European challenge for English hops

by Michael Griffin

Hop farming is part of the English rural tradition, but it's not protected from change. Michael Griffin looks at the history of the hop industry and the effects of market forces and technology upon it

As PARISIANS FLEE the city in August, so for generations of Londoners, September used to signal an exodus to the hop pickings of Sussex and the Kentish Weald.

There, the casual picker could earn enough money filling bushel baskets to keep the family in food and fresh air for a month. As the harvest progressed, relatives and neighbours would pop down to take a turn at the picking crib, a bin suspended between two trestles, while their children played between the hop bines or raided the apple orchards. The work was exhausting and the pay minimal, but the plantations wore a holiday air.

Among the villages of the Weald and the West Country, the brick hop kiln is as solid an emblem of the landscape's maturity and stability as the half-timbered house or the village steeple. The hopyards stretch away like gigantic vineyards, criss-crossed with wires, which are supported on stout larch poles. When the wind blows, the wirework trembles. A single faulty pole could bring the whole network of cable and its cargo of hops crashing to the ground.

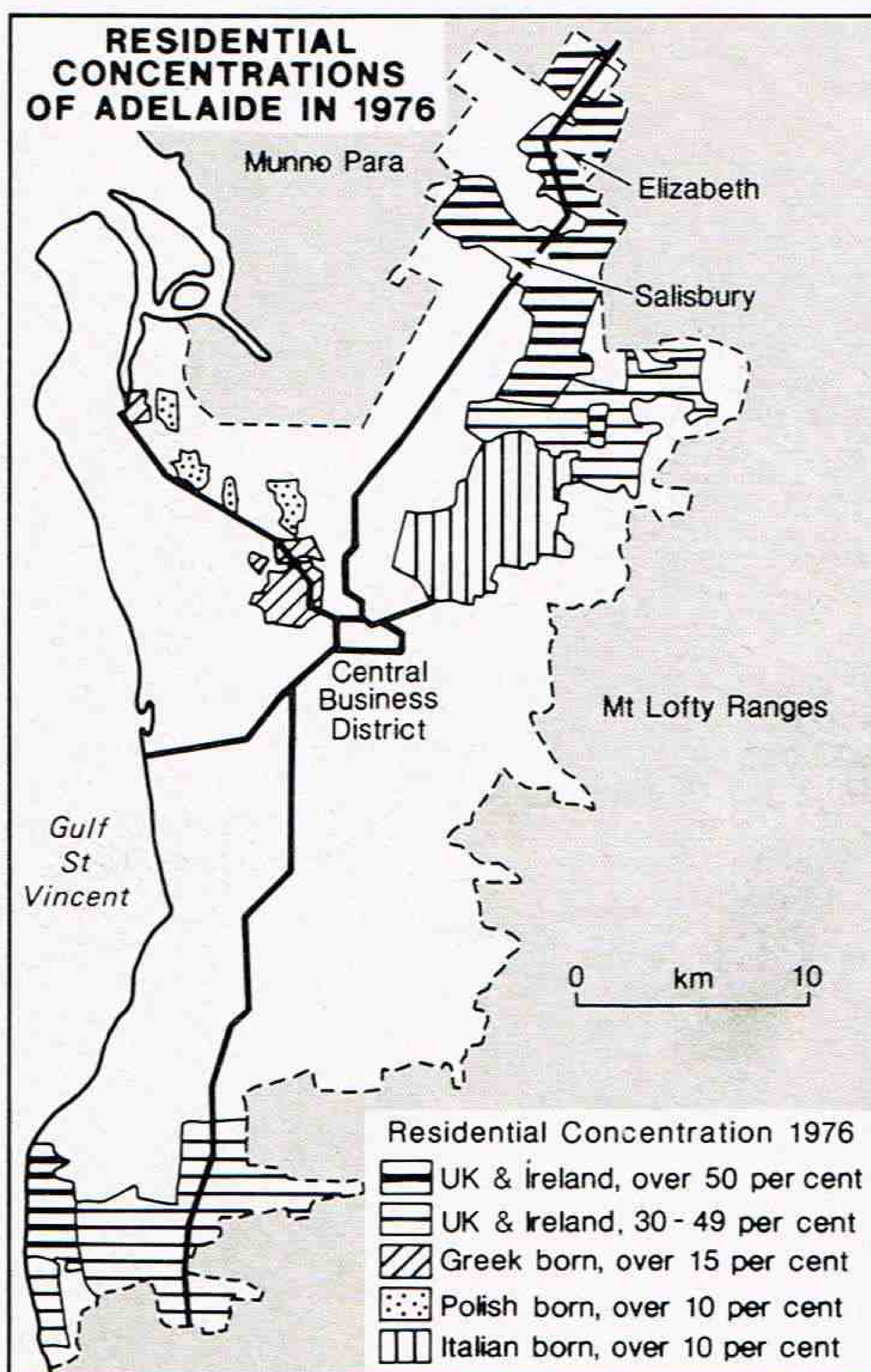
An 18th century print (above) gives a romanticized impression of hop picking, not quite the reality of early this century when an army of London families spent September picking hops in the Kentish Weald and Sussex. Originally hops were picked from poles and then cleaned in canvas cribs (left). The poles were later replaced by wires (right). The hops are now picked by machine and are cleaned on a conveyor belt in the farm's drying plant

