

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84 estimate:

	- - thousands of tonnes - -				Total
	2-Row		6-Row		
	Winter	Spring	Winter	Spring	
All Barley	6,496	2,318			8,814
% distribution by barley type used this year by malt producers	30%	60%	10%		1,500

2. Imports, Calendar year 1983 estimated, previous year in brackets:

	thousands of tonnes		Principal supplier(s)
Malt	17.3	(27.5)	United Kingdom (80%)
Malting barley -Free import and export of goods to be finished	5.2	1.0	
-Third World	-	5.7	United Kingdom
-EEC	<u>161.6</u>	<u>199.6</u>	
	166.8	206.3	

3. Additional Information

Change in malting capacity: France's malting capacity is estimated at 1.25 million tonnes of malt. Production in 1983 was 1.1 million tonnes compared to 1.2 million tonnes in 1982.

Malt exports (1983):

EEC:	265,591 tonnes
Third countries:	567,886 tonnes
TOTAL:	833,477 tonnes compared to 747,034 tonnes in 1982

Annual per capita beer consumption: In 1983, the brewing industry in France produced 21.8 million HL of beer compared to 22.3 in 1982. The balance of trade shows imports of 2 million HL. The results confirm the market stagnation experienced since 1975. Annual per capita consumption: 43.5 litres.

Market potential for Canadian malt and/or malting barley:

Malt - Very limited. All imports come from neighbouring EEC countries where French maltsters are established (such as Belgium). Great Britain also delivers small quantities to the north of France.

Barley - Grain handlers are not always prepared to sell when maltsters place their orders. Since the latter must meet their needs to ensure the supply of their plants, they are sometimes obliged to buy outside France (essentially in Great Britain).