.89	− 2.61	− 7.78
Germany total		**20,288.52**	**18,961.96**	**17,860.94**	− 1,326.56	− 1,101.02

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We will keep you posted on further acreage and harvest developments.

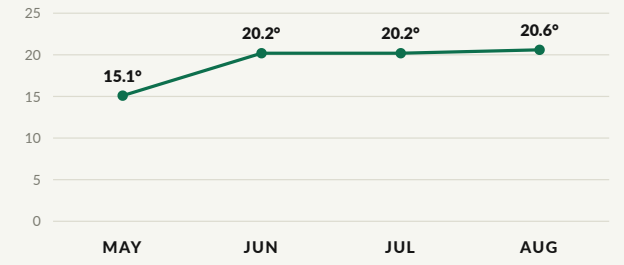
02 / MAY TO AUGUST 2026 · HALLERTAU

GROWING CONDITIONS

Weather and crop development · Review based on the August report

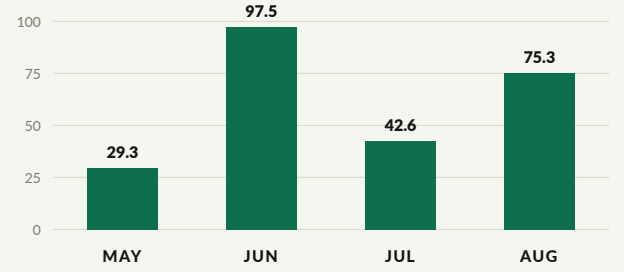
TEMPERATURE °C · MONTHLY AVERAGE

HALLERTAU — GERMANY



RAINFALL MM · PER MONTH

HALLERTAU — GERMANY



TOTAL MAY–AUGUST	244.7 mm

HOT DAYS > 30 °C

MAY	JUN	JUL	AUG	TOTAL
6	12	12	16	46

SEASON OVERVIEW

HALLERTAU — GERMANY

From May to August, a total of 46 hot days with temperatures above 30 °C were recorded - the highest figure ever recorded, according to the August report.

The average temperature in August was 20.6 °C. Temperatures exceeded 30 °C on 16 days.

August rainfall totalled 75.3 mm. From May to August, rainfall amounted to 244.7 mm, compared with the long-term average of 392.8 mm. This represents a shortfall of 148.1 mm, or 37.7%.

From January to August, total rainfall was 398.5 mm. The long-term average up to the end of August is 617.7 mm, leaving a shortfall of 219.2 mm, or 35.5%.

The hop harvest had begun by the reporting date at the end of August. Persistent hot weather adversely affected the harvest. Detailed crop estimates follow in the next chapter.

Sources: Lupex crop development reports, May and August 2026.

AUGUST 2026 · GERMANY & EUROPE

HARVEST ESTIMATE

Estimated 2026 hop crop compared with the final 2025 crop

GERMANY 2025	HALLERTAU 2025	GERMANY 2026	HALLERTAU 2026
43,141 mt	**37,250 mt**	**33,779 mt**	**28,750 mt**
▼ – 3,395 mt · – 7.3 % vs. 2024	▼ – 3,052 mt · – 7.6 % vs. 2024	▼ – 9,362 mt · – 21.7 % vs. 2025	▼ – 8,500 mt · – 22.8 % vs. 2025

Following the official Hallertau hop estimate on **25 August 2026**, estimates are now available for the major growing regions in Europe.

Germany is expected to harvest **33,779 mt** in total. This is **9,362 mt**, or **21.7%**, below the 2025 crop. In addition to a **1,101 ha** reduction in acreage, weak yields are weighing heavily on the estimate.

The Hallertau estimate stands at **28,750 mt**, down **8,500 mt**, or **22.8%**, from 2025. Average yield falls from 2.38 to **1.95 mt/ha**. Numerous hot days during the growing season placed the plants under severe stress, and alpha levels are also expected to be well below average.

The other European growing countries expect a combined **13,250 mt** – a decline of **2,176 mt**, or **14.1%**. The largest reductions are reported by Czechia, Slovenia and Poland.