tional opportunities. Thus by 1976, whereas eight and nine per cent of the populations of Sydney and Melbourne were born in the UK and Ireland the percentages for Adelaide and Perth were 15 and over 17 respectively.

In Adelaide, the impact of the British on particular areas was profound, and this was because of the activities of the South Australian Housing Trust. In Adelaide, the Trust did not provide accommodation solely for the disadvantaged as did the public Housing Commissions in the eastern states, but was directly involved in the suburban planning process. From 1958 the Trust, in association with the State Immigration Office participated in three migration schemes devised mainly for British and Irish settlers. The House Purchase Scheme, which was administered from a London office, selected British applicants with some capital and good prospects for employment. The Housing Trust undertook to offer a selection of houses to new arrivals. Between 1958–1971, some 3,500 British families were settled in north east Adelaide, and near Port Noarlunga in the south west.

Assistance with accommodation was also offered by the Housing Trust through two other schemes: Personal and Group Nomination. Personal Nominations involved nomination by a friend and relative (as with other immigrants) while Group Nominations involved the employer nominating an employee with a particular skill.

By 1976 there were 145,000 British and Irish-born in Adelaide. Strong residential clustering resulted from resettlement policies; public housing was itself spatially concentrated. In the areas of highest British concentration – Elizabeth North, Para Vista, Salisbury, and Modbury Heights in the north east, and Noarlunga and Morphett Vale in the south, between 45–70 per cent of the population was born in the United Kingdom and Ireland. An additional attraction to British immigrants was that in Australia,



public housing could be *bought* by tenants, something prohibited in Britain until as recently as 1980.

Communal organizations were established by the British on a considerable scale in Elizabeth, often for people from specific regions of Britain: the Merseyside Association, the Elizabeth Society of Yorkshiremen, the Welsh Society of Elizabeth, the Cornish Association of South Australia, the Cambrian Society, the Ulster Society, the British Australian Association, the Elizabeth John Bull Association, the New Settlers Club, the Northdowns Residents Association and the British Workingmans Club.

The next largest immigrant population was the Italians, some 350,000 of whom have migrated to Australia since the Second World War. The Italian populations in individual cities were large, over 105,000 in metropolitan Melbourne, 70,000 in metropolitan Sydney and 30,000 in Adelaide. Including children born in Australia, there were almost 200,000 persons of Italian origin in metropolitan Melbourne in 1976.

Strong concentrations formed in the inner suburbs; over 12,000 in Sydney's Leichhardt and the adjacent Local Government Areas (LGAs) of Ashfield, Marrickville, and Drummoyne, and over 215,000 in Melbourne's inner northern LGA of Brunswick and the adjacent LGAs of Coburg, Essendon and Broadmeadows.

The Greek concentrations were of comparable size (although the total Greek populations in the cities were less than the Italian) because the *relative* concentration of the Greeks was greater than the Italian.

