

Hot in Hallertau, Fine in Yakima

Crop 2026 Hop Update & Sourcing in the Current Market

Vermont Craft Brewers Conference, November 2026

What We'll Cover

- Introductions
- Global hop market overview
- What happened in Germany? Country-specific overview
- Where are we at in the US? Focus on the PNW
- What does this mean for hop buying? Considerations and outlook

Introductions

Almost 200 Years in Hops

- Founded in 1845 in Germany by the Steiner family, still 6th-generation owned. Headquarters in NYC since early 1900s
- We grow, breed, and process the highest quality hops and hop products available
- Serving as a dedicated partner for breweries of all sizes – from 50 bbl to 500,000,000 bbl! – by helping brewers source public and proprietary hops from around the globe









ABOUT ME



Heather McReynolds, Specialty Craft Manager at Hopsteiner

- Manage education, customer service, sales, and outreach for Hopsteiner in the Northeast from Brooklyn, NY
- Began as a 400-bottle beer bar manager in Gainesville, FL
- Brewpub manager, then brewer. Moved to Brooklyn to brew at Sixpoint, then promoted to Head Brewer of 20bbl facility in Red Hook, Brooklyn
- Jumped to 5 years marketing and social media with Guinness
- Now 5 years with Hopsteiner – and there's still always something new to learn!

Global Hop
Market Overview

CROP 2026 AT A GLANCE

127,874 acres
GLOBAL HOP ACREAGE
-2.0% vs. 2025

95,152 tons
WORLD CROP ESTIMATE
-12% vs. 2025 estimate

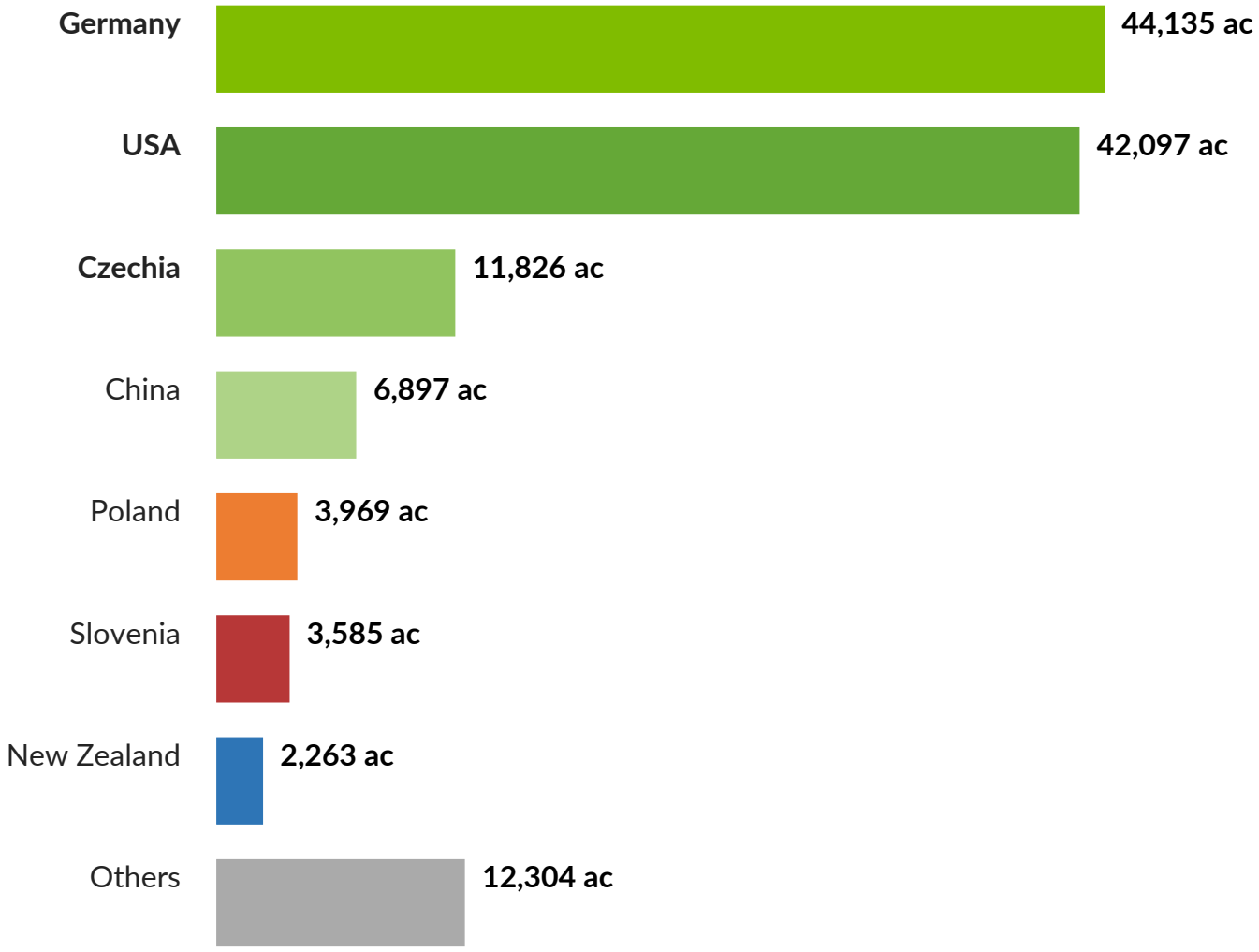
34,597 tons
GERMANY ESTIMATE
-20% vs. 2025

