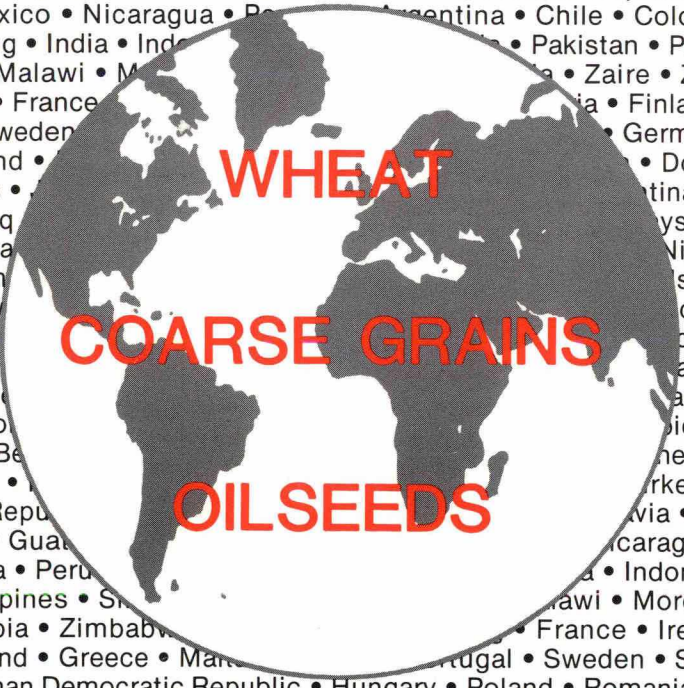
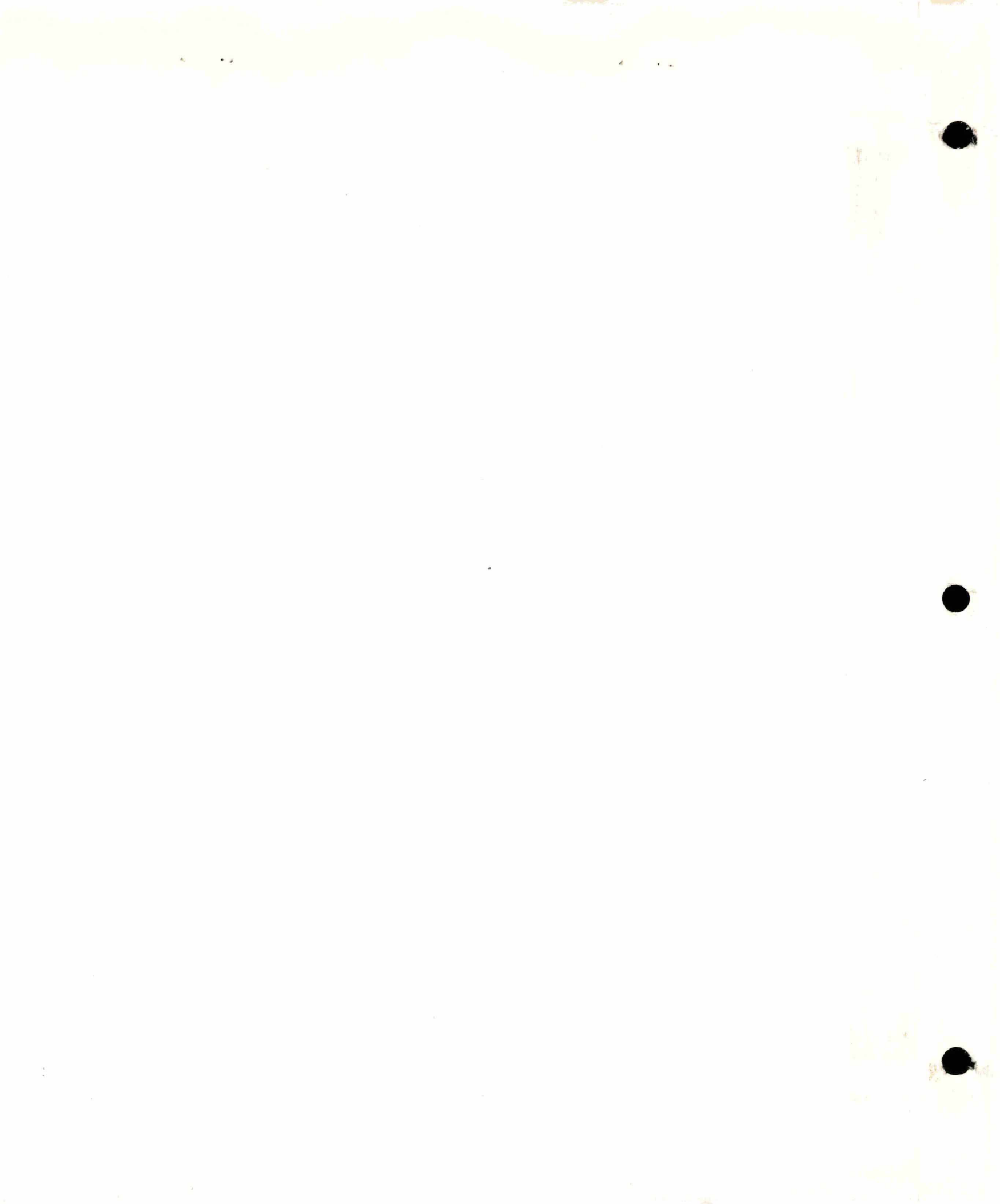


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# ANNUAL MARKET SURVEY 1984









ANNUAL SURVEY OF WHEAT, COARSE GRAINS AND OILSEED MARKETS 1984

This survey is conducted on an annual basis primarily on behalf of the Canadian Wheat Board, although the information is also utilized in the Grain Marketing Office. Through the use of a survey questionnaire, 67 External Affairs trade posts abroad, covering 103 countries, are canvassed to obtain information on market opportunities and the supply and disposition situation for individual grains, oilseeds and products, including malt and malting barley. General information on government policies affecting grain and agriculture and on processing facilities, storage and throughput capacity and other subjects is also solicited.

As was done with the 1982 and 1983 surveys, we have condensed the information, comments and statistics provided focusing on that information which may not be readily available to grain exporting and processing firms from more comprehensive domestic or international sources.

Not all countries are covered in the survey since posts in some major grain importing or exporting nations report on a regular basis and accordingly were excluded from the survey. Some other countries were excluded because locally available information proved to be too sketchy to be of any real value. In addition, some posts did not return a completed questionnaire or were only able to develop very limited information on their respective countries. Nevertheless, it is believed that the coverage and information are sufficiently broad and detailed for this report to be of interest and some usefulness to most grain industry recipients.

This market survey report is only made available on a very limited basis to those Canadian firms and organizations actively involved in the export marketing of grains, oilseeds and products and is not compiled for general distribution.

Grain Marketing Bureau  
Department of External Affairs

December, 1984

ACKNOWLEDGEMENT

The cooperation and assistance of our External Affairs trade posts abroad in the conduct of this survey is acknowledged and appreciated.

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ANNUAL SURVEY OF WHEAT, COARSE GRAINS AND OILSEED MARKETS 1984

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PART I  
EUROPEAN ECONOMIC COMMUNITY



DENMARK

UNITED KINGDOM

NETHERLANDS

BELGIUM

LUXEMBOURG

FRANCE

ITALY

GREECE



## BELGIUM - LUXEMBOURG

Economic classification:	Industrial Market economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$6,400	year 1982
Annual per capita GNP	US\$9,700	year 1982
Average annual growth 1960-80	3.8%	
Annual inflation rate 1970-80	7.6	
Annual inflation rate (current)	7.8%	
Volume of imports	55 billion US\$	year 1983
Of which food	72.0%	year 1983
Of which fuels	20.0%	year 1983
Principal foreign exchange earning export:	Base Metals&Products	
Debt service as % of GNP	60.0%	year 1982
Debt service as % of exports	100.0%	year 1982
Population	10.4 million	year 1983
Annual population growth	0.2 %	years 1983-2000
Annual Consumption:		
Flour	65 kg/capita	year 1983
Meat	80 kg/capita	year 1983
Vegetable Oil	10 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1983 crop was lower than average due to a very wet spring followed by hot dry weather. The outlook for 1984 is, in general, very encouraging and latest estimates are that crops will be above average.

#### 2. Foreign Exchange Situation

The high rate of the Canadian dollar vis-a-vis the Belgian franc is currently a major drawback for Canadian suppliers. There are currently no priorities for imports of food and agricultural inputs. Belgium is not likely to receive international aid other than that provided by the CAP.

#### 3. Fertilizer Situation

There are no major problems in the fertilizer supply situation due to reliable sources of supply within the EEC.

#### 4. Import Mechanism

Grain imports are carried out by private importers. There have not been any changes in the import structure over the past year and changes in the current established procedure are not foreseen.

5. Grain Industry Infrastructure

During the past year, there were no important changes in the import, storage, handling and processing facilities and there are no significant changes imminent.

6. Government Policies Affecting Grain and Agriculture

There are no current or anticipated changes in government policies which will significantly influence this sector. The Belgium agricultural policies are in line with the Common Agricultural Policy of the EEC.

7. Canadian Grain Marketing Prospects

Prices remain the major factor in securing a larger share of the grain markets.

Market opportunities do exist for Canadian special crops such as mustard seeds, field peas, lentils and canaryseed. Again price is a major drawback for Canadian suppliers.

8. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	90	90	1,800	900
Compound Feed Mills	225	225	6,500	5,000
Malt Houses	11	11	500	450
Oilseed Crushers	24	26	2,000	1,500

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Antwerp	270	10,000
Ghent	585	8,000
Total Capacity	855	18,000

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	650	50			700
Suitable for malting	205	35			240

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	85 (84)	EEC Countries
Malting barley	1,170 (1,451)	EEC Countries

3. Additional Information

Malting capacity remains stable at approximately 500,000 tonnes.

In 1983, malt exports totalled 305,000 tonnes. 107,000 tonnes were exported to EC countries, namely Netherlands, Denmark and West Germany. The remaining 199,000 tonnes were destined to Austria, USSR, Nigeria, Zaire, Brazil, Japan and over 35 other markets around the world.

The annual per capita beer consumption is stable at approximately 132 liters.

Market potential for Canadian malt and malting barley: Belgian malt requirements are currently supplied by member states of the EEC. High import levies on imports from third-countries limit access to this market for Canadian suppliers.



### III. OILSEEDS

#### 1. Import Policy

Import tariffs: (i) Oilseeds - No duty  
(ii) Crude oil - 10%  
(iii) Oilseed meal - No duty  
(iv) Refined oil - 15%

Importation procedure and structure: Oilseed imports handled by private importers.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Seed Type	Production	Imports	Quantity Processed	Principal Sources of Imports
Soybeans	-	1,455	1,450	U.S.A.-1,195 EEC-260
Linseed	4	30	9	EEC-13 Canada-15
Rapeseed	1	25	23	EEC-25
Mustardseed	-	3	-	EEC-3
Sunflower	-	130	125	U.S.A.-32 EEC -98 Canada 15
TOTAL	5	1,643	1,607	

Oil Type	Imports		Principal Sources of Imports
	(crude)	(refined)	
Olive	1	.5	EEC-1
Soya	16	18	EEC-34
Linseed	1	.5	EEC-1.5
Palm	31	19	Malaysia-11
Rapeseed/mustard	49	3	EEC-52
TOTAL	180	41	

Meal Type	Imports	Principal Sources of Imports
Soyabean	610	U.S.A.-130 EEC-110 Arg.-178
Linseed	105	EEC-23 Argentina-78
Rapeseed	35	EEC-30
Sunflower	100	U.S.A.-7 EEC-45 Argentina-48
Palm	2	U.S.A.-1 EEC-1
TOTAL	120	852

#### 3. Number and capacity of oilseeds crushing plants:

Number	Type of Seed crushed	Capacity (tonnes)
26	Soyabean, Rapeseed, Mustard seed, linseed, sunflowerseed.	2,000,000

III. OILSEEDS cont'd

4. Export Policy

There are no specific control measures or export assistance relative to exports of oilseeds. Oilseed exports are carried out by private exporters.

5. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Seed Type	Production	Exports	Destination	
			EEC	Romania
Soyabeans		3	3	
Linseed	4	25	24	1
Rapeseed	1	3	3	
Mustard		3	3	
Sunflower		.5	.5	
TOTAL	5	34.5		

Oil Type		EEC	USSR	Sweden
Linseed		1		
Soya		175	17	20
Palm		12		
Rapeseed/mustard		21		
TOTAL	180	209		

Meal Type		EEC	USSR
Soyabean		879	83
Linseed		19	
Rapeseed		10	
Sunflower		44	
TOTAL	120	1,035	

IV. STATISTICAL NOTES  
(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat*	850 (868)	295 (200)	1,100 (1,205)	2,245 (2,273)
Durum wheat	80 (82)	9 (4)	36 (80)	45 (84)
Flour/Semolina	930 (950)	17 (247)	29 (25)	126 (354)
TOTAL		321 (451)	1,165 (1,310)	2,416 (2,711)

\*of which spring wheat 38 (43)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>				
Wheat	1,300 (1,200)	325 (300)	(54)	240 (424)	380 (295)	2,245 (2,273)
Durum wheat	25 (28)			10 (47)	10 (9)	45 (84)
Flour Semolina	30 (82)			80 (255)	16 (17)	126 (354)
TOTAL	1,355 (1,310)	325 (300)	(54)	330 (726)	406 (327)	2,416 (2,711)

Export Destination: EEC, USSR, Algeria, Egypt, Ethiopia

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>TOTAL IMPORTS</u>	
	<u>U.S.A.</u>	<u>EEC</u>
Canada		
Australia		
Argentina		
Others		

WHEAT (including durum)

Cash	117 (212)	1,019 (1,073)	1,136 (1,285)
Commercial Credit			
Aid, concessional			
credit, etc.			

FLOUR (including semolina)

Cash/comm. credit	29 (25)		29 (25)
Aid, concessional:			
credit, etc.			

TOTAL	117 (212)	1,048 (1,098)	1,165 (1,310)
-------	-----------	---------------	---------------



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	4,000 (4,400)	328 (380)	2,515 (3,051)	6,843 (7,831)
Barley	700 (745)	100 (96)	1,170 (1,451)	1,970 (2,292)
Sorghum		23 (10)	120 (201)	143 (211)
Oats	95 (100)	15 (18)	58 (53)	168 (171)
Rye	25 (30)	7 (6)	9 (13)	41 (49)
TOTAL	4,820 (5,275)	473 (510)	3,872 (4,769)	9,165 (10,554)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	700 (750)	4,200 (4,800)	110 (125)	8 (40)	1,540 (1,788)	285 (328)	6,843 (7,831)
Barley	40 (55)	495 (500)	900 (990)	2 (5)	480 (642)	53 (100)	1,970 (2,292)
Sorghum		120 (160)			2 (28)	21 (23)	143 (211)
Oats		150 (150)		1 (2)	2 (4)	15 (15)	168 (171)
Rye			30 (40)		1 (2)	10 (7)	41 (49)
TOTAL	740 (805)	4,965 (5,600)	1,040 (1,155)	11 (47)	2,025 (2,464)	384 (473)	9,165 (10,554)

of which poultry: 20% Export Destination: EEC countries.  
Industrial Use: Oil/Breweries

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	Australia Argentina EEC All Others	
Corn		1,542 (2,367)		2,515 (3,051)
Barley			973 (684)	1,170 (1,451)
Sorghum			1,170 (1,451)	120 (201)
Oats			120 (201)	58 (53)
Rye			9 (9)	9 (13)
TOTAL		1,542 (2,367)	2,330 (2,398)	3,872 (4,769)

## D E N M A R K

Economic classification: Industrial market economy  
 Oil exporter or importer (net): Importer (US\$ 1 billion)  
 Annual per capita income: US\$ 7,620 year 1983  
 Annual per capita GNP US\$ 9,613 year 1983  
 Average annual growth 1960-80: 3.7%  
 Annual inflation rate 1970-80 9.6%  
 Annual inflation rate (current) 6.9% June 1984  
 Value of imports US\$ 7.1 billion year 1984\*  
 Of which energy 17.4% year 1984  
 Principal foreign exchange earning export: Industrial goods  
 Debt service as % of GNP 11% year 1983  
 Debt services as % of imports 38% year 1983  
 Population 5.1 million year 1983  
 Annual population growth -0.04%  
 Annual Consumption:  
 Flour (rye) 20.2 kg/capita year 1982  
 Meat 70.9 kg/capita year 1982

\* first half 1984

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

<u>Area Sown ('000 ha)</u>	<u>1982-83</u>	<u>1983-84</u>	<u>1984-85 (Forecast)</u>
Winter Wheat	234	304	may increase by 100
Winter Rye	78	120	no increase
Winter Barley	95	200	
Spring Barley	1,270	N/A	
Oats	28	N/A	
Spring Wheat	10	N/A	
Rapeseed, Winter	10	15	20-25
Rapeseed, Spring	143	147	155
Peas	4	18	50
<b>Total</b>	<b>1,872.5</b>		

The Danish harvest of spring barley was very poor in 1983 (due to climatic conditions) resulting in a considerable increase in winter barley sown in 1983-84. In 1984 the spring barley harvest was excellent giving a better balance. The Danish pea harvest is becoming so successful that it substitutes protein imports for animal fodder.

2. Foreign Exchange Situation

Foreign Exchange Earning Exports:

	<u>1983</u>	<u>first half 1984</u>
Industrial	US\$ 9.2 billion (65%)	US\$ 5.2 billion (68.4%)
Fish and Agriculture	US\$ 3.0 billion (21.5%)	US\$ 1.6 billion (20.8%)

The rate for the Canadian dollar has increased 70 percent since 1980 and badly hinders Canadian exports to Denmark.

3. Fertilizer Situation

1983 Imports used in Danish Fertilizer Production:

	<u>Tonnes</u>
Nitrogen - principally from West Germany and Trinidad	362,717
Raw Phosphate - principally from Morocco, some from Israel	286,185
Potash	<u>155,052</u>
Total	803,954

1983 exports of Finished Fertilizers: 470,775 tonnes.

4. Canadian Grain Marketing Prospects

A Danish pig farmer, established both in Denmark and in Canada is offering Triticale with considerable success. However, official agricultural consultants are awaiting results of testing under Danish conditions before recommending it.

5. Processing Facilities

Year: 1984

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	6	8		
Compound Feed Mills				
Malt Houses	7	7	130	
Oilseed Crushers*	2	2		

\* soya, rape and copra

II. MALT AND MALTING BARLEY

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

Malt	Thousand of tonnes 197.5 (1882.8)
------	--------------------------------------

2. Additional Information

Change in malting capacity: Domestic malting capacity is unchanged at 130-150,000 tonnes annually

II. MALT AND MALTING BARLEY cont'd

3. Malt Exports 1983 (tonnes)

West Germany	1,910.6
Italy	7.5
Iceland	60.0
Faroe Islands	347.8
Norway	5,788.6
Sweden	56.1
Uganda	400.0
Malawi	912.1
Panama	3,109.1
West Indies	45.0
Haiti	163.0
Jamaica	750.0
Trinidad/Tobago	560.0
Brazil	500.0
Bolivia	100.0
Sri Lanka	400.0
Thailand	3,535.5
Malaysia	1,207.3
Philippines	2,736.0
Japan	7,316.1
Hong Kong	1,032.1
TOTAL	29,880.5

4. Trend in beer consumption:

1981	131.0	litre per capita
1982	133.7	" " "
1983	136.1	" " "



### III. OILSEEDS

#### 1. Import Policy

Import Tariffs:	(i) Oilseeds	- 0
	(ii) Crude oil	- 4-10%
	(iii) Oilseed meal	- 0
	(iv) Refined oil	- 15%

Importation procedure and structure: Private importers.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Rape	340	1	72	EEC
Soya		190	169	U.S.A. and Argentina
Laurics		45	39	Africa and Far East
Others		25	21	Africa
TOTAL	340	261	301	
<u>Oil</u>		<u>Crude and Refined</u>		
Rape	30	3		EEC
Soya	27	40		EEC
Laurics	21	13		Africa and Far East
Palm		18		Far East
Others	9	7		Africa
TOTAL	87	81		
<u>Meal</u>				
Rape	42	127		EEC, China
Soya	137	1,210		EEC, U.S.A., Brazil, Argentina
Laurics	15	119		Africa
Cotton		369		Argentina
Others	9	267		EEC, Africa, Far East
TOTAL	203	2,092		

#### 3. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
2	Soya and Rapeseed	

OILSEEDS cont'd

4. Export Policy:

Export assistance or control measures: EEC Common Agricultural Policy regulations apply.

Export procedure and structure: Private exporters.

5. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Principal Destinations</u>
Rape	340	255	EEC
<u>Oil</u>		<u>Crude and Refined</u>	
Rape	30	8	EEC
Soya	27	5	EEC, Scandinavia
Laurics	21	6	EEC
Palm		7	EEC
Others	30	1	EEC
TOTAL	87	27	
<u>Meal</u>			
Rape	42	6	EEC
Soya	137	2	EEC
Laurics	15	4	EEC
Others	9	9	EEC
TOTAL	203	21	

IV. STATISTICAL NOTES(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	1,577 (1,207)	423 (124)	88 (88)	2,088 (1,419)
Durum wheat			4 (4)	4 (4)
Flour/Semolina				
TOTAL	1,577 (1,207)	423 (124)	92 (92)	2,092 (1,423)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat	320 (335)	1,065 (421)		125 (80)	335 (160)	243 (423)	2,088 (1,419)
Durum/Wheat	4 (4)					4	(4)
Flour Semolina							
TOTAL	324 (339)	1,065 (421)		125 (80)	335 (160)	243 (423)	2,092 (1,423)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>		<u>Australia</u>		<u>Argentina</u>		<u>EEC</u>		<u>ALL Others</u>		<u>TOTAL IMPORTS</u>
	<u>Canada</u>										

WHEAT (including durum)

Cash	1 (1)	10 (10)								81 (81)	92 (92)
Commercial Credit											
Aid, concessional											
credit, etc.											

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional

TOTAL	1 (1)	10 (10)								81 (81)	92 (92)
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## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn		11	160 (182)	171 (182)
Barley	4,450 (6,357)	669 (339)	220 (23)	5,339 (6,719)
Sorghum				
Oats	90 (178)	26 (18)	30 (9)	146 (205)
Rye	321 (235)	63 (75)	5 (5)	389 (315)
TOTAL	4,861 (6,770)	769 (432)	415 (219)	6,045 (7,421)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	25 (25)	134 (146)				12 (11)	171 (82)
Barley	1 (18)	4,101 (4,609)	200 (200)	370 (437)	355 (786)	312 (669)	5,339 (6,719)
Sorghum							
Oats	24 (24)	84 (141)		9 (11)	10 (3)	19 (26)	146 (205)
Rye	90 (97)	151 (72)	2 (2)	37 (21)	85 (60)	24 (63)	389 (315)
TOTAL	140 (164)	4,470 (4,968)	202 (202)	416 (469)	450 (849)	367 (769)	6,045 (7,421)

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn						
Barley	4 (2)	8 (10)		22 (22)	120 (126)	160 (182)
Sorghum		4 (2)			212 (17)	220 (23)
Oats			1 (1)	4 (2)	7 (6)	30 (9)
Rye		1 (2)			4 (3)	5 (5)
TOTAL	4 (2)	13 (14)	1 (1)	26 (24)	343 (152)	415 (219)

Other: Finland



**F R A N C E**

Economic classification:	Industrial Market economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$6,825	year 1982
Annual per capita GDP	US\$9,009	year 1982*
Average annual growth 1959-73:	5.9%	1973-82: 2.3%
Annual inflation rate 1978-82	11.3%	
Annual inflation rate (current)	7.5%	(past 12 months ending July 1984)
Volume of imports	104.6 billion US\$	year 1982
Of which food	12%	year 1982
Of which fuels	26.7%	year 1982
Principal foreign exchange earning export:	Durable professional goods	
Population	54.8 million	year 1983
Annual population growth	0.35%	year 1983
Annual Consumption:		
Flour	60 kg/capita	year 1982
Meat (including poultry)	93.5 kg/capita	year 1982
Vegetable Oil	10.6 kg/capita	year 1982
Of which peanut oil	6.3 kg/capita	year 1982

\* Based on U.S.\$1 = 7.25 francs

I. GENERAL INFORMATION

1. Crop Situation and Outlook

On the whole, the 1984 crop outlook is fairly good. The planting of soft winter wheat and winter barley increased by 5.4 and 3.7% respectively. Only spring grains decreased, especially spring barley, with a loss of 90,000 hectares. Winter and spring weather were fairly favourable for winter grains, particularly wheat. A dry autumn permitted early planting under good conditions. At winter's end, growth was fairly advanced, with extensive tillering. A cold spring with an initial lack of moisture subsequently militated against disease and slowed growth.

Warm weather experienced from early June 10 onward permitted renewed growth, particularly for corn, which seems to have recovered well. Furthermore, the acreage set aside for corn, estimated at 1,716,000 hectares, has apparently increased by five percent compared to the 1983 crop.

Oilseed crops looked good, as did rapeseed, and warm weather has enabled sunflowers to make up for their late growth.

2. Foreign Exchange Situation

The changing value of the French franc continued its momentum of the past four years. In July 1982, the Canadian dollar was quoted at 5.45 francs. On August 1, 1983, it was worth 6.50 francs, and on August 1, 1984, the exchange rate was 6.83 francs. This does not facilitate Canadian exports to France.



### 3. Fertilizer Situation

Fertilizer utilization in thousands of tonnes of fertilizing units per crop

	<u>1981/82</u>	<u>1982/83</u> (thousands of tonnes)	<u>Difference</u>
N	2,157	2,196	+1.8%
P205	1,673	1,630	-2.5%
K20	<u>1,646</u>	<u>1,744</u>	<u>+5.9%</u>
	5,476	5,570	+1.7%
Tonnage of quantities Used:	14,717	14,762	

### 4. Import Mechanism

All grain imports to France are handled by the private sector. The ONIC applies European regulations in France (levies/refunds/assistance) and coordinates certain international tenders and adjudication procedures.

### 5. Grain Industry Infrastructure

As at January 1, 1984, the storage capacity of grain handlers in France totalled 24 million tonnes, including 72% for cooperatives, 23% for jobbers, 4.5% for jointly constructed warehouses and 0.26% for other grain handlers. The total capacity shows an increase of 423,485 tonnes since January 1, 1983 or 1.8% in one year.

As at January 1, 1984, the secondary storage (transit and carry-in) totalled 4.8 million tonnes, compared to 4.5 million tonnes for the preceding year.

Farm storage capacity was estimated at 17.4 million tonnes as at January 1, 1984.

### 6. Government Policies Affecting Grain and Agriculture

In this area, France applies the decisions of the community but continues to insist that the Board negotiate limitations on the import of substitutional goods within GATT. France also opposes the idea that community domestic prices should be brought into line with world prices. Finally, France does not wish to see the distribution of the world market fixed permanently.

Grain imported from Canada has qualities (soft wheat and durum) not available in France.

### 7. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990 of national grain imports: The level of imports each year depends on the quality of the French crop.

The difficulties experienced by French millers a few years ago in obtaining high-protein Canadian wheat seem to have been resolved.

7. Canadian Grain Marketing Prospects (cont'd)

Mustard, linseed, lentils, canaryseed and various types of beans are already exported from Canada to France. There is more than one sure market for buckwheat if Canadian prices could be competitive. The sale of these crops to Third World countries could also be developed through mercantile firms in France.

A representative of the industry in France attended a course at the Canadian International Grains Institute in 1984. We think this is an auspicious initiative that might possibly be repeated depending on the results obtained.

8. Processing Facilities

Year: 1983/84

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Semolina	7	8		550
Flour		1,400	6,000	5,300
Malt Houses	21	26	1,250	1,113
Oilseed Crushers	7	16	2,500	1,760

9. Storage and Throughput Capacity

Main Grain Ports of France (metric tonnes)

<u>Name of Port</u>	<u>Storage Capacity All Silos Combined</u>	<u>Exports of Grains 1982-1983 Crop Year</u>
ENGLISH CHANNEL PORTS		
Dunkerque	25,000	398,000
Rouen	428,900	5,600,000
Le Havre	113,200	1,280,000
Le Treport	23,000	150,000
Dieppe	11,200	74,000
Caen	12,000	292,000
ALTANTIC PORTS		
Nantes	80,000	350,900
Saint Nazaire	20,000	10,650
Les Sables D'Olonne	10,700	34,300
La Pallice (La Roeheffe)	111,000	1,006,000
Tonnay Charente	35,000	35,500
Bordeaux	115,000	525,000
Blaye	139,500	255,000
Bayonne	58,000	790,000
MEDITERRANEAN PORTS		
Port La Nouvelle	43,000	356,800
Sete	15,000	125,800

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).



### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: (i) Oilseeds - Exemptions (according to GATT regulations)  
 (ii) Crude oil - Variable levy  
 (iii) Oilseed meal - Exemption  
 (iv) Refined oil - Variable importers

Importation procedure and structure: Private importers.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983 (January-December) and 1983/84 (crop year) for grain production

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Peanuts		44.1	25.4	U.S.A., Argentina
Rapeseed	939	53.8	577.8	Canada, Germany(FRG)
Sunflower	825	45.2	315.6	U.S.A., Spain
Oil Linseed	34	3.7	5.9	Canada, Belgium
Soybean	23	846.5	836.1	U.S.A., Paraguay
Others (copra, palm, cottonseed)		23.0		
<b>TOTAL</b>	<b>1,827</b>	<b>1,016.3</b>	<b>1,760.8</b>	
<u>Oil</u>		<u>Crude/Refined</u>		
Soybean	143.4	56.9	30.1	Belgium, Netherlands
Rapeseed	211.9	11.3	8.2	Germany(FRG), Belgium
Sunflower	131.4	70.7	48.7	Netherlands, Germany(FRG)
Peanut	10.0	187.6	33.2	Senegal, Belgium
Others (linseed copra, palmseed, corn)	42.6	176.1	86.9	
<b>TOTAL</b>	<b>539.3</b>	<b>502.6</b>	<b>207.1</b>	
<u>Meal</u>				
Peanut	14.9	32.8		Senegal, Sudan, Argentina
Oil Linseed	3.9	92.4		Argentina, Brazil, Belgium
Soybean	653.3	3,376.2		Brazil, Belgium, U.S.A.
Sunflower	167.3	100.0		Argentina, Belgium, Brazil
Rapeseed	342.5	5.0		Germany (FRG), Belgium
Others (copra, palmseed, castorseed, cottonseed)		24.6		Brazil, Belgium, Argentina
<b>TOTAL</b>	<b>1,181.9</b>	<b>3,631.0</b>		<b>Brazil, Belgium, Argentina</b>

3. Number and capacity of oilseeds crushing plants.

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes annually)</u> 1,000,000
	2	Soybean and rapeseed	
	6	Rapeseed, sunflower, linseed, soybean	900,000
	2	Peanut, sunflower, rapeseed, copra, palmseed	300,000
Others	<u>6</u>		<u>300,000</u>
TOTAL	16		2,500,000

4. Export Policy: This market operates according to community regulations.

Export Procedure and structure: Private exporters.

5. Addition Factors: This market is governed by community regulations.

6. Exports of oilseeds and products by type, thousands of tonnes:

Year: 1983 (January-December) and 1983/84 (crop year) for grain production

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Peanuts		0.2	Netherlands, Martinique, Belgium
Rapeseed	939	649.0	Germany (FRG), Netherlands, Belgium
Sunflower	825	769.0	Germany (FRG), Netherlands, Belgium
Oil Linseed	34	14.1	Belgium, Germany (FRG), Italy
Soybean	29	0.3	Netherlands, Belgium, Italy
Others		7.3	Netherlands, Belgium, Italy
TOTAL	1,827	1,439.9	
<u>Oils</u>			
Soybean	143.4	139.0	U.S.S.R., Morocco, Senegal
Rapeseed	211.9	150.0	Belgium, Algeria, India
Sunflower	131.4	17.9	United Kingdom, Italy, Belgium
Peanut	10.0	18.1	Belgium, Hong Kong, Martinique
Others (linseed, copra, palmseed, corn, grape seed)	42.6	49.6	
TOTAL	539.3	374.6	
<u>Meals</u>			
Peanut	14.3	1.0	Belgium
Oil Linseed	3.9	2.1	Belgium
Soybean	653.3	14.5	Netherlands, Nigeria, Guadeloupe
Sunflower	167.3	19.9	Belgium, Portugal, Germany (FRG)
Rapeseed	342.5	89.6	United Kingdom, Germany (FRG), Belgium
Others		0.7	
TOTAL	1,181.9	127.8	



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, August 1	Imports**	Total Supply
Wheat *	24,437 (24,976)	3,052 (1,569)	298 (773)	27,787 (27,318)
Durum wheat	399 (365)	125 (129)	265 (325)	789 (819)
Flour/Semolina			56 (52)	56 (52)
TOTAL	24,836 (25,341)	3,177 (1,698)	619 (1,150)	28,632 (28,189)

\*of which spring wheat 214 (332) \*\*plus adjustment

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Farm Consumption	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	4,640 (4,577)	3,550 (2,655)	3,237 (3,390)	660 (653)	13,600 (12,991)	2,100 (3,052)	27,787 (27,318)
Durum wheat	440 (411)		9 (28)	30 (25)	160 (230)	150 (125)	789 (819)
Flour/Semolina				1,940 (1,470)			1,940 (1,470)
TOTAL	5,080 (4,988)	3,550 (2,655)	3,246 (3,418)	690 (678)	15,700 (14,691)	2,250 (3,177)	28,632 (28,189)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

## ORIGIN

	Canada	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
	WHEAT (including durum)						
Cash							
Commercial Credit							
Total	221 (169)	194 (272)			102 (529)	1 (3)	518 (973)
FLOUR (including semolina)							
Cash/comm. credit							
Total					56 (52)		56 (52)
General Total	221 (169)	194 (272)			158 (581)	1 (3)	574 (1,025)

The crop year in question extends from August 1 to July 31, since too much information is lacking to make estimates from July to June 30 (such as carry-in).

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, August 1	Imports	Total Supply
Corn	9,658 (10,257)	2,040 (1,723)	560 (639)	12,258 (12,619)
Barley	8,814 (10,036)	219 (71)	251 (370)	9,284 (10,335)
Sorghum	248 (276)	19 (25)	3 (2)	270 (303)
Oats	1,437 (1,802)	14 (17)	1 (1)	1,452 (1,820)
Rye	296 (322)	7 (9)	3 (3)	306 (334)
TOTAL	20,453 (22,693)	2,299 (1,703)	818 (1,015)	23,570 (25,411)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Animal	Farm		Other (seed, waste)	Exports	Carry-out	Total
	Human	Human		Consumption	(seed, waste)				
Corn	690 (677)	3,650 (3,726)	658 (1,335)	160 (156)	5,500 (4,685)	1,600 (2,040)	12,258 (12,619)		
Barley	380 (382)	1,400 (1,387)	3,264 (3,877)	320 (326)	3,810 (4,144)	110 (219)	9,284 (10,335)		
Sorghum	9 (10)	78 (109)	8 (11)	2 (2)	150 (162)	32 (19)	270 (303)		
Oats	36 (33)	236 (310)	987 (1,210)	35 (42)	170 (234)	15 (14)	1,452 (1,820)		
Rye		29 (27)	226 (247)	5 (4)	8 (16)	2 (7)	306 (334)		
TOTAL	1,115 (1,102)	5,393 (5,559)	5,143 (6,680)	522 (530)	9,638 (9,241)	1,759 (2,299)	23,570 (25,411)		

Industrial use is included for corn: 577 (567)

Industrial Use: Production of starch.

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina	EEC		ATI Others
Corn	2 (0.7)	536 (629)		15 (1.5)	1 (3.3)	6 (4.1)	560 (638.6)
Barley	10 (0.4)	(0.5)	11 (5.7)		225 (361.6)	5 (2.1)	251 (370.3)
Sorghum	0.2 (0)	1 (1.3)			0.1 (0.2)	(1.7) (0.5)	3 (2)
Oats					0.2 (0.7)	(0.8)	1 (0.7)
Rye	2 (2.5)				1 (0.1)		3 (2.6)
TOTAL	14.2 (3.6)	537 (630.8)	11 (5.7)	15 (1.5)	227.3 (365.9)	13.5 (6.7)	818 (1,014.2)

The crop year in question extends from August 1 to July 31, since too much information is lacking to make estimates from July 1 to June 30 (such as carry-in).

## G R E E C E

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$3,563	year 1982
Annual per capita GNP	US\$4,014	year 1982
Average annual growth 1960-80	12.5%	
Annual inflation rate 1970-80	15.6%	
Annual inflation rate (current)	20.5%	year 1983
Volume of imports	10.1 billion US\$	year 1982
	4.4 billion US\$	Jan-June 1983
Of which food	13.2%	year 1982
Of which fuels	27.6%	year 1982
Principal foreign exchange earning export:	Fruit, Vegetables, tobacco, leather, furs, textiles, ores, cement	
Debt service as % of GNP*	3.0%	year 1982
Debt service as % of exports	12.0%	year 1982
Population	9.74 million	year 1981
Annual population growth	0.5 %	years 1980-1990
Annual Consumption:		
Flour**	1,000,000 tonnes or 100 kg/capita	year 1982
Meat***	700,000 tonnes or 70 kg/capita	year 1983
Vegetable Oil+	280,000 tonnes or 28 kg/capita	year 1983

- \* Public debt in 1983 was 42.4% of GNP (EC Commission report)
- \*\* based on 1,260,000 tonnes non-feed consumption of soft wheat. Same consumption forecast for 1984.
- \*\*\* based on 500,000 tonnes domestic production and 200,000 tonnes imports in 1983.
- + based on annual production of between 240-330,000 tonnes olive oil.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

July 1984 forecasts of grain and feed crop acreage for 1984/85 crop year in thousand hectares (preliminary 1983/84 crop year figures in brackets):  
soft wheat 637 (713); durum wheat 301 (302); corn 176 (171);  
barley 300 (312).

July 1984 forecast of grain and feed crop yields for 1984/85 crop year in thousand tonnes (preliminary 1983/84 crop figures in brackets): soft wheat 1,911 (1,464); durum wheat 784 (561); corn 1,600 (1,550);  
barley 790 (572).