It is tempting to see the residential concentrations as being manifestations of the urban social class system: since disproportionate numbers of the Greeks, Italians, Yugoslavs and Lebanese were in low income jobs, they concentrated in low rent housing. However, residential concentrations formed in separate parts of the working-class districts. The primary factor in the formation of these specific concentrations was kinship. Indeed the main Greek and Italian concentrations began in the 1920s and 1930s and the stronger post-war migrations expanded the kin networks of the earlier settlements on the basis of village-of-origin groupings. These *chain migrations* were from different source regions to particular cities in Australia. For example the main Calabrian migrations to the market garden periphery of Sydney were from Opido and Melecucca whereas the Calabrian settlers in Adelaide originated near Taurianova, Casilonia and Caulonia. Meanwhile, proportionately more from eastern Sicily settled in Sydney's inner suburbs and more from Viggiano and adjacent areas of Basilicata settled in Melbourne's *inner* northern suburbs.

In the larger residential concentrations, a wide range of ethnic institutional, associational, and business services evolved. The ethnic businesses – delicatessens, land agents, haberdasheries, bakeries, espresso bars and the like – allowed traditional diets, preferences, and transactions in the native language. Near a key intersection in Leichhardt in Sydney, there were over 170 Italian businesses and institutions in 1976; in Brunswick, Melbourne, over 200 on Sydney Road; in Carlton, over 100, also in Melbourne. Comparable developments occurred in Greek concentration areas, and more recently in areas of Yugoslav and Lebanese concentration in Sydney, albeit on a smaller scale. Such trends took place in old string-street shopping developments where shops could be leased cheaply.

Chain migration was an important influence on migration and residential concentration. Religion was also influential, especially where groups set up their own institutions, as was the case with the Greeks, Macedonians, Serbians, Russians, Bulgarians, German Lutherans, Armenians, Coptic Christians from Egypt, the Maronites, Melkites, Antiochan Orthodox, and Druze from the Lebanon, the Assyrians from the Middle East, Moslems from Lebanon and Turkey, Jewish settlers from Europe, and Dutch Reformed Church members.

The most visible influence of religion has been with the Greeks: in Sydney in 1980 there were 26 Greek Orthodox churches, most of which were associated with residential concentrations, although an increasing number were locating in affluent suburbs as Greeks suburbanized. The Orthodox churches gave cohesion to ethnic concentrations as did the Maronite, Melkite and Moslem institutions in the Lebanese concentrations. Indeed in Sydney, the Maronites were the main component of the old inner city Redfern concentration; the Moslems were the main element in the Lakemba settlement, and the Maronites and Orthodox Lebanese Christians were dominant in Punchbowl. In all cases where there were *ethnic* churches, there was some residential concentration, as for example the more than 5,700 Dutch on the south eastern fringe of Melbourne, most of whom had some affiliation with the Reformed Church of Australia.

Ethnic settlement in Australian cities is complex, and has involved the interplay of economic, social, cultural and migrational forces. Large ethnic concentrations have formed, but much residential mobility has taken place so that by the 1976 census, the majority of all ethnic groups, even the most 'segregated' resided outside *ethnic* concentrations. The ghetto model is not applicable to the concentrations even where they have been associated with low rent neighbourhoods, in part because they have also been linked to home ownership, and also because many second generation persons have been socially mobile. This is not to say that there have not been problems with those immigrant children of lesser ability, and with unemployment among Lebanese and Turkish youth, and also Greek and Yugoslav household heads and womenfolk. Structural change in manufacturing has caused problems for some immigrants.

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Growing hops is a secret skill, enveloped in a rich tradition that would keep an historian busy for years. Farmers, for their part, are growers because their grandfathers were, and many confess to an obscure sense of loss – unusual among farmers – when the last bine is cut and the hopyard left looking empty and ransacked.