36,943 tons
U.S. ESTIMATE
-2% vs. 2025

Overview

- Acreage reductions have moved supply closer to balance – not a bad thing overall.
- But - 2026 weather and yield pressure created regional and variety-specific risk.
- Broad availability remains, especially for older crop years, but niche varieties require careful forward planning.

GLOBAL HOP ACREAGE – CROP 2026



127,874 acres

WORLD TOTAL

-2,627 acres vs. 2025

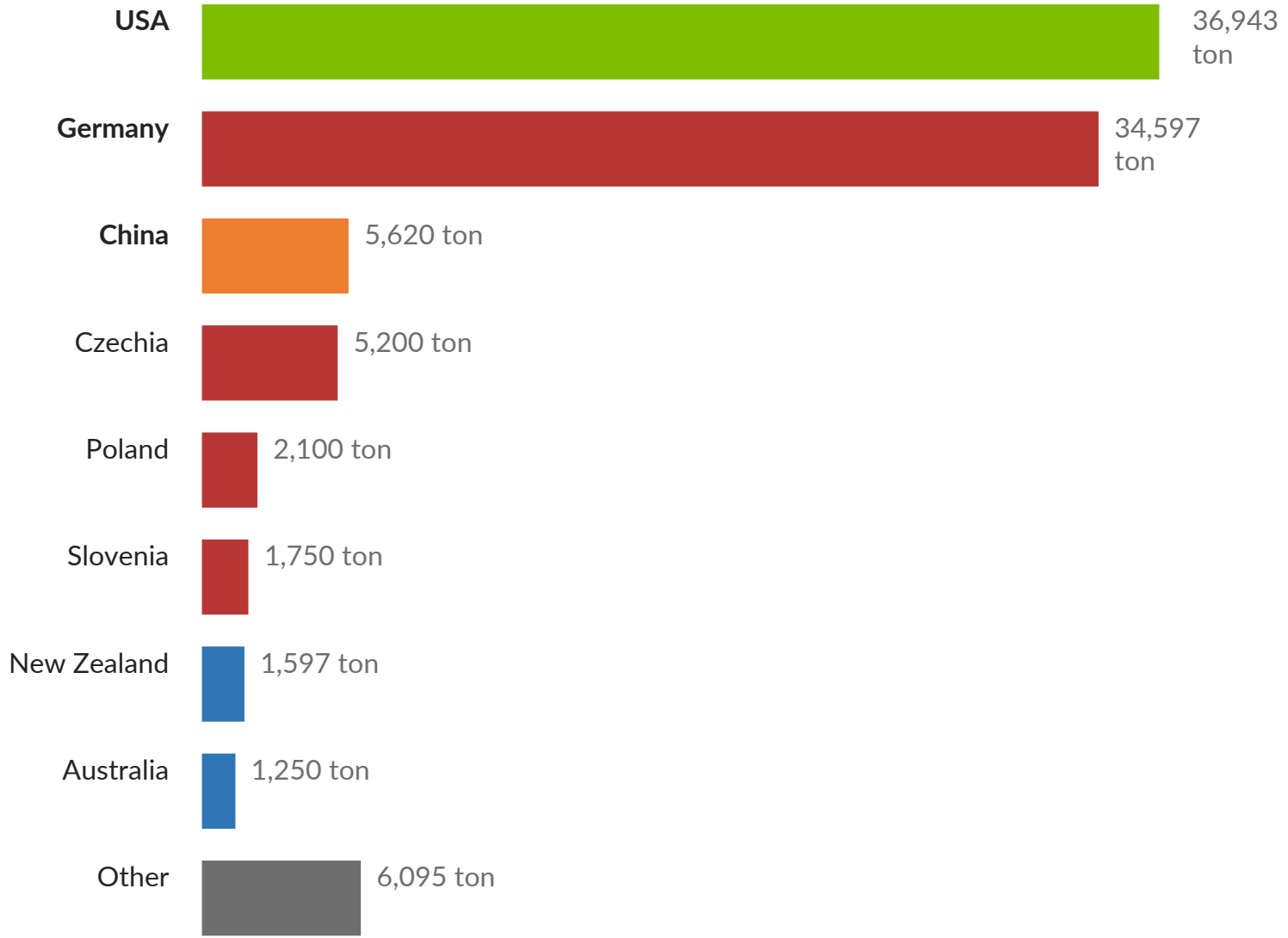
Notable acreage movements

- Germany -2,721 ac (-6%)
- USA +751 ac (+2%)
- Slovenia -376 ac (-10%)
- China +289 ac (+4%)

GLOBAL HOP YIELD ESTIMATE – CROP 2026

Hopsteiner est. 1845

Europe accounts for most of the projected year-over-year decline



95,152 tons

WORLD TOTAL

-12% vs. 2025

Regional totals

Europe	47,805 tons	-20%
USA	36,943 tons	-2%
Other	10,404 tons	

Source details in speaker notes

German Hop Harvest Overview

GERMANY – HEAT AND DROUGHT DEFINE CROP 2026

Hopsteiner est. 1845

Hop availability will be driven by lower acreage and reduced yield

44,135 acres
ACREAGE
-5.8% year over year

34,597 tons
CROP ESTIMATE
-20% vs. 2025

45 days
HEAT DAYS >30°C (86°F)
May through August

904
FARMS
-62

What changed

- Perle acreage -833 ac
- Tradition acreage -739 ac
- Magnum acreage –687 ac
- Herkules acreage -500 ac
- Titan acreage +390 ac

Harvest impact - yields

- Hallertau estimate: -21% vs. 2025
- Perle crop estimate: -36%
- Tradition crop estimate: -32%
- Herkules crop estimate: -16%



FIELD EVIDENCE: NEWER GENETICS





VARIETY YIELD DIVERGED SHARPLY

Some of the traditional varieties experienced the most severe production losses





2026 Hop Crop Alpha Acid Values

Alpha acids (%) under EBC 7.4 | Part 1 of 2 - Hallertau varieties

Growing Region / Variety	Type	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	5-Yr Avg.	10-Yr Avg.
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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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 - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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
Hallertau - 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

Source: Alpha_Tabelle_2026_Komplett.pdf | AHA values, EBC 7.4

2026 Hop Crop Alpha Acid Values

Alpha acids (%) under EBC 7.4 | Part 2 of 2 - Other regions and additional varieties

Growing Region / Variety	Type	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	5-Yr Avg.	10-Yr Avg.
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
Tettnang - 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
Spalt - 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
Czech Republic - Saaz	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
Czech Republic - 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
Czech Republic - 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
Slovenia - 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
Slovenia - 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
Slovenia - 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
Poland - 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
Hallertau - 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
Hallertau - 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

Source: Alpha_Tabelle_2026_Komplett.pdf | AHA values, EBC 7.4

US Hop
Market Overview

U.S. HOP STOCKS – MOVING TOWARD EQUILIBRIUM

Hopsteiner est. 1845

Inventory remains sufficient, but the cushion is narrowing and becoming variety-specific