## 2. Foreign Exchange Situation

Since being unpegged from the U.S. dollar in August 1983, the Greek drachma has depreciated by over 30% against the U.S. and Canadian dollars, and by smaller percentages against other currencies. While this move has assisted tourism and exports somewhat, it has increased the cost of imports in terms of drachmas, and kept the annual inflation rate up to 18%. The drachma is still weak against the dollar and other major currencies and a further adjustment of exchange rates should not be ruled out during 1984.

While not imposing actual quantitative import restrictions, which would be at variance with GATT and EC regulations, the government, through the introduction of strict profit margins and other bureaucratic measures, is endeavouring to cut down the high level of imports of what it considers luxury and non-essential products, in an endeavour to improve the large imbalance in the country's foreign trade, current account and balance of payments. Foreign currency reserves showed a further drop from US\$1,042 million on December 31, 1983 to US\$954 million on March 31, 1984. However, it is unlikely that restrictions will be introduced on the import of essential foods and other agricultural products, which cannot be provided or substituted by domestic production, including for the time being certain quantities of corn and seed potatoes. The Ministry of Agriculture hopes to be self-sufficient in these two latter items within the next five years.

Greece receives EC economic and US military aid.

## 3. Fertilizer Situation

Preliminary estimates of the Ministry of Agriculture and the Agricultural Bank (February 1984) indicate Greek chemical fertilizer production at 1,725,000 tonnes in 1983 compared to 1,615,000 tonnes in 1982. Increased production is planned at the Phosphate Fertilizer Industry S.A. plant through the installation of a 400 tonne/day capacity ammonia unit and a 700 tonne/day capacity sulphuric acid unit to replace the existing out-dated 350 tonne/day capacity unit, which uses indigenous pyrites as raw material.

According to the following Agricultural Bank of Greece figures 150,000 tonnes of fertilizers were imported in 1983:

Ammonium Sulphate (21-0-0) - 110,000 tonnes from Italy, Poland and USSR.  
Urea (46-0-0) - 18,000 tonnes from Romania.  
Potassium Sulphate (0-0-50/52) - 15,000 tonnes from France and Germany.  
Potassium Nitrate (13-0-46) - 7,000 tonnes from Israel.

The total consumption of fertilizers in CY1983/84 to cover the needs of Greek agriculture has been estimated at 2 million tonnes, including stock carryover. At the beginning of CY 1984/85 total fertilizer stocks were estimated at 354,000 tonnes, based on preliminary information supplied by the Agricultural Bank. In September 1983, the Ministry of Agriculture had estimated the total needs of fertilizer input for 1984 at 2,070,300 tonnes - 1,915,000 tonnes domestic production and 155,500 tonnes imports.

#### 4. Import Mechanism

Since Greece's accession to EEC (January 1981), all grain imports have been made by the KYDEP Cooperative State Agency. In compliance with the EEC policy of free trade in grains, Greece must permit private grain dealers to participate in this trade, but this has not yet happened. Greece is self-sufficient in grains with the exception of corn and occasionally barley, and KYDEP regularly announces international calls for tenders for corn. 1984 corn import requirements are estimated at 350 thousand tonnes.

#### 5. Grain Industry Infrastructure

Grain handling pooling and imports continue to be controlled by KYDEP (Home Products Handling Cooperative Organization), while grain exports from outstanding grain stocks remain the responsibility of the Ministry of Commerce, which calls for offers on an international tender basis. Flour millers and feed producers continue to purchase directly from growers or Ministry Commerce State grain stocks.

#### 6. Government Policies Affecting Grain and Agriculture

Greece's grain and agricultural policies must be gradually aligned to the EC/CAP. Greece is self-sufficient in grains except for corn which continues to be imported from the USA and France in reduced quantities as domestic production increases. Greece is self-sufficient in soft wheat and durum with limited imports of barley from EC supplies. KYDEP is still interested in exploring possibility of importing corn from Canada (Ontario) against Greek products (offsets). Meat consumption and imports are on the increase. Greek government wishes to promote cattle breeding, but it is difficult to compete against EEC lower priced beef/veal. Import levies make it prohibitive to import either beef/veal or breeder cattle from Canada and difficult for Canadian poultry meat.

#### 7. Canadian Grain Marketing Prospects

Projections to 1985 or 1990 of national grain import needs: None, but corn imports will gradually be reduced/eliminated, once anticipated production increases materialize.

Canadian marketing initiatives: No sales prospects for wheat, durum or barley. Feed corn opportunities, but Canadian (Ontario) crop is usually committed to traditional customers and no interest has been shown to date by Canadian corn exporters in offering to Greece.

Marketing possibilities for Canadian special crops: When domestic production of lentils and beans are insufficient, imports are permitted through the private trade. Once a year, Canadian producers/exporters are regularly informed of requirements.



7. Canadian Grain Marketing Prospects cont'd

Greek State agricultural cooperative crop handling and distribution agency KYDEP just recently expressed interest in producing Triticale as animal feed, and has requested post assistance in obtaining technical know-how on cultivation and processing into animal feed. KYDEP also asked which varieties are available for export from Canada. Significant quantities of Canadian canary seed have already been sold in packaged form through Greek supermarkets and pet shops. This trade reached 451 tonnes valued at Cdn\$272,427 in 1983.

8. Processing Facilities

	Year 1983			
	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills*	234	230	2,600	2,000
Compound Feed Mills	1,491	1,450	5,325	5,000
Malt Houses	4	4	43	43
Oilseed Crushers**	46	46	880	670

\* An additional undisclosed number of small village milling facilities increases total annual capacity to 3,200 thousand tonnes.

\*\* Includes 4 soyabean crushers established since 1981, which processed 220 thousand tonnes soybean meal in 1983.

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port*</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Piraeus	20	250
Thessaloniki	20	250
Volos	15	160
Total Capacity	55	660

\* Operated by respective Port Authorities.

In addition KYDEP operates modern grain elevators of 9,400 thousand tonnes capacity and old grain storage warehouses (600 thousand tonnes) throughout Greece. An EEC/Greek state program for the construction of metal silos of one million tonne capacity during 1981-84 is underway.

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	572				572
Suitable for malting	60 - 70%				

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	4 (4)	W. Germany, Holland
Malting barley		

3. Additional Information

Change in malting capacity: All five Greek breweries (one (FIX) closed in 1983) have their own malting facilities of which two (Henninger in Thessaloniki and Loewenbrau in Patras) were established in 1981/82.

Malt Exports: None.

Trend in beer consumption: After a steady increase in recent years, assisted by the growth in tourism and served by the opening of new breweries, a slowdown in tourist arrivals in 1982/83 and price increases have resulted in customer resistance and a slight reduction in sales. Annual per capita beer consumption is still relatively low at 25 litres.

Market potential for Canadian malt and/or malting barley: Greece is self-sufficient in malting barley. The malt import situation is unlikely to change in the foreseeable future in view of German and Dutch interests in Greek breweries (Amstel, Carlsberg, Henniger, Loewenbrau).

III. OILSEEDS

1. Import Policy

Import Tariffs:	i) Oilseeds	- Free
	ii) Crude oil	- 20% levy
	iii) Oilseed meal-	Soybean 7.6%; others free
	iv) Refined oil	- 20% levy

Importation procedure and structure: On January 24, 1984, the Ministry of Commerce invited interested crushing mills to file their application through March 20, 1984 in order to participate in the CY 1984 allocation of imports of duty-free oilseeds (117,000 tonnes), hydrogenated fats (18,000 tonnes) and seed oils (6,000 tonnes). The above 117,000 tonnes of oilseeds is equivalent to 27,500 tonnes of seedoil.

### III. OILSEEDS cont'd

For 1984 an amount of oilseeds equivalent to 20,000 tonnes of oil can be imported into Greece duty free. Applications by traders for participation include allocation of import quotas for the following commodities:

- Unlimited amounts of oils for any uses except food (tariff class: 1507 D1) with 8% duty when they originate from third countries and free when from EEC.
- 4,500 tonnes of seed oils for polishing sultanas with 15% duty when from third countries and free when from EEC (tariff class: 1507 D 2B and 2BB).
- 1,500 tonnes for therapeutic uses with the same terms as above.
- And 18,000 tonnes of animal and vegetable fats partly or totally hydrogenated with 24% duty when they are imported from third countries and 6.5% when from EEC (tariff class 1512 B).

2. Additional factors: Greece's oil picture depends in large part on its olive oil output, which has an alternate year production pattern. Consumption of olive oil remains fairly constant, with other oils increasing in use, especially as shortening, margarine and table oil ingredients. Sunflower oil and cottonseed oil are prime examples of this trend. In 1986 when soybean oil can be used in Greece, instead of being exported (mandatory) it is expected that it too will find expanded use in this sector of the industry, perhaps to the detriment of olive oil.

### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean		245	228	USA, Argentina
Cottonseed	190	7	160	China, Ethiopia, Togo
Sunflower	20	3	23	Hungary, USA
TOTAL	210	255	411	

<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u> (crude) (refined)
Olive	231	
Soybean	39	
Cottonseed	26	
Sunflower	10	
Total	306	

<u>Meal</u>	<u>Production</u>	<u>Imports</u>	
Soybean	190	6	Spain, USA
Cottonseed	132		
Sunflower	11		
TOTAL	333	6	



III. OILSEEDS cont'd

4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity</u>
4	Soybean	510,000 tonnes annual capacity, only 228,450 tonnes actually crushed in CY 1984

5. Export Policy

Export assistance and control measures: Crushing plants import soybean duty free, but are obliged to export all soybean oil produced, except for small quantities purchased by the government.

Export procedure and structure: Olive oil exports are administered by YDAGEP (Elaiourgiki), the Greek intervention agency of the Ministry of Agriculture. All exports to both EEC and non-EEC countries are made according to EEC instructions through tenders. Olive oil producers receive subsidies.

6. Exports of oilseeds and products by type, thousands of tonnes:

Crop Year 1983/84

<u>Oils</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Olive	231	66	Italy, France, USSR
Cottonseed	26		
Soybean	39	35	Egypt, Cyprus, Turkey
TOTAL	296	101	
<u>Meals</u>			
Soybean	155	20	Libya, Cyprus, Yugoslavia
Cottonseed	132	22	Italy, Malta, Libya
Sunflower	11	4	France, U.K., Romania
TOTAL	298	46	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat*	1,465 (2,236)	544 (245)	33	2,042 (2,481)
Durum wheat	561 (747)	202 (266)		763 (1,013)
Flour/Semolina**				
TOTAL	2,026 (2,983)	746 (511)	33	2,805 (3,494)

\* of which spring wheat (soft) approx. 100%

\*\* Included in soft wheat and durum supply

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	1,100 (1,200)	200 (180)		(1) 340 (3) (497)	402 (544)		2,042 (2,481)
Durum wheat	300 (310)	20 (5)		(2) 433 (4) (556)	12 (202)		763 (1,013)
Flour Semolina							
TOTAL	1,400 (1,510)	220 (185)		733 (1,053)	414 (746)		2,805 (3,494)

Note: Wheat and durum used by milling industry for production of flour and semolina - Also amounts kept by farmers for consumption and seed.

Export Destination - Flour - Iraq (125) Other Middle East, African and Far East Countries.  
 Soft wheat - Italy (50), Algeria (8)  
 Durum - Italy (315), Belgium (18), Algeria (18), Others  
 (1) 282 Flour (3) 82 Semolina  
 (2) 216 Flour (4) 31 Semolina

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	ALL Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash

Commercial credit

33 -France

33

The KYDEP State agency has announced the sale of 500,000 tonnes of surplus Greek soft wheat at \$137 per tonne. The buyers were not disclosed so that it is unknown whether hard currency will be earned from this deal or whether Greece will have to accept payment in kind through some form of barter deal.



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	1,550 (1,449)	188 (305)	300 (584)	2,038 (2,338)
Barley	572 (872)	188 (155)	115 (41)	875 (1,068)
Sorghum	82 (80)			82 (80)
Oats	6 (7)			6 (7)
Rye				
TOTAL	2,210 (2,408)	376 (460)	415 (625)	3,001 (3,493)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	150 (150)	1,800 (2,000)			5	83 (188)	2,038 (2,338)
Barley	140 (140)	650 (740)				85 (188)	875 (1,068)
Sorghum	10 (10)	72 (70)					82 (80)
Oats	6 (7)						5 (5)
Rye							
TOTAL	306 (307)	2,522 (2,810)			5	168 (376)	3,001 (3,493)

Of which poultry - 40-50%

Export Destination:

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	ATT
Corn					300* (186)*	300	(584)
Barley					115 (41)	115	(41)
Sorghum							
Oats							
Rye							
TOTAL					415 (227)	415	(625)

\* France

## I R E L A N D

Economic classification: Industrial Market economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$ 4,300		year 1983
Annual per capita GNP	US\$ 5,150		year 1983
Average annual growth 1960-80	3.1 %		
Annual inflation rate 1970-80	9.7 %		
Annual inflation rate (current)	8.3 %		
Volume of imports	11.5 billion US\$		year 1983
Of which food	13.5 %		year 1983
Of which fuels	15.0 %		year 1982
Principal foreign exchange earning export: Computers & Parts			
Debt service as % of GNP	16.5 %		year 1982
Debt service as % of exports	22.2 %		year 1982
Population	3.5 million		year 1983
Annual population growth	1.0 %		years 1980-2000
Annual Consumption:			
Flour	20.1 kg/capita		year 1982
Meat*	79 kg/capita		year 1982

\* beef, mutton, pigmeat and poultry

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

<u>Crop</u>	<u>Estimated Quantity</u>		<u>Estimated Value</u>	
	<u>(000 tonnes)</u>		<u>(IR£000)</u>	
	<u>1982</u>	<u>1983</u>	<u>1982</u>	<u>1983</u>
Wheat	360	317	39,894	41,976
Oats	33	37	3,119	4,390
Barley	1,171	954	119,823	123,148
Sugar Beet	1,659	1,630	59,614	57,578
Potatoes	254	307	26,260	29,307
Hay	17	17	898	832

In the 1984 crop year the winter wheat acreage is expected to rise to 190,000 acres, which is 71% up from last year's figure of 111,200 acres and 2.25 times the 1981 figure of 84,100 acres. Most of the Irish wheat crop is made up of feeding varieties.

Winter wheat and spring barley yields are good although prices are considered poor. Winter wheat yields are up to four tonnes per acre and for spring barley up to 2½ tonnes per acre. The best ever yields for rape are also being achieved (1½-1¾ tonnes per acre).

#### 2. Foreign Exchange Situation

The Irish pound (punt) has continued to weaken against the dollar. As of December 31, 1983, it was valued at \$US1.13.

### 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			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>thousands of tonnes Annual Capacity</u>	<u>Actual Output</u>
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



9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1981  
- - thousands of tonnes - -

Name of Port	Grain	
	Storage Capacity	Annual Throughput Capacity*
Dublin	60	440
Cork	90	475
Waterford	20	180
Total Capacity	170	1,045

\* tonnes per hour

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	2-Row		6-Row		Total
	Winter	Spring	Winter	Spring	
All Barley		Not Available			1,354
Suitable for malting		Not Available			210

Although total production of barley has declined from 1982/83 (1,406,000) the amount suitable for malting has increased by 3,000 tonnes.

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

Malt	Tonnes	Principal supplier(s)
Malting barley	1,148 (268)	Britain
	N/A	

Change in malting capacity: There has been no real change within the industry.

Malt exports (1983):

United Kingdom	8,620 tonnes
Nigeria	13,719 "
Cameroon	1,137 "
Phillipines	8,056 "
Japan	2,230 "
Other	3,171 "

Trend in beer consumption: The total beer market has declined from 1.23 million kegs in 1982/83 to 1.18 million kegs in 1983/84. While ale sales fell by 12% and stout sales by 4%, lager sales were up by 20%. Heavy excise duty and VAT rates have brought about falling sales.

Market potential for Canadian malt and/or malting barley: Negligible. Most of Ireland's malting barley is grown on contract between the brewers and the National Grain Committee of the Irish Farmers Association. The brewers are also associated with the main malsters.

### III. OILSEEDS

#### 1. Import Policy

Import tariffs: EEC Regulations and Commons External Tariff apply.

Non-tariff barriers: EEC Regulations apply.

Importation procedure and structure: Under auspices of private importers.

2. Additional Factors: Irish Oil and Cake Mills Limited which established rapeseed crushing facilities in 1982 went into receivership in late 1983. Production is continuing and the company will be sold as a going concern. The company also refines vegetable, animal and marine oils.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Processed</u>	<u>Principal Sources of Imports</u>
Rape	10 (est)			
<u>Oil</u>				
Rape	Not disclosed	6		Netherlands & W. Germany
Soya	" "	13		Netherlands & France
Copra	" "	5		Phillipines & Britain
Palm	" "	4		Indonesia & Malaysia
Others*	" "	10		

\*Sunflowerseed, linseed, palm kernel, peanut

#### Meal

Rape	Not disclosed	18		France, Canada
Soya	" "	201		USA, Brazil, Netherlands
Cotton	" "	40		Brazil, Thailand, Senegal
Groundnut	" "	39		Senegal, Singapore
Others*	" "	22		Argentina, Netherlands

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
1	Rapeseed	Not disclosed

#### 5. Export Policy:

Export Assistance or control measures: EEC Regulations apply.

Export Procedure and structure: Private exporters.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat*	597 (390)	(40)	(143)	(573)
Durum wheat	160 (160)	(20)	(3)	(3)
Flour/Semolina	757 (550)	(60)	(47)	(227)
TOTAL	1,514 (1,100)	(193)		(803)

\*of which spring wheat (90)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	(320)	75 (138)	(1)	18 (10)	(52)	(69)	(590)
Durum/Wheat	(3)						(3)
Flour Semolina	(180)				(2)	(28)	(210)
TOTAL	(503)	75 (138)	(1)	18 (10)	(54)	(97)	(803)

Industrial Use: Not specified Export Destination: Northern Ireland.

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS		
	Canada	U.S.A.	Australia Argentina EEC ATT Others

## WHEAT (including durum)

Cash	(49)	(4)	(93)	(146)
Commercial Credit				
Aid, concessional				
credit, etc.				

## FLOUR (including semolina)

Cash/comm. credit			(47)	(47)
Aid, concessional				

TOTAL	(49)	(4)	(140)	(193)
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## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn		(13)	(170)	(183)
Barley		(30)	(25)	(1,461)
Sorghum				
Oats	105	(2)	(2)	(110)
Rye				
TOTAL	1,459	(45)	(197)	(1,754)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Corn	(135)	(168)			(3)	(12)	(183)
Barley		(1,032)	(138)	(56)	(148)	(87)	(1,461)
Sorghum							
Oats	(14)	(92)	(10)	(3)	(1)	(4)	(110)
Rye							
TOTAL	(149)	(1,292)	(148)	(59)	(152)	(103)	(1,754)

Of which poultry - 25% approx. Export destination: United Kingdom.  
Industrial Use: Malting

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn						(170)
Barley						(25)
Sorghum						
Oats						(2)
Rye						
TOTAL						(196)

I T A L Y

Economic classification:	Industrial Market		
Oil exporter or importer (net):	Importer		
Annual per capita income:	US\$6,120		year 1982
Annual per capita GNP	US\$6,237		year 1983
Average annual growth 1960-80	3.6 %		
Annual inflation rate 1970-80	15.3 %		
Annual inflation rate (current)	12 %		
Volume of imports	80.3 billion US\$		year 1983
Of which food	14 %		year 1983
Of which fuels	28 %		year 1983
Principal foreign exchange earning export:	Machinery, Clothing, Tourism		
Debt service as % of GNP	N/A		
Debt service as % of exports	N/A		
Population	56.6 million		year 1983
Annual population growth	0.7 %		years 1970-1980
Annual Consumption:			
Flour	6,123,600 tonnes or 108 kg/capita		year 1983
Meat	4,306,400 tonnes or 76 kg/capita		year 1982
Vegetable Oil	1,304,000 tonnes or 23 kg/capita		year 1983

I. GENERAL INFORMATION

1. Crop Situation and Outlook

	<u>1983/84</u>		<u>1984/85</u>	
	<u>'000 ha.</u>	<u>'000 t.</u>	<u>'000 ha.</u>	<u>'000 t.</u>
Bread Wheat	1,579	5,615	1,507	5,550
Durum	1,749	2,900	1,809	4,100
Corn	986	6,670	975	6,630
Barley	383	1,175	428	1,450
Oats	209	305	194	430
Rice	183	1,021	N/A	N/A
Sunflower	69	135	N/A	N/A

2. Foreign Exchange Situation

Current 12% inflation continues to drop slowly, but it is still running double the rate on the EC as a whole. The Lire is holding reasonably well in EMS, but continues to drop against dollar, now running over 1750 lire as compared to 1983 average of 1518. Cost of imports is rising, encouraging substitution and exports are increasing strongly thus narrowing trade deficit. There is concern in the government over cost of meat imports, but the situation is largely due to EEC internal policy.



### 3. Fertilizer Situation

	<u>Production</u>	<u>Imports</u>	<u>Exports</u> (1982 in '000 tonnes)	
Urea	935	91	274	Government price controls and low production encourages exports. Phosphate imports are for incorporation in compound products. Potassium Chloride is imported from E. Germany, Israel, USSR, France and Spain.
Amm. Nitrate	779	60	114	
Amm. Sulphate	900	21	508	
Phosphate	1,070	114	-	
Pot. Sulph.	N/A	33	86	
Pot. Chlor.	N/A	563	-	
Cmpd/Complx	2,198	819	581	

### 4. Import Mechanism

Private traders, with occasional transfers of intervention stocks of bread wheat from other EC countries. AIMA (Intervention Agency) has in the past, occasionally held tenders to purchase third country durum from local trading companies. Major change last year in EC import policy requires technical equivalence for re-exports of product imported temporarily for outward processing. This has raised the price of flour and semolina re-exports, and consequently reduced temporary imports of North American bread wheat and durum.

### 5. Grain Industry Infrastructure

There is an increasing concentration of grain and oilseed imports in the hands of a few large trader/importer companies with multi-national operations (Italgrani, Continental, Casillograni, Ferruzzi) and port silo facilities. Little new infrastructure has been created, although mills have increased their own storage capacity. The last few years has seen closure of many smaller mills and pasta plants, and there has been substantial investment in new machinery and plants (high temperature pasta dryers).

### 6. Government Policies Affecting Grain and Agriculture

Grain Production: High EC support encourages increased durum production.

Grain Imports and/or Exports: Changed EC regulations on outward processing has reduced demand for North American bread wheat and durum.

Grain Consumption Patterns: High feedgrain prices encouraging use of wheat for feed, and also encouraging a switch to locally produced grain substitute materials; bread and pasta consumption is in slight decline.

Grain Reserves: AIMA holds large stocks of local durum which should increase considerably due to record crop.

Meat Consumption: Rising slightly.

Implications for Canadian grains: High EC support prices for barley have led to overproduction in the Community; this availability combined with rapid rise of the dollar has made it uneconomical to import Canadian barley, and consequently there has been a sharp drop in Canadian sales. Although the EC outward processing regulations dampen demand for North American bread wheat, traditional quantities of CWRS Utility and CWAD will continue to be required for domestic blending.



## 7. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990 of national grain import needs:

None with any validity. All will depend on EC grain policy decisions, and then only with a certain lag time.

Marketing initiatives to increase Canadian sales: Very little can be done in either short or long term to increase market here, and most efforts must be aimed at hanging on to what we have. Variety development programs, especially for durum, can help us maintain current lead position, but this is currently seriously threatened by high temperature pasta drying techniques.

Marketing possibilities for Canadian "special crops": Specialty crops generally will continue to have a market, as many of these enjoy relatively little EC production subsidy. Good quality clean lentils, beans, and canaryseed, etc. will have a market here in future. Currently, trading and importing in this sector is fragmented, and disrupted by failure of many small companies.

## 8. Processing Facilities

Year: 1979 (most recent)

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	-	1,439	14,840	9,000
Compound Feed Mills	-	900	15,000	7,400
Malt Houses	3	5	-	80
Oilseed Crushers	10	15	2,340	1,750

Since these figures were published, number of flour mills and feed mills (plants) have declined by about 15% but capacity and output remain about the same.

## 9. Storage and Throughput Capacity

### Grain Import Capacity by Port

Year: 1979 (most recent)

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>	<u>Actual Grain Arrivals in '82</u>
Ravenna	507	11,382	528
La Spezia	30	525	237
Napoli	90	720	307
Venezia	100	2,940	270
Savona	50	2,100	279
Genova	105	3,570	257
Ancona	100	3,780	199
Livorno	137	6,762	164
Civitavecchia	36	924	60
Catania	55	672	183
Trieste	35	378	10
Total Capacity	1,245	33,753	2,494

## II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	2-Row		6-Row		Total
	Winter	Spring	Winter	Spring	
All Barley	350	824	-	-	1,174
Suitable for malting	45	75	-	-	120

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

	thousands of tonnes		Principal supplier(s)
	1982	1983	
Malt	100	(100)	France
Malting barley	30	(30)	France

### 3. Additional Information

Change in malting capacity: Stationary, no change expected.

Malt Exports: None Exported.

Trend in beer consumption: The per capita beer consumption was estimated at 17.9 litres in 1981, and continues to grow steadily.

Market potential for Canadian malt and/or malting barley: NIL. The limited requirements of Italy are readily available from other EC countries.

## III. OILSEEDS

### 1. Import Policy

Import tariffs: (i) Oilseeds: Exempt.  
(ii) Crude Oil: 5% for industrial purposes, 10% food oils.  
(iii) Oilseed meal: Soya. 7.4%, others exempt.  
(iv) Refined oil: 8% for industrial purposes, 15% food oils.

Non-tariff barriers: No particular non-tariff barriers.

Importation procedure and structure: Private importers, no government involvement.

### 2. Additional factors

Major food oil is olive oil, of which Italy is major producer. Thus, even though Italy is major oilseed importer and crusher, government will push for EC measures to increase price of seed oils so as to keep olive oil demand from falling.

III. OILSEEDS continued

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soya	58	1,538		U.S.A., Argentina, Paraguay
Sunflower	185	75		U.S.A., Hungary
Rape	3	15		France, Hungary
Corn Germ	51	21		
Others*	151	33		
TOTAL	448	1,682		

\*Peanut, palm, flax, grapeseed

<u>Oil</u>		<u>Crude/Refined</u>		
Soya	271	19	13	Germany, France
Corn	28	60	-	U.S.A., Belg./Lux., France
Rape	7	26	23	France, Germany, Netherlands
Sunflower	106	10	5	Germany, Hungary
Others*	36	127	53	
TOTAL	448	242	94	

\*Peanut, palm flax

<u>Meal</u>			
Soya	1,277	1,449	U.S.A., Brazil, Argentina
Rape	10	9	France, India
Flax	5	38	Argentina, Egypt
Sunflower	146	27	
Others*	55	39	
TOTAL	1,493	1,562	

4. Number and Capacity of oilseeds crushing plants.

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
	6	Only Soybeans	3,600
	4	Only high oil yield seeds	700
	5	All types	3,500
TOTAL	15		7,800

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	5,615 (5,985)	300 (560)	2,300 (1,444)	8,215 (7,989)
Durum wheat	2,901 (2,915)	400 (310)	750 (1,038)	4,051 (4,263)
Flour/Semolina				
TOTAL	8,516 (8,900)	700 (870)	3,050 (2,482)	12,266 (12,252)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports*	Carry-out	Total
Wheat	6,115 (6,257)	900 (400)		400 (430)	350 (602)	450 (300)	8,215 (7,989)
Durum wheat	2,001 (2,254)	-		350 (350)	950 (1,259)	750 (400)	4,051 (4,263)
Flour/Semolina							
TOTAL	8,116 (8,511)	900 (400)		750 (780)	1,300 (1,861)	1,200 (700)	12,266(12,252)

\*Above exports almost totally in form of flour, semolina and pasta.

Export Destination: Algeria(Semolina)  
Libya (Semolina)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	ALL Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash	750 (741)	750 (760)				
Commercial Credit						
Aid, concessional						
credit, etc.			20 (23)	1,530 (958)		3,050 (2,482)

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional:



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	6,669 (6,847)		1,600 (1,282)	8,269 (8,129)
Barley	1,174 (1,060)		1,200 (1,336)	2,374 (2,396)
Sorghum	104 (91)	5	(7)	109 (98)
Oats	307 (359)	80	(77)	387 (436)
Rye	28 (32)	2	(2)	30 (34)
TOTAL	8,282 (8,389)	2,887 (2,704)		11,169 (11,093)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	280 (280)	7,219 (7,073)	300 (300)	320 (310)	150 (166)		8,269 (8,129)
Barley	20 (20)	1,954 (1,981)	200 (200)	100 (100)	100 (95)		2,374 (2,396)
Sorghum		109 (98)					109 (98)
Oats		347 (396)	20 (20)	20 (20)			387 (436)
Rye		30 (34)					30 (34)
TOTAL	300 (300)	9,659 (9,582)	520 (520)	440 (430)	250 (261)	(20)	11,169 (11,093)

Of which Poultry: 30%  
Industrial Use: Starch  
Export Destination: Libya

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	ATI
Corn		300 (679)		300 (236)	750 (277)	250 (90)	1,600 (1,282)
Barley	150 (304)	(14)			1,050 (1,018)		1,200 (1,336)
Sorghum		(3)		2 (3)	5 (7)		5 (7)
Oats					77 (71)		80 (77)
Rye					2 (2)		2 (20)
TOTAL	150 (304)	300 (696)		304 (240)	1,884 (1,377)	250 (90)	2,887 (2,704)

Principal Others: Yugoslavia

NETHERLANDS

Economic classification: Developed/Industrial economy  
 Oil exporter or importer (net): Importer  
 Annual per capita income: US\$8,666 year 1983  
 Annual per capita GNP US\$11,470 year 1980  
 Average annual growth 1960-80 3.2 %  
 Annual inflation rate 1970-80 8.4 %  
 Annual inflation rate (current) 2.8 %  
 Volume of imports 76.9 billion US\$ year 1980  
 Of which food 15.0 % year 1979  
 Of which fuels 20.0 % year 1979  
 Principal foreign exchange earning export: Natural Gas,  
 Agriculture  
 Population 14.3 million year 1981  
 Annual population growth 0.5 % years 1980-2000  
 Annual Consumption:  
 Flour 54 kg/capita year 1981  
 Meat 62 kg/capita year 1981

I. GENERAL INFORMATION

1. Crop Situation and Outlook

<u>Acreage (hectares)</u>	<u>1982</u>	<u>1983</u>
Winter wheat	112,800	141,700
Summer wheat	18,100	6,500
Winter barley	6,600	10,200
Summer barley	37,100	27,200
Other	29,800	20,300
TOTAL GRAINS	204,400	205,900

In 1983 there was an increase of 1,500 hectares seeded to grains over 1982. This trend will continue with Groningen and Zeeland provinces accounting for most of the increases.

2. Foreign Exchange Situation

With strengthening of the dollar (both US and Canadian) the Netherlands grain import requirements will reflect the general trend of reductions in usage of North American feedstuffs. The Netherlands currency is tied within the European Monetary System to other EEC currencies and thus French and West German currencies are presently much more attractive than Canadian dollars.

3. Fertilizer Situation

The agrifoods industry is an extensive user of all types of fertilizers.

4. Import Mechanism

Subject to import levy system and other import requirements and regulations of EEC Common Agricultural Policy.

5. Grain Industry Infrastructure

Netherlands has a complex infrastructure for the grains industry. All the major grain firms are present in the Port of Rotterdam together with grain transfer storage facilities of the Grain Elevator Maatschappij. This country is a leading trading center for grains of all types.

6. Government Policies Affecting Grain and Agriculture

The EEC Common Agricultural Policy.

7. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990 of national grain import needs:

Not known; however as population is stable and there is no public debate we do not see any significant shifts for the Netherlands as an entity.

Marketing possibilities for Canadian special crops: There is currently a substantial trade in these crops.

8. Processing Facilities

Year: 1981 (most recent)  
thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	52	55	1,200	1,000
Compound Feed Mills	600	700	1,500	1,400
Malt Houses	5	5	150	120
Oilseed Crushers				

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1981 (most recent)

<u>Name of Port</u>	- - thousands of tonnes - -	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Rotterdam	500	19,000
Amsterdam	109	4,000

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley		210	38		248
Suitable for malting		75			75

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

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
Malt	132	(116)	EEC
Malting barley	120	(105)	EEC

3. Additional Information

Malt Exports: (includes EC intra-trade)

1983 - 43,000 Tonnes  
1982 - 60,000 Tonnes  
1981 - 24,000 Tonnes

Annual per capita beer consumption:

1983 - 87.3 litres per capita  
1982 - 81.9 liters " "  
1981 - 89.5 liters " "  
1980 - 86.5 litres " "

Market potential for Canadian malt and/or malting barley: Perhaps small quantities of malting barley.



### III. OILSEEDS

#### 1. Import Policy

Import procedure and structure: Imports mainly by private importers, i.e. crushing industry and animal feed manufacturers. No particular licensing for oilseeds except rapeseed and sunflowerseed, where an import license with security is compulsory in the light of the EC subsidy system. Other products can be imported with only a statistical form. Exception exists for meals from so called "oorsprong landenbesluit" countries (mainly Eastern Europe, and China), where an import license is being given to anyone asking for it. For olive oil there is a system of certification and an import levy.

2. Additional factors: Apart from big soybean crushings, crushings of rapeseed and sunflowerseed have increased enormously. The opening of a new multi-seed plant in 1981 meant an additional capacity of about 400,000 tonnes (sunflowerseed). Total multiseed capacity increased from 100,000 tonnes in 1980 to 600,000 tonnes in 1984.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources</u>	
				<u>U.S.A.</u>	<u>France</u>
Soybean		2,852.8	2,496.5	2,672.6	0.1
Sunflower		304.7	288.0	88.6	212.4
Rapeseed	38.3	229.6	222.3		120.0
<u>Others</u>		9.8	9.3	0.2	
TOTAL	38.3	3,396.9	3,016.1	2,761.4	332.5

<u>Oil Type</u>	<u>Production</u>	<u>Imports of Oils</u>		<u>Principal Sources</u>	
		<u>(Crude)</u>	<u>(Refined)</u>	<u>EEC</u>	<u>Malaysia</u>
Palmkernel		94.1	3.0	3.1	79.7
Palmoil		146.5	52.8	7.5	79.9
Rapeseed	86.8	65.0	16.1	80.6	
Sunflower	125.6	53.0	9.3	16.1	
Soybean	445.4	24.4	17.2	41.6	
<u>Others</u>	2.4	162.3	14.4	34.7	
TOTAL	660.2	545.3	112.8	183.6	159.6

<u>Meal Type</u>	<u>Production</u>	<u>Imports</u>	<u>Principal Sources of Imports</u>		
			<u>E.E.C.</u>	<u>U.S.A.</u>	<u>Brazil</u>
Soymeal	2,008.0	1,579.2	39.2	1,103.8	316.8
Rapeseed	134.0	215.3	50.8		
Sunflower	161.9	168.3	34.1	35.4	0.5
Copra		407.3	7.9		
Palmkernel		316.0	4.9		0.3
<u>Others</u>	6.6	1,025.1	21.2	406.8*	134.4
TOTAL	2,310.5	3,711.2	158.1	1,546.8	452.0

\* Corn 389.0

III. OILSEEDS cont'd

4. Export Policy

Export assistance or control measures: Export subsidies for EC-produced rapeseed.

Export procedure and structure: Private exporters. No special procedures.

5. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Seed Type	Production	Exports	Destinations		
			E.E.C.	OTHERS	
Soybeans	-	111.7	103.9	7.8	
Sunflower		8.1	1.8	6.3	
Rapeseed	38.3	15.9	14.4	1.5	
Others	-	1.0	0.8	0.2	
TOTAL	38.3	136.7	120.9	15.8	
Oil Type					
Rapeseed	86.8	93.3	69.8	23.5	
Sunflower	125.6	121.7	115.5	6.2	
Soybean	445.4	293.7	223.1	70.6	
Palm		95.1	92.2	2.9	
Plamkernel		38.6	34.3	4.3	
Others	2.4	102.4	78.2	24.2	
TOTAL	660.2	744.8	613.1	131.7	
Meal Type					
Soymeal	2,008.0	2,036.8	894.8	1,040.9	101.1
Sunflower	161.9	135.7	135.7		
Rapeseed	134.0	122.4	121.4		1.0
Cornmeal	-	45.7	45.7		
Others	6.6	81.5	81.5		
TOTAL	2,310.5	2,422.1	1,279.1	1,040.9	102.1

6. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
4	Soybean	Figures not available
1	Rapeseed	
1	Sunflower	



(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	177 (247)	80 (80)	1,920 (2,164)	2,000 (2,244)
Barley	45 (40)	45 (40)	722 (765)	944 (1,052)
Sorghum	2 (2)	2 (2)	37 (39)	39 (41)
Oats	61 (136)	5 (5)	50 (15)	116 (156)
Rye	26 (26)	4 (5)	55 (43)	85 (74)
TOTAL	264 (409)	136 (132)	2,784 (3,026)	3,184 (3,567)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Other		Exports	Carry-out	Total
	Human	Animal	Industrial	(seed, waste)			
Corn	50 (50)	1,000 (1,217)	820 (817)	20 (20)	30 (60)	80 (80)	2,000 (2,244)
Barley	14 (14)	500 (501)	330 (329)	15 (13)	40 (150)	45 (45)	944 (1,052)
Sorghum	35 (36)	35 (36)	14 (14)	6 (6)	2 (3)	2 (2)	39 (41)
Oats	13 (13)	48 (90)	14 (14)	6 (6)	30 (28)	5 (5)	116 (156)
Rye	60 (61)	12	2 (2)	2 (2)	7 (7)	4 (4)	85 (74)
TOTAL	137 (138)	1,595 (1,844)	(1,164)(1,160)	43 (41)	109 (248)	136 (136)	3,184 (3,567)

of which poultry: 50% Export Destination: EEC  
 Industrial Use: Corn: Starch; Barley: Malt

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	AIT
Corn	250 (251)	50 (47)	1,610 (1,856)	10 (10)	1,920 (2,164)	722 (765)	
Barley			33 (35)	4 (4)	37 (39)		
Sorghum			30 (15)	20	50 (15)		
Oats			40 (28)		55 (43)		
Rye	10 (11)	5 (4)					
TOTAL	10 (11)	255 (255)	50 (47)	2,435 (2,699)	34 (14)	2,784 (3,026)	



## UNITED KINGDOM

Economic classification:	Industrial Market economy		
Oil exporter or importer (net):	Exporter		
Annual per capita income:	US\$4,590		year 1982
Annual per capita GNP	US\$5,360		year 1982
Average annual growth 1960-80	2.2%		
Annual inflation rate 1970-80	14.4%		
Annual inflation rate (current)	5.2%		
Volume of imports	120.1 billion US\$		year 1980
Of which food	15.0%		year 1979
Of which fuels	12.0%		year 1979
Principal foreign exchange earning export:	Oil & manufactured goods		
Population	56.2 million		year 1981
Annual population growth	0.2%		years 1980-2000
Annual Consumption:			
Flour	3,495,000 tonnes	or 59.4 kg/capita	year 1982
Meat	3,046,000 tonnes	or 54.1 kg/capita	year 1982
		(edible weight)	
Oils & Fats	1,323,000 tonnes	or 23.5 kg/capita	year 1982
		(fat content)	

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Record wheat and oilseed rape crops are expected in the UK in 1984. Wheat production is likely to be within the range of 11.5 to 12.0 million tonnes compared with 10.9 million in 1983. Rapeseed production may exceed 800,000 tonnes for 1984, up substantially from 560,000 in 1983. Barley production will be about the same as last year at 10.2 million tonnes versus 10.1 in 1983. Milling wheat varieties make up only 24% of the 1984 crop wheat area whereas in 1983 they represented about 35% of the area. The protein content of the 1984 wheat crop is expected to be about 11%, up from the 1983 crop level of 10.6%.