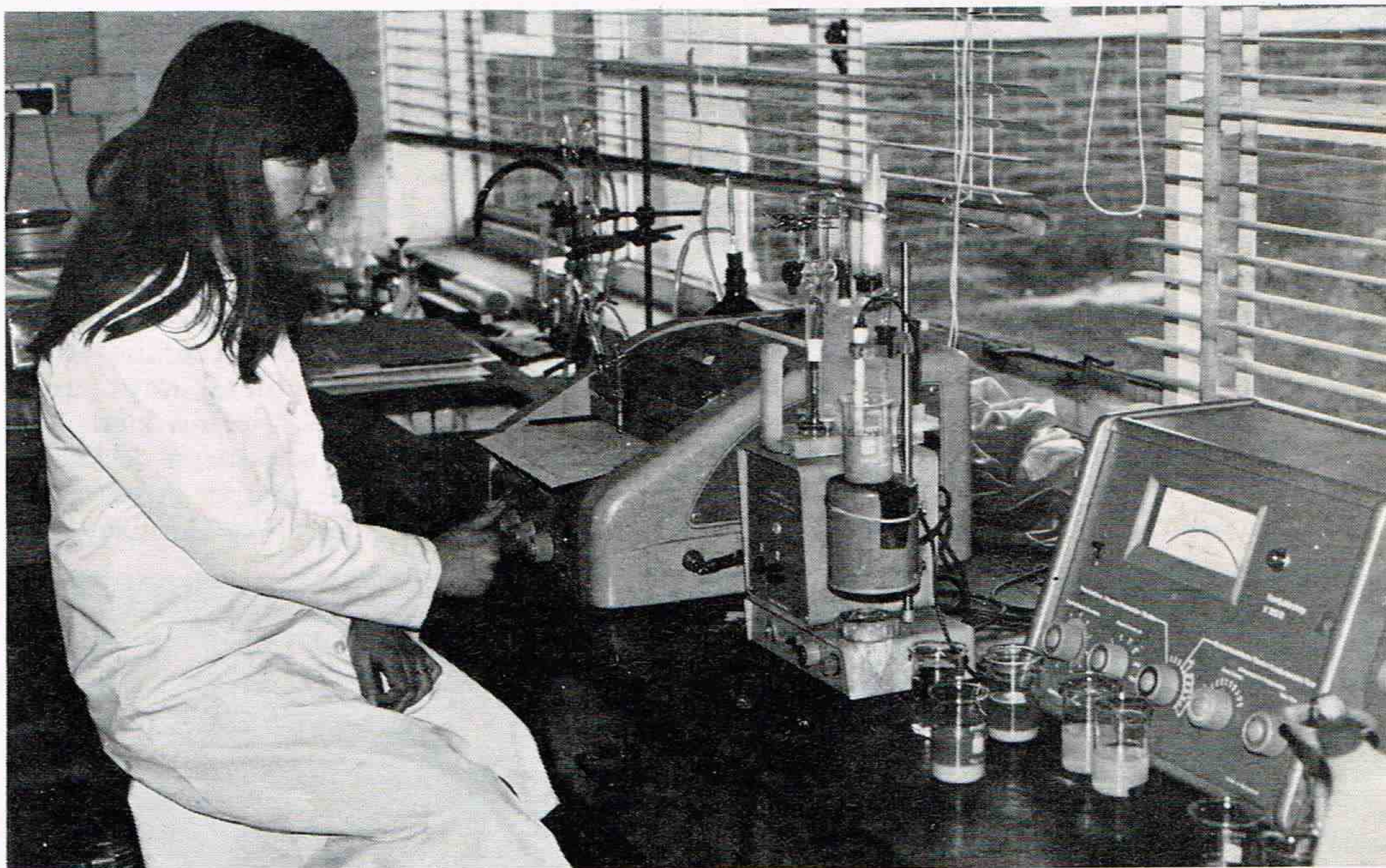
Hops start to produce shoots in late March when they are trained to grow clockwise up strings fixed with hooks into the loamy soil. By the end of July they have come into burr (blossom) and three weeks later green seeded cones appear. In September the hops hang in handfuls as bright and plentiful as grapes. At the base of the feathery petals lurks a gummy, sulphurous pollen, which is what the brewer uses.

The brewer requires hops for a variety of reasons, other than their obvious aromatic qualities. Soft resins within the flower give the characteristic bitterness of English beer, but they also have a bacteriostatic effect which prolongs its storage life. Hop tannins also help in clarifying the beer during brewing. The efficiency of a particular variety of hop, and there are many, is defined in terms of its alpha acid content – a measure of the bittering value of hops. A high alpha hop will produce more beer than a low alpha one ıd, in recent years, brewers have increased ıeir demand for the former. They have good bittering qualities but more importantly, represent a considerable cost saving as fewer are required.

