



2025 CROP REPORT

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HPA PROCESS BUMPER CROP THROUGH NEW FACILITY

Hop Products Australia (HPA) have completed this year's harvest. We picked 566 hectares across Victoria and Tasmania, which resulted in 1,468 tonnes of hops. This was a 128 tonne (9.5%) increase despite a 104 hectare (15.5%) decrease across six proprietary hops - Eclipse®, Ella™, Enigma®, Galaxy®, Topaz™ and Vic Secret™ - as well as Cascade. The bumper crop is thanks to some near-perfect weather conditions that allowed us to run farm operations as planned, resulting in a great foundation for HPA Hop Central's first year of production.

Global demand for hops remains soft in the current oversupply situation, with many brewers still working through a backlog of previous crop years. This led HPA to idle 32% of our gardens. We used this production decrease as an opportunity to focus on soil remediation, cover cropping, cycling rootstock, and scaling up leading experimental hops in our breeding program.

Two hops recorded significant year-on-year increases. Ella™, our best performing hop in a supporting role, had a 48 tonne (88.0%) increase in response to contracted demand. And Eclipse®, our newest proprietary hop, had a 25 tonne (36.7%) increase as plantings continue to mature and produce higher yields.

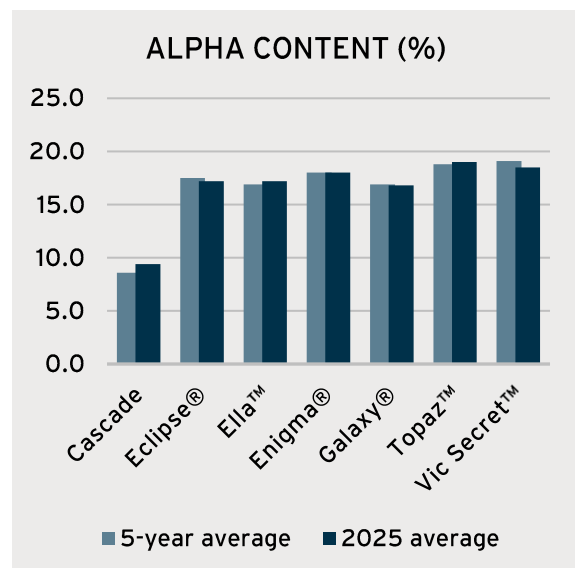
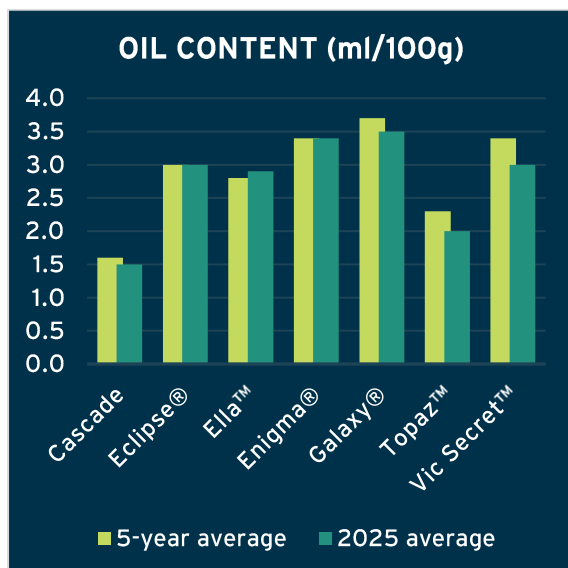
	Production Volume (Tonnes)	Year-on-Year Variation
Galaxy®	955	+ 8.6%
Vic Secret™	245	- 2.2%
Ella™	103	+ 88.0%
Eclipse®	95	+ 36.7%
Enigma®	35	- 15.7%
Cascade	19	+ 4.2%
Topaz™	17	- 38.1%
Total	1,468	+ 9.5%

Note: measurements calculated on raw hop quantities.

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A return to El Niño delivered near-perfect weather conditions for the first time in years. A dry and cold winter created the ideal conditions for dormancy, while a wet and hot summer resulted in rapid growth and robust plants with the greatest number of flowering sites in recent memory. Our Victorian farm experienced above average temperatures, solar radiation, and rainfall. While our Tasmanian farm experienced above average temperatures, average solar radiation and below average rainfall, with the exception of localised flooding at the beginning of spring. Fortunately, most of the affected areas were already idle and there was no lasting impact on the crop.

Impact in beer is expected to remain strong, with this year's average oil content coming in slightly below or equal to the 5-year average for most proprietary hops. The star performer this year was Ella™, with both oils and alphas above the 5-year average, which should deliver a real depth of flavour and complexity when paired with other new world hops. Eclipse®, Galaxy® and Vic Secret™ all experienced a slight decrease in alphas, and are expected to produce some well-balanced beers with true-to-type flavours and aromas.



Note: measurements calculated on raw hop quantities. Processed hop pellets will show reduced values.

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Our mission is to always deliver the highest possible quality, with the lowest possible flavour variability. Commissioning HPA Hop Central in time to process crop 2025 was fundamental to this task. Our new facility harnesses 100% cold chain bale storage, temperature-controlled production rooms, and modern pelleting and packaging equipment. It is a highly efficient operation that has reduced processing time, retained a higher percentage of oils in the finished product, and minimised residual oxygen in the final packaging.

