

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84 estimate: None.

2. Malt Imports, 1981 and 1982 (000 tonnes)

<u>Country</u>	<u>1982</u>	<u>1981</u>
Canada	1.0	7.9
U.S.A.	-	.027
Denmark	-	.1
United Kingdom	18.3	2.7
Netherlands	.765	.246
Belgium	5.7	-
France	3.25	1.36
Germany	5.75	4.92
Australia	53.6	65.67
New Zealand	12.7	.97
TOTAL	101.0	84.0

Source: National Statistics & Census Office

3. Additional Information

Trend in beer consumption: The San Miguel Corp., which dominates 96% of the beer market share, projects an increase of 3% in the 1984 per capita beer consumption. The forecast assumes an improved coconut export price in 1984. Twenty percent of the country's livelihood depends on the coconut industry.

Market potential for Canadian malt and/or malting barley: The San Miguel Corp. and Asia Brewery Inc. have been importing most of their malt from Australia and Europe mainly due to price. Last year San Miguel purchased 40,000 tonnes from Eastern Europe (low quality, 160 US\$/tonne). Their annual requirement is 110,000-120,000 tonnes. The U.S. government has offered C.C.C. credit for approximately 17,000 tonnes of malt which will probably be taken up. However, due to the 3 year term of credit, San Miguel must take a 3 year foreign exchange risk which at the moment is very risky. Canadian prospects for barley malt are good if 360-day credit could be arranged.