#### 2. Foreign Exchange Situation

During first quarter of 1984 Britain had £838 million surplus on current account.

### 3. Fertilizer Situation

Plentiful supplies of fertilizers are available to the UK agricultural industry. Total fertilizer consumption figures for 1982/83 are given below in thousand metric tonnes.

Nitrogen	1,500	Between 1950 and 1983 consumption of fertilizer increased at an average annual rate of 3%. The increase in nitrogen consumption over the same period averaged 6% per year.
Phosphates	400	
Potassium	500	
Total	2,400	

### 4. Import Mechanism

Private importers purchase grain from the international trade under EEC Common Agricultural Policy Import regulations.

### 5. Grain Industry Infrastructure

Three major milling organizations and two major grain trade firms purchase non-EEC wheat directly for virtually all of the U.K. and most of Ireland. The three milling Groups, Mardorf Peach/Associated British Foods, Rank Hovis McDougall, and Spillers Milling account for about seventy-five percent of non-EEC origin imported wheat which corresponds roughly to their collective share of the U.K. flour market. The balance of the flour market is supplied by smaller independent mills who purchase non-EEC wheat from two major trade houses namely Usbornes in the South-East of England and Milford Grain in the North-West. Alexanders, a small trading firm associated with Halls of Ireland, also purchase third country wheat for Irish mills. This market configuration appears to be stable.

### 6. Government Policies Affecting Grain and Agriculture

The current CAP favors the production of cereals and oilseeds in the Community and in the UK. It is likely that measures designed to limit cereal production in future will be introduced before too long. At present, however, the likely scenario is that grain production will continue to increase over the next few years. As a result, the EEC and UK cereal exports are likely to increase although this year's wheat will be subject to voluntary restraint as last year. This means that continued high levels of wheat feeding will likely take place this year particularly in the UK, replacing in part feed barley, more of which will then be available for export.

Imports of Canadian wheat have declined in recent years and are expected to continue to decline as a direct result of CAP. The high levy charged on third country wheat imported into the Community to ensure preference for Community wheat makes Canadian wheat, levy-paid, in the Community so costly relative to Community supplies that the substitution of gluten extracted from EEC wheat for Canadian wheat is now economically attractive. A levy charged on imported barley has virtually eliminated third country barley from the UK market.

7. Canadian Grain Marketing Prospects

A report entitled the Next Five Years, published by the Ministry of Agriculture in 1983, suggested that the need for significant quantities of third country wheat is expected to continue although home grown wheat is likely to claim a larger share of the grist in the future.

Marketing initiatives: It appears that the only way to halt the decline in Canadian wheat exports to the UK is to achieve better terms of access to the Community for quality wheat, that is reduced levies.

Marketing possibilities for Canadian special crops: Good continuing market for mustard seed, white pea beans, century yellow peas and canary seed with smaller demand for buckwheat and lentils. Interest in triticale continues.

8. Processing Facilities

Year: 1982

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	49	98	3,900	3,536
Compound Feed Mills	300	450		
Malt Houses	N/A	50	N/A	1,835
Oilseed Crushers	8	8	N/A	1,342

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Tilbury	100	2,200
Seaforth	133	1,750
Bristol	62	202
Forth	55	250
Clyde	185	800
Belfast	80	1,000
Lowestoft	13	300
Total Capacity	628	6,502



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	5,838	4,898	218	-	10,954
Suitable for malting	865	3,688	33		4,586

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

	thousands of tonnes		Principal supplier(s)
Malt	33	(27)	Sweden, Ireland, Finland, France
Malting barley	90	(80)	Australia, Bel-Lux, Ireland

3. Additional Information

Malting capacity: Situation static. U.K. usage of barley by maltsters and distillers in '000 tonnes:

	<u>1975/76</u>	<u>76/77</u>	<u>77/78</u>	<u>78/79</u>	<u>79/80</u>	<u>80/81</u>	<u>81/82*</u>	<u>82/83</u>
Imported	173	132	123	95	60	32	12	5
Home Grown	1,674	1,751	1,847	1,930	2,040	1,881	1,884	1,870
Total	1,847	1,884	1,970	2,050	2,100	1,913	1,896	1,875

\* Adjusted from a 53 week statistical year.

	UK Malt Exports '000 tonnes			
	<u>1979/80</u>	<u>1980/81</u>	<u>1981/82</u>	<u>1982/83</u>
Aug/July total	<u>202.3</u>	<u>233.5*</u>	<u>366.9*</u>	<u>374.1</u>
Total Available	<u>Aug/July</u> 202.3	<u>Aug/Feb</u> 130.0	<u>Sept/July</u> 346.2	<u>Aug/July</u> 374.1
Of which:				
Netherlands	7.1	2.0	19.9	25.6
West Germany	11.1	6.4	25.1	45.2
USSR	7.8	5.0	38.9	57.9
Nigeria	56.4	30.1	49.9	62.5
South Africa	6.2	15.8	24.3	28.1
Japan	44.2	33.5	54.3	50.2
Philippines	8.8	-	19.8	11.0
Venezuela	10.2	7.0	22.3	20.3
Brazil	15.2	11.9	21.5	17.3

\* Estimated



II. MALT AND MALTING BARLEY cont'd

Trend in beer consumption: Beer consumption is decreasing. Beer production peaked in 1979. By 1983 it had fallen by 11% from the level.

U.K. beer consumption in millions of bulk barrels:

<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>
41.67	40.02	38.08	37.22

Market potential for Canadian malt/malting barley: This market is very limited. CAP import levy makes third country barley non competitive with EEC barley. In years of bad harvest conditions resulting in poor malting quality of EEC barley there is potential interest in third country supplies including Canada.

III. OILSEEDS

1. Import Policy

Import Tariffs:	(i) Oilseeds:	Free	
	(ii) Crude oil:	5%	
	(iii) Oilseed meal:	Free	(Soya 7.4%)
	(iv) Refined oil:	5%	

Importation procedure and structure: Private importers

2. Additional factors: EEC production subsidies in operation for rapeseed, sunflower seed and flaxseed.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Rapeseed	565	125	405.1	France, FRG, Denmark
Mustard seed	Very Limited	0.8		Canada, Netherlands
Flaxseed	Minimal	60	40.0	Canada, PRC, Netherlands
Soybeans		451.1	1,088.9	Netherlands, USA
Others		198.3	171.9	
TOTAL		835.2	1,705.9	

<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u>		
		<u>(crude)</u>	<u>(refined)</u>	
Soy	178.9	77.9	27.4	Netherlands
Rapeseed	160.0	11.7	50.8	FRG, France, Netherlands
Sunflower	12.6	27.8	9.9	France, Belgium
Palm kernel	30.6	47.1	3.3	Nigeria, Malaysia, Netherlands
Other	47.8	195.5	48.8	Gambia, Nigeria, New Guinea
TOTAL	430.9	360.0	137.2	

3. Supply of oilseeds and products by type, thousands of tonnes: cont'd

Base year: 1983

Meal	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean		1,165		USA, Belgium
Rapeseed		81		France, India, FRG
Cotton		79		India, Burma, PRC
Sunflower		16		FRG, Spain, Netherland
Others		596		Philippines, Burma, China
TOTAL		1,937		

4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity ('000 tonnes/yr)</u>
5	Rapeseed	535-650
1	Soybeans	300-400
1	Flaxseed	25
1	Palm Kernel etc	35-40
	Other*	90-100

\*shea nuts, illipe, copra, maize germ, flaxseed and supplementary crushings of rapeseed.

5. Export Procedure: Private exporters.

6. Additional factors: Exports are primarily to other EEC countries.

7. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Rapeseed	565	106	FRG, Norway, Netherlands
Mustardseed	Very limited	min.	FRG, Netherlands
Flaxseed	Minimal	min.	FRG, Ireland
Peanut		2.6	Netherlands, Jordan, S. Africa
Others		1.5	FRG, France
TOTAL		110.1	

<u>Oils</u>		<u>Crude/Refined</u>		
Soybean	178.9	0.238	1.144	FRG, Ireland
Rapeseed	160.0	4.1	0.643	Tunisia, Ireland
Sunflower	12.6			Ireland
Pam kernel	30.6	.378	1.086	Ireland
Others	47.8	606.0	7.221	Egypt, Saudi Arabia
TOTAL	430.9	611.6	10.1	

<u>Meal</u>			
Soybean		8.621	Ireland, Japan, Norway
Rapeseed		16.422	Denmark, FRG, Norway
Cotton		1.895	Denmark, Ireland,
Corn germ		3.508	Ireland
Others		2.653	Morocco, FRG, Ireland
TOTAL		33.099	

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat *	10,880 (10,316)	1,159 (953)	1,260 (1,426)	13,299 (12,695)
Durum wheat	40 (15)		36 (50)	76 (65)
Flour/Semolina	3,511 (3,403)	100 (90)	3 (2)	3,614 (3,495)
TOTAL	14,431 (13,734)	1,259 (1,043)	1,299 (1,478)	16,989 (16,255)

\*of which spring wheat: 217 (206)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	4,394 (4,504)	5,185 (4,114)	243 (157)	520 (483)	1,850 (2,285)	1,107 (1,152)	13,299 (12,695)
Durum wheat	74 (64)			2 (1)			76 (65)
Flour Semolina	3,441 (3,324)				73 (71)	100 (100)	3,614 (3,495)
TOTAL	7,909 (7,892)	5,185 (4,114)	243 (157)	522 (484)	1,923 (2,356)	1,207 (1,252)	16,989 (16,255)

Industrial use: wheat starch and gluten

Export destination: EEC, W. Germany, Eire, E. Germany, Poland  
Algeria

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS		
	U.S.A.	Australia	EEC
Canada			
Argentina			
Others			

WHEAT (including durum)

Cash	900 (1,107)	25 (14)	250 (280)	85 (25)	1,296 (1,476)
Commercial Credit					
Aid, concessional					
credit, etc.					

FLOUR (including semolina)

Cash/comm. credit			3 (2)	3	(2)
Aid, concessional:					

TOTAL	900 (1,107)	25 (14)	253 (282)	85 (25)	1,299 (1,478)
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(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	10,091 (10,954)	127 (92)	1,620 (1,951)	1,747 (2,043)
Barley	1,090 (728)	1,090 (728)	90 (80)	11,271 (11,762)
Sorghum	462 (575)	1 (1)	3 (2)	4 (3)
Oats	27 (27)	35 (35)	50 (21)	547 (631)
Rye		4 (4)	10 (8)	41 (39)
TOTAL	10,580 (11,556)	1,257 (860)	1,773 (2,062)	13,610 (14,478)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	505 (629)	225 (412)	880 (863)	461 (497)	10 (12)	127 (127)	1,747 (2,043)
Barley	1,962 (1,885)	5,270 (5,773)			2,900 (2,580)	678 (1,067)	11,271 (11,762)
Sorghum	145 (134)	333 (425)		33 (45)	1 (2)	1 (1)	4 (3)
Oats	20 (18)	16 (16)		1 (1)		35 (35)	547 (631)
Rye						4 (4)	41 (39)
TOTAL	2,632 (2,666)	5,847 (6,588)	880 (863)	495 (533)	2,911 (2,594)	845 (1,234)	13,610 (14,478)

Of which Poultry: 3,097 thous. tonnes (2 year average) Export Destination: EEC, Belgium, Italy  
Algeria, Saudi Arabia

Industrial Use: Starch/glucose

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	All Others	
Corn		658 (792)	962 (949)	1,620 (1,951)
Barley		35	35 (80)	90 (80)
Sorghum			3 (2)	3 (2)
Oats			15 (21)	50 (21)
Rye			9 (8)	10 (8)
TOTAL	658 (792)	35	1,024 (1,060)	1,773 (2,062)

Principal "Others": South Africa, Finland





PART II  
WESTERN EUROPE (NON-EC)



FINLAND

SWEDEN

NORWAY

AUSTRIA

SWITZERLAND

SPAIN

PORTUGAL

TURKEY

MALTA

## A U S T R I A

Economic classification: Industrial market economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$11,700		year 1983
Annual per capita GDP	US\$ 8,900		year 1983
Average annual growth 1960-80	4.1%		
Annual inflation rate 1970-80	6.3%		
Annual inflation rate (current)	5.9%	(Jan.-Jun/84)	
Volume of imports	19.35 billion US\$		year 1983
Of which food	5.7%		year 1983
Of which fuels	14.0%		year 1983
Principal foreign exchange earning export: Machines & transport equipment and tourism			
Debt service as % of GNP	4.4%		year 1982
Debt service as % of exports	18.4%		year 1982
Population	7.5 million		year 1983
Annual population growth	0.2%		years 1980-2000
Annual Consumption:			
Flour	415,000 tonnes	or 55.0 kg/capita	year 1982/83
Meat	667,500 tonnes	or 81.0 kg/capita	year 1982/83
Vegetable Oil	113,250 tonnes	or 15.7 kg/capita	year 1982/83

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Although cool weather existed in April and May winter grains have shown good growth to June 1984. Summer grains have developed normally. Corn growth is slower in some regions and some of the crop was destroyed by hail in July. It is expected that the 1984 harvest will remain at a similar level to that in 1983.

#### 2. Foreign Exchange Situation

The Austrian Schilling is stable and one of the strongest West-European currencies pegged to the European Monetary System (EMS), in particular to the West-German D-Mark (main trading partner).

#### 3. Fertilizer Situation

Fertilizer prices were generally lower in 1983 than a year earlier. 1983 fertilizer use in 1,000 tonnes (1982 in brackets).

nitrogen	263	(374)	- of which imported	170	(119)
phosphate	113	(116)	- of which imported	69	(80)
potash	57	(48)	- imports	262	(273) exports 31 (50)
multiple	530	(506)	- of which imports	200	(152)
Total	1063	(1044)			



4. Import Mechanism

Import: Ministry of Agriculture issues public tenders.

Export: Through bilateral agreements without tenders or private organizations.

The country in general is self-sufficient in agricultural products and became in recent years an exporter of grains to Eastern Europe.

5. Government Policies Affecting Grain and Agriculture

Grain exports to Eastern Europe are effected through direct negotiations in each case and to each country by a concerted action of private exporters/cooperatives and the Ministry of Agriculture because of the need for export subsidies.

6. Canadian Grain Marketing Prospects

Austria appears as in the recent past to be only a spot market in case of disastrous harvest.

With regard to special crops, the private trade imported from Canada in 1983 (tonnes): mustard 98.9; lentils 255.2; beans 161.7; buckwheat 23.2.

7. Processing Facilities

Year 1983

Thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	440	460	N/A	360
Compound Feed Mills	250	270	N/A	1,500
Malt Houses	2 malt houses, 57 breweries			
Oilseed Crushers	---			

8. Storage and Throughput Capacity

Total grain storage capacity in Austria is 3 million tonnes. Austria is landlocked; imports through Hamburg, Rotterdam, and Trieste.

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	-	-	-	-	1,442
Suitable for malting	-	-	-	-	N/A

MALT AND MALTING BARLEY cont'd

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

	thousands of tonnes		Principal supplier(s)
Malt, roasted	.552	(.120)	Czechoslovakia
Malting barley	n/a	(n/a)	
Malt not roasted	2.630	(1.217)	Czechoslovakia, Hungary

3. Additional Information

Change in malting capacity: Remaining at same level of about 100 - 120,000 tonnes.

Malt exports: Malt, not roasted: 48 tonnes to West Germany  
 40 tonnes to Italy  
 182 tonnes to Switzerland  
 5,040 tonnes to Thailand

Trend in beer consumption: 1982/83 - 109 litres/capita, a slight increase over 1981/82 as summer of 1983 again warm.  
 Production 1982/83 - 8,440,000 hectolitres of which 420,000 hectolitres exported.

Market potential for Canadian malt and/or malting barley: Limited under normal crop conditions. (Old established trade pattern)

1983 imports: malt, not roasted - West Germany	321.4 tonnes
Belgium	23.6 tonnes
Czechoslovakia	999.6 tonnes
Hungary	1,283.8 tonnes
malt, roasted - Czechoslovakia	550.0 tonnes

III. OILSEEDS

1. Import Policy

- a) Import Tariffs: (i) Oilseeds - Free  
 (ii) Crude Oil - 12%  
 (iii) Refined Oil - 12%
- b) There are no significant non-tariff barriers.
- c) Importation procedure and structure: Private importers.

2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Seed Type	Production	Imports	Quantity Processed	Principal Sources of Imports
Rapeseed	460.9	349.9		EEC-154.9, Canada-56.6
Sunflowerseed		6569.3		E. Europe-5327.6
Soybeans		804.1		EEC-773.6
Groundnuts		2221.6		
Linseed		1178.1		EEC-733.6 E. Europe-425.4

OILSEEDS cont'd

3. Exports

Base Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Rapeseed	460.9	9543.8	Yugoslavia-9474.4
Sunflowerseed		866.7	EEC-73.5
Linseed		23.0	
Soybeans		26.2	EEC-24.4

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	986 (900)	235 (205)		1,221 (1,105)
Durum wheat	49 (50)	16 (16)		65 (66)
Flour/Semolina				
TOTAL	1,035 (950)	251 (221)		1,286 (1,171)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human							
Wheat	400 (400)	3 (3)	4 (4)	5 (5)	587 (550)	200 (200)	1,199 (1,162)	
Durum wheat	30 (30)				17 (20)	16 (16)	63 (66)	
Flour Semolina								
TOTAL	430 (430)	3 (3)	4 (4)	5 (5)	604 (570)	216 (216)	1,262 (1,228)	

Industrial Use: beer, adjuncts

Export Destination: Yugoslavia, Eastern Europe and EFTA countries

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets: NIL



## Austria

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>		<u>Carry-in, July 1</u>		<u>Imports</u>		<u>Total Supply</u>	
Corn	1,437	(1,400)	80	(70)	15	(12)	1,532	(1,482)
Barley	1,442	(1,500)	64	(55)			1,506	(1,555)
Sorghum								
Oats	292	(290)	10	(6)	5	(4)	307	(300)
Rye	205	(220)	60	(68)			265	(288)
TOTAL	3,376	(3,410)	214	(199)	20	(16)	3,610	(3,625)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	6	(6)	1,400	(1,400)			
Barley			1,120	(1,160)	190	(150)	1,516 (1,516)
Sorghum							
Oats	160	(160)	300	(300)	10	(5)	315 (310)
Rye			13	(2)	21	(60)	264 (279)
TOTAL	166	(166)	2,833	(2,862)	221	(215)	3,595 (3,605)

Industrial Use: malt coffee, glue extenders, beer, food industry  
 Export Destination: EEC, EFTA, Eastern Europe

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets: Negligible (less than 50,000 tonnes/year)

## F I N L A N D

Economic classification:	Industrial Market economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$ 8,021	year 1982
Annual per capita GNP	US\$10,200	year 1982
Average annual growth 1974-83	2.8%	
Annual inflation rate 1974-83	11.8%	
Annual inflation rate (current)	6.4%	
Volume of imports	12.7 billion US\$	year 1983
Of which food	6.9%	year 1983
Of which fuels	24.6%	year 1983
Principal foreign exchange earning export:	Wood based products	
Debt service as % of GNP	4.4%	year 1983
Debt service as % of exports	16.6%	year 1983
Population	4.9 million	year 1983
Annual population growth	0.3%	years 1975-1980
Annual Consumption:		
Flour(grain equiv.)	72.4 kg/capita	year 1983
Meat	66.4 kg/capita	year 1983
Vegetable Oil	5.9 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1983 crops were excellent with a 15.5% increase in agricultural production as compared with previous year. The 1984 crops outlook at present is equal to 1983. Weather conditions have been favourable. Sown areas in 1984 slightly exceed those in (1983), winter wheat 36,000 ha (32,000), spring wheat 141,000 ha (128,000), rye 49,000 (47,000). Acreages for barley and oats are about the same as in 1983, 550,000 ha and 450,000 ha respectively. Oilseeds (turnip rape) were sown on 60,000 ha which equals previous years acreage.

#### 2. Foreign Exchange Situation

Finland's foreign trade is in balance, the foreign exchange situation is satisfactory and the outlook remains similar. There will be no import priorities for basic foodstuffs or agricultural inputs. Finland is not likely to become an aid recipient.

### 3. Fertilizer Situation

Finland is self-supporting in the production of fertilizers except for potassium for which raw material is imported from the USSR and GDR. Finland is a net exporter of NPK mixed fertilizers. Nutrients in fertilizers applied, kg/ha:

	N	P <sub>2</sub> O <sub>5</sub>	K <sub>2</sub> O
1980/81	82.4	27.8	49.3
1981/82	78.7	26.8	47.5
1982/83	91.4	29.9	53.8

### 4. Import Mechanism

The Finnish State Granary is the sole importer. Bids are invited from local agents of international grain trading houses. The State Granary has also contacted the Canadian Wheat Board directly. Decisions for grain purchases are made by a special committee consisting of representatives of the government, agricultural producers and consumers.

### 5. Grain Industry Infrastructure

Total storage capacity of the Finnish State Granary is at present 1 million tonnes which exceeds the target set for the year 1987. The purpose of the increased storage capacity is to build up reserves of domestic grain in favourable years. This will decrease the need to import grain in the long run. Within the next two years the storage capacity of the State Granary will increase to 1.25 million tonnes when the present building program is completed.

### 6. Government Policies Affecting Grain and Agriculture

Objectives of government policy:

The Agricultural Policy Work Group set by the Ministry of Agriculture recommended in 1983 the following acreages to be sown by the end of this decade to ensure self-sufficiency in all crops: wheat 220,000 ha, rye 60,000 ha, barley 600,000 ha, oats 450,000 ha and oilseed 100,000 ha.

The long term objective of the above is to avoid imports or exports of grain.

No changes are expected in grain consumption habits.

To fill reserves with eventual domestic overproduction.

Overproduction of meat in 1984 is expected to be 15-17,000 tons of beef and 20-22,000 tons of pork.

7. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990: Canada remains a potential supplier of grain if and when self-sufficiency is unbalanced by adverse weather conditions. Statistically this happens in seven years out of ten.

Marketing initiatives: The Post liaises regularly with State Granary officials and provides on-going information on the Canadian crop.

Marketing possibilities for Canadian "special crops": At present Canada is the main supplier of mustard seed to Finland, (1982: 468 tonnes out of a total 575; 1983: 555 tonnes out of a total 661 tonnes). Occasional sales of whole dried green peas have also occurred. The field pea crop of 1983 will be sufficient for the next four years. Demand for other "special crops" is minimal.

8. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	20	26	600	369
Compound Feed Mills	7	12	-	1,500
Malt Houses	2	2	-	91
Oilseed Crushers	2	2	-	100

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Naantali	200	1,250
Rauma	30	650
Total Capacity	230	1,900



## II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley		1,764			1,764
Suitable for malting		100			100

2. Imports: There were no imports of malt or malting barley in 1983.

### 3. Additional Information

Change in malting capacity: Domestic malting capacity is unchanged.

Malt exports: The total export of malt from Finland in 1983 was 47,420 tonnes. Main importers were USSR with 28,481 tonnes, Venezuela 11,690 tonnes, Norway 3,051 tonnes and Great Britain 2,851 tonnes.

Trend in beer consumption: Beer consumption in 1983 was 55 litres per person which was slightly less than in the previous year (57 litres). Beer consumption per capita is expected to be stable in the 55-57 litre range.

Market potential for Canadian malt and/or malting barley:

Malting houses secure the supply of malting barley by contracts with local farmers. Amounts contracted far exceed the amounts actually required for malting as a precaution against crop failure. In 1983 the contract farmers produced 160,000 tonnes of malting of which 50,000 tonnes was surplus and had to be exported. Import takes place only after severe crop failures with Sweden being the preferred source since their varieties cultivated are mostly the same as in Finland.

## III. OILSEEDS

### 1. Import Policy

Import Tariffs: (i) Oilseeds - 19%, groundnuts 10%, mustard seed - free  
(ii) Crude Oil - 10%  
(iii) Oilseed Meal - 20%  
(iv) Refined Oil - 19%

Non-tariff barriers: Imported oilseeds are subject to inspection for contaminants by the Customs Laboratory. Rejections are not uncommon.

OILSEEDS (cont'd)

Importation procedure and structure: Importation of oilseeds is subject to licences (permits). These are obtained by crushers. Imports for seed and consumption as health food are duty free. In practice only soya and sunflowerseed imports for crushing are permitted.

2. Additional Factors: Import of oilseeds for human consumption (health food) often takes place through wholesalers and packers in Sweden. Volume of consumption in Finland is limited.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Turnip rape	101		101	
Soya		112	112	U.S.A.
Sunflower		8	8	U.S.A.
TOTAL	101	120	221	

<u>Oil</u>	<u>Crude/Refined</u>		
Turnip rape	29		
Soya	35	5	Sweden
Sunflower	3	2	Hungary
palm & cocos		7	Philippines, Malaysia
TOTAL	67	14	

Meal Type

Turnip rape	70
Soya	75
Sunflower	5
TOTAL	150

4. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
2	Turnip rape and soyabeans	800

OILSEEDS (cont'd)

5. Export Policy

Export assistance or control measures: Finland does not export oilseeds.

Export procedure and structure: As above.

6. Additional Factors: Surplus rapeseed oil is exported unrefined.

7. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oils</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Turnip rape	29	16	West Germany, Holland

IV. STATISTICAL NOTES  
(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat *	549 (435)	378 (281)	6 (188)	933 (904)
Durum wheat				
Flour/Semolina				
TOTAL	549 (435)	378 (281)	6 (188)	933 (904)

\*of which spring wheat 437 (387)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat	281 (300)	41 (90)	65 (66)	50 (50)	42	454 (378)	933 (884)
Durum wheat							
Flour Semolina							
TOTAL	281 (300)	41 (90)	65 (66)	50 (50)	42	454 (378)	933 (884)

Industrial Use: Starch, Alcohol      Export Destination: Ethiopia, Bangladesh

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS	
	<u>U.S.A.</u>	<u>ALL Others</u>
Canada	Australia	EEC

WHEAT (including durum)

Cash	(29)	6 (59)	(16)	(84)	6 (188)
Commercial Credit					
Aid, concessional credit, etc.					

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional:

Total	(29)	6 (59)	(84)	6 (188)
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## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	1,764 (1,598)	103 (25)	(20)	(20)
Barley			26 (5)	1,893 (1,628)
Sorghum	1,406 (1,320)	79 (34)	(5)	1,485 (1,359)
Oats	116 (35)	45 (60)	2 (61)	163 (156)
Rye				
TOTAL	3,286 (2,954)	227 (119)	28 (91)	3,541 (3,163)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	16 (15)	1,165 (1,300)	68 (100)	107 (110)	97	440 (103)	1,893 (1,628)
Barley							(20)
Sorghum	26 (30)	1,000 (1,150)		88 (100)	227	144 (79)	1,485 (1,359)
Oats	99 (100)	3 (1)	1 (5)	9 (5)		51 (45)	163 (156)
Rye							
TOTAL	141 (145)	2,168 (2,481)	69 (105)	204 (215)	324	635 (227)	3,541 (3,163)

Of which poultry: 3%

Export Destination: EEC, U.S.A.

Industrial use: Malting

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	U.S.A. Australia Argentina EEC All Others	
Corn		(20)		(20)
Barley			10	26 (5)
Sorghum				(5)
Oats	2 (38)		(7)	2 (63)
Rye				
TOTAL	2 (38)	(20)	10 (7)	28 (93)

Principal "Others": Sweden

## M A L T A

Economic classification: Middle Income economy  
Oil exporter or importer (net): Importer  
Annual per capita income: US\$3,526 year 1980  
Annual per capita GNP US\$3,113 year 1982  
Average annual growth 1960-80 5 %  
Annual inflation rate 1970-80 5%  
Annual inflation rate (current) -2 % (3rd quarter 1983)  
Volume of imports 0.73 billion US\$ year 1983  
Of which food 16.5 % year 1983  
Of which fuels 12 % year 1983  
Principal foreign exchange earning export: Manufactures  
Population 0.33 million year 1983  
Annual population growth: 1.0 % years 1973-1983  
Annual Consumption:  
Flour 37,000 tonnes or 113 kg/capita year 1983  
Meat 11,000 tonnes or 33.7 kg/capita year 1983  
Vegetable Oil 5,000 tonnes or 15.3 kg/capita year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Annual wheat crop amounts to only around 4,000 tonnes. Malta also produces small quantities of barley and corn.

#### 2. Foreign Exchange Situation

Chronic trade deficit - but 1983 balance of payments, government budget and international reserves are all positive and improving. Wage and price controls, freeze on government hiring for past three years and other measures brought inflation down below zero in last two quarters of 1983, but industrial production, employment and tourism continued to decline. Malta joined World Bank in September 1983 and hoped to obtain special classification between "developed" and "developing" status. However, the World Bank assigned Malta to the former category thus precluding special loan eligibility. Malta also managed to get the EC to reduce or suspend import tariffs on Maltese goods for 1984 in lieu of negotiating special associate status to the EC.

#### 3. Import Mechanism

All grain imports are governed by the Maltese government bulk buying policy, and the only import agency is MEDIGRAIN Limited, Mill Street, MARSA, Telex 340 MEDGRN MW.

#### 4. Grain Industry Infrastructure

The only major port storage facilities are operated by Malta Milling and Grain Handling Company Limited, Valletta, and grain is trucked throughout the islands. A new port project currently underway will provide for substantial port storage capacity which the Maltese hope to utilize as a transshipment facility for grains destined to shallow draft North African ports.

5. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990 of national grain import needs: Consensus is for stable market.

There may be some marketing opportunities for wheat and coarse grains. Recently, a U.S. mission, led by a representative of the U.S. Feedgrains Council has visited Malta. Also, the Australians are very interested in this market.

Marketing possibilities for Canadian "special crops": There are some possibilities as Canada already exports small amounts of canaryseed (main supplier), corn, dried peas, beans and other dried vegetables to Malta.

6. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	7	7	80	45
Compound Feed Mills	15	15	100	70
Malt Houses	-	-	-	-
Oilseed Crushers	1	1	N/A	N/A

7. Storage and Throughput Capacity

Year: 1983

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Valetta	N/A	N/A

II. MALT AND MALTING BARLEY

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

	--thousands of tonnes--				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					3

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	0.1 (0.1)	U.K., Belgium, France

3. Additional Information

Domestic malting capacity: There is no domestic malting capacity.

Trend in beer consumption: Slight increase.

Market potential for Canadian malt and/or malting barley: Market is of little significance.

III. OILSEEDS

1. Import Policy

Importation Procedure and structure: Oilseeds (mainly peanuts for food) and meals are handled by private importers. Soybean oil is imported under government bulk buying policy.

2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Peanuts		0.4		Brazil, U.S.A.
Others		0.1		
TOTAL		0.5		
<u>Oil</u>		<u>Crude/Refined</u>		
Soya		3.6	0.5	Italy, Spain, Netherlands Malaysia Singapore
Palm			0.1	
Coconut			0.1	
Others		0.4	0.3	
TOTAL		4	1	
<u>Meal</u>		0.1		



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	4 (4)	(4)	46 (42)	50 (50)
Durum wheat				
Flour/Semolina			1 (1)	1 (1)
TOTAL	4 (4)	(4)	47 (43)	51 (51)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	50 (50)						50 (50)
Durum wheat							
Flour Semolina	1 (1)						1 (1)
TOTAL	51 (51)						51 (51)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS		
	Canada	U.S.A.	Australia Argentina EEC ATT Others

## WHEAT (including durum)

Cash							
Commercial Credit		10 (13)			25 (24)	5 (5)	46 (42)
Aid, concessional							
credit, etc.							

## FLOUR (including semolina)

Cash/comm. credit					1 (1)		1 (1)
Aid, concessional:							
TOTAL		10 (13)			26 (25)	5 (5)	47 (43)

Principal Others: Yugoslavia

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July.1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn			50 (52)	50 (52)
Barley	2 (2)		20 (21)	22 (23)
Sorghum				
Oats				
Rye				
<b>TOTAL</b>	<b>2 (2)</b>	<b>70 (73)</b>		<b>72 (75)</b>

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn		50 (52)					50 (52)
Barley		22 (23)					22 (23)
Sorghum							
Oats							
Rye							
<b>TOTAL</b>		<b>72 (75)</b>					<b>72 (75)</b>

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>		
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>	<u>ATI</u>
Corn							
Barley					20 (21)		50 (52)
Sorghum							20 (21)
Oats							
Rye							
<b>TOTAL</b>					<b>20 (21)</b>	<b>50 (52)</b>	<b>70 (73)</b>

Principal Others: Yugoslavia

## N O R W A Y

Economic classification: Industrial Market economy		
Oil exporter or importer (net): Exporter		
Annual per capita income:	US\$5,189	year 1979
Annual per capita GNP	US\$10,666	year 1982
Average annual growth 1960-80	4.0%	
Annual inflation rate 1970-80	9.6%	
Annual inflation rate (current)	6.0%	
Volume of imports	12.1 billion US\$	year 1982
Of which food	6.0%	
Of which fuels	9.8%	
Principal foreign exchange earning export: Crude Oil		
Debt service as % of GNP	3.0%	year 1982
Debt service as % of exports	11.0%	year 1982
Population	4.1 million	year 1982
Annual population growth	0.38%	year 1982
Annual Consumption:		
Flour	303,000 tonnes or 73 kg/capita	year 1983
Meat	173,600 tonnes or 42 kg/capita	year 1983
Vegetable Oil	1,420 tonnes or 0.34 kg/capita	year 1984 est

Note: All NOK to US\$ conversions done at today's rate 1US\$= NOK 8.26

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

1984 crop estimated to be approximately 20% over last year's. Total 1984 grains crop will probably reach 1,350,000 tonnes, which will be 270,000 tonnes over last year.

#### 2. Foreign Exchange Situation

No problems are foreseen in the foreign exchange position.

#### 3. Fertilizer Situation

Fertilizer supplies are adequate.

#### 4. Import Mechanism

Importation of grains is carried out by government agency (Statens Kornforretning).

#### 5. Grain Industry Infrastructure

There have been no noteworthy changes in infrastructure in the past year.

6. Government Policies Affecting Grain and Agriculture

No current changes are reported in Government policies. Production plans show no changes.

7. Canadian Grain Marketing Prospects

Considering Canada's substantial market share and that there is an import monopoly, we cannot see any marketing initiatives that might increase Canadian sales.

Current marketing strategy seems to be effective for Canadian special crops.

8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	9	10		370
Compound Feed Mills	15	22		1,400
Malt Houses	3	3		
Oilseed Crushers	2	2		

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Oslo	104.1	342.2
Moss	129.6	162.3
Larvik	79.5	156.7
Skien	30.4	49.4
Kristiansand	18.7	48.3
Stavanger	329.0	908.0
Sandnes	12.5	26.5
Bergen	85.3	243.3
Floro	24.0	25.7
Trondheim	127.7	361.0
Steinkjer	31.5	84.0
Total Capacity	972.4	2,507.4



## II. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat*	90 (74)	308 (423)	290 (182)	688 (679)
Durum wheat	11 (7)	11 (11)	22 (18)	22 (18)
Flour/Semolina	309 (308)	68 (63)	377 (371)	377 (371)
TOTAL	399 (382)	387 (493)	301 (193)	1,087 (1,068)

\*of which spring wheat 90 (74)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	302 (301)	41 (64)	1 (1)	7 (5)	1	336 (308)	688 (679)
Durum wheat	7 (7)					15 (11)	22 (18)
Flour/Semolina	315 (305)					62 (66)	377 (371)
TOTAL	624 (613)	41 (64)	1 (1)	7 (5)	1	413 (385)	1,087 (1,068)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash	109 (70)	49 (18)	53	38 (30)	52 (75)	301 (193)
Commercial Credit						
Aid, concessional credit, etc.						

FLOUR (including semolina)

Cash/comm. credit						
Aid, concessional:						
TOTAL	109 (70)	49 (18)	53	38 (30)	52 (75)	301 (193)

Principal Others: Sweden

(B) COARSE GRAINS

Norway

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn		15 (42)	76 (42)	91 (84)
Barley	572 (607)	255 (158)	2 (25)	829 (790)
Sorghum		23 (80)	(45)	23 (125)
Oats	413 (501)	173 (161)		586 (622)
Rye	3 (2)	46 (32)	35 (47)	84 (81)
TOTAL	988 (1,110)	512 (473)	113 (159)	1,613 (1,742)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn		74 (68)				17 (16)	91 (84)
Barley	5 (5)	546 (494)		58 (36)		220 (255)	829 (790)
Sorghum		21 (102)				2 (23)	23 (125)
Oats	11 (12)	430 (410)		42 (67)		103 (173)	586 (662)
Rye	33 (33)	3 (2)				48 (46)	84 (81)
TOTAL	49 (50)	1,074 (1,076)		100 (103)		390 (513)	1,613 (1,742)

Of which poultry: 17%

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	All Others	
Corn		76 (42)		76 (42)
Barley			2 (25)	2 (25)
Sorghum		(45)		(45)
Oats	(22)		35 (25)	35 (47)
Rye				
TOTAL	(22)	76 (87)	2 (25)	113 (159)

Principal Others: Sweden, Denmark

## P O R T U G A L

Economic classification: Middle Income Market economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$2,520		year 1981
Annual per capita GDP	US\$2,449		year 1982
Average annual growth 1960-80	5.0 %		
Annual inflation rate 1970-80	16.6 %		
Annual inflation rate (current)	31.0 %	(1st half 1984)	
Volume of imports	7.6 billion US\$		year 1983
Of which food	20 %		year 1983
Of which fuels	27.2 %		year 1983
Principal foreign exchange earning export:		*Immigrant	
		remittances, tourism	
Debt service as % of GDP	6.6 %		year 1982
Debt service as % of exports	28 %		year 1983
Population	9.83 million	(census)	year 1981
Annual population growth	0.8 %		years 1979-1981
Annual Consumption:**			
Flour	730,000 tonnes	or 74.3 kg/capita	year 1982/83
Meat	408,000 tonnes	or 41.5 kg/capita	year 1982
Vegetable Oil***	220,000 tonnes	or 22.4 kg/capita	year 1983

\* Light industry exports account for majority of foreign exchange earnings from exports, however, single largest sources of foreign exchange are remittances and tourism, each of which accounted for approximately US\$1 billion in 1983.

