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Report Name: US Hops Dominate the German Import Market

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Report Highlights:

Germany – currently the world’s largest hop producer – continues to rely heavily on U.S. hop imports, which reached 68.3 million USD in 2024, representing 41 percent of total German hop imports. German breweries, especially in the growing craft and specialty segment, depend on U.S. high-alpha and aromatic varieties as well as hop extracts not widely available domestically. Competition mainly comes from European Union suppliers such as the Czech Republic, Slovenia, Poland, and France, though the United States remains the dominant supplier of all hop categories. Consumer trends – including booming non-alcoholic beer production, premiumization, and a focus on sustainability – are expected to sustain demand for U.S. hops and extracts.

Introduction and Context

Hops are a critical commodity in the brewing industry, valued particularly for their alpha acids (bitterness) and aromatic compounds. The United States, especially the Pacific Northwest (Washington, Oregon, Idaho), and Germany are the two leading hop producers globally, supplying 76 percent of the world's hops, while Germany is also one of the largest consumers. Over the past five years, the U.S.–Germany hop trade has been stable, but shaped by structural changes in supply, shifting demand, and evolving market dynamics. FAS Berlin has supported *Hop Growers of America (HGA)* with various activities around Germany over the past years to drive demand and educate consumers – leading to a stable export value of 68.3 million USD in 2024 for U.S. producers.

SECTION I. MARKET OVERVIEW

Germany's Hop Import Landscape

Germany regained its place as the world's number one hop producer in [2024](#) — historically dominating global hop acreage together with the United States. According to European Union (EU) data, German hop farms account for a sizable share of EU hop production. Despite its strong domestic production, Germany still imports significant volumes of hops and hop-derived products. These imports help German brewers, especially specialty and craft breweries, to access hop varieties not widely grown in Germany and extracts not produced in sufficient volumes locally.

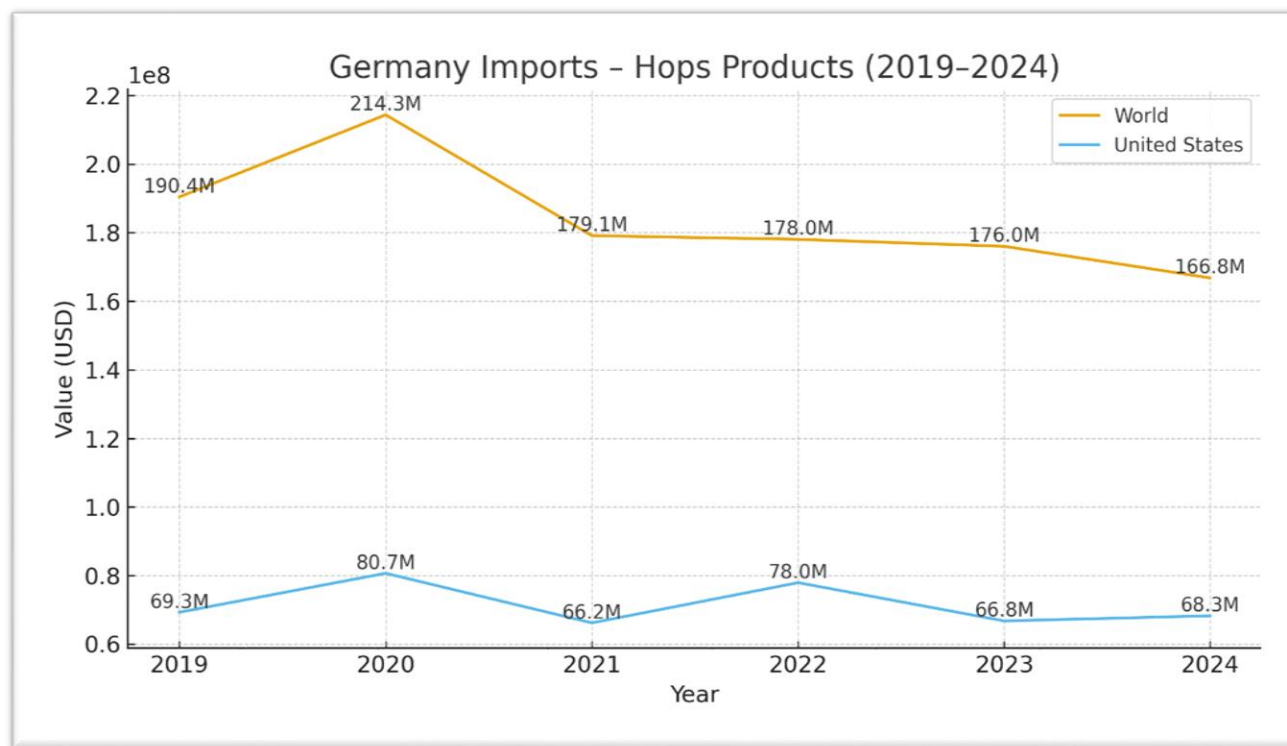
Trade Data

Germany is the third largest market for U.S. hops exports after Mexico and Brazil.