105M lb
SEPTEMBER 2026 TOTAL STOCKS
dealers/growers + brewers

-9%
YEAR-OVER-YEAR CHANGE
fourth consecutive annual decline

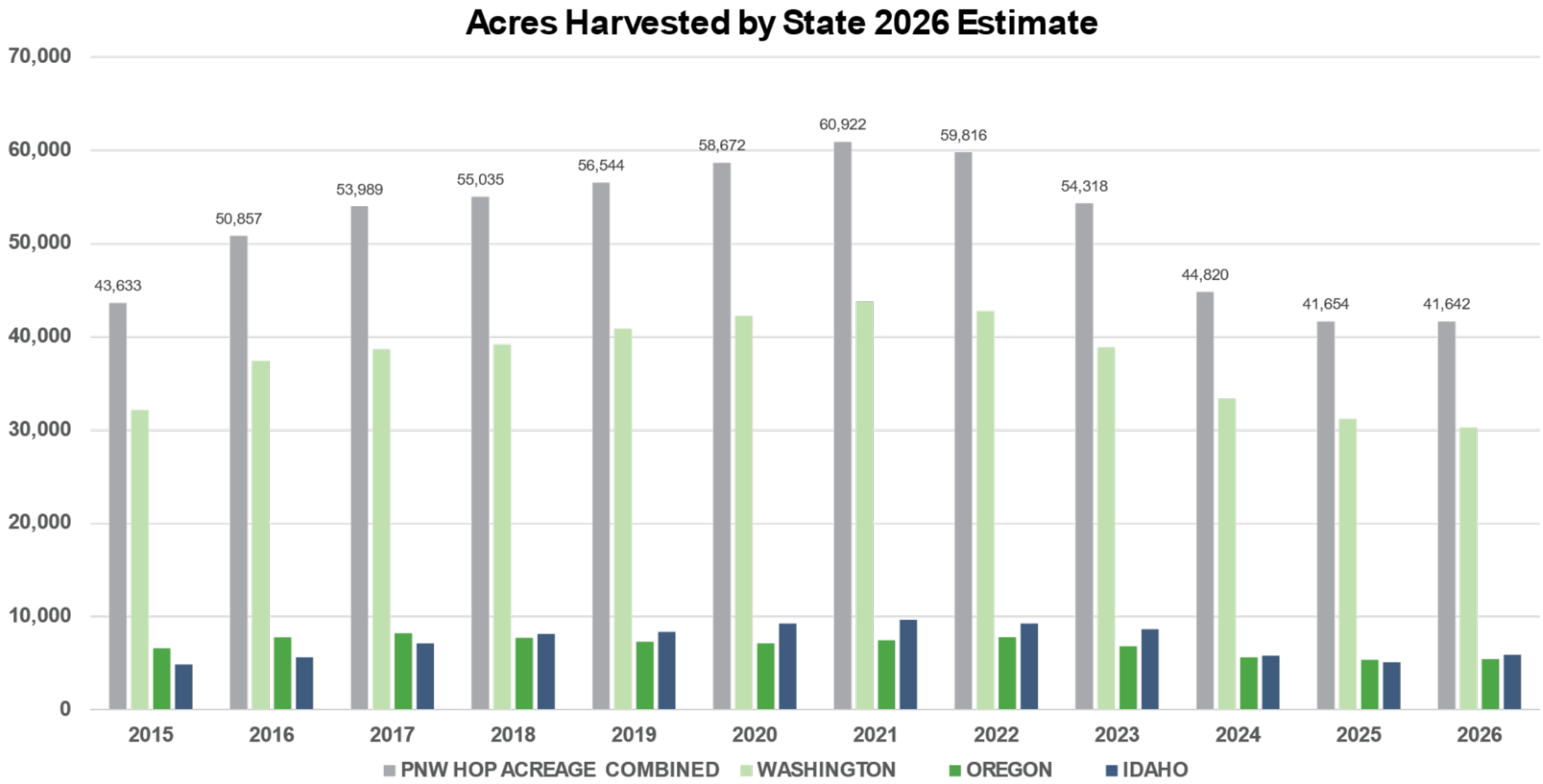
~1.6×
STOCK-TO-2025 CROP
balance target: 1.0–1.3×

Key Take Aways

- Broad supply remains available across most major categories.
- Widespread shortage risk remains low.
- Aroma and specialty positions can tighten faster than the market total.
- Manage inventory and contracts by variety, crop year and specification.



2026 HOP ACREAGE



Source: 2026 HGA State Pack & USDA Production Report(s)