\*\* Office estimates.

\*\*\* Includes 60,000 tonnes of olive oil.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1984 winter cereal crop is reportedly one of the best ever as a consequence of ideal weather conditions during the latter stages of the growing season, use of improved techniques and better incentive prices offered by the government than for the 1983/84 campaign. Current unofficial estimates indicate a wheat harvest of as much as 700,000 tonnes (314,000 tonnes in 1983), barley 260,000 tonnes (41,000 tonnes) and oats 200,000 tonnes (66,000 tonnes). No estimate is yet available for rye (last year's production was 114,000 tonnes). Areas planted were 320,000 hectares for wheat (down 12%); 94,000 hectares for barley (up 5%); 184,400 hectares for oats; and 186,300 hectares for rye during the previous crop year.

Rice production in 1983 was reported as 110,000 tonnes (uncleaned) down 23% from 1982 - due to decreased plantings (down 18% to 26,000 hectares) and lower average yields (down 6%). The 1983 corn harvest totalled 430,000 tonnes (up 7%) from 351,000 hectares.

Oilseed production in 1983 was minimal: sunflower seed production totalling 12,500 tonnes from 20,000 hectares and safflower seed production totalling 600 tonnes from 1,700 hectares.



## 2. Foreign Exchange Situation

Despite recent significant improvements in Portugal's balance of payments (BOP) situation, the government is continuing to impose stringent controls on imports. Portugal nevertheless still relies on imports for approximately 60% of its food and animal feed requirements. With improved winter cereal crop harvests in 1984 some decline in cereal imports may be anticipated. The 1983 BOP deficit was cut to US\$1.7 billion (from US\$3.2 billion in 1982). As part of a BOP assistance package offered by the IMF, Portugal has agreed to further cut the deficit in 1984 to no more than US\$1.25 billion. At the present time it is expected this target will be met. No direct international aid assistance for food purchases is foreseen for Portugal although the country continues to benefit from access to USA CCC credits (GSM-102). In 1983 GSM-102 credits reportedly totalled US\$550 million plus a further US\$70 million in blended credits. GSM-102 credits announced to date for 1984 total US\$386 million.

## 3. Fertilizer Situation

In June 1983 a reduction in government subsidies for fertilizers resulted in price increases of 85%. Due to steep price rises and poor weather conditions for most of 1983, fertilizer use and production were significantly down. Production declined 27% to 782,000 tonnes while consumption fell by 21% to 760,000 tonnes. Due to improved conditions in June '83-June '84 and increased producer prices, the use and production of fertilizer will likely increase in 1984.

The wheat crop accounts for 30% of fertilizer use while all other grains account for a further 30%. Fertilizer use in 1983: 350,000 tonnes nitrogen, 64,000 tonnes phosphate; 4,000 tonnes potassium, and 342,000 tonnes compound and organic fertilizers.

## 4. Import Mechanism

In early 1984, the Government issued a new law as a first step to liberalize grain imports and, in part, to begin the process of conforming to EEC standards (Portugal expects to join by January 1, 1986). According to the terms of this legislation EPAC's import monopoly is discontinued and up to 10% of Portugal's cereal import requirements during 1984/85 can be supplied via commercial channels. Since detailed operational regulations for this procedure have not yet been established, no imports have been made via commercial channels and EPAC effectively remains the sole importer. The same legislation also resulted in the domestic cereals market being liberalized although EPAC remains the Government's instrument to intervene to maintain established producer prices i.e. EPAC must buy all grain offered to it by growers at the intervention prices set by the Government for each crop year. Cereal imports continue to be sourced on the basis of regular tenders (usually for boat load lots of 30-40,000 tonnes) negotiated with registered local representatives of the international grain traders.

## 5. Grain Industry Infrastructure

Work has continued on the Canadian \$132 million EPAC grain terminal at Trafaria (south of Lisbon), which is expected to become operational during 1985. It will be able to unload 27,000 tonnes per day (into 190,000 tonnes storage capacity) directly from vessels and will operate in conjunction with EPAC's other Lisbon



## 5. Grain Industry Infrastructure (cont'd)

facility at Beato which can unload 2,000 tonnes per day (120,000 tonnes storage capacity). Under present circumstances due to limited draught at Beato, 40% to 50% of each vessel load is transferred by barge to 5 privately owned plant terminals outside of Lisbon on the coast (4 flour mills, 1 feed mill). The remaining tonnage is transported directly to Beato for off-loading. Rail and road transport move the grain to some 114 private mills (38 flour and 76 compound feed) located in the south and centre of the country. In addition, slightly more than one-third of grain imports arrive at the EPAC facilities in the Port of Leixoes from where it is transported to 48 mills in the north of the country (22 flour and 26 compound feed).

## 6. Government Policies Affecting Grain and Agriculture

Grain production: Substantial increases in government intervention (support) prices have encouraged production of cereal crops. The 1983/84 support prices for wheat, barley and oats were increased by 48%, 53% and 54.5% respectively from year earlier levels. It has been reported that Portuguese guarantee prices for wheat (approximately Cdn\$375/tonne for Class A-Hard) are 30% higher than current EEC levels. Some concern exists that these intervention prices for cereals will distort agricultural production away from more efficient crops which do not benefit from the same high support levels.

Grain imports: 1984/85 imports will undoubtedly be influenced by the increased 1983/84 winter wheat crop i.e. wheat imports at least should decline. In addition, Portugal anticipates entry to the EEC by January 1, 1986 which is likely to have at least some impact on the sourcing of some grain imports.

Grain consumption patterns: Although the government has recently raised bread prices (May 1984) by almost 20%, human flour consumption is not expected to change significantly (by comparison the average price increase for foods during the first quarter of 1984 was 35.5%). Due to the continually decreasing value of the escudo vis-à-vis the U.S.A. dollar (and the current overall strength of the dollar) there is significant upward pressure on the prices for imported grains which must either be passed on to the flour millers, feed producers or consumers, or be absorbed by the government at the risk of substantially increasing the public sector deficit.

Grain reserves: The apparent preference continues to be to hold minimum grain reserves and instead, rely on a steady flow of shipments which move quickly into the market.

Meat production and consumption: According to producers, controlled retail prices for meats have not kept pace with input costs (including feed grains). Nevertheless, retail prices have increased substantially for consumers faced with an inflation rate of over 30%, high unemployment of more than 10% and, in 1983, an average decline in real wages (reportedly as much as 8%). Hence consumers are buying less meat (or buying less expensive varieties) and producers are reducing production. As an example of the cost squeeze, pork producers currently claim to be losing approximately Canadian \$20 per pig they send to market.

Longer term implications: While agricultural integration into the EEC is expected to extend over ten years (in two 5 year segments) it can be anticipated

6. Government Policies Affecting Grain and Agriculture (cont'd)

that Portuguese grain imports will be sourced more and more from within the EEC although the traditional links with U.S.A. would perhaps continue on the basis of the favourable financial package offered. Market access for "non-traditional" suppliers such as Canada will undoubtedly become even more difficult than it already is.

7. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990 of national grain import needs: No official projections exist. However, notwithstanding national production fluctuations due to weather, etc., it can be expected that total grain imports will continue in the range of 3.0 to 4.0 million tonnes per year until the end of the decade. Any general increase in human consumption of grains during this period is likely to be offset by decreased feed grain usage due to the economic difficulties facing the livestock industry.

Marketing Initiatives to increase Canadian sales: Although Portugal's ultimate entry into the EEC may make Canadian access to the Portuguese grain market difficult, the current obstacle to any consideration of purchases from Canada is the existence of the CCC GSM 102 finance package against which regular tenders are drawn.

Marketing possibilities for Canadian "special crops": At the present time the only special crop with regular market prospects is canary seed. However, from time to time, Canada has supplied mustardseed, flaxseed and sunflowerseed. In addition, an import market exists for beans. In all cases the key criteria for market success is price.

8. Processing Facilities

	Year 1983			
	Number of Companies	Number of Plants	thousands of tonnes Annual Capacity	Actual Output
Flour (and durum) Mills	80	85**	3.3*	1,100
Compound Feed Mills	94	100	2.0*	2,700
Malt Houses	1	1	50.0	50
Oilseed Crushers		40		

\* Hourly capacity.

\*\* During 1983 some 21 plants operated on a non-continuous basis.

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Name of Port	Year 1983	
	Grain Storage Capacity	Annual Throughput Capacity
Lisbon	175	2,360
Leixoes	90	745
Ponta Delgada and Angra do Heroismo	16	165
Total Capacity	281	3,270 (estimated)



II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	41.0				41.0
Suitable for malting	20.0				20.0

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

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
Malt	0	(5.3)	France
Malting barley	32.0	(14.0)	Australia, Sweden, Canada, U.K.

3. Additional Information

Malting capacity: Capacity has remained constant with a potential through-put of some 62,000 tonnes of barley to produce 50,000 tonnes of malt. No expansion is anticipated.

Malt exports: No exports occurred in 1983. As production and demand are in virtual balance exports or imports of malt may or may not occur in small amounts from year to year depending upon factors such as the Portuguese barley crop.

Trend in beer consumption: During 1983 per capita beer consumption decreased slightly to 37 liters/person, down from 37.4 liters/person in 1982. Consumer spending constraints are believed to have been the major cause of reduced consumption.

Market potential for Canadian malt and/or malting barley: In 1983 Canada sold malting barley to Portugal (some 4,700 tonnes of Klages barley). This was the first time and it was an important achievement in view of strong international competition. It will hopefully convince the Portuguese authorities that Canada offers an alternative source of malting barley.

In view of forecasts pointing to a sharp increase in domestic barley production, very little, if any, malting barley is expected to be imported in 1984/85.

III. OILSEEDS

1. Import Policy

Import Tariffs: (i) Oilseeds: Tariff item 12.01 - 5%  
(ii) Crude oil: Tariff item 15.07 - Olive oil 35%, plam 20%,  
soya 35%; rape 35%; linseed, free; coconut 35%; palm kernel 35%; others 35%  
(iii) Oilseed meal: Tariff item 23.04 - 7%  
(iv) Refined oil: Tariff item 15.07 - Soya 40%, linseed 40%,  
palm 30%, others 40%

### III. OILSEEDS (cont'd)

Non-tariff barriers: Due to domestic capacity, oil (refined or crude) and meal imports are discouraged as non-essential. Import permits are difficult to obtain. Also regarding rapeseed oil government regulations prohibit the retail distribution of this product.

Importation procedure and structure: New legislation introduced June 1, 1984 ended the import monopoly of IAPO, the state oilseeds agency. However, due to difficulties in establishing operating regulations for private imports, IAPO's monopoly has been extended until at least September 30, 1984.

2. Additional factors: CCC credits in past years have covered soyabean and sunflowerseed from U.S.A. and this has effectively protected the market for U.S.A. oilseeds. No CCC provisions for oilseeds have been made for FY 1984 and this may result in an opening of the market to other countries. In 1983 total oilseed crushings were some 998,050 tonnes of which 69% was soyabean and 24% sunflowerseed.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983

Oilseed	Production	Imports	Quantity Processed	Principal Sources of Imports
Sunflower	12.5	210.0	240.0	U.S.A.
Soyabeans		700.0	688.0	U.S.A.
Safflower	0.6		0.75	
Peanuts		38.0	35.4	
Others*		27.3	33.9	
TOTAL	13.1	975.3	998.05	

Olives 256.2 256.0 Domestic

\*Corn germ, rapeseed, tomato seed (imports include corn germ, copra and palm kernel)

Oil	(Crude/Refined)	(Crude/Refined)	
Soyabean	116.0	44.5	
Sunflower	94.0	93.5	
Peanut	16.0	11.5	
Corn germ	3.2	3.0	
Others*	3.2	3.0	19.0
TOTAL	232.4	155.5	19.0

Olive 83/84 82.0 12.0 Greece, Tunisia

\*Rapeseed, safflower, tomato seed

Meal		
Sunflower	142.0	22.8
Soyabean	553.8	0.1
Peanut	18.7	15.0
Corn germ	13.4	
Others*	16.5	27.4
TOTAL	744.4	65.3

\*Production - palm kernel, copra, rapeseed, safflower, tomato seed)

Imports - palm kernel



III. OILSEEDS (cont'd)

4. Number and capacity of oilseeds crushing plants

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
3	Soyabeans	3,000
7	Sunflowers	1,000
30	All types of seeds	N/A

5. Export Policy

Export assistance or control measures: Limited export assistance is available via the Instituto do Comércio Externo Português (ICEP). Exports are conducted on the basis of bulletins to ensure conformity with prescription of currency or foreign exchange surrender requirements.

Export procedure and structure: Private exporters.

Additional factors: Portugal is seeking to expand exports of oils and meals in order to fully utilize the capacity of domestic crushing facilities. For the most part exports are at low prices and comprise unrefined oils for further processing.

6. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Sunflower	12.5		
Safflower	0.6		
TOTAL	13.1		
<u>Oils</u>			
Soyabean	116.0 (crude)	104.0 (crude)	Morocco, Tunisia, Senegal, Bangladesh, India
Sunflower	94.0 (crude)	7.0 (crude)	France, Egypt, Algeria, Jordan
TOTAL	210.0	111.0	
<u>Meals</u>			
Soyabean	553.8	117.0	Spain, EEC
Sunflower	142.0	22.0	FRG
TOTAL	695.8	139.0	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat*	282.0 (353.0)	115.0 (203.0)	743.0 (520.0)	1,152.0 (1,076.0)
Durum wheat	32.0 (37.0)	23.0 (7.0)	14.0 (40.0)	72.0 (84.0)
Flour/Semolina				
TOTAL	314.0 (390.0)	138.0 (210.0)	757.0 (560.0)	1,209.0 (1,160.0)

\*of which spring wheat 0 (0)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat*	915.0 (925.0)	12.0 (20.0)		34.0 (32.0)		182.0 (115.0)	1,143.0(1,092.0)
Durum wheat	43.0 (45.0)			7.0		16.0 (23.0)	66.0 (68.0)
Flour Semolina							
TOTAL	958.0 (970.0)	12.0 (20.0)		41.0 (32.0)		198.0 (138.0)	1,209.0(1,160.0)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	ALL Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash	86.0 (12.0)				(14.0)	86.0 (26.0)
Commercial Credit (GSM-102)	671.0 (534.0)					671.0 (534.0)
Aid, concessional credit, etc.						

FLOUR (including semolina) (Amount too small to be expressed)

Cash/comm. credit  
Aid, concessional:

TOTAL	757.0 (546.0)				(14.0)	757.0 (560.0)
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Principal Others: Greece

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	430.0 (421.0)	200.0 (210.0)	2,348.0 (2,280.0)	2,978.0 (2,911.0)
Barley	41.0 ( 51.0)	12.0 (16.8)	32.0 (14.0)	85.0 (81.8)
Sorghum		16.0 (44.0)	138.0 (193.0)	154.0 (237.0)
Oats	66.0 (86.0)	10.0 (10.0)		76.0 (96.0)
Rye	114.0 (119.0)	20.0 (28.0)		134.0 (147.0)
TOTAL	651.0 (677.0)	258.0 (308.8)	2,518.0 (2,487.0)	3,427.0 (3,472.8)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other</u> (seed, waste)	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	240.0 (240.0)	2,350.0 (2,340.0)	95.0 (93.0)	51.0 (38.0)		242.0 (200.0)	2,978.0 (2,911.0)
Barley	2.0 (2.0)	10.0 (10.0)	64.8 (57.8)	1.0 (1.0)		8.0 (12.0)	85.0 (81.8)
Sorghum		123.0 (221.0)				31.0 (16.0)	154.0 (237.0)
Oats		64.0 (84.0)		2.0 (2.0)		10.0 (10.0)	76.0 (96.0)
Rye	121.0 (125.0)	1.0 (1.0)		2.0 (1.0)		10.0 (20.0)	134.0 (147.0)
TOTAL	363.0 (366.0)	2,548.0 (2,656.0)	159.0 (150.8)	56.0 (42.0)		301.0 (258.0)	3,427.0 (3,472.8)

Of which poultry: 669.0%

Industrial Use: Oil and malt

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>
Corn*		2,348.0 (2,280.0)				2,348.0 (2,280.0)
Barley	4.7		11.0		5.3	32.0 (14.0)
Sorghum**		138.0 (166.0)		(27.0)		138.0 (193.0)
Oats						
Rye						
TOTAL	4.7	2,486.0 (2,446.0)	11.0	(27.0)	5.3	2,518.0 (2,487.0)

\* Cash - 238.0; GSM-102 - 2,110.0

\*\* GSM-102

Principal Others: New Zealand

## S P A I N

Economic classification: Industrial Market economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$3,685	year 1983
Annual per capita GNP	US\$4,053	year 1983
Average annual growth 1960-80	4.5%	
Annual inflation rate 1970-80	15.9%	
Annual inflation rate (current)	12.0%	year 1984
Volume of imports	28.83 billion US\$	year 1983
Of which food	3.79%	year 1983
Of which fuels	38.0%	year 1983
Principal foreign exchange earning export: Tourism, Machinery, Agriculture		
Debt service as % of exports	6.9%	year 1982
Population	37.9 million	year 1982
Annual population growth	0.7%	years 1980-2000
Annual Consumption:		
Flour	56 kg/capita	year 1982 *
Meat	76 kg/capita	year 1982

\* 98% bread

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Cereals: Official forecast for the 1984 cereal harvest as of early November is as follows (1983 figures in brackets).

	<u>Sown Area ('000 Ha.)</u>	<u>Estimated Production ('000 Tonnes)</u>
Wheat	2,615 (2,267)	6,044 (4,330)
Barley	3,944 (3,634)	10,695 (6,571)
Oats	473 (466)	790 (470)
Rye	233 (212)	325 (246)
Corn	433 (351)	2,519 (1,789)
Sorghum	22 (20)	103 (81)

With a record grain harvest of about 20 million tonnes in sight, the Spanish Minister of Agriculture stated that the cost of imported grain could be reduced this year by 50,000 million pesetas (Cdn\$400 million).

Oilseeds: 1984 also promises to be a record year for oilseed production. Unofficial but reliable estimates from the Ministry and the private sector coincide and are shown below (1983 figures in brackets). Final official figures



for the 1984 oilseed crops will be available in December. No estimates are as yet available for the olive crop but a large harvest is anticipated.

	<u>Sown Area ('000 Ha.)</u>		<u>Estimated Production ('000 tonnes)</u>	
Sunflower	1,282	(946)	975	(674)
Safflower	20	(19)	12	(11.4)
Soybean	1.2	(2.5)	2.4	(4.8)
Rapeseed	10	(18.6)	8	(12)
TOTAL	1,313.2	(986)	997.4	(702.2)

## 2. Foreign Exchange Situation

Since 1980 the peseta has depreciated considerably against the US dollar with the exchange rate having more than doubled in 4 years. Sufficient foreign exchange is available to cover cereal imports.

## 3. Fertilizer Situation

Purchases of fertilizers decreased in 1983 and were far below the 1980 level.

	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>
	- - - - - '000 tonnes - - - - -			
Nitrogen (N)	984.8	806.0	883.8	713.1
Phosphate (P205)	473.5	420.0	404.9	357.9
Potash (K20)	294.0	253.9	255.4	224.2

## 4. Import Mechanism

Wheat is imported either by the government or through government tenders to recognized agents of foreign grain suppliers. Feed grains may be imported freely subject to the granting of an import license and the payment of levies. Feed grain may also be exported from Spain in surplus years with tenders being announced by SENPA.

## 5. Grain Industry Infrastructure

During the first half of 1984, grain importers were reduced to three multinationals, Cargill, Continental and Dreyfus and one Spanish company - Transafrica, the others having gone out of business. This has caused a concentration of activity within the sector.

## 6. Government Policies Affecting Grain and Agriculture

During the first year of free domestic grain marketing the producers have been selling most of their grain directly to the market itself rather than to SENPA. At the end of August the government agency had purchased only 500,000 tonnes of

wheat and 800,000 tonnes of barley, i.e. less than 10% of production. Now that Spain has reached a surplus production level in cereals, the government has proposed that some 500,000 tonnes of wheat and between 500,000 and 1 million tonnes of barley be exported annually.

Once the international trade in grain is passed into private hands, opportunities for imports of Canadian grain should increase. The policy of the Spanish government regarding the importation of cereals will change radically once this country joins the EEC (1986). With a free market, imports and exports will become more frequent.

### 7. Canadian Grain Marketing Prospects

No projections can be made as the domestic harvest is at the mercy of a climate which varies greatly from one year to another. Apart from corn, large quantities of which must always be imported, imports of cereals will mostly be made only to offset shortfalls in the domestic crops.

Lentils, beans, chickpeas and canary seed all have a good market potential in Spain.

### 8. Processing Facilities

Year: 1983

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>thousands of tonnes Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	514	564	5,000	3,800
Compound Feed Mills		620	n/a	12,431*
Malt Houses	18	18	n/a	300

* includes:	<u>Type of Feed (tonnes)</u>		<u>Type of Feed (tonnes)</u>	
	Cattle	2,636,629	Poultry	4,463,997
Sheep & goats	536,030	Horses, pet foods	631,536	
Swine	4,098,524	Feed correctors	35,083	
		Other products	29,387	

### 9. Storage and Throughput Capacity

#### Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
La Coruna	113	These figures are not available. Silos could use their storage capacity any number of times during a year. Figures for goods transited through ports do not help either as they are frequently discharged onto trucks.
Vigo	29.5	
Gijon	16	
Santander	65	
Bilbao	11	
Santurce	14	
Barcelona	170	
Tarragona	235	
Valencia	45	
Cartagena	16	
Malago	12	
Sevilla	46	
Total Capacity	773	

## II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	3,500				6,571
Suitable for malting	400		Nil		400

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

	thousands of tonnes		Principal supplier(s)
Malt	10	(12)	W. Germany, Belgium, France
Malting barley	None	None	

### 3. Additional Information

Domestic malting capacity: In 1983 production of malt by domestic brewers was 270,000 tonnes. An additional 30,000 tonnes was produced by other companies. Taking into account imports of 10,000 tonnes, the total annual requirement was 310,000 tonnes. Spanish brewers use 14 kg of malt to produce 1 hectolitre of beer.

Malt exported: There were no exports of malt in 1982 or 1983.

Annual per capita beer consumption: Annual per capita consumption of beer in 1983 increased by 2.71% to 58.60 litres. Total domestic production of beer reached 22,082,426 hectolitres. Twenty-three Spanish companies own a total of 37 plants.

Market potential for Canadian malt and/or malting barley: Very little malt or malting barley are imported into Spain but some activity could commence once Spain joins the EEC.

## III. OILSEEDS

### 1. Import Policy

Import tariffs: Crude or refined oils are unlikely to be imported into Spain. The only oilseed imported in quantity is soybean, between 2 and 3 million tonnes a year. Import duty is 2% of the CIF value but has been suspended during the last few years. Compensatory tax is 6%.

Officially the importation of oilseeds is restricted to State Trading but the government cedes the right to import on a non-permanent basis to the private sector.

2. Additional factors: Spanish crushing plants can import all the soybeans they want but only 10% of the oil can be sold on the domestic market. The remaining 450-500,000 tonnes of soybean oil must be exported "force majeure".



3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982-83

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	674			
Safflower	11			
Soybean	5	2,272		USA
Rapeseed	12			
TOTAL	702	2,272		

<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u> (Crude) (Refined)	
Sunflower	276		
Safflower	5		
Soybean	520		
Rapeseed	5		
Olive	640		
Olive cake	48		
TOTAL	1,494		

<u>Meal</u>	<u>Production</u>	<u>Imports</u>
Sunflower	283	
Safflower	7	
Soybean	1,822	103
Rapeseed	7	
TOTAL	2,119	103

4. Export Policy

Tax rebates are made available to the exporters.

To obtain an export license for olive oil the exporter must first show a copy of a letter of credit from the buyer. The trade in soybean oil is free.

5. Exports of oilseeds and products by type, thousands of tonnes:

Year: 1982-83

<u>Oils</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Olive		65	Worldwide
Olive cake oil		3	
Soybean		475	Mediterranean basin, Iran, India, Pakistan, China
TOTAL		543	



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	(4,096)	49	(140)	(4,612)
Durum wheat	(272)		(76)	(348)
Flour/Semolina				
TOTAL	6,130 (4,368)	49 (376)	50 (216)	6,229 (4,960)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets. Note- there is some disagreement between SENPA and the trade on the following data.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	3,500 (3,500)	630 (400)	15 (65)	380 (383)	(83)	1,404 (49)	5,929 (4,480)
Durum wheat			(346)		(2)		(348)
Flour Semolina				300 (132)	300 (132)		300 (132)
TOTAL	3,500 (3,500)	630 (400)	15 (411)	380 (383)	300 (217)	1,404 (49)	6,229 (4,960)

Export Destination: Egypt, Algeria, Nicaragua

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	AIT
WHEAT (including durum)							
Cash		(128)			50 (68)	(20)	50 (216)
Commercial Credit							
Aid, concessional							
credit, etc.							
FLOUR (including semolina)							
Cash/comm. credit							
Aid, concessional:							
TOTAL		(128)			50 (68)	(20)	50 (216)

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	2,382 (1,788)	3,244 (2,394)	4,455 (5,416)	10,081 (9,598)
Barley	10,810 (6,571)	626 (2,654)	1,597 (444)	13,033 (9,669)
Sorghum	110 (81)	500 (225)	315 (1,400)	925 (1,715)
Oats	855 (470)	154 (133)		1,009 (603)
Rye	325 (247)	10 (89)		335 (336)
TOTAL	14,482 (9,157)	4,534 (5,495)	6,367 (7,269)	25,383 (21,921)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	13 (20)	5,400 (6,803)	550 (58)	14 (15)		4,104 (3,244)	10,081 (10,140)
Barley		6,500 (6,653)	470 (584)	570 (515)		5,493 (626)	13,033 (8,378)
Sorghum		600 (1,258)	2 (3)	1		322 (500)	925 (1,761)
Oats		380 (396)	(2)	60 (55)	13	556 (154)	1,009 (607)
Rye	30	150 (114)	(106)	30 (29)		125 (10)	335 (259)
TOTAL	43 (20)	13,030(15,224)	1,022 (753)	675 (614)	13	10,600 (4,534)	25,383 (21,145)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	All Others
Corn	104 (65)	3,100 (4,667)		802 (293)	1	448 (391)	4,455 (5,416)
Barley	381 (157)	18 (269)		7	1,157 (18)	34	1,597 (444)
Sorghum		92 (790)		216 (596)		7 (23)	315 (1,409)
Oats							
Rye							
TOTAL	485 (222)	3,210 (5,716)		1,025 (889)	1,158 (18)	489 (414)	6,367 (7,269)

Principal "Others": Corn - Brazil, Yugoslavia

Barley - Sweden, Egypt

Note: 1982/83 production data has been amended whereas disposition data has yet to be updated. There is some disagreement between SENPA and the trade on the disposition data.

S W E D E N

Economic classification: Industrial market economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$ 8,300	year 1983
Annual per capita GNP	US\$10,600	year 1983
Average annual growth 1960-80	2.3%	
Annual inflation rate 1970-80	10.2%	
Annual inflation rate (current)	9.0%	
Volume of imports	25.3 billion US\$	year 1983
Of which food	1.3%	year 1983
Of which fuels	5.7%	year 1983
Principal foreign exchange earning export: Engineering products		
Population	8.3 million	year 1983
Annual population growth	0.0 %	year 1983
Annual Consumption:		
Flour	506,500 tonnes or 60.1kg/capita	year 1983
Meat	484,500 tonnes or 58.1kg/capita	year 1983

I. GENERAL INFORMATION

1. Crop Situation and Outlook

Crop	1983-84			1984/85 Estimated	
	Area Sown (000 ha)	yield/hectare tonnes	Total production (000 tonnes)	Area Sown (000 ha)	Total Production (000 tonnes)
Winter Wheat	273	5.3	1,448	226	1,200
Spring Wheat	62	4.39	274	85	400
Winter rye	62	3.8	235	62	250
Spring rye	1	-	2	1	2
Barley	618	3.27	2,026	639	2,400
Oats	404	3.14	1,268	433	1,650
Mixed grains	60	2.69	162	64	200
Winter rape	48	3.27	156	39	110
Spring rape	55	2.0	111	62	120
Winter turnip rape	4	2.27	8	2	5
Spring Turnip rape	56	1.75	98	63	110
Mustard	0	1.61	1	1	1
Rice	-	-	-	-	-



2. Fertilizer Situation

Consumption of commercial fertilizers 1982/83 (in tonnes):

	<u>Simple Fertilizers</u>	<u>Compound Fertilizers</u>
Nitrogenous	138,000	111,000
Phosphoric	2,000	48,000
Potassium	2,000	96,000

3. Import Mechanism

Grain imports are handled by private companies. There have been no significant changes during the last year and none are foreseen for future years.

4. Government Policies Affecting Grain and Agriculture

Swedish agricultural policy is subject to a major review, the purpose of which is to find means to reduce Sweden's export surpluses of wheat, other grains, meat (pork and beef), and to reduce the over-production of milk. The new policy under review is not likely to change the Swedish import requirements for grain.

5. Canadian Grain Marketing Prospects

In view of Sweden's position as a significant net exporter of grains (except durum - not grown locally) the possibilities of increasing Canadian sales are very marginal. For durum ordinary market factors, price and supply, govern the choice of foreign suppliers.

The market for field peas and beans (light red kidney) is variable and depends on the outcome of local crops. The previous upward trend for Canadian lentils, dehulled sunflower seeds, canary seeds and white pea beans was halted in 1983/84 primarily because of the extremely high dollar exchange rate and Sweden's 16% devaluation at the end of 1982.

6. Processing Facilities

Year: 1982-83 (most recent)

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills*	12	21	735	706 grain eqv.
Compound Feed Mills**	55	77	N/A	2,252 feed
Malt houses	2	2	90	86 barley eqv.
Oilseed Crushers	1	1	250	239 seed eqv.

\* Major companies

\*\* Registered feed producers.



7. Storage and Throughput Capacity

Grain Export/Import Capacity by Port

Year: 1983/84

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Norrköping	154	
Helsingborg	150	
Köping	110	
Djuron	140	
Västeraås	95	
Uddevalla	74	
Lidköping	60	
Åhus	83	
Ystad	58	
Others	756	
Total Capacity	1,680	

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley (approx.)		1,811	15	200	2,026
Suitable for malting (approx.)		360			360

2. Imports, Calendar years 1983, 1982, 1981

	<u>thousands of tonnes</u>			<u>Principal supplier(s)</u>
Malt	4.41	3.25	4.45	W. Germany, E. Germany Britain
Malting barley	0	0	0	

3. Additional Information

The malting capacity is stable at about 90,000 tonnes of barley per annum.

Malt Exports: primarily to Britain, USSR, W. Germany  
 1983 20,000 tonnes (est.)  
 1982 21,600 tonnes  
 1981 33,000 tonnes

Trend in beer consumption: Consumption of light beer has remained unchanged, while that of strong beer shows a marginal upward trend.

Market potential for Canadian malt and/or malting barley:  
 Almost non-existent when seen against the above figures.

### III. OILSEEDS

#### 1. Import Policy

There are no actual tariffs on oilseeds, meals and oils.

Importation procedure and structure:

There are no quantitative restrictions on oilseeds imports. Import levies are used to protect the domestic prices.

#### 2. Export Policy

Export procedure and structure:

Almost all oilseed produced within Sweden is bought by SOI, a semi-governmental association. SOI is responsible for all disposal of oilseeds, both on domestic and foreign markets.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Destination</u>
Rape, Turnip rape & mustard	374	120	Japan, EEC
<u>Oil Type</u> Rapeseed	87	48	EEC, Algeria
<u>Meal Type</u> Rapeseed	130	15	Norway

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/year)</u>
1	rape, turnip rape, and mustard	250,000

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	1,722 (1,491)	302 (315)	27 (24)	2,051 (1,830)
Durum wheat			13 (12)	13 (12)
Flour/Semolina				
TOTAL	1,722 (1,491)	302 (315)	40 (36)	2,064 (1,842)

\*of which spring wheat 274 (305)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Animal	Other (seed, waste)*	Exports**	Carry-out	Total
	Human							
Wheat	472 (477)	250 (168)	22 (11)	182 (163)	835 (709)	290 (302)	2,051 (1,830)	
Durum wheat	13 (12)				(63) (73)		13 (12)	
Flour Semolina								
TOTAL	485 (489)	250 (168)	22 (11)	182 (163)	835 (709)	290 (302)	2,064 (1,842)	

Industrial Use: Distillery Usage

Export Destination: Poland, Norway, DDR, Iran

\* incl. wheat kept on farms

\*\* incl. wheat in products

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS		
	Canada	U.S.A.	EEC
Argentina			2 (3)
Australia			
Others			40 (36)

WHEAT (including durum)

Cash	10 (12)	28 (21)	2 (3)	40 (36)
Commercial Credit				
Aid, concessional				
credit, etc.				

FLOUR (including semolina)

Cash/comm. credit

Aid, concessional:

TOTAL	10 (12)	28 (21)	2 (3)	40 (36)
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## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn		2 (4)	50 (60)	52 (64)
Barley	2,026 (2,378)	234 (245)	70 (6)	2,330 (2,629)
Mixed Grains	162 (184)	17 (16)		179 (200)
Oats	1,268 (1,663)	235 (199)	5 (-)	1,508 (1,862)
Rye	237 (227)	84 (78)		321 (305)
TOTAL	3,693 (4,452)	572 (542)	125 (66)	4,390 (5,060)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports*	Carry-out	Total
	Human	Animal					
Corn	6 (6)	44 (56)				2 (2)	52 (64)
Barley	60 (59)	1,935 (1,991)		130 (126)	30 (219)	175 (234)	2,330 (2,629)
Mixed grains		151 (169)		14 (14)		14 (17)	179 (200)
Oats	27 (26)	1,100 (1,187)		96 (87)	160 (327)	125 (235)	1,508 (1,862)
Rye	120 (118)	30 (12)		30 (33)	55 (58)	86 (84)	321 (305)
TOTAL	213 (209)	3,260 (3,415)		270 (260)	245 (604)	402 (572)	4,390 (5,060)

\* Incl. grains in products

Export Destination: DDR, Norway, Holland

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	Australia Argentina EEC All Others	
Corn		15 (23)		50 (60)
Barley			33 (35)	70 (6)
Mixed Grains			67 (3)	5
Oats				
Rye				
TOTAL		15 (23)	105 (38)	125 (66)



## SWITZERLAND

Economic classification: Industrial Market economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$13,328	year 1982
Annual per capita GNP	US\$15,595	year 1982
Average annual growth 1960-80	1.9%	
Annual inflation rate 1970-80	5.0%	
Annual inflation rate (current)	3%	
Volume of imports	29.1 billion US\$*	year 1983
Of which food	9.0% (est)	year 1983
Of which fuels	11%	year 1983
Principal foreign exchange earning export: Light manufacturing, banking, machinery, services		
Debt service as % of GNP	1.6%	year 1982
Debt service as % of exports	6.2%	year 1982
Population	6.46 million	year 1983
Annual population growth	0.06%	years 1980-2000
Annual Consumption:		
Flour	396,241** tonnes or 63.3 kg/capita	year 1983
Meat	477,215 tonnes or 72.7 kg/capita	year 1983
Vegetable Oils and fats	81,175 tonnes or 12.4 kg/capita	year 1982

\* Exchange rate of 2.032

\*\* 396,241 tonnes convertible at the rate of 1.33 - 527,000 tonnes in wheat equivalent.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1984 crop should be good. However, much depends on the weather conditions which will prevail during the harvesting period. Anticipated yields are 450,000 tonnes (435,000 mt 1983) which should meet 80% of the requirement of wheat. Projections are that the importation of Canadian/U.S. durum wheat will be in the range of 100,000 tonnes for 1984/85 i.e. 20% of normal requirements.

#### 2. Foreign Exchange Situation

The foreign exchange situation is stable. The Swiss franc continues to be strong in the international money markets and is fully convertible into other currencies. Priorities for imports of food and agricultural inputs will be determined by the level of demand, the capacity of local production to meet that demand and changes in import quotas aimed at supplementing shortfalls in local production. Fluctuations in the rate of exchange between the Canadian dollar and the Swiss Franc should not have any marked effect on Swiss purchase of Canadian grain.

### 3. Fertilizer Situation

Fertilizer supplies and utilization continue to be adequate though Switzerland continues to be very dependent on imported fertilizers. In 1983, 472,409 tonnes of fertilizers valued at SF 138.4 million were imported, compared to 431,211 tonnes valued at SF 125.9 million in 1982. This represented a 9.6% increase in imports. The major suppliers were France, W. Germany and Italy. A summary of fertilizer imports is as follows:

	<u>1982</u>	(tonnes)	<u>1983</u>
ammonium and calcium nitrate	20,685		29,423
ammonium sulphate	14,900		10,895
calcium cyanamide	3,825		3,741
other nitrogen fertilizers	38,236		44,404
other phosphate fertilizers	6,865		7,600
potassium fertilizer	86,356		96,524
other fertilizers	133,566		159,027
mineral/chemical fertilizer/basic slag	108,553		99,470

### 4. Import Mechanism

Grain is usually purchased by private importers. From time to time the Swiss Cereals Administration replenishes its reserve stocks by purchasing wheat from local importers through a system of tendering. As of May 1983, the president of the Association of Swiss Cereals Importers is Mr. Max Baur who recently retired from Karr & Company, Zurich.