GROWING REGION	VARIETY	CROP VOLUME (MT) 2025	CROP VOLUME (MT) 2026	CHANGE 2025/26	AVG YIELD (MT/HA) 2025	AVG YIELD (MT/HA) 2026
Hallertau	Perle	4,061	2,633	– 1,428	2.05	1.56
	Tradition	3,658	2,370	– 1,288	2.01	1.54
	Hersbrucker	1,423	1,219	– 204	1.82	1.63
	Hallertauer	622	444	– 178	1.38	1.07
	Spalter Select	751	582	– 169	1.95	1.39
	Saphir	417	301	– 116	2.03	1.37
	Mandarina Bavaria	269	154	– 115	2.72	2.16
	Opal	183	85	– 98	1.69	1.74
	Tango	144	145	+ 1	2.22	1.65
	Hallertau Blanc	109	44	– 65	2.27	2.08
	Northern Brewer	101	59	– 42	1.58	1.13
	Herkules	20,781	16,615	– 4,166	2.84	2.32
	Magnum	1,718	1,174	– 544	2.06	1.72
	Polaris	933	902	– 31	2.21	2.20
	Titan	854	1,064	+ 210	1.71	1.66
	Taurus	161	83	– 78	1.85	1.73
	Other varieties	1,065	877	– 188	2.12	1.70
Hallertau total		**37,250**	**28,750**	– 8,500	**2.38**	**1.95**
Tettnang		2,724	2,312	– 412	1.79	1.52
Elbe-Saale		2,505	2,196	– 309	1.82	1.81
Spalt		615	494	– 121	1.71	1.42
Bitburg		47	27	– 20	2.76	1.80
Germany total		**43,141**	**33,779**	– 9,362	**2.28**	**1.89**
Belgium		246	235	– 11	1.47	1.46
England		651	678	+ 27	1.36	1.36
France		854	680	– 174	1.14	0.97
Austria		477	452	– 25	1.77	1.67
Poland		2,648	2,200	– 448	1.68	1.37
Russia		435	460	+ 25	1.13	1.15
Slovenia		2,345	1,750	– 595	1.46	1.21
Spain		861	795	– 66	1.70	1.73
Czechia		6,909	6,000	– 909	1.44	1.25
Other countries total		**15,426**	**13,250**	– 2,176	**1.46**	**1.28**