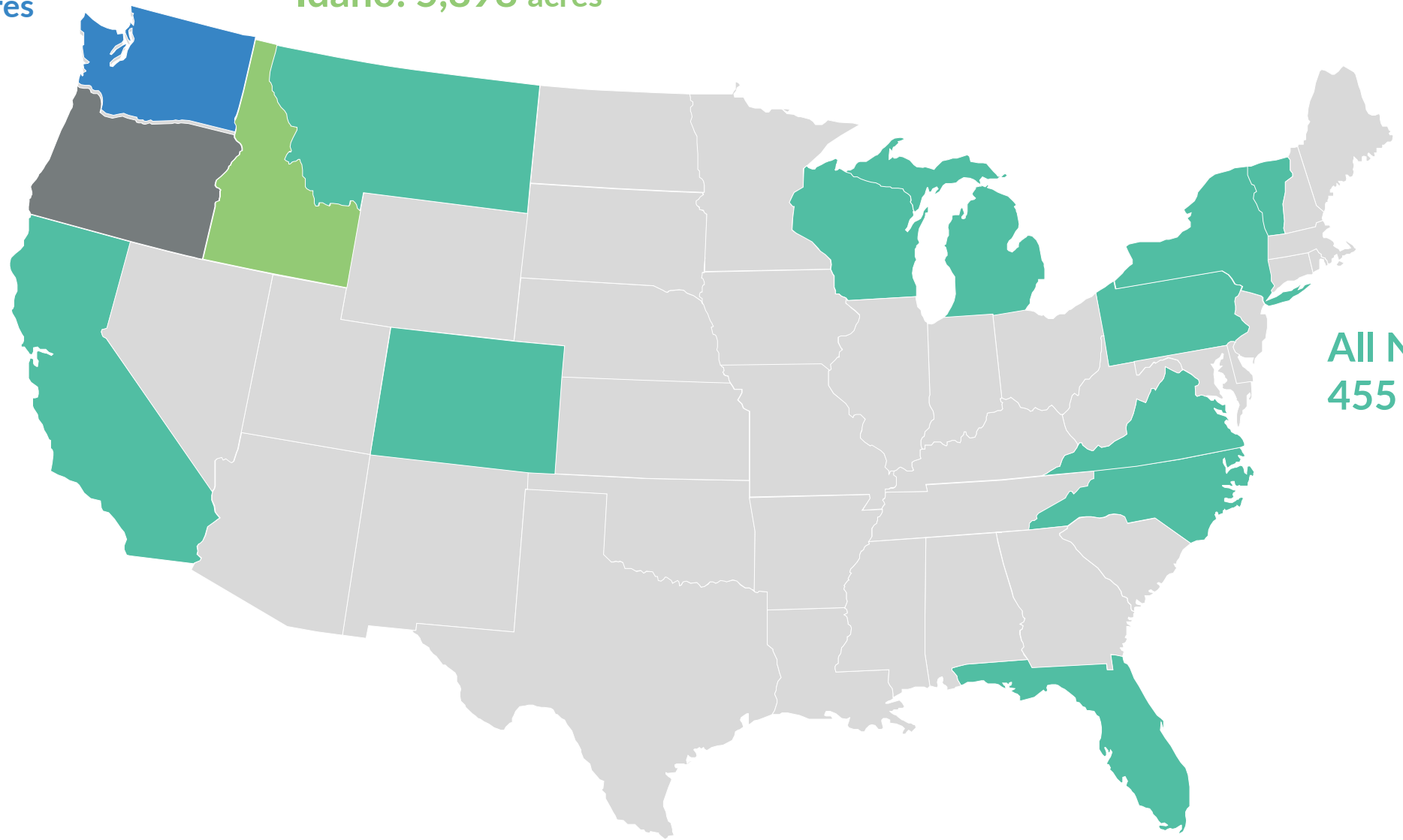
TOTAL U.S. ACREAGE 2026

Hopsteiner est. 1845

Washington:
30,301 acres

Idaho: 5,898 acres

Oregon:
5,443 acres

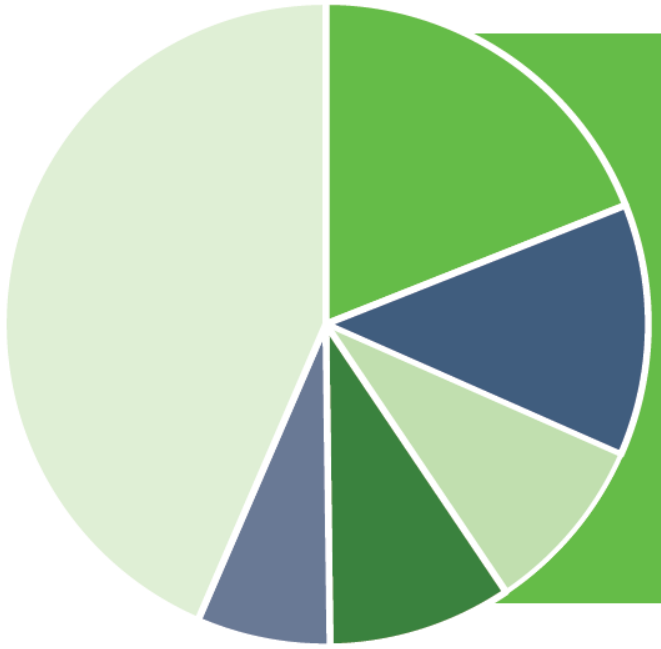


All Non-PNW:
455 acres

PNW ACREAGE MIX

Which varieties are we growing?