### 5. Grain Industry Infrastructure

Regular imports of bread wheat and durum wheat are normally handled through Rotterdam/Antwerp - Basle (90%) or occasionally through Marseilles - Geneva (10 %). Private and government owned storage facilities exceed present requirements. No significant changes in the infrastructure are anticipated.

### 6. Government Policies Affecting Grain and Agriculture

With respect to bread wheat production, the government tries to maintain a level of 80% of self-sufficiency. In times of unfavourable harvest conditions (e.g. in 1982) domestic production losses are replaced by increased imports. Agricultural production and consumption patterns will not be subject to drastic changes because of government policies. However, there is a gradual decline in the consumption of bread (from 25 kg p.a. per person to 24 kg p.a. per person) and also of red meat. Grain related policies have been in place for many years and should not pose any major change in the existing trading pattern between Canada and Switzerland.

### 7. Canadian Grain Marketing Prospects

Imports of bread wheat will continue to range between 100-120 thousand tonnes per year, depending on the level of domestic production and the quality of the crop yield each year. The market for Canadian grain is small and stable. Major

Canadian Grain Marketing Prospects cont'd

and sudden increases in demand are not anticipated. However, a continuing effort must be made to maintain market share. In this respect regular visits by a representative of the Canadian Wheat Board are considered useful and desirable.

The consumption of "special crops" is limited to very small quantities, which means that marketing possibilities are very restricted.

8. Processing Facilities

	Year 1983/84		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills Compound Feed Mills		150 (17 durum)	1,030	565
Malt Houses	2			
Oilseed Crushers	4	4	165	122*

\*est. oil & oilcake

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley Suitable for malting	164	66			230

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

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
Malt	87	(93)	West Germany, France
Malting barley	5	(3)	Australia

3. Additional Information

Change in malting capacity: Domestic malting capacity is decreasing slightly.

Malt Exports: Malting barley is not grown in Switzerland and no malt is exported.

Trend in beer consumption: There has been a slight decrease in beer consumption - 1982/83 - 71 litres per capita  
1981/82 - 72.5 litres per capita



MALT AND MALTING BARLEY cont'd

Market potential for Canadian malt and/or malting barley: Market potential is extremely limited. Most brewing malt is imported from EEC countries, F.R. Germany, France and prices (because of special subsidies) are much lower than those to be obtained from Canadian suppliers.

III. OILSEEDS

1. Import Policy

Import Tariffs: (i) Oilseeds - Swiss francs - .10 per 100 kilos gross weight  
(ii) Crude oil - Swiss francs 10.-- per 100 kilos gross weight  
(iii) Oilseed meal- in containers of less than 5 kg SFR 4.50 per  
100 kg gross weight  
(iv) Refined oil - in containers of more than 5 kg SFR 20.-- per  
100 kg gross weight  
SFR 30.--(coco, palm) per 100 kg gross weight  
SFR 12.--(others) per 100 kg gross weight

Non-tariff barriers: "Price supplements" (non-tariff barriers) are applied according to the end-use of the oilseed, ie. whether it is to be used to produce edible oil or animal feed. Oilseeds for animal feeds are subject to quota restrictions.

Importation procedure and structure: All oilseeds must be imported by companies which are members of the "Société Coopérative Suisse des Céréales et Matières Fourragères.

2. Additional factors: The most important oilseed produced in Switzerland is rapeseed, and "supplements" (subsidies) are paid to farmers and oil processors. In 1983 total value of these "supplements" was SFR 33.1 million. Guaranteed acreage under rapeseed production in 1984 was 14000 hëctares, 1985 will be 15,500 hectares.



3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Groundnuts		22.8		Gambia, U.S.A., Israel
Rapeseed, flax, sesame	31.9*	8.9		Canada**, Hungary, Argentina
Mustard		1.16		Canada, Netherlands, Hungary
Soya, sunflower, poppy	-	96.38		U.S.A., Hungary, Bulgaria
TOTAL	31.9	129.24***		

\* Rapeseed only

\*\* Mostly flax

<u>Oil</u>				
Coco, palm, babassu		4.8		Malaysia, Philippines, W. Germany
Olive		2.25		EEC
Edible oils, refined* & unrefined	12.7**	46.96		Hungary, EEC, Argentina
Lin,soya,palm		2.8		W. Germany, France, EEC
TOTAL	12.7	56.81***		

\* Includes rapeseed

\*\* Rapeseed

<u>Meal</u>				
All types incl.flour (ex. mustard)	18.5**	0.72		Britain, W.Germany, France
Mustard flour		0.038		EEC, other
Others, incl oil cakes		31.7		U.S.A., W. Germany, Italy
TOTAL	18.5	32.46***		

\*\* rapeseed meal

\*\*\* totals above do not represent total imports of oilseeds, oils and meals.

4.	<u>Number</u>	<u>Type of seed crushed</u>	<u>Estimated annual capacity</u>
	4	Rapeseed	165,000 tonnes

OILSEEDS cont'd

5. Export Policy

There are no export assistance or control measures as domestic production of vegetable oils meets only a small percentage (15% in 1983) of Swiss demand.

Export procedure and structure: Exports when made are carried out through private exporters. Quantities are insignificant and probably include re-exports e.g. refined oil. Most exports are to EEC and EFTA countries.

6. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Oilseed	Production	Exports	Destinations
Rapeseed, flax, sesame	31.9*	1.77	W. Germany, France, Netherlands
Mustard		0.14	
Soya, sunflower, poppy		0.32	
TOTAL	31.9	2.23***	

\* Rapeseed

Oil	Production	Exports	Destinations
Coco, palm, babassu		1.2	EFTA, EEC
Olive		0.002	EFTA
Edible oils, refined & unrefined	12.7**	5.8	W. Germany, Italy, EEC
Lin, soya, palm		2.79	Austria, EFTA
TOTAL	12.7	9.79***	

\*\* Rapeseed

Meal	Production	Exports	Destinations
All types incl. flour (ex. mustard)		0.07	EEC
Others, incl oil cakes, all types		0.61	EEC
TOTAL		0.68***	

\*\*\* totals above do not represent total exports of oilseeds, oils and meals.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	430 (435)	435 (458)	320 (200)	1,185 (1,093)
Durum wheat	67 (67)	90 (97)		157 (164)
Flour/Semolina				
TOTAL	430 (435)	502 (525)	410 (297)	1,342 (1,257)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	420 (437)	220 (174)	17 (17)	18 (18)		470 (435)	1,145 (1,081)
Durum wheat	100 (90)				30 (19)	67 (67)	167 (157)
Flour Semolina							30 (19)
TOTAL	520 (527)	220 (174)	17 (17)	18 (18)	30 (19)	537 (502)	1,342 (1,257)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
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WHEAT (including durum)

Cash	80 (84)	90 (117)	5 (3)	200 (79)	35 (14)	410 (297)
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Principal "Others": Austria, Hungary

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	180 (130)	70 (60)	240 (231)	490 (421)
Barley	230 (220)	260 (280)	360 (358)	850 (858)
Sorghum/other cereals	5 (20)	15 (10)	20 (39)	40 (69)
Oats	70 (60)	100 (90)	130 (178)	300 (328)
Rye	30 (30)	20 (10)	30 (31)	80 (71)
TOTAL	515 (460)	465 (450)	780 (837)	1,760 (1,747)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	17 (16)	410 (330)		5 (7)		60 (70)	492 (423)
Barley	1 (2)	595 (585)		10 (12)		250 (260)	856 (859)
Sorghum/other cereals	3 (5)	35 (46)		1 (2)		1 (15)	40 (68)
Oats	13 (10)	150 (200)		4 (5)		123 (100)	290 (315)
Rye	20 (30)	40 (30)		2 (2)		20 (20)	82 (82)
TOTAL	54 (63)	1,230 (1,191)		22 (28)		454 (465)	1,760 (1,747)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	All Others
Corn		55 (108)		20 (12)	15 (3)	150 (108)	240 (231)
Barley	(2)	(4)	2 (2)		343 (348)	15 (2)	360 (358)
Sorghum/other cereals		4 (8)		10 (24)		6 (7)	20 (39)
Oats	10 (22)	(2)	5	10 (9)	60 (69)	45 (76)	130 (178)
Rye	10 (20)	(4)			19 (4)	1 (3)	30 (31)
TOTAL	20 (44)	59 (126)	7 (2)	40 (45)	437 (424)	217 (196)	780 (837)

Principal Others: Austria, Yugoslavia, Hungary for corn  
Norway/Sweden, for oats  
Argentina, Hungary, Yugoslavia for other cereals



## TURKEY

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$900 (est)	year 1983
Annual per capita GNP	US\$975 (est)	year 1983
Average annual growth 1960-80	6%	
Annual inflation rate 1970-80	45% (est)	
Annual inflation rate (current)	41% (est)	
Volume of imports	9.23 billion US\$	year 1983
Of which food	3.7%	year 1983
Of which fuels	37.2%	year 1983
Principal foreign exchange earning export:	Agriculture, argi- industry products, raw materials, minerals	
Debt service as % of GNP	2.4%	year 1983
Debt service as % of exports	19.2%	year 1983
Population	47.2 million	year 1983
Annual population growth	2.0%	years 1980-2000
Annual Consumption:		
Flour	2,500,000 tonnes or 53 kg/capita	year 1983*
Meat	175,000 tonnes or 3.7 kg/capita	year 1983*
Vegetable Oil	120,000 tonnes or 2.5 kg/capita	year 1982*

\* Estimate

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Coarse grains, rice and oilseeds: The heavy April/May 1984 rainfalls (much higher than seasonal averages) were expected to increase general crop production, but June rainfalls were generally lower than season averages. Hence production is expected to remain approximately at 1983 levels. In addition continuous increases in local market prices of fertilizers have caused a downward trend in per hectare fertilizer utilization. Acreage estimates are as follows:

	<u>1982/83 (est)</u>	<u>1983/84 (est)</u>	<u>1984/85 (est)</u>
	- - - - - '000 hectares - - - - -		
Wheat	9,020	9,000	9,500
Coarse Grains	4,271	4,000	4,500
Rice	52	50	70
Oilseeds	920	1,000	1,100

## 2. Fertilizer Situation

Turkey's foreign trade deficit increased in 1983 to US\$3.5 billion from US\$3.1 billion in 1982. 1983 exports totalled US\$5.728 billion while imports reached US\$9.235 billion. The first six months foreign trade figures for 1984 show a decline in trade deficit. The Central Bank's usable foreign exchange reserves were US\$950.9 million as of June 30, 1984. Turkey is self-sufficient in terms of food production with exception of coffee, cocoa, rice, soybean oil, however, with a possible decline in production of some crops the Government is planning to import wheat, barley and corn. In addition, in an effort to prevent speculative stocking of some commodities the government has liberalized imports of many foods which are also available from local sources. Turkey is a recipient of international financial credits from organizations such as OECD, IBRD, Ex-Im Bank, the Saudi Development Bank, etc.

## 3. Fertilizer Situation

Although there was more than a 100% increase in imports, utilization of fertilizer declined in 1983. 1982 fertilizer imports were valued at US\$51 million while 1983 imports were valued at US\$119.5 million. The continued devaluation of the Turkish Lira against other foreign currencies causes continuous increases in the import price of fertilizers. Imported fertilizer chemicals include: ammonia, urea, ammonium nitrate, ammonium sulphate, DAP, superphosphate, potassium sulphate, composite fertilizers, ammonium phosphate. 1983 imports of these fertilizer chemicals totalled 1,240,000 tonnes. Domestic production of fertilizers is estimated at about 7.0 million tonnes, of which 52% was nitrogenous and 48% phosphate fertilizers. The agricultural area fertilized in 1983 is estimated at 13,000 hectares and the proportion of area fertilized to the total cultivated area is 28%.

## 4. Import Mechanism

A government agency The Soil Products Office (TMO) is authorized by law to import grains. Due to an anticipated decline in wheat production, the government is expected to import wheat in 1984. In addition a reduction in corn production is also expected. TMO may be instructed by the government to import corn and barley. As stipulated by law TMO must call international tenders for imports of these grains. No important changes have occurred recently in the grain import procedures of the government.

## 5. Grain Industry Infrastructure

In Turkey, the State Soil Products Office (TMO) buys grain from farmers at a predetermined support price which is determined by the Council of Ministers. TMO then sells the grain to municipality administrations or other state-run organizations at subsidized prices. Wheat for bread making is supplied through this mechanism. The involvement of TMO in the internal wheat trade has a direct influence on the price of bread which is an important element in the Turkish diet. The farmers, however, also have the choice of selling grain to private merchants who usually offer more attractive prices than TMO, but give payment in



5. Grain Industry Infrastructure cont'd

installments. The 1983 grain crop support advance prices of TMO are as follows:

Grade 1 Durum wheat	52	(TL per kg)
Grade 2	48	
Grade 3	45	
Group 1 Bread wheat	45	
Group 2	42	
Group 3	39	

These support prices reflect an average increase of 60% compared to 1983 support prices. Further increases may be declared if necessary. No important changes have occurred in the country's imports, storage facilities and processing mills. The capacity of TMO storage facilities has remained at 1.5 million tonnes. Fifty to sixty large scale and 500-700 medium scale flour mills are operating. TMO's US\$85 million WB-financed grain silos project is expected to be renewed. The total capacity of silos projected was decreased to 710,000 tonnes from initial 900,000 tonnes and both concrete and steel silos are included in project requirement list. WB is expected to take a decision on this project in the fall of 1984.

6. Government Policies Affecting Grain and Agriculture

The interest rate on agricultural credits was increased by the government to 36-42% and farmers have been reluctant to use agricultural credit in the first six months of 1984. Grain production is expected to be affected adversely.

Due to an anticipated decline in production of some crops, the government is expected to import wheat, barley and corn. The government to government trade protocols which were signed recently with Middle East Countries include increasing quantities of wheat exports.

No major change is expected in consumption patterns even though there have been sharp increases in bread prices. Bread is the most important element in the Turkish diet.

TMO believes 1984 grain support prices will help reserves climb to record levels.

Per capita annual meat consumption decreased to 17.5 kg and the increase in interest rates on bank credits for cattle breeding is expected to have an adverse affect on meat production.

The government's expected decision to import wheat, barley and corn could create an opportunity for export of these grains by Canada.

7. Canadian Grain Marketing Prospects

Government projections for the period of 1985-1995 aim at increasing grain production by 30-40%. At the present, local production is believed to meet local demand.

There are no prospects for marketing Canadian special crops in Turkey. These crops are available in sufficient quantities from local sources.

8. Processing Facilities

	Year 1983 (est)		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	400-500	500-700	10-11,000	4,500-7,000
Compound Feed Mills	22	30	40-50	20-30
Malt Houses	3	5		
Oilseed Crushers	55-60	75-100	300-350	180-220

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Istanbul	60	(2,500 MT/day) 900
Izmir	40	" 900
Mersin	100	" 900
Iskenderun	60	" 900
Samsun	20	(1,500 MT/day) 540
Trabzon	20	(1,000 MT/day) 360
Tekirdag	70	( 500 MT/day) 180
Total Capacity	370	4,680



## II. MALT AND MALTING BARLEY

### 1. Domestic Production of barley by type, 1982/83 estimate:

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					6,200
Suitable for malting					3,000

### 2. Imports Nil

### 3. Additional Information

Domestic malting capacity is steadily increasing to meet the local beer consumption.

Malt exports: Total 1983 malt exports reached 7,900 tonnes. Continued increases in local beer consumption has had a negative impact on malt exports, reducing them by 40-50%.

Trend in beer consumption: Increasing. 1983 beer production exceeded 360 million litres, compared to 323 million litres in 1982.

There is no market potential for Canadian malt/malting barley. Demand is met by local production.

## III. OILSEEDS

### 1. Import Policy

Import tariffs: (i) Oilseeds: Nil  
(ii) Crude oil: US\$20/tonne  
(iii) Oilseed meal: No importation allowed.  
(iv) Refined meal: US\$20/tonne

The Ministry of Agriculture may restrict the quantity of annual imports of a certain oilseed at its discretion at any time.

Importation procedure and structure: The government has very recently freed the importation of all oil seeds. However, the Ministry of Agriculture is responsible for determining the list of qualified importers and government agencies must by law call international tenders to import oilseeds. Private firms can deal directly with foreign suppliers.

### III. OILSEEDS cont'd

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Cottonseed	1,352			
Sunflower	715	.005		Italy
Sesame	30	.17		Spain
Hempseed	5			Switzerland
Others*	40	4.0		France, USA
TOTAL	2,142	4.175		

\* Opium, flax, hemp, soybean, safflower, rape

<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u>		
		<u>(crude)</u>	<u>(refined)</u>	
Sunflower	150		21	Italy, France
Cottonseed	75		3.8	Italy, W. Germany
Soyabean	8		82	Spain, Switzerland USA
TOTAL	233		106.8	

#### 3. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
30	Sunflower	1,200 (est)
14	Cottonseed	180 (est)
4	Soybean	22-26 (est)

#### 4. Export Policy

Export Assistance or control measures: Low interest export credits are available to private exporters. In order to qualify for these credits the exporter must have the approval of the State Incentive and Implementation Department. In addition, a tax refund is applicable to the export of oils.

Export procedure and structure: Both the private sector and government agencies can export oilseeds. During good crop years, the state-owned Soil Products Office (TMO) calls export tenders.

5. Additional factors: Turkey is a regular exporter of linseed, sesame, hempseed, poppyseed and sunflower seed. Domestic consumption usually keeps export levels low and the government does not have an incentive program to promote oilseed exports.

III. OILSEEDS cont'd

6. Exports of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Sunflower	715	.008	Switzerland
Sesame	30	1.9	Egypt, Syria, Others
Poppyseed	19	1.7	W. Germany, U.S.A.
TOTAL		3.608	
<u>Oil</u>			
Sunflower	150	.06	Iran, Iraq
Cottonseed	75	.007	Syria, Iran
Soyabean	8	1.9	Iran, Iraq
TOTAL	233	1.967	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	11,700 (12,900)	300 (800)	1,000 (est)	13,000 (13,700)
Durum wheat	1,900 (1,800)	200 (250)		2,100 (2,050)
Flour/Semolina	1,800 (1,700)	250 (300)		2,050 (2,000)
TOTAL	15,400 (16,400)	750 (1,350)	1,000	17,150 (17,750)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Wheat	(13,800)	600 (600)	250 (200)	235 (160)	520 (360)	200 (300)	13,000 (13,700)
Durum wheat							2,100 (2,050)
Flour Semolina	(1,665)	5 (5)	20 (20)		220 (190)	100 (250)	2,050 (2,000)
TOTAL	15,000* (15,465)	605 (605)	270 (220)	235 (160)	740 (550)	300 (750)	17,150*(17,750)

Industrial Use: Plywood, chipboard prod. Export Destination: Iraq, Iran, Kuwait, Libya, Syria

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>

WHEAT (including durum)

Cash  
Aid, concessional  
credit, etc.

FLOUR (including semolina)

TOTAL

1,000



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	1,350 (1,360)	100 (100)	30 (20)	1,480 (1,480)
Barley	6,200 (5,450)	250 (250)		6,450 (5,700)
Sorghum	10 (15)			10 (15)
Oats	324 (320)	10 (20)		334 (340)
Rye	360 (380)	10 (20)		370 (400)
TOTAL	8,244 (7,525)	270 (390)	30 (20)	8,544 (7,935)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

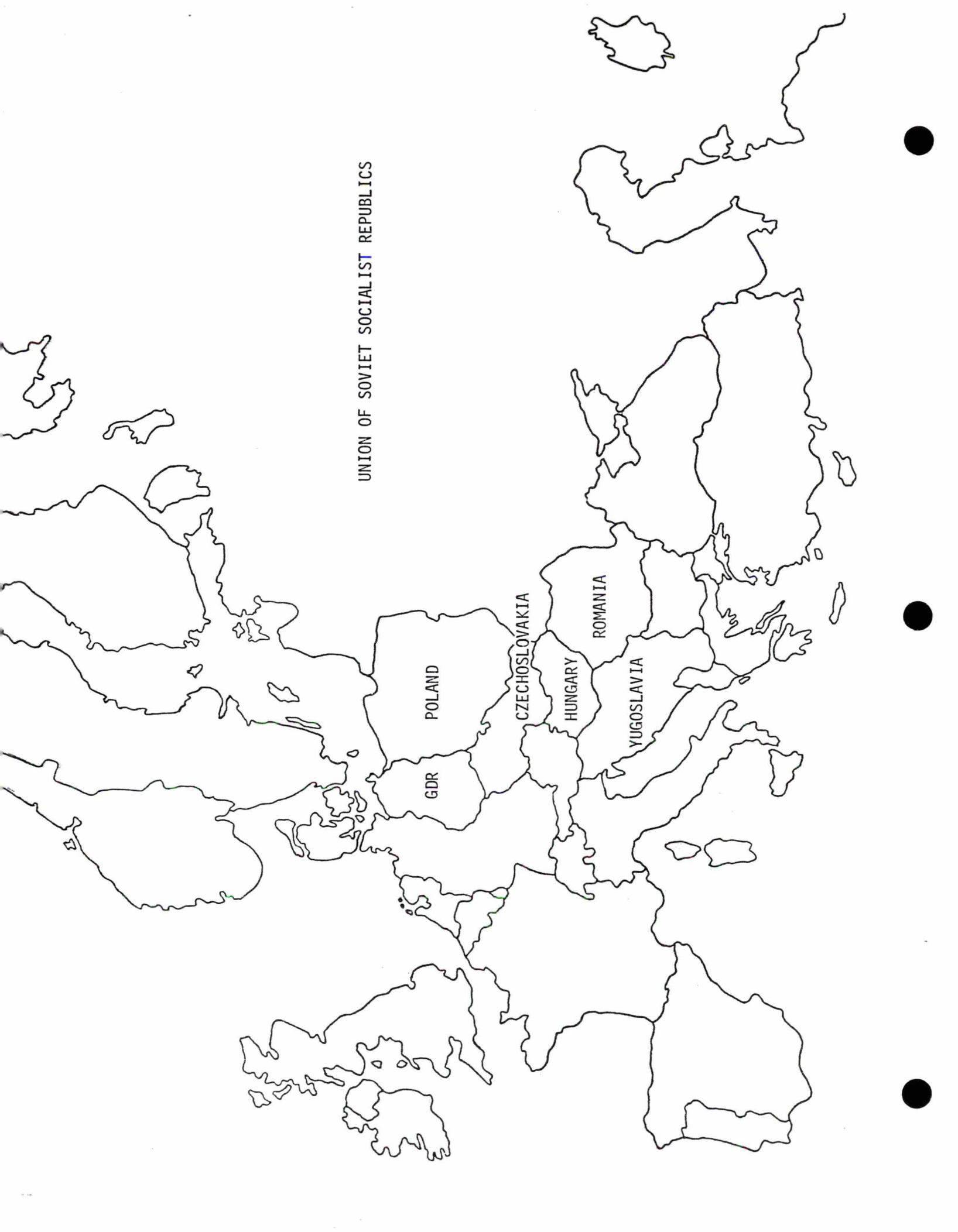
	Consumption			Exports	Carry-out	Total
	Human	Animal	Industrial (seed, waste)			
Corn				15	(100)	1,480 (1,480)
Barley				550 (360)	(250)	6,450 (5,700)
Sorghum						10 (15)
Oats				50 (40)	(10)	334 (340)
Rye					(10)	370 (400)
TOTAL				615 (400)	(270)	8,544 (7,935)

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets (July/83 - June/84)

	ORIGIN				TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	
Corn					
Barley		30 (20)			30 (20)
Sorghum					
Oats					
TOTAL		30 (20)			30 (20)
				EEC	
				All Others	

PART III  
EASTERN EUROPE

UNION OF SOVIET SOCIALIST REPUBLICS



## C Z E C H O S L O V A K I A

Economic classification:	Non-Market Industrial economy	
Oil exporter or importer (net):	Importer	
Annual per capita GNP:	US\$4,840 net	year 1982
Average annual growth 1960-80	4.0%	
Annual inflation rate (current)	4% (estimate)	
Volume of imports	15.515 billion US\$	year 1982
Of which food	7.8%	year 1982
Of which fuels	28.2%	year 1982
Principal foreign exchange earning export:	Industry	
Debt service as % of exports	22% (estimate)	year 1982
Population	15.4 million	year 1982
Annual population growth	0.38%	years 1980-1982
Annual Consumption:		
Flour	83.6 kg/capita	year 1982
Meat	79.5 kg/capita	year 1982
Vegetable Oil	10.6 kg/capita	year 1982

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Grain and oilseed crops in 1983 were at the highest level ever reached in Czechoslovak agriculture. Czechoslovakia finally reached its objective of 11 million tonnes of grain and 362,000 tonnes of oilseed production representing a 201% increase compared to the average of the period 1946-1980. Due to a cold and rainy spring the results of this year's crop are not expected to be as good as in 1983. Grains were sown on 53% of the total arable land out of which wheat was sown on 1,209,000 hectares (1,192,000 hectares in 1983), barley on 790,000 hectares (822,000 hectares in 1983) and winter rapeseed on 113,000 hectares which was 3.9% less than in 1983. Five percent of winter grains and 10.6% of winter rapeseed have been ploughed in which is considered average.

#### 2. Foreign Exchange Situation

Czechoslovakia has a low debt load by East European standards but has been affected by the liquidity crisis in east-west trade. They are determined to run a balance of payments surplus which has resulted in across the board cuts in hard currency allocations for imports of agricultural products such as rice, durum and subtropical fruits and vegetables. Purchasers are under continued pressure to request supplier credit in agricultural purchases from western countries on terms of at least 180 days.



### 3. Fertilizer Situation

Fertilizer utilization in 1983 was 260 kilograms per hectare. Local fertilizer production consists of 590,751 tonnes of nitrogen and 326,166 tonnes of phosphate; but nitrogen, phosphate and potash are also regularly imported mainly from CMEA countries.

1982 imports: phosphates - 280,000 tonnes (160,000 from U.S.S.R., 27,000 from Tunis, 20,000 from Algeria, 15,000 from Morocco, and 8,000 from Jordan).

potash - 639,000 tonnes (487,000 from East Germany, 152,000 from U.S.S.R.).

nitrogen - 105,000 tonnes from U.S.S.R.

### 4. Import Mechanism

The sole grain importer is KOOSPOL Foreign Trade Company Limited, Leninova 178, 160 67 Prague 6, Telex: 121 121, Phone: 336.

Koospol also maintains a buyer in New York, Omnitrade Industrial Co. Limited, Mr. M. Vratny, 135 Dupont Street, Plainview, New York 11803, Telex: 968085.

### 5. Government Policies Affecting Grain and Agriculture

This is a centrally planned economy but the government's ability to meet its objectives in the agricultural sector is constrained. The country wishes to reduce the amount of hard currency spent on grain imports (used almost exclusively for animal feed) but the high consumption of meat is part of the Czech diet. Since little additional acreage is available for grains we expect no major change from their grain import requirements of 1 to 1.5 million tonnes annually.

If the government's policy for self-sufficiency was totally implemented, Canada could expect no grain market opportunities in this country. As it stands, our opportunities for durum are expected to continue but our ability to compete with EEC, the United States and Argentina for feed grain contracts is questionable.

### 6. Canadian Grain Marketing Prospects

Local Projections to 1985 or 1990 of national grains import needs: None.

Marketing Initiatives to increase Canadian sales: Canadian quotations should be more frequent and more attention paid to the supplier credit and unique transportation needs of the buyer.

Marketing possibilities for Canadian "special crops": Only lentils seem to be of interest - depending on competitiveness of Canadian suppliers. Market potential is about 2-3 thousand tonnes/year. Canadian suppliers are regularly quoting lentils but have not yet been successful. Financing is expected.

7. Processing Facilities

Year 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills				1,296
Compound Feed Mills				
Malt Houses				544
Oilseed Crushers				161

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1982/83 estimate:

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley		3,276			3,276
Suitable for malting		800 (est)			800

2. Imports, Calendar year 1983 estimated: Nil.

3. Additional Information

Change in malting capacity: The Czechoslovak malting industry is modernizing and extending its production plants. In the past few years three large capacity malting houses have been put into operation, and the construction of another two is under consideration.

Malt exports: 199 thous. tonnes of malt were exported to the following traditional importers in 1982: to the USSR 45, Cuba 35, Japan 27, Venezuela 26, West Germany 15, Switzerland 11, Belgium 6, Angola 5, The Netherlands 5, and Philippines 2.

Trend in beer consumption: Annual per capita beer consumption is again slightly increasing (1980 - 137.8 litres, 1981 - 140.1 litres).

Market potential for Canadian malt and/or malting barley: No opportunities for Canadian product exist in this field as Czechoslovakia is a traditional exporter.

### III. OILSEEDS

#### 1. Import Policy:

- a) Import Tariffs: None.
- b) Non-Tariff barriers: None.
- c) Importation Procedure and structure: As with grain, the sole importer is Koospol Foreign Trade Co. Limited, (a government monopoly), Leninova 178, 160 67 Praha 6. Telex: 121 121, telephone: 336.

- 2. Additional factors: Financing (supplier's credit - minimum 6 months) is required by Czechoslovakia for the purchase of oilseeds.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Rapeseed	314			
Sunflower	40	19		Switzerland
Poppy	4			
Soya		31		U.S.A.
Others				
TOTAL	358	50		
<u>Oil</u>		<u>Crude/Refined</u>		
TOTAL	161.4	41 (1982)		Hungary (26) Italy (10)

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat				
Durum wheat				
Flour/Semolina				
TOTAL	5,823 (4,613)	1,500 (1,500)	(262)	(6,375)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat							
Durum wheat							
Flour Semolina							
TOTAL	1,800			500			

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Wheat (including durum)							
Cash							
Commercial credit							
Aid, concessional							
credit, etc.							
Flour (including semolina)							
Cash/comm.credit							
Aid, concessional							
TOTAL							

TOTAL

Principal "Others": Hungary



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	714 (941)			
Barley	3,276 (3,654)		(1,064)	
Sorghum				
Oats	749 (583)			
Rye				
TOTAL	5,217 (5,658)		(1,064)	

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>	<u>Other (seed, waste)</u>			
Corn						
Barley	800	(2,000)				
Sorghum	30					
Oats	400					
Rye						
TOTAL	1,230					

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>			<u>TOTAL IMPORTS</u>
	<u>Canada</u>	<u>U.S.A.</u>	<u>All Others</u>	
Corn				
Barley				
Sorghum				
Oats				
Rye				
		<u>U.S.A.</u>	<u>Argentina</u>	<u>EEC</u>
		N/A (535)		N/A (318)
				(1,064)

Principal "Others": Hungary, Romania

## GERMAN DEMOCRATIC REPUBLIC

Economic classification:	Centrally Planned economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	10,660 Marks	year 1982
Annual per capita GNP	12,040 Marks	year 1982
Average annual growth 1960-80	4.4%	
Volume of imports	69.9 billion Marks	year 1982
Of which food	17.8%	year 1982
Of which fuels	36.8%	year 1982
Principal foreign exchange earning export:	75.231 million marks	
	(Machinery & transport equipment)	
Population	16.7 million	year 1982
Annual population growth	-0.1%	years 1970-1980
Annual Consumption:		
Flour	91.2 kg/capita	year 1982
Meat	91.0 kg/capita	year 1982
Vegetable Oil	1.8 kg/capita	year 1982

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The overall goal of the GDR agricultural sector is to reduce its level of imports in grain to reach self-sufficiency by 1990. It is most unlikely that this can be achieved in the time limit prescribed. Much of the imported grain is destined for the animal industry. Thus the size of increasing domestic harvests does not lead to lower imports in the short term.

#### 2. Foreign Exchange Situation

Given the unique situation which, the GDR enjoys with the Federal German Republic, it can utilize its short supply of foreign exchange for many purchases. With a trending upward movement in foreign exchange earnings, the GDR is able to purchase those inputs it desperately needs for its industry. This is consistent with a policy to reduce imports. As a result, imports will be in areas of short production such as grains and oilseeds products.

#### 3. Fertilizer Situation

The GDR is in an excellent position regarding fertilizer inputs as both nitrogen and potash are exported. However, given the need to earn export dollars, supplies of these inputs to domestic farms are curtailed. For example, on average only 12% of GDR potash and 60% of the nitrogen is used domestically. In 1982 the following applications per hectare were noted: N<sub>2</sub>-111.7 kg, P<sub>2</sub>O<sub>5</sub>-53.5 kg, K<sub>2</sub>O-87.2 kg

4. Import Mechanism

Grain imports are handled through a state foreign trade organization NAHRUNG. Given the centralized nature of the GDR government and economy, there are no changes anticipated in NAHRUNG's primacy in the import field.

5. Government Policies Affecting Grain and Agriculture

The main policy change reflects price reform, whereby producers are paid higher prices for their goods but retail prices remain the same. This is to encourage grain production to assist in feeding animals. However, this is coupled with producers paying full prices for inputs and the price increase has been about 60% in both cases. This is designed to make state farm managers more cost conscious in their management practices.

Despite the overall policy goal of reducing grain imports by 1990, the GDR will likely continue to need about 3 million tonnes per year. While most of the imports will be feed grain (which forms the bulk of Canada's current exports) the market could prove fickle unless we are in a position to secure our position through 1985 and 1986.

6. Canadian Grain Marketing Prospects

Current grain imports are about 3 million tonnes, decreasing to 2 million tonnes by the late 1980s.

While there may be scope for small quantities of canary seed we are not aware of marketing possibilities for other special crops.

7. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1982

- - - -Thousands of tonnes- - - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Rostock	2,828	N/A

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1982/83 estimate:

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	1,780	2,275			4,055

2. Additional Information

Domestic malting capacity: Slightly increasing, but exact figures not available.

Malt exports: Estimated at over 20,000 tonnes annually of which FRG - 50% and Japan about 40%.

Annual per capita beer consumption: Slightly increasing.

Market potential for malt or malting barley: None.

III. OILSEEDS

1. Import Policy

Import tariffs: None

2. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1982

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Total	318.74	40.7		N/A

<u>Oil</u>	<u>Production</u>	<u>Imports</u>
Total	247.7	106.6



## HUNGARY

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer*	
Annual per capita GNP	US\$2,100	year 1981
Average annual growth 1960-80	5.1%	
Annual inflation rate (current)	7.3%**	
Volume of imports	7.2 billion US\$	year 1982
Of which food	7.0%	year 1982
Of which fuels	20.0%	year 1982
Principal foreign exchange earning export:	Raw materials & semi-finished products	
Debt service as % of exports	15.8%	year 1981
Population	10.7 million	year 1981
Annual population growth	-.002%	year 1983
Annual Consumption:		
Flour	108.3 kg/capita	year 1983
Meat	72.3 kg/capita	year 1983

\* 7.5 million tonnes imported in 1981

\*\* consumer price index

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Continued dry weather throughout the spring and early summer threaten to produce another disappointing harvest this year, following 1983's drought-plagued performance that saw a 3.2% drop from 1982's record levels. Heavy rains in late July and early August may yet lessen the shortfall, especially for the corn crop.

Sowing for the 1984 grain crop will cover 2.91 million hectares, of which 1.35 million are for winter grains and 1.16 million for corn. Smaller areas are for winter barley (170,000 hectares), spring barley (120,000), rye (70,000), and oats (40,000). The total sown area is actually 60,000 hectares more than planned, but the implications of this for greater 1984 grain production are offset somewhat by an insufficient level of precipitation.

#### 2. Foreign Exchange Situation

Agricultural products usually account for about 25% of Hungary's exports. More significantly, in view of the country's delicate convertible currency (cc) debt situation, about 75% of these exports are sold for cc. The 3 largest export items are livestock and livestock products, fruits and vegetables, and grain. Annual grain exports are usually in the 500,000-1.5 million tonne range, with about 80% of this sold for cc. Main customers are the USSR, Czechoslovakia and GDR. The serious drought in 1983 caused considerable damage to Hungarian farming and exports. As part of governmental policy to maintain adequate food supplies, agricultural goods worth \$US 200 million destined to cc export markets were diverted to the home market.

### 3. Fertilizer Situation

Fertilizer input per hectare of arable land rose to 237 kg in 1983, up from 232 kg in 1982 and 225 kg in 1981. Total application of fertilizers in 1983 was 1.56 million tonnes, consisting of potassium (528,000 tonnes), phosphorus (462,000 tonnes), and nitrogen (630,000 tonnes). Potassic and phosphoric varieties are mostly imported; nitrogen fertilizers are produced domestically.

### 4. Import Mechanism

The import mechanism is similar in principle to that found in other CMEA states, with a state-run foreign trade organization (FTO) serving as the exporting/importing body. In Hungary the relevant FTO is Agrimpex (address: Munnich Ferenc utca 22, Budapest V. tel: 113-800, telex 22-5751).

In July 1984 Mr. Karoly Samu became the new General Manager of Agrimpex, replacing Ferenc Jurassza, who retired. Mr. Samu has been to Canada a few times in the past, including participation at the IWC 100th session in Ottawa in June 1984.

### 5. Grain Industry Infrastructure

Under the Ministry of Agriculture and Food, the Grain Trust (Gabona Troszt) is the state enterprise responsible for the procurement, storage and marketing of grains destined for domestic consumption and export markets. The Trust is also the sole importer of protein feed material, acting through Agrimpex.

The past year has seen the unfolding of the World Bank (WB)-supported Grain Storage and Mechanization Project, which is designed to increase grain surpluses available for export by reducing post-harvest losses through improved storage and by increasing yields through improved mechanization. The project, with the World Bank's share of cc financing amounting to \$US 130.4 million, is the first one in the agricultural sector since Hungary joined the WB in July, 1982. The loan is being used to procure metal silos, pneumatic grain handling units and various types of tractors, harvesting and tillage equipment. Further stages of the project will be carried out in 1985.

### 6. Government Policies Affecting Grain and Agriculture

Unlike its Comecon neighbours, in Hungary the 5 Year Plan for the agricultural sector is more a guide and less a central planning directive imposing binding production targets. The two main goals of the sector are to maintain the present satisfactory domestic food supply and to increase the volume of exports to cc markets. The government strives for these goals through the manipulation of agricultural prices (80% are centrally determined), intensive output growth, and major upgrading of the country's storage and mechanization facilities. Livestock production is regarded as being at satisfactory levels; the grain sector will be receiving most of the future developmental assistance and investment.

Sales prospects for Canadian grain in Hungary will probably diminish further as a result of these policies, since their objective is to increase Hungary's own grain exports to convertible currency markets.