- HS Code 1210 is for hop cones, fresh or dried, whether or not ground, powdered or in the form of pellets; lupulin. The sub-classifications include:
 - 1210 10 hop cones, not ground or powdered and not in pellet form
 - 1210 20 hop cones, ground, powdered, or in pellet form; lupulin
 - 1210 2010 hop cones, ground, powdered, or in the form of pellets, with a higher lupulin content; lupulin.
 - 1210 2090 Other (for ground, powdered, or pellet forms).
 - 1210 2090 10 hop powder
 - 1210 2090 90 other
- 130213 hop extracts

Germany's imports of all hop products (all HS codes above) have been relatively stable in the past five years (2019 – 2024). Most imports come from the United States with a value of 68.3 million USD in 2024, which is a market share of 41 percent of the 166.8 million USD German imports in total. The United States is followed by Czech Republic, Slovenia, Poland and France as the main source of German imports.

Graph 1 German Imports All Hops Products (in U.S. dollars)



Source: Trade Data Monitor

Table 1 Germany Imports From the USA In Value and Quantity

Product		2019		2024	
		USD	Tons	USD	Tons
Total		69,331,149	2,902	68,286,753	3,261
1210	Hop cones, fresh or dried, whether or not ground, powdered or in the form of pellets; lupulin	17,842,800	854	20,077,121	980
1210 10	Hop cones, not ground or powdered and not in pellet form	809,978	43	489,230	26
1210 20	Hop cones, ground, powdered, or in pellet form; lupulin	17,032,822	810	19,587,890	955

1210 2010	Hop cones, ground, powdered, or in the form of pellets, with a higher lupulin content; lupulin.	9,607	1	9,315	1
1210 2090	Other (for ground, powdered, or pellet forms)	17,023,215	810	19,578,579	955
130213	Hop extracts	16,612,727	384	8,544,621	344

Source: Trade Data Monitor

Drivers of Import Demand for Hops

- Mitigating supply issues: Imports help the German industry secure a stable and diverse supply of hops even when domestic harvests are impacted by heat and draught. German consumers continue to seek the distinct taste of traditional hops.
- The growth of craft and specialty brewing in Germany: While traditional German brewing remains strong, the segment of craft, micro, and experimental breweries is increasingly seeking aromatic, high-alpha, or novel hop varieties that cannot be fully met by local production.
- Innovation in hop-derived products: German brewers and hop processors use imported extracts for bittering, aroma, and functional uses, e.g. in non-alcoholic beer, bakery products and snack products, that domestic extract capacity may not fully cover.

SECTION II. MARKET ANALYSIS

Competition

- Domestic German production remains dominant for basic cone hops, which limits the role of imported full-cone hops in certain segments.
- Apart from the United States, Germany imports hops mainly from its EU neighbors Czech Republic, Slovenia, Poland and France. The UK and Australia follow in ranks six and seven.
- As for hops extracts, Germany mainly imports from the United States, followed by the UK, China, Belgium, and Spain.

Consumer Trends

- **Craft Brewing/Specialty Beers:** The demand for imported U.S. hops is largely driven by the craft beer movement in Germany. Brewers value U.S. aromatic and high-alpha hops, as well as proprietary extract profiles. The trend shifts toward more bittering hops and extract use.

- **Sustainability and Innovation:** German brewers increasingly focus on sustainability and consistent supply. Imported U.S. extracts can offer a standardized alpha-acid profile, reducing dependence on harvest variability.
- **Premiumization:** As some German breweries target higher-margin craft beer, using distinctive hop varieties – such as U.S. aroma hops for aromas like citrus, floral, piney, and fruity notes – helps to differentiate their products.
- **Non-alcoholic Beer:** Non-alcoholic beer is booming in Germany. Compared to wine and spirits, non-alcoholic beer is not a new product to German consumers. It was introduced in Leipzig 50 years ago. However, the shift in consumer preferences toward a more healthy lifestyle has seen a doubling in production over the past ten years, from 295 million liters in 2014 to 579 million liters in [2024](#). It now accounts for approximately 8 percent of the total German beer market, making it the third most popular category after “Pils” and “Helles”. This increase is driven by health-conscious consumers, especially millennials and generation z, and the perception that non-alcoholic beers are a conscious choice rather than a substitute. Meanwhile, overall beer sales declined by 14 percent in the past ten years in Germany, so non-alcoholic beers are becoming a lifeline for many breweries. Looking ahead, the [German Brewers’ Association](#) expects that one in ten beers brewed in Germany will soon be alcohol-free, suggesting that the trend will continue growing strong.

