3. Fertilizer Situation

There has been no dramatic change in usage. The 1982/83 estimated consumption of fertilizers in terms of tonnes nutrient follows: Nitrogen 271,400, Phosphate 145,800, and Potash 178,000.

4. Import Mechanism

Grain brokers R & H Hall Limited negotiate wheat imports and most of the feed grain imports on behalf of the flour millers and the compound feed manufacturers.

5. Grain Industry Infrastructure

Following the closure of three of the larger flour mills in 1983/84, (one of which went into receivership in June 1984 and is presently for sale), the structure of the industry had changed considerably. There is disquiet at both industry and Government levels at the increasing imports of British flour. The Irish Flour Millers Association claim that larger British concerns are dumping flour into the Irish market. A major promotional campaign is being organized by the IFMA to encourage consumers to buy bread made from Irish flour.

6. Government Policies Affecting Grain and Agriculture

Government policies are subject to EEC regulations etc. In attempts to cut spending, the Government has recently halved the consumer subsidies on bread (milk and batter). The Government continues to encourage farmers to maintain and increase grain production but total acreage is declining. Bread and flour consumption are also declining in Ireland.

7. Canadian Grain Marketing Prospects

The flour-milling industry is declining due to recent closures. Sales of Canadian hard wheat are unlikely to increase.

With respect to marketing possibilities for Canadian "special crops", a small market for canary-seed has developed. Local canners have long-established contact with the Ontario Bean Producers Marketing Board.

8. Processing Facilities

Year: 1984

	Number of Companies	Number of Plants	thousands of tonnes Annual Capacity	Actual Output
Flour (and durum) Mills	5	9	200	180
Compound Feed Mills	34	44		
Malt Houses	6	13		110*
Oilseed Crushers	1	1		

*EEC Industry Statistics