## 7. Canadian Grain Marketing Prospects

For the past several years imports have been limited to small amounts of feed grains, consisting mainly of low grade wheat and maize. 1981 imports totalled 55,000 tonnes. This is not expected to increase significantly in the near to medium term. To the best of our knowledge there are no locally available publications that outline grain import projections for the 1980s.

If attractive buying prices for feed grains develop on the world market then a trade mission of Canadian sellers to Budapest for 1 or 2 working days to make offers to Agrimpex might be useful.

The Hungarians are interested in canola meal as a partial substitute for their sizeable soya meal imports from the USA and Brazil. Canola meal has performed well here in technical feeding trials but supply problems and the Hungarian preference for spot buying over advance commitments have prevented any sales to date.

## 8. Processing Facilities

Year: 1982

			thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	1	148	2,000	2,000
Compound Feed Mills		300	n/a	n/a
Malt Houses		2	63	63
Oilseed Crushers	1	6	2	2

## 9. Storage and Throughput Capacity

Hungary is a landlocked country.

## II. MALT AND MALTING BARLEY

Domestic Production of barley by type, 1983 (1982) figures:

- 1,007,000 (865,000) tonnes - 6 row barley

Trend in beer consumption:	1983 - 89 litres per capita
	1982 - 90 " " "
	1981 - 89 " " "
	1980 - 86 " " "
	1975 - 72 " " "

Market potential for Canadian malt and/or malting barley: Very little, if any, potential.

### III. OILSEEDS

#### 1. Import Policy

Importation procedure and structure: The importation procedure and structure is the same as that for grain, i.e. through the foreign trade organization Agrimpex.

2. Additional Factors: Hungary imports large quantities of soya meal each year from the USA and Brazil, directly on a subsidized financing basis offered by the seller, and indirectly through West European traders on a spot buying basis. American financing is provided by the Commodity Credit Corporation.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	592	66	532	

#### 4. Number and capacity of oilseeds crushing plants.

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
6	Sunflowerseed	2,000

#### 5. Export Policy

Exporting is a state monopoly, carried out by the foreign trade organization Agrimpex.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983 - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	5,985 (5,762)			8,911 (8,372)
Durum wheat				
Flour/Semolina				
TOTAL	5,985 (5,762)			8,911 (8,372)

DISPOSITION 1983 - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Wheat	1,672 (1,671)	2,600 (1,905)	92 (64)	544 (600)	1,107 (1,147)	2,896 (2,925)	8,911 (8,372)
Durum wheat							
Flour Semolina							
TOTAL	1,672 (1,671)	2,600 (1,905)	92 (64)	544 (600)	1,107 (1,147)	2,896 (2,925)	8,911 (8,372)

IMPORT TRADE 1983 - thousands of tonnes - previous year in brackets

ORIGIN	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>ATT</u>	<u>Others</u>	<u>TOTAL IMPORTS</u>
Canada							

WHEAT (including durum) There are no statistics available from Hungarian sources.

Cash  
Commercial Credit  
Aid, concessional  
credit, etc.

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional:

TOTAL

## (B) COARSE GRAINS

SUPPLY 1983 - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-over, January</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	6,426 (7,959)	5,743 (5,620)	10 (1)	12,179 (13,580)
Barley	1,013 (871)	326 (466)	1 (1)	1,340 (1,338)
Sorghum		(5)		
Oats	124 (123)	71 (113)	(1)	195 (237)
Rye	138 (117)	64 (55)	13 (6)	215 (178)
TOTAL	7,701 (9,070)	6,204 (6,259)	24 (9)	13,929 (15,338)

DISPOSITION 1983 - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Dec.31/83 Carry-over</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	3 (1)	6,702 (6,872)	329 (286)	167 (438)	264 (438)	4,716 (5,743)	12,181 (13,581)
Barley	4 (3)	740 (787)	130 (146)	58 (55)	24 (21)	384 (326)	1,340 (1,338)
Sorghum				(5)			(5)
Oats	37 (35)	106 (152)	2 (3)	10 (10)	1 (1)	76 (71)	195 (237)
Rye		86 (60)	1	20 (19)		71 (64)	215 (178)
TOTAL	42 (41)	7,634 (7,871)	462 (435)	255 (330)	289 (460)	5,247 (6,204)	13,929 (15,341)

IMPORT TRADE 1983 - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS	
	<u>U.S.A.</u>	<u>All Others</u>
Canada		
Australia		
Argentina		
EEC		

Statistics not available from Hungarian sources

Corn  
Barley  
Sorghum  
Oats  
Rye  
TOTAL

## P O L A N D

Economic classification: Centrally Planned economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$1,825	year 1983
Annual per capita GNP	US\$1,768	year 1983
Average annual growth 1960-80	5.7%	
Annual inflation rate 1970-80	5%	
Annual inflation rate (current)	123%	
Volume of imports	10.6 billion US\$	year 1983
Of which food	10%	
Of which fuels	26.1%	
Principal foreign exchange earning export: coal		
Population	36.7 million	year 1983
Annual population growth	1.0%	year 1983
Annual Consumption:		
Flour	4,482,890 tonnes or 120 kg/capita	year 1982/83
Meat	2,142,233 tonnes or 58.3 kg/capita	year 1983
Vegetable Oil*	242,527 tonnes or 6.6 kg/capita	year 1983

\* including margarine

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Under near perfect harvest conditions, the 1984 crop appears to be slightly better than the 1983 harvest of just over 22 million tonnes. The area under cultivation is approximately 8.2 million hectares, 100,000 hectares higher than last year.

The 1984 rapeseed crop is estimated at 925,000 tonnes, up significantly from 520,000 tonnes harvested in 1983.

The government's annual plan for 1985 calls for an increase of up to 30% in the total budget for agriculture. Other indicators suggest that decreases are actually occurring in some sectors.

#### 2. Foreign Exchange Situation

Given Poland's current massive indebtedness, a final solution to which has yet to be found, the pressure on hard currency remains extremely tight. It is not expected that the severe indebtedness will change until 1985, at the earliest. As a result, foreign exchange is used for essential purchases. In 1983, this included milling quality wheat and meat. This will recur in 1984, but the avowed policy of the Government is to discontinue the use of foreign currency for agricultural purchases abroad by 1990.

Poland has received agricultural commodities on a humanitarian aid basis since 1981. Most notably, the USA donated flour to Poland in 1983.



### 3. Fertilizer Situation

Fertilizer use for 1983 grain crops was lower than 1982 which may have reflected larger areas of cultivation. Yield may have suffered. In 1984, there was an effort to use more NPK commercial fertilizer. State farms tend to be the main users because of government allocation procedures and because of the prevalence of animal manure use on smaller farms.

### 4. Import Mechanism

Grain imports in Poland continue to be managed by the state owned Foreign Trade Organization "ROLIMPEX". Rolimpex officials are well known to the Canadian Wheat Board. Personnel have not changed in the last year. Given the difficulty of sufficient hard currency, Rolimpex often buys from the lowest price source, even if the quality of the purchase is sacrificed. The agency does not call for tenders when making a purchase - it prefers a continual checking of the market and close contact with its potential vendors.

### 5. Grain Industry Infrastructure

Poland's infrastructure would be considered inadequate by western standards. Storage is a critical problem with the result that most grain is moved to its destination as quickly as possible. The main grain importing port - Gdynia - has one 10,000 tonne through-put elevator. All grain moves from port position in 27-tonne capacity rail cars.

The milling industry has low capital investment for storage but it seems adequate. Wheat is distributed to numerous bakeries where it is stored and milled locally before baking.

### 6. Government Policies Affecting Grain and Agriculture

Despite a highly regulated system, there is no mandatory delivery mechanism that forces farmers to deliver their grain. The alternative is to feed it to animals. The Government has been trying to arrest this by offering higher prices for delivered wheat and less for rye. As yields improve the shift to a higher percentage of wheat under cultivation will increase.

In as much as self-sufficiency is the goal of Government by 1990, imports do not have a bright future. In crops where there is an exportable surplus such as rye, this will be reduced as acreage is shifted to other grains.

Poles tend to use bread as a filler rather than as a staple. Poles remain meat eaters even though, at present, an individual is rationed to 2.5 kg of meat and meat products per month (excluding black market purchases). Poultry flocks are increasing largely because poultry is ready for the table faster than beef. The fact that it takes less feed per kilo to produce poultry than it does beef does not seem to be a factor.

As consumption tends to equal production, there are only strategic reserves of grain retained. The reserves are thought to be substantial, albeit unpublicized.



7. Canadian Grain Marketing Prospects

Polish grain imports on an annual basis reflect the success of harvest, as such few long term import projections exist. In 1984/85, however, it is estimated the Poles will import 2.5 million tonnes of grain.

Canada needs to continue to show interest in the market, and that we have not abandoned Poland despite the recent financial difficulties.

Most of our specialty crops have no applicability here or are in production in Poland anyway.

8. Processing Facilities

	Year: 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	1	100 plus	5,200	4,500
Compound Feed Mills	5	65	8,500	3,500
Malt Houses	1	12	200	200
Oilseed Crushers	1	30	1,300	1,300

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year: 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
	-- thousands of tonnes --	
Szczecin	5	1,000
Gdynia	10	
Gdansk	0	

II. MALT AND MALTING BARLEY

Change in Malting Capacity: Annual production averages 220,000 tonnes. During recent years there were not significant changes in quantities produced due to the fact that domestic needs for the commodity is not growing.

Malt Exports: During 1978-80 30,000 tonnes/year was exported mainly to Brazil, Venezuela, F.R.G., Japan, and also other European markets. In the beginning of the 1980's malt exports shrunk approximately by 25.3%, but according to the officials of FT0 Rolimpex it is expected to return to the same level as in the late 1970's.

Trend in beer consumption: During 1982/83, annual consumption of beer averaged 11 million hectolitres (29.73 litres per capita), and this year's forecast calls for the same quantity.

Market potential for Canadian malt and/or malting barley: Due to the fact that domestic production surpasses the needs of the country we do not believe that one could expect any potential.

### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: - Oilseeds:       soya - no duty; rapeseed - 20%,  
  mustardseeds - 3%, other - 20%  
                  - Refined Oil: 15%

Importation procedure and structure: All importation is being arranged by Foreign Trade Enterprises which are governmental agencies.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean			193	U.S.A.

#### 3. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
30		1,300

#### 4. Export Policy

- a) Export assistance or control measures: Depends only on single year's domestic production.
- b) Export procedure and structure: Only government agencies.

#### 5. Additional Factors

The only credits that could possibly be given would be to Third World countries and mainly for political reasons.

IV. STATISTICAL NOTES(A) WHEAT AND DURUMSUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat (total) 1982/83	4,476 (4,203)	1981/82	40 (187)	3,230 (3,505)
Durum wheat				7,746 (7,895)
Flour/Semolina 1983	2,539 (2,827)	1982		
Wheat Production Marketed in 1982/83	882 (785)	1981/82		

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Consumption Human</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>(Total Domestic Utilization) Total</u>
Wheat	4,484 (4,543)	2,656 (2,735)	6 (11)	600 (606)			7,746 (7,895)
Durum wheat							
Flour Semolina							
<b>TOTAL</b>	<b>4,484 (4,543)</b>	<b>2,656 (2,735)</b>	<b>6 (11)</b>	<b>600 (606)</b>			<b>7,746 (7,895)</b>

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Canada					

WHEAT (including durum)

Cash  
Commercial Credit  
Aid, concessional  
credit, etc.

FLOUR, (including semolina)

Cash/comm. credit  
Aid, Concessional

TOTAL

3,230 (3,505)





## ROMANIA

Economic classification: Middle Income economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$1,900	year 1983
Annual per capita GNP	US\$2,500	year 1983
Average annual growth 1960-80	9%	
Annual inflation rate 1970-80	7% est.	
Annual inflation rate (current)	12% est.	
Volume of imports	8.4 billion US\$	year 1983
Of which food	0.3 billion US\$	year 1983
Of which fuels	4.4 billion US\$	year 1983
Principal foreign exchange earning export: Machinery, equipment and transport means, fuel, mineral raw materials, metals, consumer industrial goods		
Debt service as % of GNP	10%	year 1982
Debt service as % of exports	46%	year 1982
Population	22.5 million	year 1983
Annual population growth	0.5%	year 1983
Annual Consumption:*		
Flour	2,449,000 tonnes or 109 kg/capita	year 1983
Meat	1,059,000 tonnes or 34 kg/capita	year 1983
Vegetable Oil	317,000 tonnes or 14 kg/capita	year 1983

\*Apparent consumption (production + imports - exports)

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The all important cereal grains may have sufficient moisture in 1984, but late planting in 1983 could affect the winter crop results. The long term irrigation program, bringing proportionately more land under irrigation than any other East European country, will continue but its impact will not be immediate. The 1984 crop year should be an improvement over 1983 but this improvement should fall within the range of the previous four years, not the plan targets for 1984.

#### 2. Foreign Exchange Situation

Although agriculture and food products will be a source of precious foreign exchange and an important element in Romania's intra-CMEA trade, there will still be regular imports of certain grains and oilseeds to supplement local supplies.

Romania found itself in a position of having to reschedule its external debts for 1982 and 1983, but in all probability it will be able to overcome its liquidity problems in 1984.

### 3. Fertilizer Situation

In 1984, 35.5 million tonnes of organic fertilizers shall be provided, as well as 1.83 million tonnes of nitrogenous, phosphate and potash fertilizers, and 557,000 tonnes of pesticides. Liquid nitrogenous fertilizers should be used more widely.

### 4. Import Mechanism

In Romania, importation is a state monopoly. The Romanian government establishes the basic guidelines and the annual economic plan, specifying in detail the development objectives. The economic sector ministries distribute to the various foreign trade organizations the import/export targets required by the annual plan in conformity with the production requirements and goals of these ministries. For grains, the import organization is FTO AGROEXPORT headed by Mrs. Florica Gursca.

### 5. Grain Industry Infrastructure

Starting with 1964, the Romanian Government decided to invest more in the Black Sea port - Constantza, as trade was sharply increasing. The port expansion took place in several stages and was finished in 1983. The Constantza port occupies at present a total area of 728 hectares, 400 hectares of land and 328 hectares of water. Total length of break walls is about 6,800 meters. The railway system totals 200 km. Draft varies from 8.0 to 13.5 meters in the more recently developed areas, allowing ships of up to 95,000 tonnes to enter the port. There is a specialized food products berth including a refrigerating storehouse and a new grain berth, used to discharge partially large vessels before they can be accepted to the old grain terminal. Total port capacity is 52 million tonnes per year of which 35 million tonnes are dry commodities. There are about 30,000 employees working in the port. A second expansion of the port called "Constantza South-Agigea" is envisaged in direct connection with the Black Sea - Danube Canal operation. The new port facilities will cover an area of about 2,000 hectares and have a final capacity of 180 million tonnes annually. It is to be finished about the year 2000. Certain priorities have been established; among others the completion of the new phosphate berth.

### 6. Government Policies Affecting Grain and Agriculture

In mid-January 1984 the Government took a major step towards intervention in the small but productive "private" sector. With this sector delivering less than its share to the centralized state-fund, the Government decided to set crop and animal husbandry norms and to impose delivery obligations at fixed prices.

Canadian barley and rye exports will not be immediately affected by the above-mentioned legislation.

7. Canadian Grain Marketing Prospects

Romania considers itself self-sufficient in food, hence no projections are made regarding imports. Any imports that do materialize usually result from adverse climatic conditions.

The ability to arrange partial or total countertrade business would be useful in increasing Canadian sales.

Canadian "special crops" will not likely find an export market in Romania.

8. Processing Facilities

	Year: 1983		thousands of tonnes
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>
			est.
Flour (and durum) Mills			6,500
Compound Feed Mills			
Malt Houses			
Oilseed Crushers			2,500
			est. 6,200
			est. 2,200

9. Storage and Throughput Capacity

Grain Import Capacity by Port

	Year 1984	
	-- thousands of tonnes --	
<u>Name of Port</u>	<u>Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Constantza	120	3,500

II. MALT AND MALTING BARLEY

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

	-- thousands of tonnes --				
	2-Row		6-Row		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	<u>Total</u>
All Barley					2,220

2. Imports: United Nations and trade sources estimate malt imports at 3,000-6,000 tonnes annually. Figures are not available for malting barley.

3. Additional Information

Change in malting capacity: The domestic malting capacity is increasing.

Malt exports: No malt exports are registered.

Trend in beer consumption: Annual beer consumption (44 litres/capita) is increasing in 1983.

Market potential for Canadian malt and/or malting barley: There appears to be a market for Canadian malt and malting barley.



III. OILSEEDS

1. Import policy:

- a) Import tariffs: Oilseeds: Seeds are excepted tariff position- 12.01.B  
 Crude Oil: 25% (10%) ad valorem - 15.07.B  
 Oilseed Meal: 10% ad valorem - 19.04.B  
 Refined Oil: 25% (10%) ad valorem -15.07.B
- b) Non-tariff barriers: The state monopoly.
- c) Importation procedure and structure: The imports are controlled by the state-owned foreign trade organizations. The main foreign trade organization engaged in oilseeds imports is AGROEXPORT.

2. Additional Factors: Romania is trying to increase its domestic production of oilseeds.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	710			
Soybeans	250 est.	213		U.S.A.
Others	60			
TOTAL	1,020	213		
<u>Oil</u>		<u>Crude/Refined</u>		
Mixed oil (Sunflower + soybean)	360	2		Greece, Spain
Others	20			
TOTAL	380	2		
<u>Meal</u>				
Soybean	N/A			U.S.A., Brazil

4.

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
N/A	Sunflower Soybean	1,041



IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat + rye	5,250 (6,505)		98	5,348 (6,505)
Durum wheat				
Flour/Semolina				
TOTAL	5,250 (6,505)		98	5,348 (6,505)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat + rye							
Durum wheat							
Flour Semolina							
TOTAL							

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Canada						

## (B) COARSE GRAINS

SUPPLY 1983 - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	12,000 (12,600)			12,000 (12,750)
Barley	2,200 (3,110)		(150)	2,200 (3,110)
Sorghum	(40)			(40)
Oats	(80)			(80)
TOTAL	14,200 (15,830)			14,200 (15,980)

DISPOSITION 1983 - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	800 (950)	9,000 (9,750)	2,200 (2,050)				12,000 (12,750)
Barley	(210)	2,200 (2,700)	(200)				2,200 (3,110)
Sorghum		(35)	(5)				(40)
Oats	(70)	(10)					(80)
TOTAL	800 (1,230)	11,200 (12,495)	2,200 (2,255)				14,200 (15,980)

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn						(150)
Barley						
Sorghum						
Oats						
TOTAL						(150)

## U S S R

Economic classification: Non-Market Industrial economy		
Oil exporter or importer (net): Exporter		
Annual per capita income:	US\$2,674	year 1982
Annual per capita GNP	US\$6,350	year 1982
Average annual growth 1960-80	3.8%	
Volume of imports	77.75 billion US\$	year 1982
Of which food	23.7%	year 1982
Principal foreign exchange earning export: Crude oil and products, Natural gas		
Debt service as % of GNP	1.0%	year 1983
Debt service as % of exports	11.0%	year 1983
Population	274 million	year 1982
Annual Consumption:		
Bread products	136 kg/capita	year 1983
Meat	57 kg/capita	year 1982
Vegetable Oil	9.3 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Due to dry weather during planting season and heavy precipitation this summer and fall during the harvest period, this year's crop is below average and well below target. Estimates range from 165 to 180 million tonnes. Other information is as yet unavailable.

#### 2. Foreign Exchange Situation

Foreign exchange situation is good but less favourable than last year. Heavy grain buying on world markets has placed heavy burden on foreign hard currency reserves. Thus USSR has discounted oil exports by 5% below OPEC price levels in order to obtain valuable hard currency. USSR remains an extremely good credit risk.

#### 3. Fertilizer Situation

Mineral fertilizer production (29.7 million tonnes) and deliveries (23 million tonnes) were up 11 and 14 percent respectively in 1983, showing much higher growth rates than experienced since the early 1970's. Soviets complain that insufficient fertilizer availability and poor quality of preparations, insufficient storage facilities, lack of formulated mixtures, and inadequate equipment and experience restrict this sector. For example, farms receive only 60-65 percent of needed phosphorous. Potassium is the most deficient nutrient, limiting the efficiency of nitrogen and phosphorous.

#### 4. Import Mechanism

All grain trade is controlled by Exportkhleb/Zerno, a state monopoly agency. No significant changes are expected. Most grain partners deal under terms of their respective long term agreements (usually five years).

#### 5. Grain Industry Infrastructure

Increased imports of grain from France by rail transportation. In year of heavy grain buying Baltic ports and transshipment via North European ports such as Rotterdam and Hamburg by rail is on the increase.

#### 6. Government Policies Affecting Grain and Agriculture

The May 1982 Food Program endorsed by Party plenum has provided the guidelines for increased emphasis on growth of agricultural supplies and services and improved use and coordination of resources at the local level through the formation of raion agro-industrial organizations (RAPO's). Improvement in productivity is being sought through increased use of collective contract scheme (i.e. brigades).

Aside from improvement in the Soviet diet, the above Food Program in tandem with Five Year Plan aims to reduce USSR dependence on foreign grain for animal consumption. However, the USSR will likely continue to buy high quality Canadian wheat for human consumption mixes along LTA lines as cycle of poor harvests continues.

#### 7. Canadian Grain Marketing Prospects

Marketing possibilities for Canadian special crops: Exportkhleb/Semena appears interested in field peas, beans and lentils. Prodintorg should be approached more seriously on canola oil. Canola meal may have a future in the USSR.

#### 8. Processing Facilities

	Year 1983/84		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills				36,000
Compound Feed Mills				33,000
Malt Houses				
Oilseed Crushers				

#### 9. Storage

Inadequate storage causes losses of several billion rubles each year. Only 36 percent of all agricultural commodities have satisfactory storage facilities.



## II. MALT AND MALTING BARLEY

There is no published Soviet data or description of malt/malting barley situation.

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley Suitable for malting					54,000

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

	<u>thousands of tonnes</u>		<u>Principal suppliers(s)</u>
Malt	300	(249)	France, U.K., Czech, Belgium
Malting Barley	337	(249)	EEC, Sweden, Austria

### 3. Additional Information

Change in malting capacity: Believed to be increasing.

Malt exports: None.

Trend in beer consumption: Believed to be increasing. Brewing trade sources show production at 68 million hl in 1982, up from 65 million in 1981. Beer imports are given as 831,000 hl in 1982, up from 798,000 in 1981.

III. OILSEEDS

1. Import Policy

In 1983, the USSR imported \$US 1 billion of oilseeds and oil meal.

State Purchases of Oil Seeds (thousand tonnes)

<u>1981</u>	<u>1982</u>	<u>1983</u>
3,888	4,563	4,414

Non-tariff barriers: Oilseeds LTA's with Brazil, Argentina, USA.

Importation procedure and structure: Government monopoly Foreign Trade Organization Exportkhleb/Prodsyrio, 32/34 Smolenskaya-Sennaya Pl., Moscow 121200

2. Additional factor: In recent year Brazilian soybeans have been replaced by French oilseeds. Sunflower diseases restrict quality and quantity of Soviet end product output. The Soviets use both domestic and German crushing equipment.

3. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Exports (1982)</u>	<u>Principal Sources of Imports</u>
Sunflower	5,040			
Cottonseed	5,000			
Soybean	500	1,366		USA, Brazil, Argentina
Others	271			
<u>Oil</u>		<u>Imports</u>		
Sunflower		150	103	
Palm		200		Malaysia
Soy		90		
Others		210	114	
TOTAL	2,782	650		
<u>Meal</u>		<u>Imports</u>		
Soybean		2,600		EEC, Brazil, India
Other		265		
TOTAL		2,865		

4. Export Procedure: Same as import structure.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	86,000 (80,000)		20,200 (19,500)	106,000 (99,500)
Durum wheat			395 (186)	395 (186)
Flour/Semolina			20,595 (19,686)	106,395 (99,686)
TOTAL	86,000 (80,000)			

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	36,000 (36,000)	45,000 (42,000)	1,000 (1,000)	24,000 (23,000)	500 (500)		106,500 (102,500)
Durum wheat						210 (243)	210 (243)
Flour Semolina							
TOTAL							106,710 (102,743)

Export Destination: Cuba, Poland, Vietnam

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	ATT Others	TOTAL IMPORTS
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WHEAT (including durum)

Cash	7,901 (6,214)	4,236 (5,160)	991 (2,020)	5,319 (3,287)	4,611 (1,902)		23,058 (18,583)
Aid, concessional credit, etc.							

FLOUR (including semolina)

Cash/comm.credit	173 (171)						173 (171)
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Total 1983 USSR grain and grain products imports amounted to US\$6 billion.

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	16,100 (13,500)			
Barley*	54,000 (41,000)			
Sorghum*	180 (100)			
Oats	17,500 (15,500)			
Rye	14,600 (14,000)			
TOTAL			10,000 (11,300)	

\* United Nations (FAO)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets. (Government Fisca Year 1983/4- 1984/3)

	Consumption	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
--	-------------	--------	------------	------------------------	---------	-----------	-------

Corn  
Maize  
Barley  
Sorghum  
Oats  
Rye

TOTAL

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets (July/83 - June/84)

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn	230 (589)	3,400 (7,349)				
Barley	905 (2,516)			(49)		
Sorghum						
Oats	12 (29)					
Rye	(299)					

TOTAL



## YUGOSLAVIA

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$2,932	year 1983
Annual per capita SP*	US\$2,536	year 1982
Average annual growth 1960-80	5.4%	
Annual inflation rate 1970-80	18%	
Annual inflation rate (current)	58%	
Volume of imports	13.3 billion US\$	year 1982
Of which food	1.5%	year 1982
Of which fuels	20%	year 1982
Principal foreign exchange earning export:	Machinery, Transport equipment	
Debt service as % of GNP	8.8%	year 1982
Debt service as % of exports	50%	year 1983
Population	22.9 million	year 1983
Annual population growth	0.7%	years 1980-2000
Annual Consumption:		
Flour	3.4 million tonnes or 152 kg/capita	year 1983
Meat	1,156 million tonnes or 51 kg/capita	year 1983
Vegetable Oil	330,000 tonnes or 15 kg/capita	year 1983

\*Social product

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1984 wheat crop is expected to be 5.5 million tonnes from an acreage of about 1.45 million hectares compared to 5.524 million tonnes harvested from an acreage of about 1.607 million hectares in 1983. The planned acreage seeded to corn (2.38 million hectares) is larger than in previous years, when it used to be below 2.3 million hectares, and therefore a record corn crop of over 12 million tonnes is envisaged this year.

The barley crop is expected to be in the range of 0.7 million tonnes from an acreage slightly below 300,000 hectares.

The acreage seeded to rice is nearly at the same level as last year (8,900 hectares).

As for oilseeds, the acreage seeded to sunflower has been constantly diminishing since 1979 and has dropped from 257,000 to 80,000 hectares in 1983. This is due to a fungus disease ("phomopsis") which has been affecting sunflower crops for the last four years. The acreage seeded to soybeans is estimated to be 104,000 hectares and production is in the range of 240,000 tonnes (210,000 tonnes in 1983) whereas production of rapeseed is expected to be slightly over 100,000 tonnes from an acreage of 60,000 hectares, nearly the same as last year.

## 2. Foreign Exchange Situation

Yugoslavia has been experiencing great financial difficulties for the last few years and in endeavours to improve its balance of trade, imports of a large number of commodities have been drastically curtailed. However, imports of agricultural products and foodstuffs will continue to have priority. On tenders for imports of grain or oilseeds, offers with payment on credit or linked with countertrade will have the advantage. Yugoslavia is not a recipient of international aid.

## 3. Fertilizer Situation

Yugoslavia's requirements in chemical fertilizers have been constantly growing and about 3.23 million tonnes (actual weight) were required in 1983 consisting of 0.968 million tonnes of K<sub>2</sub>O, 0.233 million tonnes of urea, 2.012 million tonnes of NPK (complex) and 13,000 tonnes of super phosphates. However, these requirements were only partially met by domestic production. Due to current financial problems, it is rather uncertain whether all the required imports of fertilizers will be possible in 1984.

## 4. Import Mechanism

The imports of grain are done either through the Federal Directorate for Food Reserves or through its counterparts in the republics. If necessary, on the basis of an assessment of the overall grain situation, the Directorate releases a tender to major Yugoslav grain importers who in turn solicit offers from abroad. The most suitable bid wins the tender. Bids offering countertrade (buy back) have priority.

## 5. Grain Industry Infrastructure

Due to the current poor overall economic situation, Yugoslavia does not envisage large capital projects in the grain industry for the moment.

## 6. Government Policies Affecting Grain and Agriculture

A price-support system has been established through which social companies buy grain from farmers at previously set prices. However, due to current inflation (58% last year) the selling price which is fixed beforehand is sometimes not high enough to induce farmers to make deliveries and they prefer to keep grain for themselves and make better profits by feeding their own cattle and selling livestock.

In order to provide sufficient wheat for the industrial production of bread an ambitious plan of purchasing 3.5 million tonnes of wheat has been set up at the price of 22 dinars (20¢ at the current exchange rate) plus a 2 dinar premium per kilogram. If this program succeeds there will be sufficient supply to meet Yugoslav bread requirements and there will be no imports of wheat, regardless of the crop size this year.

7. Canadian Grain Marketing Prospects

As Yugoslavia expects to become self-sufficient in wheat, and as it exported 1.5 million tonnes of corn in 1983-84, there are no long-term projections of import needs. Yugoslavia will be certainly importing oilseeds or seed-oils in 1984 and in the next few years (150,000-170,000 tonnes of oil annually or its equivalent in seeds). Imports of wheat are uncertain, but possible. A visit of Canadian exporters of oilseeds and of Canadian Wheat Board agents to Yugoslav importers and vice-versa would be helpful.

Yugoslavia usually imports about 10,000-20,000 tonnes of beans per year through tenders released by the Federal Directorate for Food Reserves (FDFR) to main Yugoslav importers, who in turn solicit offers from abroad. So far no Canadian firm has won a tender.

8. Processing Facilities

Year 1983

	thousands of tonnes			
	<u>Number of Companies</u> est.	<u>Number of Plants</u> est.	<u>Annual Capacity</u> est.	<u>Actual Output</u> est.
Flour (and durum) Mills	100	186	3,300	2,400
Compound Feed Mills	100	189	4,000	3,500
Malt Houses	10	14	270	250
Oilseed Crushers	10	22	1,000	500

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Zadar, Rijeka, Bar, Koper, Split, Sibenik, Kardeljevo, Dubrovnik	Not available	Not available



II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1982/83 estimate:

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	150	100	400	19	669
Suitable for malting	150	100	100	0	350

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

	thousands of tonnes	Principal supplier(s)
Malt	NIL	
Malting barley	N/A (1)	USSR

3. Additional Information

Change in malting capacity: The Business Association of Yugoslav Breweries estimated barley requirements for beer production at about 250,000 tonnes.

Malt exports: No exports in 1982/83.

Trend in beer consumption: The production of beer was constantly increasing until 1982: 11,712 million hectolitres in 1980, 12,613 million in 1981, 13,469 million in 1982. Consumption in 1980 and 1981 was 9,440 and 9,950 million hectolitres respectively.

Market potential for Canadian malt and/or malting barley: Shortage of foreign currency is a restraining factor and there are no imports of malting barley envisaged this year.



### III. OILSEEDS

#### 1. Import Policy

- a) Import Tariffs: (i) Oilseeds - 5-10% plus 11% import tax  
(ii) Crude oil - 10% " " " "  
(iii) Oilseed meal - 3-5% " " " "  
(iv) Refined Oil - 10-12% " " " "
- b) There are no significant non-tariff barriers.
- c) Importation procedure and structure: Unrefined oil for processing and seeds are imported through tenders released by the Federal Directorate for Food Reserves to Yugoslav importers, who in turn solicit offers from abroad. Soya meal is imported through association of Yugoslav meat producers known as STOKO.
2. Additional factors: Offers for sale on credit or linked with countertrade (buy back) have priority.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983 estimates

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	139	0	All	U.S.A.
Soybean	210	100	All	"
Rapeseed	103	0	All	"
TOTAL	452	100		
<u>Oil Type</u>		<u>Crude/Refined</u>		
Sunflower	56	0	0	U.S.A.
Soybean	36	140	0	"
Rapeseed	41	0	0	"
TOTAL	133	140	0	
<u>Meal Type</u>				
Sunflower	58	0		U.S.A.
Soybean	168	250		"
Rapeseed	43	0		"
TOTAL	269	250		

#### 4. Number and capacity of oilseeds crushing plants:

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/yr)</u>
	24	Sunflower	N/A
	2	Sunflower & soya	N/A
	2	Soya & rapeseed	460,000
TOTAL	28		1,000,000



(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	10,588 (11,130)	3,303 (2,773)		13,891 (13,903)
Barley	670 (669)	46 (51)		716 (720)
Sorghum	5 (5)	17 (2)		5 (7)
Oats	253 (269)	4 (37)		270 (306)
Rye	83 (86)	4 (12)		87 (98)
TOTAL	11,599 (12,159)	3,370 (2,875)		14,969 (15,034)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	300 (300)	8,400 (8,500)	300 (400)	350 (300)	1,500 (1,100)	3,041 (3,303)	13,891 (13,903)
Barley	40 (30)	370 (360)	250 (264)	20 (20)		36 (46)	716 (720)
Sorghum	30 (30)	200 (229)	5 (7)	30 (30)		10 (17)	5 (7)
Oats	65 (65)	10 (24)		5 (5)		7 (4)	270 (306)
Rye							87 (98)
TOTAL	435 (425)	8,980 (9,113)	555 (671)	405 (355)	1,500 (1,100)	3,094 (3,570)	14,969 (15,034)

Type of industrial use: corn starch, syrup, alcohol  
 Export Destination: Unknown. Mostly to Mediterranean, EEC and Comecon countries.

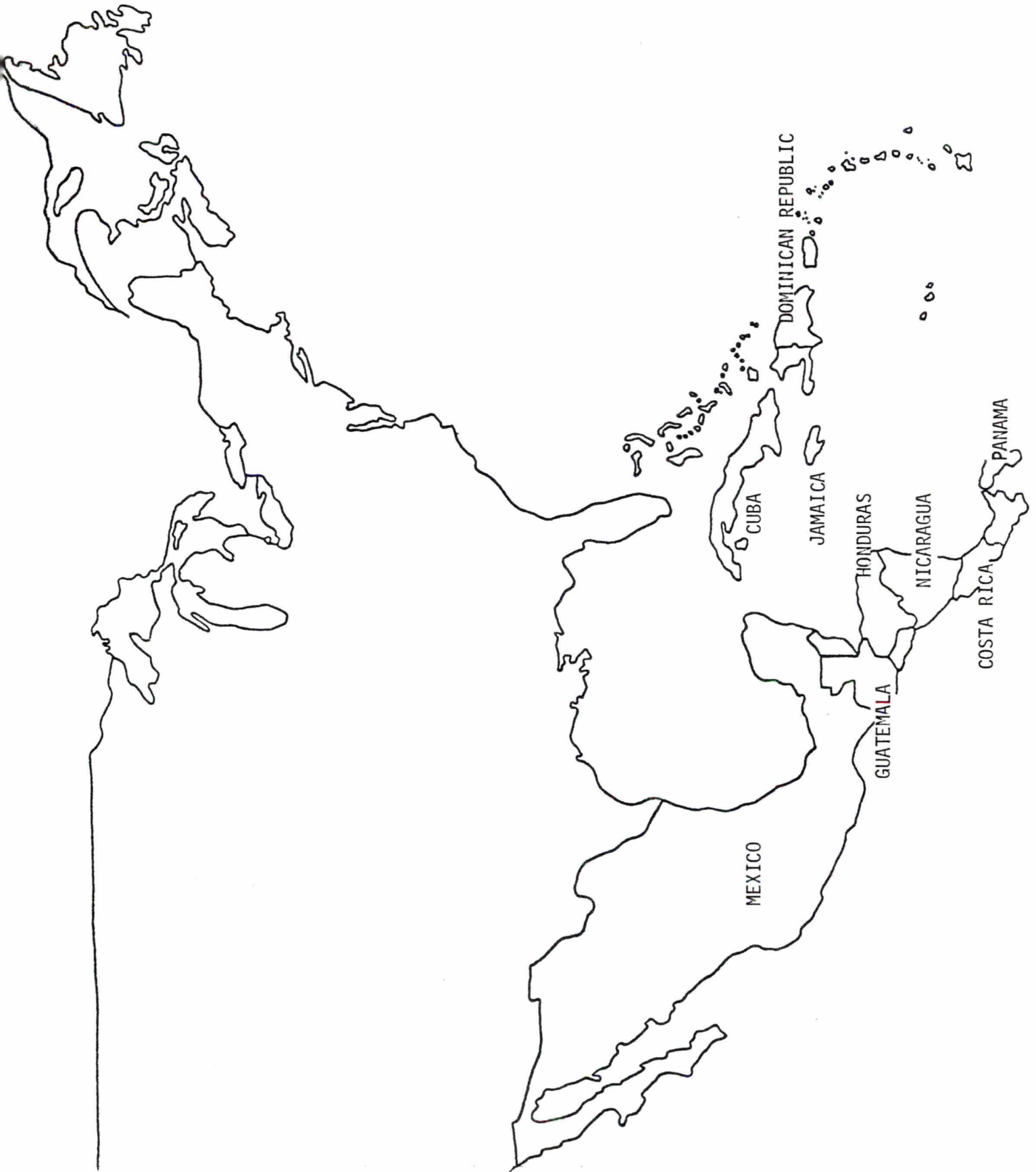
IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	ALL Others	TOTAL IMPORTS

Corn  
 Barley  
 Sorghum  
 Oats  
 Rye  
 TOTAL

PART IV  
NORTH AND CENTRAL AMERICA





## C O S T A   R I C A

Economic classification: Middle Income economy			
Oil exporter or importer (net):	Importer - US\$210 million		
Annual per capita income:	US\$1,895		year 1983
Annual per capita GNP	US\$1,840		year 1983
Average annual growth 1960-80	3.2 %		
Annual inflation rate 1970-80	15.2 %		
Annual inflation rate (current)	20.0 %		
Volume of imports	1.25 billion US\$		year 1983
Of which food	6 %		year 1983
Of which fuels	15 %		year 1983
Principal foreign exchange earning export:	Coffee, Meat, Sugar		
Debt service as % of GNP	4.5 %		year 1983
Debt service as % of exports	16.4 %		year 1983
Population	2.3 million		year 1983
Annual population growth	2.0 %		year 1983
Annual Consumption:			
Flour	43,000 tonnes or 14 kg/capita		year 1983
Meat	41,000 tonnes or 16 kg/capita		year 1983
Vegetable Oil	62,500 tonnes or 18 kg/capita		year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

- a) Wheat: Not grown in Costa Rica
- b) Corn: During the 1982/83 crop year 92,000 tonnes were harvested from 76,500 hectares. Government plans to expand acreage in 1984 to 100,000 hectares.
- c) Black beans: During the 1982/83 crop year 42,000 tonnes were harvested from 17,500 hectares. Government plans to increase acreage in 1984 to 20,000 hectares.
- d) Rice: During 1982/83 crop year 175,000 tonnes were harvested from 85,000 hectares. In 1984 production will be increased through low interest rate loans to rice producers. No figures are available.
- e) Oilseeds: During 1982/83 an african palm crop of 225,000 tonnes was harvested from 24,500 hectares. The Government is negotiating with the World Bank for a US\$50 million loan to fund a 100% increase in oil palm acreage by 1986/87. The contract is expected to be signed by the end of 1984.
- f) Sorghum: During 1982/83 crop year 35,000 tonnes were harvested from 17,600 hectares. Government estimates that the 1983/84 crop will be 40,000 tonnes. Low interest rate loans to farmers will make it possible for them to achieve this increase in production.
- g) Oats and Rye: Not grown in Costa Rica.