- Top 5 varieties by acre account for 50% of all acreage in the PNW
- Top 10 varieties account for 73%

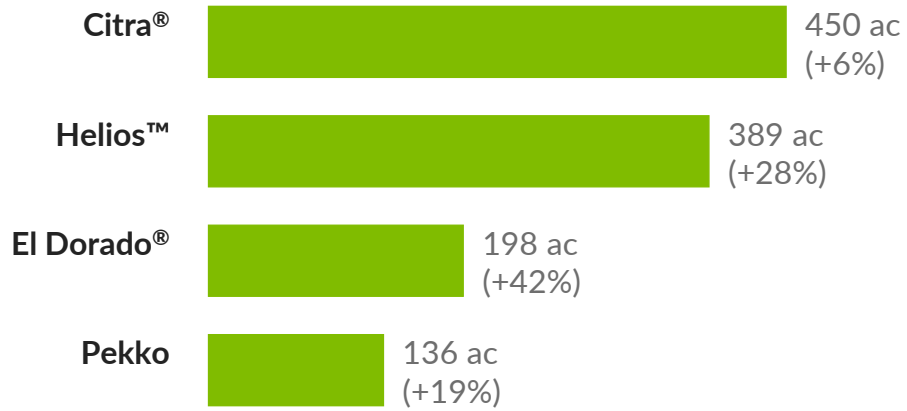


Citra®	8,030	Cascade	2,504
CTZ	3,940	Pahto®	1,888
Mosaic®	3,303	Amarillo®	1,878
Simcoe®	3,168	Helios™	1,754
Centennial	2,674	Chinook	1,122

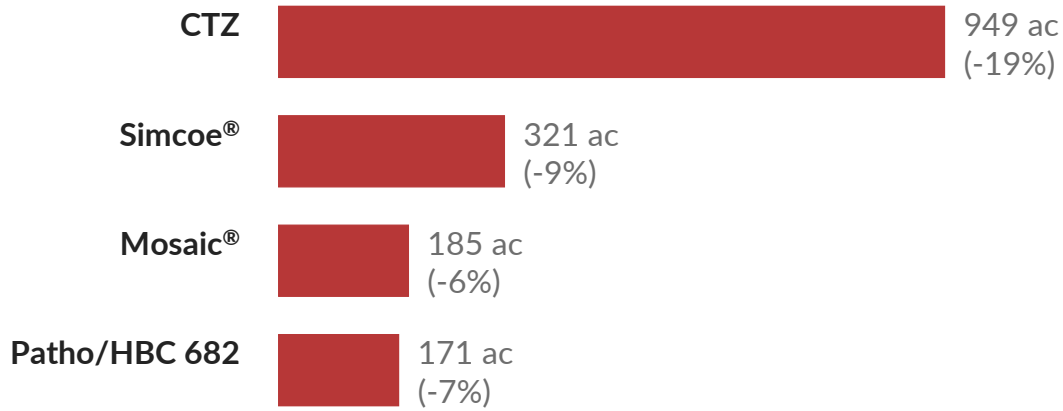
Citra® CTZ Mosaic® Simcoe® Centennial All Others

NOTABLE GAINS AND REDUCTIONS

Notable gains



Notable reductions



Notable stable varieties

- Cascade (-51 acres, -2%)
- Centennial (+93 acres, +4%)
- Chinook (-75 acres, -6%)