A century ago hops covered more than 11,700 hectares of English farmland and in 1908 thousands of pickers and growers converged on Trafalgar Square to protest the poor price being offered for English hops. Today a similar gathering would constitute a lobby for an endangered species, hardly a demonstration. The area under hops has fallen drastically to 6000 hectares and barely 400 growers are left in the country. As for the pickers, their services and their summer holidays became obsolete in the Fifties when growers bought elaborate picking machines. While these figures seem to indicate an industry in rapid decline, it is only half the picture. As a result of the introduction of higher yielding varieties, these 6000 hectares actually produce nearly double the alpha ıd of 50 years ago and roughly the same amount of beer. The traditional English hops, Fuggles and Golding, have largely disappeared from the South East, after a severe outbreak of wilt, an incurable hop disease. They have been replaced by the more recent breeds, Target, Challenger, and Northdown, which combine high alpha with a degree of wilt resistance. No, if there were to be a replay of the Trafalgar Square rally tomorrow, it would most likely be thronged with brewers. What threatens the English hop industry in the 1980s is that it has ceased to be competitive in both international and domestic markets.

The production of hops in England is controlled by the Hop Marketing Board (HMB), a producers' society and the first of the new boards to be set up under the Agricultural Marketing Act, 1931. No hops may be sold except through the board, which also sets quotas for individual farmers based on its forward sales policy. A producer consigning hops in excess of his quota has no guarantee of payment, unless they are subsequently sold on the 'spot market'. The Board sells the bulk of its crop four years in advance in an efort to stabilize an industry that has suffered from wild fluctuations in production and demand in the past. The HMB also undertakes measurement of the alpha acid and moisture content of the crop by making tests on a random selection of the 'pockets' of hops in their vast warehouses.

On a large brewery-owned hop farm in Hereford picking goes on 24 hours a day with a new machine (above) which clips the bines from the wires while people in the cart tug the bines from the wires. (Below) the higher the alpha acid content of a hop the more beer that it can flavour; a technician at the Hop Research Department of Wye College at Ashford in Kent does an alpha acid analysis



Some farms are owned entirely by breweries or have specific contracts to supply them. When Allied Breweries' new farm in Leominster, Herefordshire, comes into full operation in 1984, this will be able to supply about 40 per cent of the company's entire requirement. Few breweries can ever hope to fulfil their total needs. Consequently, a large degree of cooperation has developed between the growers – represented by the board – and the brewers. Both contribute finance to the Hop Research Department at Wye College in Kent, where some of the most dramatic strides in breeding and disease control have taken place. There has been an unwritten agreement between board and brewer that it was in the brewer's interest to continue supporting a domestic hop industry, rather than set themselves at the mercy of German or Yugoslavian growers, having driven their own farmers out of business. The brewers never agreed to underwrite hop production however, and the decline in the numbers of growers and the increased planting of high alpha hops underlines how competitive the industry has had to become. Mr G. C. Hall Production Manager at the HMB summed up the quandary for hop growers: 'There were fears, and very real fears, that if you increase the alpha acid content of hops and

increase the yield per acre, then your market is going to contract. As opposed to that, we were being told by English brewers, that if you don't produces high alpha hops, there are bags of Northern Brewer in Europe which we will want to buy, because we want high alpha at a price that's economical. We were over a barrel. Either you lose your home market because you're not producing what your customer wants, or you lose some of your home market, because you're producing what he does want'.