## 2. Foreign Exchange Situation

- a) The foreign exchange situation is controlled by the Central Bank which uses an official rate of 43.75 colones per US\$1 for raw materials, food and agricultural products and a "free" rate of 44.25 colones per US\$1 for most other products.
- b) The government will continue to allow importation of essential agricultural products not produced locally, such as: wheat, malt, barley, etc. and others such as black beans produced locally but not in sufficient quantity to meet domestic requirements.
- c) Wheat is imported from the USA by a local flour mill (Molinos de Costa Rica) and other agricultural products by the official agency, CNP, on PL480 terms. Such credit facilities are not offered by Canadian exporters.

## 3. Fertilizer Situation

Fertica S.A. (owned by the government) supplies requirements of farmers. Fertica imports from Canada through a CIDA line of credit, the following items: potash, urea, nitrogen, phosphate, etc. for mixing in their facilities at Puntarenas on the Costa Rican Pacific Coast. Production in 1983 was 210,000 tonnes. Exports to Central America and Panama were 126,000 tonnes.

## 4. Import Mechanism

Wheat is imported directly by a local mill (Molinos de Costa Rica) almost exclusively from the USA under PL480.

Other grains: The importation is controlled by the official Government agency Consejo Nacional de Produccion (CNP) apartado 2205, San José, Costa Rica. Local firms must present bids on behalf of overseas suppliers tendering on CNP requirement. No changes are expected in the import structure or procedures.

## 5. Grain Industry Infrastructure

Molinos de Costa Rica S.A. and CNP have storage and handling facilities in the ports of Limon (Atlantic side), Puntarenas and Caldera (Pacific side) as well as silos in the more important distribution and production centres of Costa Rica. Molinos de Costa Rica, S.A. has enough infrastructure to fulfill its production and marketing needs until 1990. Wheat storage capacity in 1983 was 55,000 tonnes. Total CNP storage capacity for rice, beans, sorghum and wheat is 185,000 tonnes. There are no plans to increase CNP and Molinos de Costa Rica storage capacity during the next four years.

## 6. Government Policies Affecting Grain and Agriculture

- a) There is no production of wheat, oats, rye or barley.
- b) Imports in 1983 of wheat were 118,500 tonnes, barley 38,600 tonnes, corn 71,500 tonnes, oats 3,150 tonnes, malt 9,500 tonnes, black beans 15,000 tonnes, lentils 1,500 tonnes.
- c) Wheat is for human consumption, corn is used 67% for livestock and 33% for human consumption, oats and sorghum is 100% for livestock and barley malt is 100% for human consumption.
- d) Grain reserves: information is not available.
- e) Meat production: 41,000 tonnes, exports 18,500 tonnes, consumption 16 kg per capita.



6. Government Policies Affecting Grain and Agriculture (cont'd)

Competition with US grains and related financing facilities through the PL-480 and CCC programs and the ownership of the local flour mill by US companies are the main factors. There are some prospects for Canadian barley, oats and malt if Canadian exporters can compete in price, delivery, and terms offered by competitors.

7. Canadian Grain Marketing Prospects

In order to compete with offers of US grains which are financed under PL480, Canadian exporters would have to offer comparable credit terms.

There may be market opportunities for special crops, depending on prices, quality and delivery.

8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	1	1	100	88
Compound Feed Mills	14	17	125	97
Malt Houses				
Oilseed Crushers	1	2	68	55

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Moin	20	20
Limon	125	125
Puntarenas	26	26
Caldera	95	75
Total Capacity	266	246

- - thousands of tonnes - -

II. MALT AND MALTING BARLEY

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

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	9.5 (6)	France, Germany and Belgium



II. MALT AND MALTING BARLEY cont'd

3. Additional Information

Change in malting capacity: No domestic production

Trend in beer consumption: Increasing 4% per year

Market potential for Canadian malt and/or malting barley: Competition can be expected from EEC suppliers since local brewers prefer a blend of French/Belgium/Luxemburg barley malt. A Canadian supplier entered market in 1984 and additional shipments from Canada are expected.

III. OILSEEDS

1. Import Policy

Import tariffs: (i) Oilseeds - 10% on CIF value  
(ii) Crude oil - 10% on CIF value  
(iii) Oilseed meal - 10% on CIF value  
(iv) Refined oil - 25% on CIF value plus 15% ad valorem.

Importation procedure and structure: Consejo Nacional de Produccion (CNP), apartado 2205, San José, controls importation through public tenders. Bids must be presented by local firms on behalf of foreign suppliers.

2. Additional Factors: Costa Rica produces palm oil which provides 80% of local market requirements.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983				
<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources Of Imports</u>
African Palm	208		208	
Cotton		18.5	18.5	El Salvador, Nicaragua
TOTAL	208	18.5	226.5	

<u>Oil Type</u>	<u>Production</u>	<u>Imports of Oils</u>
Vegetable Oil	62.5	

Vegetable Oil 62.5

Meal Type

Animal Feed 28

4. Number and capacity of oilseeds crushing plants:

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
	1	African Palm	125
	1	Cotton	80
Total	2		205

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	None	N/A	118.5 (100.4)	118.5 (100.4)
Durum wheat				
Flour/Semolina				
<b>TOTAL</b>			118.5 (100.4)	118.5 (100.4)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	118.5 (100.4)						118.5 (100.4)
Durum wheat							
Flour Semolina							
<b>TOTAL</b>	118.5 (100.4)						118.5 (100.4)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Canada						

WHEAT (including durum)

Cash	
Commercial credit (CCC)	118.5 (100.4)

118.5 (100.4)

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional

<b>TOTAL</b>	118.5 (100.4)
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118.5 (100.4)

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	92 (87.6)		71.5 (72)	163.5 (159.7)
Barley			38.6 (39.9)	38.6 (39.9)
Sorghum	35 (27.6)			35.0 (27.6)
Oats			3.1 (4.1)	3.1 (4.1)
Rye				
TOTAL	127 (115.2)		113.2 (116)	240.2 (231.4)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	50 (45.6)	113.5 (114)					163.5 (159.7)
Barley			38.6 (39.9)				38.6 (39.9)
Sorghum		35.0 (27.6)					35.0 (27.6)
Oats							
Rye		3.1 (4.1)					3.1 (4.1)
TOTAL	50 (45.6)	151.6 (145.7)	38.6 (39.9)				240.2 (231.4)

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn		50 (67.2)				71.5 (72)
Barley					38.6 (39)	38.6 (39)
Sorghum						
Oats		3.1 (4)				3.1 (4)
Rye						
TOTAL		53.1 (71.3)			38.6 (39)	113.2 (116)

Principal "Others" (specify countries): El Salvador  
Honduras  
Nicaragua

## C U B A

Economic classification: Middle Income economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$1,215 est.		year 1980
Annual per capita GNP	US\$1,712 appr.		year 1980
Average annual growth 1970-80	7.9%		
Annual inflation rate 1970-80	Nominal		
Annual inflation rate (current)	N/A		
Volume of imports	7.1 billion US\$		year 1982
Of which food	18%		year 1982
Of which fuels	23%		year 1982
Principal foreign exchange earning export: Sugar, nickel, citrus fruits, fish products, tobacco and coffee			
Debt service as % of GNP	N/A		
Debt service as % of exports	30-38% projected		year 1986-90
Population	9.8 million		year 1981
Annual population growth	1.4%		year 1980
Annual Consumption:			
Flour	501,000 tonnes or	52 kg/capita	year 1981
Meat	195,873 tonnes or	20 kg/capita	year 1981
Vegetable Oil	55,726 tonnes or	6 kg/capita	year 1981

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Rice is the principal cereal crop grown in Cuba. The last two rice crops have been satisfactory providing a large portion of the domestic requirements (some 600,000 tonnes), with the balance being imported from Italy (100,000 tonnes) and China (60,000 tonnes). Cuba does not grow wheat or corn.

#### 2. Foreign Exchange Situation

Cuba operates under a strict foreign exchange control regime and has rescheduled payments (hard currency) for 1983 and 1984. Food and agricultural imports have a very high priority. Cuba will be receiving World Food Program assistance in 1984/85 for a development program in Camaguey province, but is not otherwise a major aid recipient.

#### 3. Fertilizer Situation

Cuba produces approximately one million tonnes of fertilizer per year. This amount is not sufficient to meet the domestic demand. The balance is purchased primarily from the USSR and East Germany (estimated at 2-3 million tonnes per year). Sulphur is supplied by Canada under the USSR/Cuba triangular trade agreements.



#### 4. Import Mechanism

All imports are conducted via state trading organizations. ALIMPORT is one agency responsible for imports of agricultural products.

#### 5. Grain Industry Infrastructure

Cuban ports are not adequately equipped to handle bulk cargoes of cereal grains. Most shipments are bagged and immediately after unloading the products are trucked or sent by train to the central warehouses of the users, i.e. Ministry of Food Industry, for subsequent distribution to the provincial recipient. Major ports in Cuba do not have grain storage facilities. For example, wheat is limited to four days milling requirements.

#### 6. Government Policies Affecting Grain and Agriculture

Cuba cannot grow wheat, due to climatic considerations, therefore, the country will remain a net importer of the major cereal crops, including corn. As a result of foreign currency problems, Cuba is directing procurement to countries offering credit facilities. Traditional Canadian supplies of wheat (direct), beans, corn and soya beans were replaced in 1984 by French, Argentine and Mexican supplies.

Lack of financing facilities to Cuba has played a decisive role in the downward trend of ALIMPORT direct wheat imports from Canada and has permitted both France and Argentina to capitalize on this sector of the Cuban market. New lines of credit have been extended by Argentina and France to ALIMPORT in 1984/85.

#### 7. Canadian Grain Marketing Prospects

Due to the current economic difficulties affecting Cuba (sugar price is below the five cents per pound mark in the international market) all marketing initiatives submitted to the Cuban buyers should be accompanied by financial facilities or credit lines. The lack of this requisite bears a great deal of influence on Cuban planners when co-ordinating their buying programs with Western suppliers.

Marketing possibilities for field peas, lentils and beans are subject to the availability of financial/credit facilities. A market for these commodities exists, but the absence of credit has not facilitated the imports of these Canadian commodities by ALIMPORT.

#### 8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills		4	440	430
Compound Feed Mills		5	N/A	N/A
Malt Houses		nil	nil	nil
Oilseed Crushers		1	30	30

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983 --- thousands of tonnes ---	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Havana	100	N/A
Caibarien	65	"
Santiago de Cuba	75	"
Manzanillo	60	"
Cienfuegos	60	"
Total Capacity	360	

II. MALT AND MALTING BARLEY

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

	<u>thousands of tonnes</u>	<u>Principal supplier</u>
Malt	35 (35)	Czechoslovakia

2. Additional Information

Change in malting capacity: Malt is not produced locally.

Malt exports: Cuba does not export malt.

Trend in beer consumption: Beer is not always available to local liquor stores. This can be explained by the fact that due to a lack of hard currency, Cuba has not been able to supplement Czechoslovakia deliveries.

Market potential for Canadian malt and/or malting barley: Imports of barley malt are conducted by the state trading agency MAPRINTER which purchases 4000-5000 tonnes of malt annually from market economy countries to supplement Czechoslovakian deliveries if hard currency is available. When this occurs, MAPRINTER has traditionally turned to Canadian and French suppliers.

### III. OILSEEDS

#### 1. Import Policy:

Non-tariff barriers: No import tariffs are applied in Cuba as all trade is government controlled. However, non-tariff barriers may exist as a result of the government policy not to accord import priority to a specific commodity.

Importation procedure and structure: ALIMPORT is the purchasing agency.

2. Additional factors: These purchases are also susceptible to the availability of credit/financial facilities. Oilseeds and products are currently imported under credit facilities provided by Argentina.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower		25		Argentina
Cotton		36		U.S.S.R.
TOTAL		61		
<u>Oil</u>		<u>Crude/Refined</u>		
Sunflower		22		Argentina
Cotton		33		U.S.S.R.
TOTAL		55		
<u>Meal</u>				
Soy (pellets)		37		Argentina
Soy Meal		200		"
TOTAL		237		

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
1	Soya/Sunflower/peanut	100 (combined)

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat		60 (60)	838 (950)	883 (1,010)
Durum wheat			29 (50)	34 (50)
Flour/Semolina		20 (20)	170 (200)	195 (220)
TOTAL		80 (80)	1,037 (1,200)	1,112 (1,280)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	480 (520)	343 (430)				60 (60)	883 (1,010)
Durum wheat	30 (46)					4 (4)	34 (50)
Flour Semolina	175 (200)					20 (20)	195 (220)
TOTAL	685 (746)	343 (430)				84 (84)	1,112 (1,280)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Wheat (including durum)						
Cash						763 (800)
Commercial credit				(80)	104 (70)	104 (150)
Flour (including semolina)						
Cash/comm.credit						170 (200)
TOTAL				(80)	104 (70)	1,037 (1,200)



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	15 (15)*	30 (30)	300 (400)	345 (445)
Barley			50 (42)	50 (42)
Sorghum			10	10
Oats			30 (15)	30 (15)
Rye				
TOTAL	15 (15)	30 (30)	390 (457)	435 (502)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	15 (15)	250 (350)	30 (40)	10 (20)		40 (30)	345 (445)
Barley		50 (42)					50 (42)
Sorghum		10					10
Oats		27 (14)	3 (1)				30 (15)
Rye							
TOTAL	15 (15)	337 (396)	33 (41)	10 (10)		40 (35)	435 (502)

Type of industrial use: Glucose Plant and rolled oats.

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn				300 (400)		300 (400)
Barley	50 (42)					50 (42)
Sorghum				10		10
Oats	30 (15)					30 (15)
Rye						
TOTAL	80 (57)			310 (400)		390 (457)

\*Private farmers' production for household consumption but not accounted for in Cuba's statistics.

## DOMINICAN REPUBLIC

Economic classification: Low Income economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$188	year 1981*
Annual per capita GNP	US\$428	year 1981*
Average annual growth 1960-80	3.4%	
Annual inflation rate 1970-80	9.0%	
Annual inflation rate (current)	4.0% based on US\$ value	
Volume of imports	2.3 billion US\$	Jan.-June 1983
Of which food	20%	year 1982
Of which fuels	32%	year 1982
Principal foreign exchange earning export: Sugar & products		
Debt service as % of GNP	2.3%	year 1980
Debt service as % of exports	21.5%	year 1979
Population	6.0 million	year 1983
Annual population growth	2.9%	Years 1983-2000
Annual Consumption:		
Flour	117,747 tonnes	year 1982
Meat	n/a	
Vegetable Oil	61,700 tonnes	year 1982

\* At 1970 prices

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Rice production will be down slightly and wheat production is insignificant. Sugar production will be down because of the low price and corn production is forecast to be higher.

#### 2. Foreign Exchange Situation

Foreign exchange situation is difficult at present. Most imports are financed through the parallel market rate of exchange which is now US\$1 = RD\$2.80. Letters of credit are established at the parallel market rate. The government is trying to inject dollars into the market in order to lower the exchange rate to 2 for 1. This is an aid recipient country.

#### 3. Fertilizer Situation

Semimanufactured products are imported and blended in the country for local use and export.

	1982 - Production -	175,966 tonnes	
	1983 - Jan-June -	103,217 tonnes	
Imports of chemical Nitrogen -	1983	11,596 tonnes	- USA, some Germany
Potash -	1983	20,194 tonnes	- USA
Phosphate-	1983	6,408 tonnes	- USA

4. Import Mechanism

There are two government agencies which import by tender. These are INESPRES (Price Stabilization Board) and Molinos Dominicanos (Flour Processing Mill). There has been no recent change in the import structure, procedures or personnel.

5. Government Policies Affecting Grain and Agriculture

Because of the parallel market rate of exchange, government is trying to encourage more grain production.

6. Canadian Grain Marketing Prospects

1983 imports of special crops were as follows:

Mustard - Ground	613 kilos from USA
- Prepared	232 kilos from USA,
Lentils -	32,704 kilos from USA
Buckwheat, including sorghum -	148,097 kilos
Beans (habas)-	11,441 kilos from USA
Canary seed -	20,000 kilos (19,300 kilos from Spain and 700 kilos from USA)

II. MALT AND MALTING BARLEY

1. Imports, Calendar year 1983 est. previous year in brackets:

	<u>thousands of tonnes</u>	<u>Principal suppliers</u>
Malt (Jan - June 1983)	7.2 (15.5)	Canada/USA

2. Additional Information:

Change in domestic malting capacity: It has expanded with two new beer breweries installed last year.

Malt is not exported.

Beer consumption: 1982 - light beer - 88 million litres  
dark beer - 19 million litres

Market potential for Canadian malt and/or malting barley: There are future market opportunities due to continued market expansion.

### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: Not available

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: Jan-June 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Principal Source of Imports</u>
Soya	19.0	25.3	U.S.A.
Coconut	1.1		
Peanut	16.3		
TOTAL	36.4	25.3	

Principal Sources of

<u>Meal Type</u>	<u>Production</u>	<u>Imports</u>
Animal feed	82.1	
TOTAL	82.1	

#### 3. Export Policy

CEDOPEX - Export Promotional Agency is a government agency which helps companies that would like export assistance.





(B) COARSE GRAINS

SUPPLY - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	1983 (1982) Imports	Total Supply
Corn	1982 63.5 (62.8)		195.5 (171.8)	259 (235)
Barley			.544	.544
Sorghum	1983 15.4 (11.9) 1982		.12	15.5
Oats			1.6	1.6
Rye			.9	.9
TOTAL			196	276

DISPOSITION 1983/84 est. thousands of tonnes - previous year in brackets

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							276

IMPORT TRADE 1983/84 est. thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina	EEC	Others
Corn		195.5 (171.8)				195.5 (172)
Barley		.544				.544
Sorghum		.12				.12
Oats		.27		1.2		1.56
Rye		.9				.9
TOTAL						196 (172)

**G U A T E M A L A**

Economic classification:	Middle Income economy	
Oil exporter or importer (net)	Importer	
Annual per capita income:	US\$ 860	year 1981
Annual per capita GNP	US\$1,100	year 1981
Average annual growth 1960-80	2.8%	
Annual inflation rate 1970-80	10.5%	
Annual inflation rate (current)	13.1%	
Volume of imports	1.6 billion US\$	year 1981
Of which food	10%	year 1981
Of which fuels	12%	year 1981
Principal foreign exchange earning export:	Cotton, Coffee, Sugar	
Population	7.5 million	year 1981
Annual population growth	2.6 %	years 1980-2000
Annual Consumption:		
Flour	111,894 tonnes	year 1982

I. GENERAL INFORMATION

1. Crop Situation and Outlook

The trend in wheat production has been somewhat stable in the last five years. Variations of 10% in production are normal for Guatemala. Soft wheat production for 1979-1983 is shown in the following table:

<u>Year</u>	<u>Tonnes (000)</u>	<u>Year</u>	<u>Tonnes (000)</u>
1979	62.7	1982	45.2
1980	45.0	1983	47.2
1981	46.7		

2. Foreign Exchange Situation

Guatemala is undergoing a severe shortage of foreign exchange. Controls have been instituted and foreign exchange is authorized by the Central Bank on the basis of needs and priorities for the country. Food and agriculture inputs are considered the main priority and foreign exchange is relatively easily obtained (30 to 45 days). Guatemala will not likely be an international aid recipient.

3. Fertilizer Situation

Supply of fertilizer is ample as foreign exchange for inputs are easily approved by the Central Bank. Fertilizer is imported from Mexico, USA, Germany, and from the Central American Fertilizer Company (FERTICA) which mixes NPK formulas in Costa Rica.

4. Import Mechanism

The government controls imports of grains through INDECA (Instituto Nacional de Comercializacion Agricola). INDECA is directly responsible for controls on production, storage and marketing. Private importers are allowed import quotas and can obtain import licenses from the Ministry of Economy.

5. Grain Industry Infrastructure

Two ports handle all imports of grain; Puerto Quetzal (Pacific) and Puerto Santo Tomas de Castilla (Atlantic). A new bulk handling facility called GRANEL, S.A., mainly designed for sugar exports, will have a capacity to process about 75,000 tonnes of grain per year.

6. Government Policies Affecting Grain and Agriculture

Local demand for grains (staples) is usually met by local supply but scarcity of foreign exchange is presently the main deterrent for grain imports.

Canadian grain imports have been insignificant at best and government policies or exchange controls are not expected to affect Canadian exports.

7. Canadian Grain Marketing Prospects

Marketing opportunities for special crops are extremely limited.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills*	15	15	150	120
Compound Feed Mills				
Malt Houses				
Oilseed Crushers				

\*Includes other milling facilities such as rice and corn.

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Santo Thomas de Castilla	N/A	225
Puerto Quetzal	N/A	200
Total Capacity	N/A	425



## II. MALT AND MALTING BARLEY

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

2. Additional Information:

Change in malting capacity: None

Malt Exports: None

Trend in beer consumption: Increasing by about 5% per year.

Market potential for Canadian malt and/or malting barley: Cerveceria Centroamericana, the only beer producer in the country is presently purchasing malt from France. On occasion the firm has purchased Canadian malt but French prices have been more attractive in the last ten years.

## III. OILSEEDS

1. Import Policy

Import tariffs: 0.25¢ per kilo and 15% ad valorem of the CIF price plus 30%.

Significant non-tariff barriers: Non-availability of foreign exchange.

Importation procedure and structure: Oilseeds can be imported by the Government (INDECA) or by private importers under import license.

2. Additional Factors: Oilseeds are produced in Guatemala, mainly cotton and traditionally they only import oil as a finished product.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	47.2		108.5	155.8
Durum wheat				
Flour/Semolina				
TOTAL			155.8	155.8

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat							190
Durum wheat							
Flour Semolina							
TOTAL							155.8

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>			<u>TOTAL IMPORTS</u>
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>EEC</u>
				<u>All Others</u>
Wheat (including durum)				
Commercial Credit				
Flour (including semolina)				
Cash/Comm. Credit				
TOTAL				108.5

Guatemala

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	988.2	145.3		1,133.5
Beans	89.4	47.4		136.8
Sorghum	81.6	14.8		96.4
Rice	75.5	27.2		102.7
	1,234.7	234.7		1,469.4

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	831.4	202	15.0	12.8			1,061.2
Beans	113.6		1.2	4.2	2.0		121.0
Sorghum	18.0	85		.8			103.8
Rice	75.1			1.8	7.5		84.4
TOTAL	1,038.1	287	16.2	19.6	9.5		1,469.4

## H O N D U R A S

Economic classification: Middle Income economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$ 625	year 1981
Annual per capita GNP	US\$ 575	year 1981
Average annual growth 1960-80	2%	
Annual inflation rate 1970-80	10.1%	
Annual inflation rate (current)	12.2%	
Volume of imports	1.51 billion US\$	year 1983
Of which food	10%	year 1983
Of which fuels	13%	year 1983
Principal foreign exchange earning export: Coffee, Bananas, lumber		
Debt service as % of GNP	4%	year 1983
Debt service as % of exports	10%	year 1983
Population	3.5 million	year 1983
Annual population growth	3.0%	years 1980-2000

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1983/84 grain production increased to 702,000 tonnes, up about 10% over 1982/83 production. This increase is largely due to land reclamation projects and low interest loans to small producers.

#### 2. Foreign Exchange Situation

Foreign exchange situation is tight as international prices for the main export crops are presently very low. Controls were introduced in 1981 and no change is expected. Food and agricultural inputs are considered essential and a priority to the government. Honduras is not expected to be an aid recipient.

#### 3. Fertilizer Situation

Traditional suppliers of fertilizer to Honduras are Mexico, U.S.A., and Germany with nitrogen, phosphate and potash formulas being used most.

#### 4. Import Mechanism

The government controls imports through the IHMA (Instituto Hondureno de Mercadeo Agricola). Private importers can also import by obtaining import licences from the government.



5. Grain Industry Infrastructure

No change is expected in the infrastructure. Imports are routed through Puerto Cortés (90%) in the Atlantic and Puerto San Lorenzo (10%) in the Pacific. There exist two established major millers, who mill 90% of all wheat imported to Honduras. This situation will not change in the short term.

6. Government Policies Affecting Grain and Agriculture

Land reclamation projects, subsidized seed and low interest rate loans are government policies designed to increase production of basic grains.

7. Canadian Grain Marketing Prospects

Market opportunities for Canadian grains and special crops are limited unless Canada is prepared to provide a line of credit to Honduras.

8. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	2	2	N/A	
Compound Feed Mills				
Malt Houses				
Oilseed Crushers				

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Puerto Cortes		256.1
San Lorenzo		104.2
Total Capacity	N/A	360.3

## II. MALT AND MALTING BARLEY

### 1. Imports, Calendar year 1983 estimated, previous year in brackets:

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	9 (7.5)	Belgium and France

### 2. Additional Information

Change in malting capacity: Malt is not produced in Honduras.

Malt exports: None.

Trend in beer consumption: Increasing at a rate of approximately 7% per year.

Market potential for Canadian malt and/or malting barley: Good, provided the price is competitive and that aggressive marketing endeavours are undertaken.

## III. OILSEEDS

### 1. Import Policy

a) Import Tariffs: When imports are made by the Government Agency, they are free of duties. If they are made by the private sector, the tariff is 15% of the CIF price and US\$0.25 per kg. Basically, however, Honduras is not an important importer of oilseeds.

b) Non-Tariff barriers: None.

c) Importation procedure and structure: The only local crushing facilities are for cottonseed. The only imports are of refined oil.

### 2. Additional Factors

The U.S. on occasions provides credit for vegetable oil imports.

IV. STATISTICAL NOTES

WHEAT IMPORTS 1973-82\*

<u>Year</u>	<u>Tonnes</u>
1973	40,063
1974	48,689
1975	47,799
1976	50,118
1977	59,080
1978	62,944
1979	68,696
1980	70,605
1981	62,522
1982	79,697

\* All wheat imports originate from the U.S.A.

COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>
Corn	562 (537)
Barley	
Sorghum	72 (64)
Oats	
Rye	
TOTAL	634 (601)

## J A M A I C A

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$1,100	year 1983
Annual per capita GNP	US\$1,350	year 1983
Average annual growth 1960-80	0.6%	
Annual inflation rate 1970-80	18.6%	
Annual inflation rate (current)	17%	
Volume of imports	1.28 billion US\$	year 1983
Of which food	10.8% (107M)	year 1983
Of which fuels	30.1% (368M)	year 1983
Principal foreign exchange earning export:	Alumina/Bauxite	
Debt service as % of GNP	55.2%	year 1983
Debt service as % of exports	41.0%	year 1983
Population	2.3 million	year 1983
Annual population growth	2.1%	
Annual Consumption:		
Flour	149,539 tonnes	year 1983/84
Meat	90,100 tonnes	year 1983
Vegetable Oil	14,500 tonnes	year 1983

### I. GENERAL INFORMATION

#### 1. Foreign Exchange Situation

Indications are that the foreign exchange situation is increasingly better, although foreign exchange is still not readily available. The stated policy does not indicate import priority for any product. Jamaica receives aid from Canada (CIDA), U.S.A., and EEC.

#### 2. Fertilizer Situation

Fertilizer imports for 1983/84, 1984/85 and 1985/86 are financed by the Canadian International Development Agency. Fertilizer imports for 1983/84 were as follows: 38 million tonnes of ammonium sulphate, 10.7 million tonnes of diammonium phosphate, 5.1 million tonnes of urea and 21,000 tonnes muriate of potash.

#### 3. Import Mechanism

All grains are imported by the Jamaica Commodity Trading Corporation (JCTC) which is a public sector corporation. The JCTC issues tenders on an international or national bidding basis depending on the source of funds. The procedure is subject to change on short notice. The new managing director of JCTC is Mr. Paul Ellis who replaced Mr. O.K. Melhado.

#### 4. Grain Industry Infrastructure

The Jamaica Flour Mills Limited has recently completed an expansion. The start-up has created some production problems, otherwise the situation remains as stated in the 1983 report.



5. Government Policies Affecting Grain and Agriculture

The government of Jamaica has recently entered an agreement with the International Monetary Fund. According to this agreement prices on all the commodities are expected to increase dramatically. At the same time there is a wage restraint policy which limits government workers to 10% and the private sector to 15% of the expired contract wage level. It is expected that the market demand for grain products will fall as disposable income decreases.

6. Canadian Grain Marketing Prospects

i) 1984/85 Estimated Import Requirements, Source of Financing and Supply

<u>Commodity</u>	<u>Annual Quantity</u>	<u>Estimated Value</u> - Million U.S. dollars -	<u>GSM 102</u> U.S. dollars	<u>PL480</u> -	<u>Barter</u>	<u>C.W.B.</u>
Soybeans	60,000 tonnes	18.6	18.6	-	-	-
Lumber	32,000 MBF	11.0	11.0	-	-	-
Tallow	-	3.0	3.0	-	-	-
Malt	-	.5	.5	-	-	-
Wheat	180,000 tonnes	30.7	1.0	12.5	8.6	8.6
Rice	50,000 tonnes	17.0	9.0	8.0	-	-
Corn	170,000 tonnes	25.5	13.5	12.0	-	-
Oil	5,000 tonnes	3.9	1.4	2.5	-	-
TOTAL		110.2	58.0	35.0	8.6	8.6

Note: 1. GSM102 - 3 year revolving loans granted by Commodity Credit Corporation, USDA.  
 2. PL480 - 20 year loans from USA government at highly concessional rate.  
 MBF - million board feet.

ii) Jamaica currently needs credit. The buyer organization (JCTC) wishes to re-negotiate current facilities with a view to decreasing deposit requirements.

iii) At the present there are no market opportunities for special crops.

7. Processing Facilities

Year: 1984

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	1	1	200	140
Compound Feed Mills	4	4	500	210
Breweries	2	2	20M Gallons	8M Gallons
Oilseed Crushers	1	1	N/A	

thousands of tonnes

## II. MALT AND MALTING BARLEY

### 1. Imports, Calendar year 1983 estimated, previous year in brackets:

	thousands of tonnes	Principal supplier(s)
Malt	7 (12.8)	USA/Canada

### 2. Additional Information

Malt Exports: None.

Trend in beer consumption: Per capita consumption is decreasing because of increasing price of the products. Two firms are operating at a capacity of 20 million gallons per annum. Both are exporting as well as manufacturing under license. Neither has expanded plant capacity.

Market potential for Canadian malt and/or malting barley: Barley malt is still being imported from U.S.A. (about 5,000 tonnes in 1983 and 2,500 tonnes up to July 1984) but the foreign exchange situation which is generally believed to be improving suggests that there is some potential for Canadian businesses.

## III. OILSEEDS

### 1. Import Policy

Import Tariffs: (i) Oilseeds: None  
(ii) Crude oil: None  
(iii) Oilseed meal: None  
(iv) Refined oil: None

Non-tariff barriers: Foreign exchange shortage and government monopoly of the import.

Importation procedure and structure: Government agencies through regular tenders.

### 2. Additional Factors

Credit is provided by the CCC of U.S.A. Department of Agriculture.

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat				
Durum wheat				
Flour/Semolina				
TOTAL			150	

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat							
Durum wheat							
Flour Semolina							
TOTAL							

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>		
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>	<u>ATI</u>
Wheat (including durum)							
Cash							
Commercial Credit	22.5 (22.5)	37.7 (23.8)					60.2 (46.3)
Aid, concessional credit, etc.		25.4 (35.1)					25.4 (35.1)
Flour (including semolina)							
Cash/comm. credit	1.8 (2.3)	12.4 (8.2)			52.6 (51.9)		66.9 (62.4)
Aid, concessional							
TOTAL	24.3 (24.8)	72.5 (67.1)			52.6 (51.9)		150.0 (143.8)

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn				
Barley				
Sorghum				
Oats				
Rye				
TOTAL			171.7 (173.6)	171.7 (173.6)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>		<u>(seed, waste)</u>			
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL		171.7 (173.6)					171.7 (173.6)



## MEXICO

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Exporter	
Annual per capita income:	US\$2,250	year 1982
Annual per capita GNP	US\$1,541	year 1983
Average annual growth 1960-80	2.6%	
Annual inflation rate 1970-80	19.3%	
Annual inflation rate (current)	80.8%	year 1983
Volume of imports	7.7 billion US\$	year 1983
Of which food	26%	year 1983
Of which fuels	.03%	year 1983
Principal foreign exchange earning export:	Petroleum, manufactures	
Debt service as % of GNP	.10%	year 1983
Debt service as % of exports	54.6	year 1983
Population	75 million	year 1983
Annual population growth	2.5%	years 1980-2000
Annual Consumption:		
Flour	8 kg/capita	year 1983
Meat	42 kg/capita	year 1983
Vegetable Oil	12 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Mexico's grains and oilseeds production program for 1984 called for the cultivation of 15.8 million hectares for an estimated output of 28.9 million tonnes. Production in 1983 was 9.5% below the projected volume of 28.4 million tonnes, reaching 25.7 million tonnes. Comparative results in 1983 and programmed output for 1984 is presented below:

<u>CROP</u>	<u>PRODUCTION 1983</u> ( '000 tonnes)	<u>ACREAGE 1984</u> (hectares)	<u>ESTIMATED OUTPUT 1984</u> ( '000 tonnes)
Corn	13,442	8,864,007	13,831
Beans	1,302	2,158,445	1,270
Rice	441	204,455	635
Wheat	3,490	1,089,240	4,261
Sesame	116	189,278	92
Cottonseed	365	283,209	395
Safflower	272	272,376	305
Soybean	683	462,835	789
Barley	610	320,719	635
Sorghum	<u>5,068</u>	<u>2,035,904</u>	<u>6,729</u>
TOTAL	25,789	15,880,468	28,942

## 2. Foreign Exchange Situation

Mexico continued to suffer the pangs of a weakened economy, brought on by severe currency devaluations of recent years and high inflation. The Gross National Product declined by 4.7%. However, government expenditures on imports of grains and oilseeds estimated at US \$2.8 billion almost doubled, and further massive imports of some 8 million tonnes are expected to continue into 1984. This year the food sector will absorb 14% of total spending by parastatal companies. Conasupo's budget is second only to that allotted to the petroleum agency, Pemex. But, even in these difficult times, Mexico is not likely to become a recipient of international aid.

## 3. Fertilizer Situation

Raw materials used by the national fertilizer industry are practically all of domestic origin, except for phosphoric rock and potassium chloride. Fertimex, the state-owned fertilizer producer, has a current capacity of over 4.2 million tonnes/year, including 1.7 million tonnes of ammonium sulphate; 168,000 tonnes of ammonium nitrate; 1.3 million tonnes of urea; 482,500 tonnes of simple super-phosphate; 310,000 tonnes of triple super-phosphate; 82,500 tonnes of diammonium phosphate and 272,000 tonnes of NPK complexes. Fertilizer production in 1984 is expected to reach 4.0 million tonnes.

## 4. Import Mechanism

Conasupo is the primary food agency which has the sole responsibility for importing wheat, corn, soybeans, sorghum, barley, oilseeds and other basic crops. These operations are supervised by the Ministry of Commerce and Industrial Development to which Conasupo reports. Supply contracts are negotiated preferably on a government to government basis. Where such arrangements are not possible, grain and other foodstuffs are purchased under open tender.

## 5. Grain Industry Infrastructure

Guaymas on the Gulf of California is the country's major grain handling facility. Lesser installations are to be found at Mazatlan and Manzanillo. Grain is also handled at smaller ports on the Gulf and Pacific Coasts as required, with Veracruz being the most efficient on the Gulf side. Rail and road transportation are used to move grain inland from ports and border crossing facilities located at Brownsville, Laredo and El Paso. Storage of grain is done at government-owned facilities (ANDSA, BORUCONSA, etc.) and private warehouses in the vicinity of urban centers.

## 6. Government Policies Affecting Grain and Agriculture

Food production, including basic grains and oilseeds, meat and dairy products, continue to be a top priority for the current administration. Output of basic grains and oilseeds is projected to reach 28.9 million tonnes in 1984 while meat and milk production is expected to increase by 3.4% and 3.7% respectively, to 3.1 million tonnes of meat and 7.3 million tonnes of milk.



6. Government Policies Affecting Grain and Agriculture (Cont'd)

Growing inflation affecting all sectors of the economy has placed certain commodities such as beef, pork, milk, cheese and other foodstuffs outside the reach of low income earners and the lower middle class. Strategic imports of wheat, oilseeds, milk powder etc. must continue to guarantee domestic supply.

Because practically 75% of Mexico's cropped land is dependent on rainfall, the weather plays a very important role in this country's agriculture. Grain output last year was 25.7 million tonnes, a shortfall of 9% of the projected grain production. Only barley, cottonseed and safflower recorded slight increases. Consequently Conasupo has had to increase the level of imports which, according to certain sources may be more than the official figure of 8 million tonnes.

7. Canadian Grain Marketing Prospects

Import projections are not prepared in Mexico due to the unstable nature of agricultural production. Due to insufficient grain storage capacity, produce must be imported on an as-required-basis, a process further complicated by the inefficiency of domestic transportation and distribution facilities.

Continued liaison with Conasupo is essential in the pursuit of grain sales to this market. Under the new administration there have been minor changes of officials responsible for the various import products. Personal contact with these officials is necessary in order to keep them informed of Canadian grain production, prices, etc.