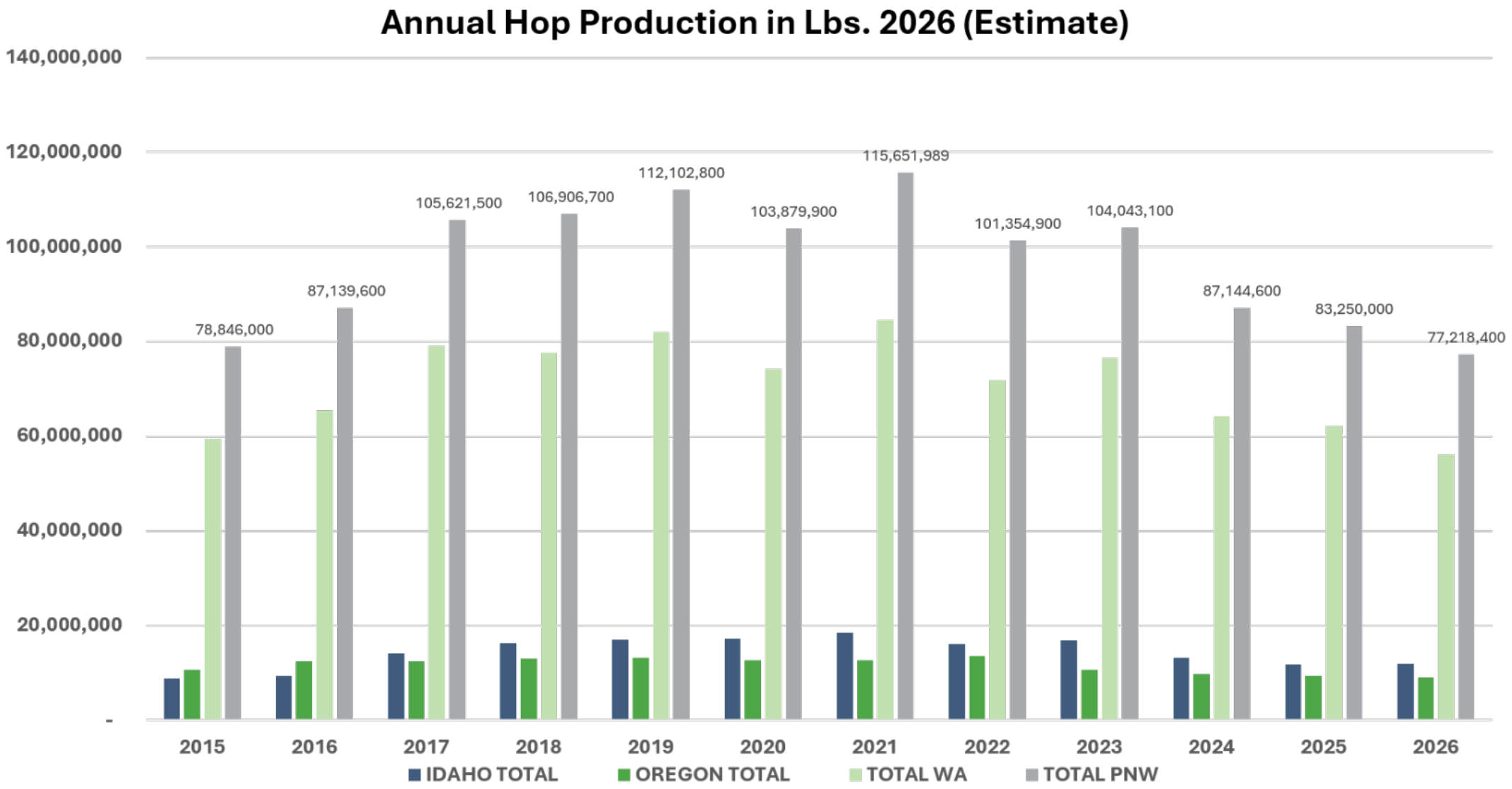
2026 US HOP ACREAGE BY VARIETY

Hopsteiner est. 1845

Variety	2025	2026	% Change
Citra®	7,581	8,030	6%
CTZ	4,890	3,940	-19%
Mosaic®	3,503	3,303	-6%
Simcoe®	3,490	3,168	-9%
Cascade	2,555	2,504	-2%
Centennial	2,581	2,674	4%
Amarillo®	2,091	1,878	-10%
Pahto®	2,022	1,888	-7%
Helios®	1,365	1,754	28%
Chinook	1,197	1,122	-6%
Pekko®	834	996	19%
Eureka!®	755	603	-20%
Apollo®	555	179	-68%
El Dorado®	471	669	42%
Willamette	584	637	9%
Ekuanot®	316	280	-11%
Idaho 7®	410	394	-4%
Strata®	356	285	-20%
Saaz	84	195	132%
Crystal	255	286	12%
Palisade®	112	115	3%
Azacca®	393	393	0%
Cluster	224	152	-32%
Super Galena®	233	85	-64%
Sabro®	181	134	-26%
Summit®	170	160	-6%
Mt. Hood	169	139	-18%
Hallertau	40	135	238%
Comet	209	161	-23%

Variety	2025	2026	% Change
Warrior	147	147	0%
Nugget	176	165	-6%
Cashmere	186	179	-4%
Calypso®	106	106	0%
Bravo®	114	114	0%
Delta®	90	90	0%
Tahoma	80	10	-88%
Loral®	80	80	0%
Galena	75	115	53%
Lotus®	58	44	-24%
Sultana®	47	19	-60%
Mt. Rainier	-	-	-
Sterling	44	44	0%
Ahtanum®	40	40	0%
Magnum	18	18	0%
Tettnanger	26	26	0%
Liberty	14	14	0%
Glacier	18	18	0%
Vanguard	9	9	0%
Golding	6	6	0%
Northern Brewer	-	-	-
Triumph	-	-	-
Perle	-	-	-
Experimental	1,397	1,305	-7%
Fuggle	-	-	-
Jarrylo®	-	-	-
Other	805	2,343	191%
Sorachi Ace	-	-	-
TOTAL PNW	41,654	41,642	0%
TOTAL NON- PNW US	455	455	0%
TOTAL US	42,109	42,097	0%

2026 HOP YIELDS



Source: 2026 HGA State Pack & USDA Production Report(s)