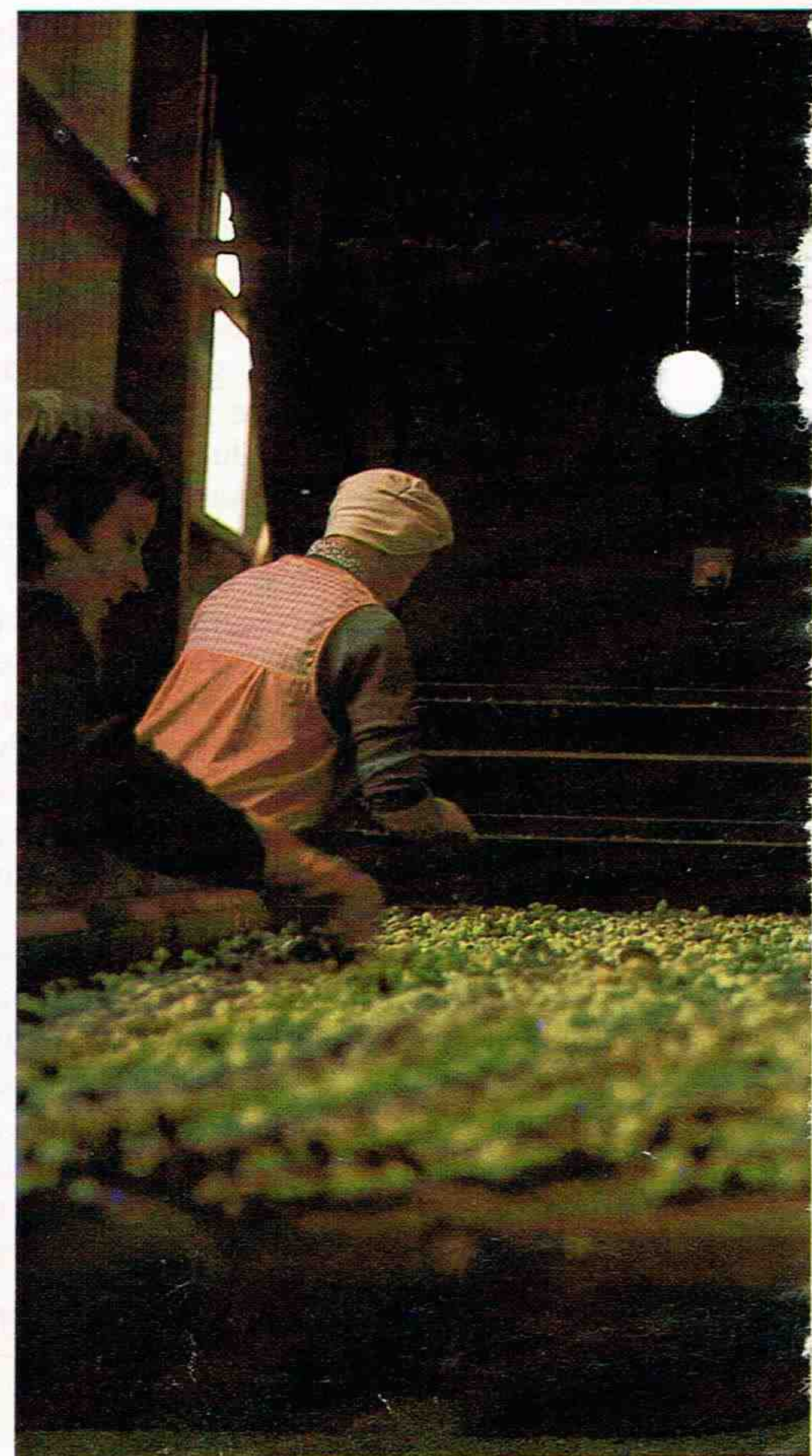
Mr Hall is justified in speaking in the singular because few other customers are interested in English hops because they are 'seeded' – the fruit has been fertilized and contains seeds. Most other countries grow unpollinated or seedless hops and, generally, world trade is in this kind. The immediate post-war years saw a decline in exports which became sharper in the 1970s as production expanded in Germany and America. Our once assured markets in the former colonies looked elsewhere and only Nigeria continues to be a customer of any weight. Trials have proved that there is no difference between the two kinds of hops when it comes to brewing either lager or bitter, but consumer resistance is entrenched. European masterbrewers also claim the seeds clog up the drains. Furthermore, with a large number of European brands being made here under licence, even

Owing to the uncertainty of the market and high costs of cultivation (wirework costs more than £1000 per hectare), hopyards are generally small. In a 4 ha privately-owned Hereford yard (above) hop bines have curled three-quarters of the way up the wires by mid-June. During the September harvest a picking machine (right) moves down the rows as the person in the 'crows nest' cuts the bine where it joins the overhead wire. Women on the cart (left) wind the bines around metal pillars for ease of handling

British brewers have to follow the recipes and buy seedless hops.

