II. MALT AND MALTING BARLEY

1. Domestic Production of Barley by Type, 1989/90 estimate:

- thousands of tonnes -

	2 Row		6 Row		
	Winter	Spring	Winter	Spring	Total
All barley	2,709	1,897	5,251		9,857
Suitable for malting		1,764	2,760		4,524

2. Statistical Notes: 1989/90 est. thousands of tonnes - previous year in brackets

	Production	Imports	Exports
Malt	1,150 (1,181)	20 (15)	850 (880)
Malting barley	4,524 (4,498)		N/A N/A

Export destinations include: FRG, Belgium/Luxembourg, Philippines, Italy
Import originations include: Belgium/Luxembourg, FRG, UK, Canada

3. Additional Information

Annual per capita beer consumption: Total beer sales in France have gradually dropped from 22,331,000 hectolitres in 1982 to 19,894,000 in 1987. In general, alcoholic beverages are being increasingly passed over in favour of mineral water and soft drinks.

Beer production capacity: Beer production is characterized by a continual restructuring of the capacity in favour of factories producing over 500,000 hectolitres, which now represents 90% of domestic production. There is also a trend at the moment to set up joint ventures with foreign companies. Overall, it seems that the capacity is dropping very slightly toward 22 million hectolitres.

Domestic malting capacity: Although the number of factories is easing slowly, the total capacity remains quite stable around 1,250,000 tonnes.

Market potential for Canadian malt: France is the world's largest exporter of malt. A few limited imports come from other EC countries. The potential for Canadian exports in this market would be close to nil unless there is a radical change in the common agricultural policy.