2026 HOP YIELDS BY VARIETY IN LBS

Hopsteiner est. 1845

Variety	2025	2026	% Change
Citra®	12,489,556	12,407,880	-1%
CTZ	13,426,080	10,328,850	-30%
Mosaic®	8,044,565	7,116,540	-13%
Simcoe®	5,156,445	4,750,740	-9%
Cascade	4,988,493	4,401,780	-13%
Centennial	3,921,046	3,917,820	0%
Amarillo®	3,773,746	3,144,310	-20%
Pahto®	4,903,350	4,191,360	-17%
Helios®	3,618,178	3,871,950	7%
Chinook	2,340,335	1,956,290	-20%
Pekko®	1,044,168	1,862,520	44%
Eureka!®	2,115,982	1,646,480	-29%
Apollo®	1,589,942	499,192	-219%
El Dorado®	946,254	1,179,510	20%
Willamette	965,602	899,150	-9%
Ekuanot®	610,992	621,600	0%
Idaho 7®	1,136,500	1,085,160	-5%
Strata®	744,428	540,600	-38%
Saaz	102,648	161,850	37%
Crystal	439,450	481,070	9%
Palisade®	246,512	239,200	-3%
Azacca®	703,470	727,050	3%
Cluster	465,178	273,240	-70%
Super Galena®	654,031	244,800	-167%
Sabro®	496,664	333,660	-49%
Summit®	255,000	254,400	0%
Mt. Hood	284,904	183,920	-55%
Hallertau	58,960	193,050	69%
Comet	243,067	241,500	-1%

Variety	2025	2026	% Change
Warrior	273,273	279,300	2%
Nugget	350,860	349,650	0%
Cashmere	322,710	297,140	-9%
Calypso®	277,840	257,150	-8%
Bravo®	345,306	308,940	-12%
Delta®	172,620	120,280	-44%
Tahoma	63,120	13,300	-375%
Loral®	153,520	154,400	1%
Galena	143,250	186,750	23%
Lotus®	163,560	116,600	-40%
Sultana®	141,940	59,850	-137%
Mt. Rainier	-	-	-
Sterling	64,372	67,320	4%
Ahtanum®	87,600	88,400	1%
Magnum	-	-	-
Tettnanger	27,100	19,710	-37%
Liberty	20,300	18,060	-12%
Glacier	28,800	28,980	1%
Vanguard	13,050	7,830	-67%
Golding	5,340	5,220	-2%
Northern Brewer	-	-	-
Triumph	-	-	-
Perle	-	-	-
Experimental	2,682,046	2,258,820	-19%
Fuggle	-	-	-
Jarrylo®	-	-	-
Other	2,012,500	4,170,540	52%
Sorachi Ace	-	-	-
TOTAL PNW	83,250,000	77,218,400	-8%
TOTAL NON- PNW US	175,000	175,000	0%
TOTAL US	83,425,000	77,393,400	-8%

Hop Market Outlook and Buying Considerations

INDUSTRY OVERVIEW & OUTLOOK

- US acreage should remain relatively stable, with shifts in variety as demand fluctuates. Are US lager hops making a comeback?
- Will brewers start shifting away from German landrace varieties? There's definitely a strong breeder and grower focus on more resilient varieties
- Tariffs and shipping costs may further encourage US brewers to look more to domestic hops. Do tariffs change in the near term?
- Hop breeders have continued pressure to breed hops that meet brewers' needs and grow efficiently – even in extreme conditions
  - Will brewers be open to trialing and using?



HOP BUYING CONSIDERATIONS

- If a niche US hop is important to your brands, connect with your rep on stability of supply. Contracting might be warranted
- Consider US subs for European hops. Many varieties were initially planted in the US for that purpose
- If you want to continue to use them, consider purchasing prior crop year European hops – and stocking up when you're able
- Many varieties of prior-year US hops are readily available and may come with a discount. With good storage, they last 5-6 years!
- Hop products are a great way to mitigate market fluctuations and provide a source of creativity, improve yield and reduce costs
  - Many brewers have had success replicating imported hops with hop oil products like Salvo and Noble hop oils
- Do you really want to use that expensive European hop for bittering, or will a US hop work just as well?



POTENTIAL EUROPEAN HOP SUBS

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Think old-school hops!

Variety	Potential substitutions
Hal Mittelfruh	US Noble Blend, GR Nobella, Mt Hood, Crystal, Liberty
Tettnang	Contessa, US Noble Blend, GR Nobella
Perle	Akoya, US Perle
Fuggle	Willamette, Delta, US Fuggle
Saaz	US Noble Blend, Delta, GR Nobella, Sterling
GR Magnum	US Magnum, Nugget, CTZ, Helios
Hersbrucker	Mt Hood

- US substitutions can ship quickly, have minimal fees, lower shipping costs, and are available for selection!

Hopsteiner®
est. 1845

Questions?

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