Outlook

- **Stable or growing German imports of extract:** As long as German brewers need specialized extracts, U.S. exports will likely remain important.
- **Focus on premium hops:** Both U.S. and German stakeholders might emphasize higher-value products (alpha-rich, specialty aromas) rather than commoditized low-margin hops.
- **Sustainability:** Growers who adopt sustainable practices can seize premium markets, especially in Germany, where consumer choices connected to environmental concerns are strong.

SECTION III. MARKET ACCESS

Import Procedures

As a member of the EU, Germany follows all EU directives, regulations, and obligations where available. Since the EU is a customs union, all member states apply the same import duties on goods imported from outside the EU based on the tariff classification of goods and the customs value. For details on the EU legislation, please see the latest [EU FAIRS report](#) for further information.

Importers represent the first link in the domestic sales chain and are consequently responsible for the compliance of imported products with national and [EU regulations](#). The European Commission has published the following guidance document which refers to key community law requirements: "[Guidance document – Key questions related to import requirements and the new rules on food hygiene and official food controls](#).” Once imported goods are cleared in one member state, they can move freely throughout the territory of the EU. This means U.S.

products coming into Germany via another EU member state, for example, the Netherlands, must clear customs there. No additional checks are carried out when crossing the border to Germany.

The responsibility for enforcing food law provisions in Germany lies with the sixteen federal states (Länder). Whether a specific product complies with the legal requirements is evaluated by considering the product in its entirety, including its origin, import certificate, composition, intended purpose, and presentation. Please contact FAS Berlin for clarification on questions concerning the interpretation and application of import provisions in individual cases.

Import Tariff and Taxes

The relevant HS codes for hops are **1210** (hop cones, fresh or dried; lupulin), **121020** (hop cones, ground/pellets; lupulin) and **130213** (hop extracts). Import duties for these products are currently at 5.8 percent of the import value. They can be checked in the EU's [TARIC database](#), which reflects the Common Customs Tariff applied by Germany. U.S. exporters are advised to consult the TARIC for up-to-date duty rates. For a comprehensive overview of all import tariffs applied by Germany, please see the following [report](#).

Trade Shows and Activities

Germany is a worldwide hub for trade shows; only the United States hosts more shows and business events annually. Trade shows like ANUGA, the world's largest bi-annual food and beverage show, or BIOFACH, the world's leading organic show, enjoy an exceptional reputation among industry experts worldwide. Participating in trade shows facilitates direct contact with German food brokers, importers, and wholesalers. For the hop industry, the most important shows are:

Trade Show	Description	Location
BrauBeviale November 10-12, 2026 https://www.braubeviale.com/en-US/home/	Major international trade fair for the beverage industry. Exhibitors range from the entire beverage production and marketing value chain.	Nuremberg
DrinkTec September 11-15, 2028 (every four years) https://drinktec.com/en-US/home/	The world's largest trade event for the beverage and liquid food industry.	Munich

FAS Berlin frequently visits the shows and supports *Hop Growers of America* and other U.S. exhibitors. FAS Berlin works closely with the U.S. Consulate General in Munich to facilitate walkthroughs and meet and greets with exhibitors and the Consul General.

FAS Berlin also leveraged Berlin Beer Week and other events to promote U.S. Products, focusing on U.S. hops. Berlin Beer Week, one of Europe's largest annual craft beer festivals with events all over the city, presented the perfect opportunity to promote U.S. agricultural products with the help of many cooperators active in the region, such as Brewer's Association, Hop Growers of America, and Yakima Chief Hops. FAS Berlin built a long-lasting relationship which resulted in the following:

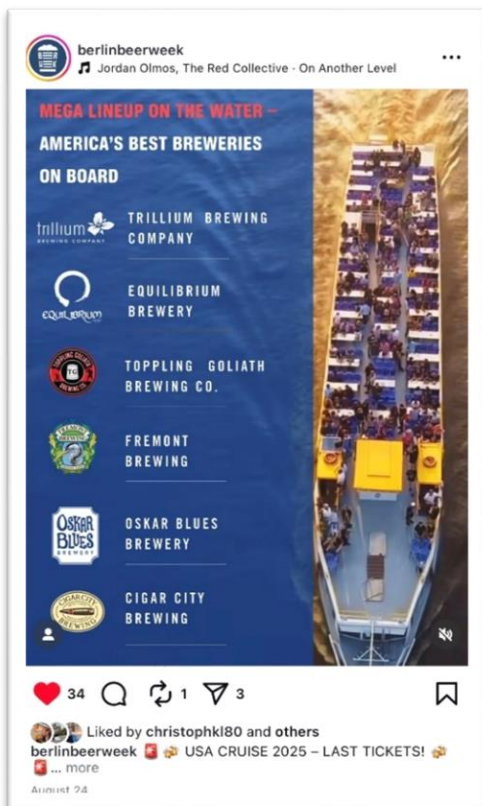
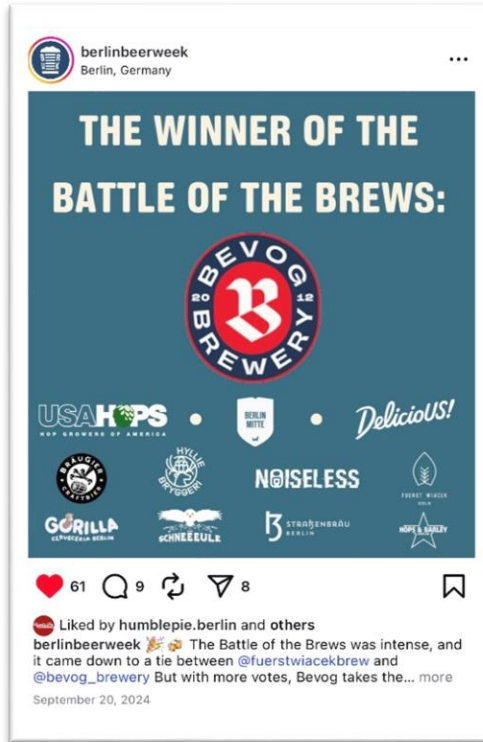
In 2023, FAS Berlin, with the branded campaign DelicioUS!, co-sponsored a street food market named "Beer, Bourbon, Barbecue," a "USA Brews Cruise" on the river with U.S. craft beer on tap, a "Tap Takeover" in a local bar, and an exclusive Tasting Event for the press and influencer at the Deputy Chief of Mission's Residence. In total, sales from all events for U.S. producers amounted to approximately 65,000 USD.

In 2024, FAS Berlin continued to promote U.S. craft beer and hops across Germany through a series of high-visibility consumer and trade events. The sold-out U.S. Brews Cruise showcased 14 American breweries and 35 unique beers drawing strong interest from German consumers and industry representatives. To further spotlight U.S. hops, FAS Berlin and *Hop Growers of America* organized a European brewery competition, strengthening awareness of U.S. hop quality and versatility among professional brewers, which resulted in a major festival beer collaboration, producing 90 hectoliters of the "Trainspotting Berlin" festival beer brewed with six different U.S. hop varieties. More than 21,000 cans and 200 kegs were distributed across Berlin and nationwide in both retail and online channels. Additional consumer-facing activities included U.S. tap takeovers in Berlin, which attracted more than 2,500 visitors. In total, over 100 industry guests, including brewers, influencers, and trade partners, took part in program activities, reinforcing valuable networking and market development opportunities for U.S. beer and hop exporters.

In 2025, FAS Berlin promoted U.S. hops and craft beer through several activities, including a sold-out U.S. Brews Cruise featuring 16 U.S. breweries, a large-scale festival beer collaboration, and an exclusive U.S. Embassy event. The festival beers were brewed with U.S. hops, producing 28,000 cans and 200 kegs distributed widely across Germany. Extensive branding and marketing – including banners, influencer outreach, and social media campaigns – achieved significant visibility, with total online reach exceeding 500,000 individuals and 1.8 million ad impressions. Overall, the event boosted sales and brand presence in the German market for U.S. hops and craft beer. Total sales generated for U.S. products during the event were 60,156 USD.



Festival Beer Collaboration with Hop Growers of America and Yakima Hops Logos in 2024



Social Media Posts in 2023, 2024 and 2025 activities with Berlin Beer Week

SECTION IV. KEY CONTACTS AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Foreign Agricultural Service Office in Berlin at the following address:

Foreign Agricultural Service

U.S. Department of Agriculture
Embassy of United States of America
Clayallee 170, 14195 Berlin
Tel: +49-30-8305-1150
E-Mail: AgBerlin@usda.gov

Please view our [Country](#) Page for more information on exporting U.S. food and beverage products to Germany. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

Please refer to the [Germany: Exporter Guide Annual](#) for contact information for USDA cooperators, state offices, and industry organizations that offer export assistance.

The [Germany-Country Commercial Guide](#) published by U.S. Department of Commerce also contains useful information on the German market.

Various regional and industry organizations in the United States offer export assistance programs to their member suppliers targeting foreign markets. General tools offered by the organizations include trade delegations to key foreign markets and international trade shows.

[Hop Growers of America](#) (HGA)

info@usahops.org

[Brewers Association](#) (BA)

info@brewersassociation.org

[Food Export Association](#) Midwest & Northeast

info@foodexport.org

[Western United States Agricultural Trade Association](#) (WUSATA)

export@wusata.org

[Southern United States Agricultural Trade Association](#) (SUSTA)

susta@susta.org

Attachments:

No Attachments.