AHA · HARVEST 2026

Alpha acid values

Fresh-harvest hops · air-dried values according to EBC 7.4

Growing area	Variety	Type	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	Ø 5 y	Ø 10 y
Hallertau	Hallertauer	A	3.5	3.6	4.1	4.5	5.2	3.1	2.9	3.3	3.7	**2.5**	3.1	3.6
	Hersbrucker	A	2.3	2.0	2.5	3.3	4.6	1.9	3.0	2.5	3.7	**2.1**	2.6	2.8
	Saphir	A	3.0	3.3	3.3	4.2	4.3	2.6	3.1	3.2	3.8	**2.5**	3.0	3.3
	Opal	A	7.2	6.4	7.3	8.5	8.7	6.1	6.7	7.1	7.7	**6.5**	6.8	7.2
	Smaragd	A	4.5	3.0	5.0	5.8	7.6	4.0	5.4	4.5	6.1	**4.3**	4.9	5.0
	Perle	A	6.9	5.5	6.7	7.4	9.0	4.9	6.0	6.2	7.0	**4.0**	5.6	6.4
	Spalter Select	A	4.6	3.5	4.4	5.2	6.4	3.3	4.7	3.9	5.6	**3.0**	4.1	4.5
	Hallertauer Tradition	A	5.7	5.0	5.4	6.3	6.1	5.2	4.9	5.3	5.7	**4.5**	5.1	5.4
	Mandarina Bavaria	A	7.3	7.5	7.9	9.0	9.9	8.2	7.9	9.0	9.1	**7.5**	8.3	8.3
	Hallertau Blanc	A	9.0	8.8	9.0	10.9	9.9	8.1	8.7	9.7	9.8	**7.7**	8.8	9.2
	Huell Melon	A	6.2	5.8	6.6	7.2	8.4	6.3	6.9	6.3	6.8	**5.8**	6.4	6.6
	Northern Brewer	A	7.8	7.4	8.1	9.1	10.5	6.4	7.5	8.3	8.0	**5.3**	7.1	7.8
	Ariana	A	8.6	9.2	9.5	10.8	10.4	8.6	9.0	9.6	8.6	**7.6**	8.7	9.2
	Callista	A	3.2	3.0	3.1	3.9	3.9	2.5	4.1	3.6	3.9	**2.3**	3.3	3.4
	Polaris	B	19.6	18.4	19.4	20.6	21.5	18.5	18.0	19.8	20.6	**17.9**	19.0	19.4
	Magnum	B	12.6	11.6	12.3	14.2	16.0	12.2	11.8	12.9	13.8	**11.4**	12.4	12.9
	Nugget	B	10.8	10.1	10.6	12.0	11.1	9.9	11.9	10.9	12.0	**9.1**	10.8	10.8
	Taurus	B	15.9	13.6	16.1	15.5	17.8	14.6	13.8	15.9	14.1	**12.3**	14.1	15.0
	Herkules	B	15.5	14.6	16.2	16.6	18.5	15.4	13.9	15.8	15.9	**12.6**	14.7	15.5
Tettnang	Tettnanger	A	3.6	3.0	3.8	4.3	4.7	2.6	2.6	3.3	4.0	**1.9**	2.9	3.4
	Hallertauer	A	4.3	3.8	4.3	4.7	5.0	3.2	3.3	3.8	4.0	**2.5**	3.4	3.9
Spalt	Spalter	A	3.2	3.5	3.9	4.7	5.2	2.8	3.0	3.6	3.4	**2.1**	3.0	3.5
	Spalter Select	A	5.2	2.9	4.1	4.7	6.4	2.8	5.4	4.4	6.0	**2.6**	4.2	4.5
Elbe-Saale	Magnum	B	12.6	9.3	11.9	11.9	13.8	12.0	14.2	12.3	13.5	**11.0**	12.6	12.3
Czechia	Saazer	A	3.0	2.9	3.4	3.6	4.0	2.8	2.6	2.6	3.3	**2.1**	2.7	3.0
	Sladek	A	6.2	4.3	5.4	6.8	7.7	6.0	6.1	6.6	7.1	**5.3**	6.2	6.2
	Premiant	A	7.6	5.1	7.1	7.8	8.5	7.8	7.0	7.3	7.3	**5.6**	7.0	7.1
Slovenia	Aurora	A	7.3	8.9	7.8	11.4	6.8	7.0	9.7	7.7	8.2	**5.9**	7.7	8.1
	Savjnski Golding	A	2.2	3.3	3.1	4.5	2.2	2.4	3.1	2.3	2.2	**1.9**	2.4	2.7
	Bobek	A	3.5	4.3	4.9	5.9	3.9	3.4	5.9	3.8	4.5	**2.3**	4.0	4.2
	Golding (Celeia)	A	2.8	3.0	3.4	4.1	3.3	2.6	4.1	3.1	3.9	**2.2**	3.2	3.3
Poland	Lubliner	A	3.2	2.1	4.6	5.0	3.5	3.9	3.2	2.5	3.7	**3.1**	3.3	3.5
	Marynka	A	8.7	6.9	7.8	8.8	7.5	8.2	7.8	7.6	8.9	**7.7**	8.0	8.0

Source: Arbeitsgruppe Hopfenanalyse (AHA).
AHA members: laboratories of the German processing works, HVG Mainburg, LfL Hüll, BLQ Weihenstephan, VLB Berlin, TU Berlin and IHPS Žalec.

MARKET UPDATE 2026

Alpha production, demand and balance

CROP 2026
8,250 mt
alpha acid production

DEMAND 2027
8,055 mt
brewing year 2027

BALANCE 2026/27
+195 mt
crop less following-year demand

1 Alpha production by crop year

Crop year	Acreage ha	Hop production mt	Average alpha	Alpha acid mt
2022	62,690	106,300	8.98%	9,550
2023	60,500	118,140	8.89%	10,500
2024	55,800	113,500	9.16%	10,400
2025	52,100	109,050	9.31%	10,150
2026	51,930	95,600	8.63%	8,250
2027	–	–	–	–

2 Alpha demand by brewing year

Brewing year	Beer prod. m hl	Dosage g/hl	Alpha demand mt
2022	1,891	4.8	9,074
2023	1,885	4.8	9,050
2024	1,875	4.7	8,813
2025	1,850	4.6	8,510
2026	1,800	4.6	8,280
2027	1,790	4.5	8,055

3 Alpha balance: crop less following-year demand

Crop year	Production mt	Brewing year	Demand mt	Balance mt
2022	9,550	2023	9,050	+500
2023	10,500	2024	8,813	+1,688
2024	10,400	2025	8,510	+1,890
2025	10,150	2026	8,280	+1,870
2026	8,250	2027	8,055	+195

Demand figures and hop requirements for 2026 and 2027. Estimate: Lupex GmbH.

We support you in your decisions.

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