HPA Hop Central has set a higher standard for Aussie hops that will lead to Food Safety System Certification (FSSC) 22000. FSSC is a Global Food Safety Initiative (GFSI) recognised system, meaning our new facility meets rigorous manufacturing, packaging, storage and distribution standards. This involved redesigning our packaging to optimise pallet capacity and minimise carton wear and tear throughout the supply chain. Our brewing customers can find the new dimensions in our [Packaging Specification Guide](#). This will have very little impact on freight efficiency and container capacity.

The increasing capabilities of our in-house sensory program are equally important. For the past two crop years we have worked alongside the sensory team at our sister company John I. Haas to exclude any material assessed as not true-to-type from our blends. This process combines non-conformance reporting, including the development of an AI model to assess hop colour, with Near Infrared (NIR) outlier analysis to flag material for sensory review.

Once sensory review was complete, we created homogenous pellet lots based on the whole-crop averages for oils, alphas, moisture and Hop Storage Index (HSI). This approach will reduce the spread of analytical data across pellet lots, and translate to more consistent performance in beer. The Galaxy® violin plots previously presented will be updated with crop 2025 results later this year, with the spread of oil content expected to be further reduced.

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Above and beyond our six proprietary hops, HPA are committed to offering choice and diversity. This year, we produced limited pellet lots of three leading experimental hops from our breeding program. We established single hectare plots of HPA-033, HPA-065 and HPA-4029, one of which will be commercialised in the coming years. HPA-033 is a versatile hop that produces creamy mango, marmalade and raspberry flavours that are perfect for XPAs and Pale Ales. HPA-065 is a complex hop that delivers spicy pineapple, ginger and lime flavours that are great for Hoppy Lagers or Pilsners. And HPA-4029 is a layering hop that should be used delicately to create strong tropical fruit punch flavours in everything from New World Lagers and West Coast Pilsners to Hazy Pale Ales.

The commercialisation of new hops is an important part of HPA's sustainability strategy. As the climate continues to change, they may be required to replace some of the more traditional hops that are sensitive to extreme weather events. To help mitigate the risk of drought on our Victorian farm, we completed construction of a second 300 megalitre dam to irrigate crop 2025 and beyond as needed.

HPA remain a committed signatory to the UN Global Compact. Our initial Life Cycle Assessment (LCA) established that we are producing ~4.2kg of CO₂ per kilogram of pellets from garden to brewery floor. We believe this positions us among the best in class hop producers around the world, but are continually researching ways to improve. This year's increase in yield will help reduce our emissions output and improve our brewing customers indirect emissions.

More than 270 local and international brewing customers joined us on farm this harvest. Together, we followed our Aussie hops from the gardens through each stage of the production process, including delegates of the 38th Chartered Institute of Brewers and Distillers (CIBD) Asia Pacific Convention in Tasmania and attendees of the High Country Hop Technical Symposium in Victoria. HPA is immensely proud to be part of such a knowledgeable, innovative and inspiring community that positively impacts city suburbs and regional towns around the world.

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Seasonal recruitment was ample, including a large percentage of returning employees with hop harvest experience, so crop 2025 was in very capable hands. To protect our people as well as our hops, we are continually investing in our safety management system with regular reporting on key indicators to measure our progress, performance, and benchmark against best practice and industry standards. A combination of lead and lag indicators from this season show we continued our “zero harm” trajectory, making this one of our safest harvests on record.

Our entire industry, from growers and suppliers to brewers, is currently facing countless challenges because of unfavourable bureaucratic, economic and environmental conditions. It is more important than ever for HPA to work in partnership with our brewing customers. Communicating early and often is the best way to ensure we have your needs covered, whether that be availability of proprietary hops for core range beers, commercialising experimental hops for flavour diversity, or innovative hop products for more sustainable beverages. We are here to help our brewing customers create awesome flavours that bring happiness to beer lovers everywhere.



Owen Johnston

Chief Executive Officer

May 2025

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HARVEST SNAPSHOT 2025

PRODUCTION



566 hectares of hops

VICTORIA TASMANIA

396 170

18,592 bales pressed

14,760 3,832

3,064,289 strings cut

2,152,309 911,980



1,467,899 KG total production volume



4,680
samples taken
from the fields
to the labs



37,440
measurements
taken from
samples

- Gland fill
- Moisture
- Dry matter
- Oil content
- Cone weight

310
hours runtime
per tractor



19,918
kilometres of
strings used

BREWER VISITS



277

Top countries brewers from:
Australia • Croatia • Estonia • Ireland
Italy • Mauritius • New Zealand
Norway • UK • USA



107,000
cartons packed

PEOPLE



73/27

male/female staff ratio

321 male staff
136 female staff



harvest staff from **24** countries

Australia	162	Canada	6	Netherlands	2
Japan	82	Argentina	5	Peru	2
France	71	Chile	5	Tonga	2
Thailand	31	South Korea	5	Ecuador	1
Italy	16	Spain	4	Fiji	1
Germany	9	US	4	Nepal	1
Sweden	8	Belgium	2	Taiwan	1
UK	7	Czech Republic	2	Turkey	1

VICTORIA TASMANIA

61 permanent staff 37 24

369 casual staff 261 108

430 total harvest staff 298 132

PROPRIETARY HOPS

Eclipse®

Ella™

Enigma®

Topaz™

Galaxy®

Vic Secret™