More significantly, in 1981 the Hop Marketing Board in selling crops in advance had increased the price of its 1984 crop by 30 per cent and even regular buyers were shying away from committing themselves, at a time of falling beer sales and uncertain futures. Small English brewers, who had continued to buy traditional Fuggles and Goldings hops for their greater aroma, found that the same were available from Yugoslavia, delivered and duty paid, for £75 per zentner (50kg) less than they cost in Kent. Moreover, while choicest English Goldings from 1984 were being offered at £210 per zentner, the German merchants were able to sell their 1990 crop without breaking the £200 per zentner barrier. Many buyers felt the Hop Marketing Board had gone too far this time and some growers worried that the new prices would drive customers into the arms of the Germans. The Board, however, justified its increase by stating that if English hop growers were even to survive into the next decade, something had to be done about the outdated equipment on which they had relied for the past thirty years. The picking machine with its complicated array of teasers, flails and tracks costs well in excess of £50,000, and most machines need major overhauls or replace-

The bines are fed into a track conveyor at the brewery farm (above) while the waste from the plant is blown out to a storage area outside, from where it is taken to be used as compost for the next crop. The bines then pass between pairs of rotors which have tines that tease off the hop cones together with leaves and shoots (below left). A conveyor belt then carries the hop cones past cleaners (below right) who pick out any remaining waste



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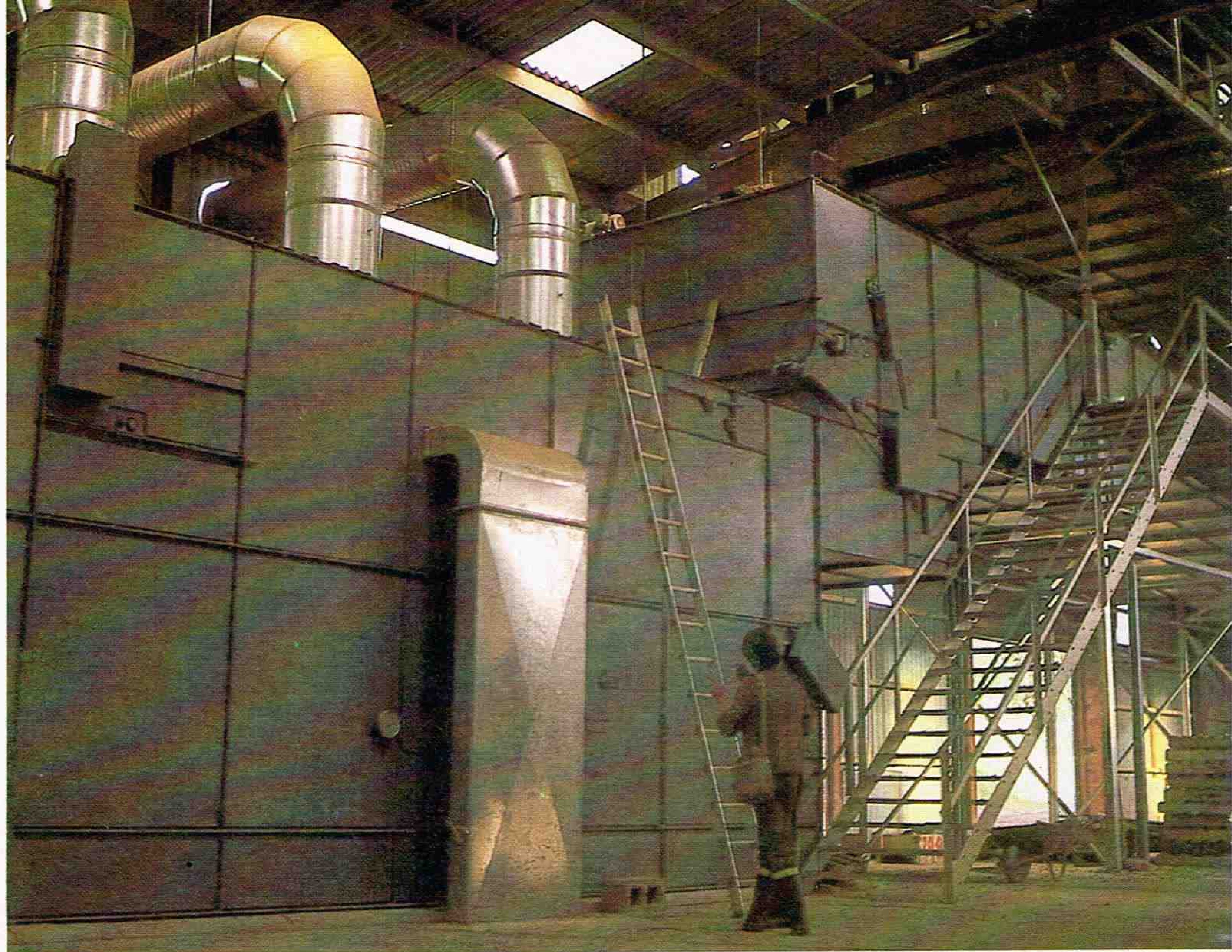
The cleaned hops move on by conveyor belt to a dryer (top right) which takes six hours to dry the hops at 60°C. The plant operates 24 hours a day



ment. Moreover, with wirework for the hop-yards costing as much as £2000 an acre to install, it was little wonder that no new private grower had set up in the last 30 years. Capital was urgently needed to prevent a decline in efficiency.

All this strikes a grim note indeed for what seems a typically English kind of husbandry. The English grower is producing a hop, for which no one has much need and charging the earth for it. Consequently, they are seriously disadvantaged in the export market place. With a dwindling share of international trade and what amounts to an increasingly fragile hold upon its one remaining captive market, life for the country's remaining 374 growers looks like becoming more cut-throat. What was previously sold abroad could be the measure of what is produced in future and quotas will have to be adjusted to reflect the declining demand. There will be a further fall in the number of growers as competition whittles away marginal producers, forcing them to grub out their hops. British brewers maintain that they will continue to support a domestic industry so long as the prices remain 'reasonably' competitive, but none as yet is prepared to say what defines reasonable. The growers clearly sailed too close to the wind with their 1984 prices. With regular customers still reluctant to place orders and barely 50 per cent of the crop sold, the Hop Marketing Board changed its tack and reduced its price rise by half. Sales have begun to pick up again, but those brewers who had already bought at the first price are now angry that they did, for they can expect no refund for their display of loyalty.

But that is not the end of the story. Though entry to the EEC has inflicted few of the drastic changes that have crippled the apple industry, the HMB as a compulsory group, runs counter to the letter of the Treaty of Rome. A Bill, currently at the committee stage in the House of Commons, will wind up the board and charter a Hop Society to which membership will be voluntary. Members will be free to leave after three years when their quotas have been fulfilled. Few are expected to make the break for it has been a long 50 years since any grower in England has had to handle his own marketing and quality control.

The English hop industry is clearly at a crossroads and its survival into the 1990s a matter of conjecture. The relationship between brewer and the Hop Marketing Board – a delicate balance of self-interest at the best of times – has been strained by the price increases and the board's realization that the future of its growers is at risk. Although hops make up barely 5 per cent of the total cost of brewing, hop buyers within the major breweries are looking for cuts. It is possible that brewers may try to wean private growers away from the new society and initiate special contracts in an attempt to avoid the expense of the administration. Alternatively, they might buy their own hop farms. Another possibility, but still an extremely remote one, is that more growers will replant with seedless hops in order to give them a greater advantage in the international market. The words of a Kentish song of 1759, when the French were preparing their invasion fleet at Le Havre finds a pertinent echo in the 1980s though the competition is now different!

'What's he that presides at the Court of Versailles
To the planter that sits on his bench?
Hurrah for your hops, your stout, beer and good ales,
Down with French wines and down with the French.'

Michael Griffin is a freelance writer