Mustard, lentils and canaryseed have some potential, depending on local production and availability of import permits which must be obtained from the Ministry of Commerce and Industrial Development. These crops have been imported in the past by private companies, although in recent years restrictions have been placed on such imports. Mexico is a producer and net exporter of lentils.

8. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	120	160	230(1)	
Compound Feed Mills	62	89	7,250	4,150(2)
Malt Houses	5	7	350	290(3)
Oilseed Crushers		60	1,800	832(4)

- (1) Durum only.
- (2) Feed Industry Chamber Affiliates.
- (3) Consumption 215,000 tonnes.
- (4) Oil Crushers Chamber data.

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983  
- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Tampico	22.0	110
Veracruz	25.0	110
Tuxpan	2.2	60
Guaymas	50.0(1)	120
Coatzacoalcos		35
Progreso		45
Mazatlan		60
Manzanillo		60
Total Capacity	99.2	600

(1) Wheat Coastal trade.

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley Suitable for malting					281 (6-row)

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

3. Additional Information

Change in malting capacity: Domestic malting capacity remains at 350 thousand tonnes per year in 1983. Cebadas y Maltas continued under construction. Plant will have initial capacity of 40 thousand tonnes annually, capable of increasing to 120,000 tonnes as required. Malt production increased by 15.5% reaching 290 thousand tonnes, compared to 250 thousand tonnes in 1982.

Malt Exports: All domestic malt production is consumed internally.

Trend in beer consumption: Beer production slipped 13.7% from the previous year's output level, reaching 24.8 million hectoliters in 1983. Consumption declined from 28.5 million hectoliters in 1982 to 23.6 million hectolitres last year. A continuing sluggish economy, rising inflation and other market factors were largely responsible for the drop in beer consumption. There were 16 breweries in operation last year.

Market potential for Canadian malt and/or malting barley: Imports of malting barley are contingent on domestic production. In a bad crop year, the beer companies must import grain, from the U.S.A. Canadian barley must compete in quality and price. Freight rates also play a significant role in the import structure.



### III. OILSEEDS

#### 1. Import Policy

- a) Import Tariffs: (i) Oilseeds - All exempt.  
 (ii) Crude oil - Cotton and sesame 5% ad valorem; soybean exempt.  
 (iii) Oilseed meal - Soybean meal exempt.  
 (iv) Refined oil - Cotton and sesame 5% ad valorem; soybean exempt.
- b) Non-Tariff barriers: All imports are subject to license control.
- c) Importation procedure and structure: Conasupo is the sole purchasing agency for oilseeds and other basic grain commodities, usually under international tender.

2. Additional Factors: Substantial credits have been offered to Mexico for purchase of agricultural products by the CCC of the U.S.A.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Cotton	365	33	398	U.S.A.
Soybean	683	22	705	U.S.A.
Sesame	116		116	
Safflower	272		272	
TOTAL	1,436	55	1,491	
<u>Oil</u>		<u>Crude/Refined</u>		
Cotton		8		U.S.A.
<u>Meal</u>				
Soybean		48		U.S.A.

4. <u>Number of Plants</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
60	Soya, cotton, sunflower, corn, sesame, rapeseed.	N/A

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	3,490 (4,468)	500 (500)	710 (398)	4,700 (5,366)
Durum wheat				
Flour/Semolina				
TOTAL	3,490 (4,468)	500 (500)	710 (398)	4,700 (5,366)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	4,200 (4,866)					500 (500)	4,700 (5,366)
Durum wheat							
Flour Semolina							
TOTAL	4,200 (4,866)					500 (500)	4,700 (5,366)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Canada						

WHEAT (including durum)

Cash	464 (66)	246 (332)				710 (398)
Commercial Credit						
Aid, concessional						
credit, etc.						

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional:

TOTAL	464 (66)	246 (332)				710 (398)
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## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	13,442 (12,215)	1,000 (1,000)	8,929 (233)	23,371 (13,448)
Barley	610 (495)		121 (4)	731 (499)
Sorghum	5,068 (4,956)	750 (750)	6,300 (1,478)	12,118 (7,184)
Oats				
Rye				
TOTAL	19,120 (17,666)	1,750 (1,750)	15,350 (1,715)	36,220 (21,131)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption			Exports	Carry-out	Total
	Human	Animal	Industrial			
Corn	13,442 (12,215)					23,371 (13,448)
Barley		(215)	(284)			731 (499)
Sorghum		11,368 (7,184)				12,118 (7,184)
Oats						
Rye						
TOTAL	13,442 (12,215)	11,368 (7,399)	(284)			36,220 (21,131)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn		8,929 (233)				8,929 (233)
Barley	84	37 (4)				121 (4)
Sorghum		6,300 (1,478)				6,300 (1,478)
Oats						
Rye						
TOTAL	84	15,266 (1,715)				15,350 (1,715)

## N I C A R A G U A

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer US\$200 million per/yr	
Annual per capita income:	US\$650	year 1982
Annual per capita GNP:	US\$665	year 1982
Average annual growth 1960-80	4.0%	
Annual inflation rate 1970-80	13.1%	
Annual inflation rate (current)	35.0%	
Volume of imports	862 million US\$	year 1982
Of which food	21%	year 1982
Of which fuels	21%	year 1982
Principal foreign exchange earning export:	Cotton, coffee, meat, Sugar	
Debt service as % of GNP	32%	year 1982
Debt service as % of exports	38%	year 1982
Population	2.9 million	year 1982
Annual population growth	4%	year 1982
Annual Consumption:		
Flour	23,500 tonnes or 16 kg/capita	year 1982
Meat	48,000 tonnes or 12 kg/capita	year 1982
Vegetable Oil	35,000 tonnes or 9 kg/capita	year 1982

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Wheat is not grown in Nicaragua. 1983 was a bad year for agriculture due to guerrilla activity and bad weather conditions which reduced the crops substantially. According to Instituto Nacional de Estadísticas y Censos, the coarse grain production was 120,000 tonnes in 1983 (estimated), rice 80,000 tonnes, oilseeds 22,000 tonnes and others 18,000 tonnes.

#### 2. Foreign Exchange Situation

Local currency: US\$1 equivalent to C 35 (Cordobas)

According to Ministerio Comercio Exterior of Nicaragua, imports of foods are included in list of import priorities.

Although this country is likely to be an international aid recipient (from Canada, Eastern European countries, Spain and Brazil) aid seems to have decreased in 1984.



3. Fertilizer Situation

	<u>1981</u>	<u>1982</u>
Potash:	150,000 tonnes	100,000 tonnes
Urea:	30,000 "	35,000 "
Blended Fertilizers:	6,000 "	7,000 "

4. Import Mechanism

All imports are controlled by the government agencies: ENABAS (Empresa Nicaraguense de Alimentos Basicos, Apartado 1041, Managua) and Empresa Nicaraguense de Importaciones, Apartado 2791, Managua.

5. Grain Industry Infrastructure

The two government agencies listed in section 4 have storage and handling facilities in the Port of Corinto and grain silos in the more important production and distribution centers of Nicaragua. No significant changes imminent.

6. Government Policies Affecting Grain and Agriculture

The government has rationed meat and grains and now controls the distribution of these products in Nicaragua. No information is available on anticipated government policies.

7. Canadian Grain Marketing Prospects

There are no projections available of national grain import needs. There are some prospects for Canadian grain sales through CIDA if conditions in Nicaragua deteriorate to the point where such aid is given on an humanitarian basis. Do not see marketing opportunities for Canadian special crops.

8. Processing Facilities

Year 1982

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	2	2	60	23.5
Compound Feed Mills				
Malt Houses	-	-	-	-
Oilseed Crushers		2	115	

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1982

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Corinto	125,000 tonnes	120,000 tonnes

II. MALT AND MALTING BARLEY

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

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

	thousands of tonnes	Principal suppliers
Malt	5.1 (4.2)	Canada(85%) Others(15%)

3. Additional Information

Change in malting capacity: No domestic production.

Malt exports: None

Trend in beer consumption: Increasing 3% per annum.

Market potential for Canadian malt and/or malting barley: Canada controls 85% of this market and is expected to hold this market share.

III. OILSEEDS

1. Import Policy:

- Import Tariffs: (i) Oilseeds - Produced locally. Mostly soya.  
(ii) Crude oil - Produced locally. 10% on CIF value.  
(iii) Oilseed meal - Produced locally. 10% on CIF value.  
(iv) Refined oil - Importation is prohibited.

2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
N/A	40	None	35	
<u>Oil</u>	<u>Production</u>			
Soya oil	35			
<u>Meal</u>	<u>Production</u>	<u>Imports</u>		
Soya meal	15	None		

3. Number and capacity of oilseed crushing plants:

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity ('000 tonnes)</u>
	1	Soya	50
	1		65
Total	2		115

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	None			
Durum wheat		40 (35.3)	40 (35.3)	40 (35.3)
Flour/Semolina				
TOTAL		40 (35.3)	40 (35.3)	40 (35.3)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Animal	Other (seed, waste)	Exports	Carry-out	Total
	Human							
Wheat	40 (35.3)							40 (35.3)
Durum wheat								
Flour Semolina								
TOTAL	40 (35.3)							40 (35.3)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

Wheat (including durum)	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	Argentina	
Cash				
Commercial credit				
Aid, concessional				
credit, etc.				
Flour (including semolina)		12.5 (8)		27.5 (27.3)
Cash/comm.credit				
Aid, concessional				
TOTAL	12.5 (8)			40 (35.3)

Principal "Others": USSR, France, European Eastern Countries

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	30 (33.9)		23.5 (1.2)	53.5 (35.1)
Barley			5 (4.2)	5 (4.2)
Sorghum	20.5 (19.3)			20.5 (19.3)
Oats				
Rye				
TOTAL	50.5 (53.3)		28.5 (5.4)	79 (58.7)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn							53.5 (35.1)
Barley							5 (4.2)
Sorghum							20.5 (19.3)
Oats							
Rye							
TOTAL							79 (58.7)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>EEC</u>	
Corn	12 (1.2)				11.5 (1.2)
Barley					5 (4.2)
Sorghum					
Oats					
Rye					
TOTAL	12 (1.2)				16.5 (4.2)
					23.5 (1.2)
					5 (4.2)
					28.5 (5.4)

Principal "Others": European Eastern Countries



## P A N A M A

Economic classification: Middle Income economy		
Oil exporter or importer (net): Importer (US\$230 million in 1983)		
Annual per capita income:	US\$1,425	year 1982
Annual per capita GNP	US\$1,878	year 1982
Average annual growth 1960-80	3.3%	
Annual inflation rate 1970-80	7.4%	
Annual inflation rate (current)	15%	
Volume of imports	1.226 billion US\$	year 1983
Of which food	12%	year 1983
Of which fuels	29%	year 1983
Principal foreign exchange earning export: Panama Canal, banking		
Debt service as % of GNP	15.4%	year 1983
Debt service as % of exports	19.2%	year 1983
Population	1.9 million	year 1983
Annual population growth	2.2%	year 1983
Annual Consumption:		
Flour	26,500 tonnes or 15 kg/capita	year 1983
Meat	37,300 tonnes or 20 kg/capita	year 1983
Vegetable Oil	44,800 tonnes or 8 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Wheat: Not grown in Panama

Corn: During 1981/82 crop year 31,500 tonnes were harvested from 71,500 hectares. No information is available on 1982/83 crop year and planting intentions for the 1983/84 crop year.

Red kidney beans: During 1981/82 crop year 3,500 tonnes were harvested from 22,000 hectares. No information is available on more recent crops.

Rice: During 1981/82 crop year 82,500 tonnes were harvested from 105,000 hectares. No information is available on more recent crops.

Oilseeds: No crop.

#### 2. Foreign Exchange Situation

Local currency: 1 Balboa is equivalent to US\$1 - Do not foresee any change.

Although the Ministry of Planning estimates the agriculture sector grew by 2.8% in 1983, other sources indicate it may have grown less, as little as 1.2%. The outlook for 1984/85 is not as good, so there will be an increase in imports of food and agricultural products.

Wheat is imported from U.S.A. by local flour mills under the Export Credit Guarantee program (GSM-102) which is administered by the Commodity Credit Corporation, USDA.

### 3. Fertilizer Situation

According to the most recent Panamanian import statistics (1983), fertilizer imports were 43,500 tonnes of which Costa Rica supplied 30%, U.S.A. 45%, Germany 20%, and others 5%. Ingredients were: nitrogen (30%), phosphate (25%), potash (30%), others (15%).

### 4. Import Mechanism

Wheat is purchased directly by local mills.

Other grains (corn, lentils, rice) are imported exclusively by the official government agency, Instituto Mercadeo Agropecuario, P.O. Box 5638, Panama 2. Such grains are purchased by tender which must be presented through established local agents.

No changes foreseen in import structure and procedures.

### 5. Grain Industry Infrastructure

The independent flour mills and Instituto Mercadeo Agropecuario have storage and handling facilities in the ports of Balboa and Colon, and grain silos in the more important distribution and production centres of Panama.

No significant changes imminent.

### 6. Government Policies Affecting Grain and Agriculture

- a) Production of grains is small and is expected to remain so in the near future.
- b) Imports in 1983: Wheat 60,500 tonnes; barley 120,000 tonnes; corn 23,000, tonnes; oats 2,000 tonnes; malt 8,500 tonnes; red kidney beans 25,000 tonnes, lentils 2,500 tonnes.
- c) Grains are for human consumption except barley and corn which are 50% utilized for livestock.
- d) Grain reserves: Information not available but believed to be modest.
- e) Meat production: 37,000 tonnes are consumed domestically or 20 kilos per capita. Approximately 17,000 tonnes are exported.

### 7. Canadian Grain Marketing Prospects

There are no projections available of national grain import needs.

To compete with U.S. offerings of grains on attractive financial terms Canadian exporters of grain would need permanent guarantees similar to those given U.S. exporters under the Export Credit Guarantee Program (GSM-102) administered by the Commodity Credit Corp. in the U.S. Also, the dependence of Panama flour mills on their U.S. parent companies makes sales of Canadian grains difficult.

There are marketing opportunities for Canadian special crops, barley and oats depending on prices, quality and delivery.

8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	3	3	60	50
Compound Feed Mills	8	10	147	140
Malt Houses	2	2	50	45
Oilseed Crushers (Oil Refiners)	2	2	72	62

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Balboa	160	150
Colon	140	125
Total Capacity	300	275

II. MALT AND MALTING BARLEY

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

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	8.5 (7.5)	Germany, U.S.A., France, Canada

3. Additional Information

Change in malting capacity: No domestic production

Malt exports: None

Trend in beer consumption: Increasing 3% per year

Market potential for Canadian malt and/or malting barley: Competition with the U.S.A. and EEC suppliers makes it difficult for Canada to obtain a larger share of the market. Canada exported 800 tonnes of malt in 1983.



III. OILSEEDS

1. Import Policy

Import Tariffs: (i) Oilseeds - 10% on CIF Value  
(ii) Crude oil - 10% on CIF Value  
(iii) Oilseed meal - 10% on CIF Value  
(iv) Refined oil - 10% on CIF Value plus 55% ad-Valorem

Importation procedure and structure: Imported direct by the two local manufacturers-Compania de aceites S.A., carretera a Tocumen 2314, Panama City and F brica de Aceite PABO S.A., Boca La Caja, Pastilla, Panama City.

2. Additional factors: The two local oil refiners import crude soya bean oil and refine it in their factories, where they meet local market demand. Until 1980, refined oil was imported by trading firms under quotas issued by the government, but quotas have been abolished to protect local oil refineries. Importation of raw soya oil in 1983 totalled 41,500 tonnes.

3. Supply of oilseeds and products by type: Base year 1983

<u>Oil</u>	<u>Production</u>	<u>Imports Crude/Refined</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean		41.5		U.S.A., Brazil

4.	<u>Number</u>	<u>Type of Oil Refined</u>	<u>Capacity (tonnes/24h)</u>
	1	Raw soya oil	84
	1	" " "	110
TOTAL	2	" " "	194

Note: No crushing activity - oil refining only.



IV. STATISTICAL NOTES(A) WHEAT AND DURUMSUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat			60.5 (58.0)	60.5 (58.0)
Durum wheat				
Flour/Semolina			60.5 (58.0)	60.5 (58.0)
<b>TOTAL</b>				

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	50 (45.0)	10.5 (13.0)					60.5 (58.0)
Durum wheat							
Flour Semolina							
<b>TOTAL</b>	50 (45.0)	10.5 (13.0)					60.5 (58.0)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>
Canada						

WHEAT (including durum)

Cash						
Commercial Credit	60.5 (58.0)					60.5 (58.0)

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	31.5			
Barley			23 (21.5)	54.5 (21.5)
Sorghum			120.0 (105.0)	120.0 (105.0)
Oats			1.5 (.6)	1.5 (.6)
Rye			2.0 (2.6)	2.0 (2.6)
TOTAL	31.		146.5 (129.7)	178.0 (129.7)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	41.5 (11.5)	13.0 (10.0)					54.5 (21.5)
Barley			120.0 (105.0)				120.0 (105.0)
Sorghum		1.5 (.6)					1.5 (.6)
Oats		2.0 (2.6)					2.0 (2.6)
Rye							
TOTAL	41.5 (11.5)	16.5 (13.2)	120.0 (105.0)				178.0 (129.7)

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn						
Barley	.5 (.35)	23.0 (21.5)			8.0 (10.0)	23.0 (21.5)
Sorghum		111.5 (94.6)				120.0 (105.0)
Oats		1.5 (.6)				1.5 (.6)
Rye		2.0 (2.6)				2.0 (2.6)
TOTAL	.5 (.35)	138.0 (119.3)			8.0 (10.0)	146.5 (129.7)



PART V  
SOUTH AMERICA





## A R G E N T I N A

Economic classification: Middle Income economy		
Oil exporter or importer (net)		
Annual per capita income: US\$1,500		year 1983
Annual per capita GNP:		
Average annual growth 1960-80	2.5%	
Annual inflation rate 1970-80	220%	
Annual inflation rate (current)	535%	
Volume of imports	6 billion US\$	year 1983
Of which food	0.5%	year 1983
Of which fuels	1.5%	year 1983
Principal foreign exchange earning export: Agricultural Products		
Debt service as % of GNP	40%	year 1983
Debt service as % of exports	150%	year 1983
Population	30 million	year 1984
Annual population growth	2%	years 1970-1980
Annual Consumption:		
Flour	7 kg/capita	year 1983
Meat	85 kg/capita	year 1983
Vegetable Oil	7 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1983/84 crop was similar to the 1982/83 crop. Production of major crops was as follows:

	<u>1983-1984</u> (000 tonnes)
Wheat	12,300
Corn	9,200
Grain Sorghum	7,740
Soybean	6,000
Sunflowerseed	2,240
Flaxseed	660

#### 2. Fertilizer Situation

Argentina uses very little fertilizer when compared to Canada except in wheat production. Average use per hectare is 12.5 kilograms.

#### 3. Government Policies Affecting Grain and Agriculture

The export tax (percent of F.O.B. value) on all agricultural products tends to have a negative effect on the sector. Some examples of the export tax are as follows: wheat 18%, sunflowerseed 33%, and all other grains and oilseeds 25%.

4. Processing Facilities

Year 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	45	50	4,800	4,200
Compound Feed Mills	20	35	2,400	1,800
Malt Houses	10	10	800	500
Oilseed Crushers	30	45	3,800	3,800

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	300				300
Suitable for malting	250				250

2. Imports, Calendar year 1983 estimated: NONE

3. Additional Information

Change in malting capacity: Domestic malting capacity is decreasing.

Malt exports: Malt is exported to Uruguay and Brazil.

Trend in beer consumption: Decreasing, from 12 litres per capita to 8 litres.

III. OILSEEDS

1. Import Policy: Imports are prohibited.

2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean	6,000		3,500	
Sunflower	2,200		2,200	
Flax	650		650	

<u>Oil</u>		<u>Crude/Refined</u>
Soybean	330	
Sunflowerseed	900	
Flax	194	

<u>Meal</u>	
Soybean	1,600
Sunflowerseed	1,025
Flax	390

3. Number of Plants 45      Type of seed crushed Oilseeds produced in Argentina.      Capacity Approx. 5,000,000 tonnes of seeds

4. Export Policy

Export assistance or control measures: None

Export procedure and structure: Private exporters.

5. Exports of oilseeds and products by type, thousands of tonnes

Base Year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Soybean	6,000	3,000	U.S.S.R., Brazil
Sunflower	2,200		U.S.S.R., Netherlands
<u>Oil</u>			
Soybean	330	330	Netherlands, U.S.S.R., Iran
Sunflower	900	900	Netherlands, U.S.S.R.
<u>Meal</u>			
Soybean	1,600	1,800	EEC, U.S.S.R.
Sunflower	1,025		



IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	12,500 (15,000)	2,000 (900)	-	14,500 (15,900)
Durum wheat				
Flour/Semolina				
TOTAL	12,500 (15,000)	2,000 (900)	-	14,500 (15,900)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Wheat	4,500 (4,400)		-	500 (500)	9,000 (9,500)	500 (1,500)	14,500(15,900)
Durum wheat							
Flour Semolina							
TOTAL	4,500 (4,400)		-	500 (500)	9,000 (9,500)	500 (1,500)	14,500(15,900)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

<u>Wheat (including durum)</u>	<u>ORIGIN</u>			<u>TOTAL IMPORTS</u>	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>		
			<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>

Cash  
Commercial credit  
Aid, concessional  
credit, etc.

Flour (including semolina)

Cash/comm.credit  
Aid, concessional

TOTAL

Argentina

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	9,000 (8,800)	1,000 (1,200)		10,000 (10,000)
Barley	300			300
Sorghum	8,000 (8,200)	800 (1,000)		8,800 (9,200)
Oats	540 (630)			540 (630)
Rye	150 (150)			150 (150)
TOTAL	17,990 (17,780)	1,800 (2,200)		19,790 (19,980)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	1,000 (1,000)	2,000 (2,000)		400 (400)	7,500 (7,000)		10,000 (10,000)
Barley							35
Sorghum		1,500 (1,500)		500 (500)	5,500 (5,500)		8,800 (9,200)
Oats	120 (120)						120 (120)
Rye	200 (200)						200 (200)
TOTAL	1,320 (1,320)	3,500 (3,500)		900 (900)	13,000 (12,500)		19,525 (20,000)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS	
	Canada	U.S.A.
	Australia	Argentina
	EEC	All Others

Corn  
Barley  
Sorghum  
Oats  
Rye

- NIL -

## B R A Z I L

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$2,258	year 1982
Annual per capita GNP	US\$2,240	year 1982
Average annual growth 1970-80	8.58%	
Annual inflation rate (current)	230%	
Volume of imports	15 billion US\$	year 1983
Of which food	12%	year 1983
Of which fuels	55%	year 1983
Principal foreign exchange earning export:	soybeans, coffee, orange juice	
Debt service as % of GNP	3.4%	year 1980
Debt service as % of exports	34.0%	year 1980
Population	125 million	year 1983
Annual population growth	2.5%	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

All crops - with the exception of coffee, manioc and peanuts - will show significant improvement this year. Corn is expected to make a strong comeback from last year, when it was hit hard by inclement weather. Output will be about 14% higher than last year's 18.7 million tonnes. As for other crops, the following estimates have been advised to us: wheat, up 30% to 2.9 million tonnes; rice output is uncertain while government officials predict an 18% jump in output to 9.1 million tonnes.

In the current growing season (now getting under way), financing costs for farmers will be higher owing to a reduction in credit subsidies.

#### 2. Foreign Exchange Situation

In the past few years the foreign exchange situation has been extremely difficult. In 1984 there has been an improvement because of a large trade surplus and a dramatic decline in interest rates on the national debt. Food imports are still a priority.

No, this country is not expected to be an international aid recipient.

#### 3. Fertilizer Situation

Anticipated increase in production and consumption. Country remains major importer of fertilizer.

#### 4. Import Mechanism

All wheat is purchased by the Junta do Trigo via the Banco do Brasil (Government agency). Purchases are negotiated and tendered mainly from Canada and U.S.

5. Grain Industry Infrastructure

Junta do Trigo sells to the mills. There have been no changes to the country's grain industry infrastructure.

6. Government Policies Affecting Grain and Agriculture

Heavy subsidies to millers make flour and bread cheap, thereby increasing consumption. However, subsidies are coming off flour gradually making bread more expensive, decreasing consumption.

7. Canadian Grain Marketing Prospects

Marketing possibilities for Canadian special crops: None.



## C H I L E

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$1,685	year 1983
Annual per capita GNP	US\$1,552	year 1983
Average annual growth 1960-80	1.6%	
Annual inflation rate 1970-80	185.6%	
Annual inflation rate (current)	25.0%	
Volume of imports	2.837 billion US\$	year 1983
Of which food	15.0%	year 1983
Of which fuels	20.0%	year 1983
Principal foreign exchange earning export:	Copper	
Debt service as % of GNP	5.2%	year 1980
Debt service as % of exports	22.9%	year 1980
Population	11.7 million	year 1983
Annual population growth	1.4%	years 1980-2000
Annual Consumption:		
Flour	1,268,000 tonnes or	108 kg/capita year 1983
Meat	399,168 tonnes or	34 kg/capita year 1983
Vegetable Oil	93,600 tonnes or	8 kg/capita year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Crop production for 1983/84 was significantly higher than last year - wheat 988,000 tonnes, corn 721,000 tonnes and oats 163,000 tonnes.

#### 2. Foreign Exchange Situation

The exchange rate which was approximately 78 pesos per US dollar at this time last year is now approximately 92, and floating daily in direct proportion to the Chilean cost-of-living index, minus the U.S.A. inflation rate. Foreign exchange is equally available for all imports, and for the moment there is no reason to expect that priorities will be established for some commodities. International food aid is not likely, except small donations to specific institutions.

#### 3. Fertilizer Situation

Consumption of fertilizers increased an estimated 20% in 1983 mainly due to larger areas planted and to improved farm income resulting from better farm prices. Consumption by nutrients was as follows:

Nitrogen	61,500 tonnes
Phosphate	58,400 tonnes
Potash	11,000 tonnes

#### 4. Import Mechanism

Wheat imports are controlled by the private millers through their associations and specially constituted foreign trading companies, as well as the pasta and semolina mills. Crude edible oil is imported directly by the refiner - industries. Similarly, the malting industry imports barley when the local production is short. Generally, there is no government intervention nor public tenders in these commodities.

#### 5. Grain Industry Infrastructure

Since the state Empresa de Comercio Agrícola (ECA) withdrew from the grain trade several years ago, there has been a lack of an adequate intermediate purchasing organization, and farmers have been selling directly to end users. Recently, a federation of farm cooperatives, COPAGRO, rented the ECA installations and started purchasing wheat and corn on a non-profit basis. While their purchases have amounted to only a small percentage of the total market, their intervention has already provided considerable improvement in the prices that farmers obtain for their crop. The project has financial support from the state bank and is expected to expand to include rice and other farm produce.

#### 6. Government Policies Affecting Grain and Agriculture

During the last crop year the government has implemented measures to provide price support to local producers of wheat and oilseeds on a continuing basis. This is expected to greatly encourage domestic production and reduce imports. No significant change is expected in grain consumption patterns, grain reserves or meat production and consumption.

As local production increases, imports will probably be reduced proportionally in wheat and oilseeds. For the moment and in the near future, it is not expected that other grains will be affected, except possibly corn and rice for which farmers are already requesting similar protection.

#### 7. Canadian Grain Marketing Prospects

Purchases are heavily dependent on price, and availability at moment required. Favourable freight costs are also very important. Concessional credit has been made available to Chile by the US for imports of wheat.

There are marketing opportunities for special crops when local production falls short, as has recently happened with canary seed and lentils.

#### 8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	90	100	1,350	1,250
Compound Feed Mills	8	12	15	12 - 15
Malt Houses	4	5	90	60
Oilseed Crushers	8	8	265	n/a

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
San Antonio	6.0	400 tonnes per hour
San Vicente	6.7	400 tonnes per hour
Total Capacity	12.7	

(Chilean ports, since 1981 work three shifts of 7.5 hours each, which amounts to 22.5 hours per day).

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	3	60	-	10	73
Suitable for malting	2	58	-	-	60

2. Imports, Calendar year 1983: Nil

3. Additional Information

Domestic malting capacity: There is idle plant capacity. No new plants or expansions are under consideration in view of depressed demand.

Malt exports: Malt is exported mainly to Brazil, Peru and Bolivia:  
as follows: 1983 - 23,000 tonnes  
1982 - 36,000 tonnes  
1981 - 55,000 tonnes

Trend in beer consumption: Beer consumption is still greatly depressed due to the recession, but is expected to get back to the normal increasing trend when the economy recovers.

Market potential for Canadian malt/and or malting barley: Chile is normally self-sufficient in both malt and malting barley. If and when a shortfall develops, imports are dependent on price and delivery at the moment required.



### III. OILSEEDS

#### 1. Import Policy

Import tariffs: Tariffs on oilseeds, crude oil, oilseed meal and refined oil are all 20% on the CIF value. A 15% additional duty is levied when international prices threaten local producers.

Importation procedure and structure: Local oil crushers and refiners purchase directly, sometimes in joint shipments to reduce freight costs. Meal is imported when needed, by individual feed producers.

2. Additional Factors: The local industry generally imports crude degummed oil, which requires less processing than seed. Marine freight cost is the key issue.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	7.4	negligible		
Rapeseed	4.0	negligible		
TOTAL	11.4			

<u>Oil Type</u>	<u>Production</u>	<u>Imports of Oils</u> (Crude) (Refined)		<u>Principal Sources of Imports</u>
Soya	78	86		Brazil, Argentina
Sunflower	12	7		Brazil, Argentina
Rapeseed	3			
TOTAL	93	93		

#### Meal Type

Sunflower	3		
Soya	-	45	Brazil, Argentina
Rapeseed	3		
Corn	1		
TOTAL	7	45	

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/year)</u>
8	Mainly Sunflower and Rapeseed	265,000



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets.

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	988 (600)	150 (250)	1,160 (1,100)	2,298 (1,950)
Durum wheat				
Flour/Semolina				
TOTAL	988 (600)	150 (250)	1,160 (1,100)	2,298 (1,950)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat							
Durum wheat							
Flour Semolina							
TOTAL (estimate)	1,696 (1,617)	50 (25)				552 (250)	2,298 (1,950)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets.

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	ATI
WHEAT (including durum)							
Cash							
Commercial Credit	(24)	(1,076)		310 (nil)			310 (1,100)
Aid, concessional							
credit, etc.		850 (nil)					850 (nil)

FLOUR (including semolina): Negligible, included in above.

Cash/comm. credit  
Aid, concessional:

TOTAL	(24)	850 (1,076)		310			1,160 (1,100)
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## Chile

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	721 (470)	260 (260)	143 (395)	1,124 (1,125)
Barley	73 (118)	30		103
Sorghum	163 (118)	11		174
Oats	5 (6)	1		6
Rye				
TOTAL	962 (712)	302 (260)	143 (395)	1,407 (1,125)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	70 (70)	680 (809)				374 (246)	1,124 (1,125)
Barley	60 (62)	15 (17)			5 (40)	23	103
Sorghum	20 (15)	125 (100)				17	174
Oats	2 (3)	3 (4)				1	6
Rye							
TOTAL	152 (150)	823 (930)			5 (40)	427 (246)	1,407 (1,125)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn		93 (250)		50 (145)		143 (395)
Barley						
Sorghum						
Oats						
Rye						
TOTAL		93 (250)		50 (145)		143 (395)

C O L O M B I A

Economic classification:	Low Income economy		
Oil exporter or importer (net):	Importer (15% of national demand)		
Annual per capita income:	US\$110		year 1983
Average annual growth 1960-80	4%		
Annual inflation rate 1970-80	18%		
Annual inflation rate (current)	34%		year 1983
Volume of imports	5.03 billion US\$		year 1983
Of which food	10%		year 1982
Principal foreign exchange earning export:	Coffee		
Population	27 million		year 1983
Annual population growth	2%	Years	1975-1982
Annual Consumption:			
Flour	13 kg/capita		year 1983
Meat	19.2 kg/capita		year 1983
Vegetable Oil	11.2 kg/capita		year 1983

I. GENERAL INFORMATION

1. Crop Situation and Outlook

Wheat, coarse grains and oilseeds are harvested twice a year in Colombia. The seed-to-harvest seasons are known as semesters A and B. The following is an indication of the crops and semesters:

	<u>Semester A</u>	<u>Semester B</u>
Wheat	Feb - July	Aug - Feb
Corn - hot climate	Feb - May	July - Oct
- cold climate	Jan - Oct	
Barley	Feb - July	Aug - Feb
Sorghum	Jan - Mar	July - Sept
Oats/rye - no significant production in Colombia		
<u>Oilseeds</u>	<u>Semester A</u>	<u>Semester B</u>
Peanut	Feb - April	Aug - Oct
Palm	Mar - May	Aug - Oct
Cotton	Feb - June	July - Oct
Soy	Mar - May	June - Aug
Rape	Feb - Apr	June - Aug
Sunflower	Apr - June	Aug - Oct
Sesame	Feb - Apr	Aug - Oct
Coconut	Mar - May	Aug - Oct

The outlook for the B Semester of 1984 is generally optimistic with forecast production increases of 7-10% across the board.

2. Foreign Exchange Situation

The situation of foreign exchange is critical at the moment. Colombia's reserves have decreased to about \$2 billion U.S. dollars. The government has met this challenge with a series of drastic import restrictions.

3. Fertilizer Situation

Colombia is largely self-sufficient in fertilizers. In 1981, national consumption was 427,043 tonnes of which 10,000 tonnes were imported. In 1982 the figures were 337,270 tonnes versus 10,000 tonnes. No figures are available for 1983.

4. Import Mechanism

Wheat, coarse grains and oilseeds are all imported by private companies, who are often millers. Imports are based on quotas assigned by the state agency IDEMA.

5. Grain Industry Infrastructure

IDEMA owns and operates grain handling and storage facilities at the Colombian ports of Santa Marta (Atlantic Coast) and Buenaventura (Pacific Coast). Processing facilities are owned by private millers. No change is expected in these facilities.

6. Government Policies Affecting Grain and Agriculture

(a) Support for grain production: Twice a year, IDEMA reviews the production of the following crops: sorghum, maize, wheat, sesame seed, beans and barley and then sets a support price. IDEMA buys a certain quantity from farmers and places the products in storage. These stocks are sold gradually to private companies and millers.

(b) Grain imports are done through the system of quotas set by IDEMA.

(c) Human consumption of wheat-based products like breads and pasta is growing steadily. Animal consumption of grain products is very low.

(d) Reserves: Colombia's annual wheat reserves amount to about 5,000 tonnes.

(e) Meat production and consumption is shown in the following table:

	No. of Livestock		No. of Slaughter		Meat Consumption	
	1982	1983	1982	1983	1982	1983
	--- million		---		--- tonnes ---	
Cattle	24.4	24.4	3.3	2.9	660,000	650,000
Hogs	2.1	2.2	1.2	1.3	103,417	111,323
Sheep	Not available					
Poultry	82.0	83.0	81.0	82.0	123,000	124,500



7. Canadian Grain Marketing Prospects

No marketing initiatives are advised at this time. Wheat is not competitive in comparison to U.S. product, while barley is selling well without any promotion.

There are no market opportunities for special crops because these crops are presently under import restriction.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	-	91	1,500	632.8
Compound Feed Mills				
Malt Houses		5	110	95
Oilseed Crushers		32	450	

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1979

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Barranquilla	-	282
Buenaventura	32	1,166
Santa Marta	30	413
Cartagena		303
Total Capacity		2,164

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley			Semester B 13.8	Semester A 15.6	29.4

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	30	Canada, Argentina
Malting barley	97	Canada, France

3. Additional Information

Malting capacity is not increasing.

Malt is not exported from Colombia.

The annual per capita beer consumption is increasing at 5%

Market potential for Canadian malt and malting barley: Canada is the primary malt supplier to Colombia. Canada is also the major supplier of malting barley, mainly Bonanza and from time to time some conquest. Brewery consortium "Malterias Unidas de Colombia" (malting capacity of 110,000 tonnes per year) has overall control of import, brewing and distribution of beer in Colombia. It also has an interest in Ecuador's barley malt industry.

III. OILSEEDS

1. Import Policy

There are a great variety of oilseeds produced in Colombia. Four major types are selected for illustration purposes.

		<u>Customs Duty</u>			<u>Customs Duty</u>
<u>Sesame</u>	Seeds	- 7%	<u>Soy</u>	Seeds	- 7%
	Crude Oil	- 20%		Crude Oil	- 15%
	Refined Oil	- 20%		Refined Oil	- 15%
<u>Cacao</u>	Seeds	- 20%	<u>Sunflower</u>	Seeds	- 20%
	Crude Oil	- 7%		Crude Oil	- 20%
	Refined Oil	- 7%		Refined Oil	- 20%

For all oilseeds the following additional taxes must be considered: promotion export fund 5%, coffee federation tax 2%, and commercial invoice tax 2.1%

2. Importation procedure and structure: Private importers.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982 (thousand tonnes)

<u>Oil</u>	<u>Production</u>	<u>Imports</u>		<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
		(Crude)	(Refined)		
Soybean	20.3	122	4.1		Argentina, Brazil, USA, Switzerland
Cotton	13.6		.042		USA
Sesame	3.0		.045		USA
Palm	103.	1			USA
Corn	4.0	.8	.017		USA
Peanut	2.5		0.13		USA
Coconut	45.	3.9	1.0		USA, Brazil
Sunflower	n/a	.5			USA
TOTAL	191	128	5.2		
<u>Meal</u>	<u>1983 Production</u>	<u>1983 Imports</u>			<u>Principal Sources of Imports</u>
Soybean	89		13		USA, Brazil
Cotton	33		12		USA
Sesame	5				
Palm	24				
TOTAL	151		25		

4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of Seed crushed</u>	<u>Capacity (tonnes)</u>
32	Sesame, Soybean, peanut African palm, cotton	450,000

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	71 (58)	52 (77)	687	810
Durum wheat				
Flour/Semolina				
TOTAL	71 (58)	52 (77)	687	810

DISPOSITION 1983 - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	475						
Durum wheat							
Flour Semolina			158				
TOTAL	475		158			n/a	810

IMPORT TRADE 1983 - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	U.K., France	ATI	Others	TOTAL IMPORTS
Wheat (including durum)									
Cash									
Commercial credit									133
Flour (including semolina)									687
Cash/comm.credit									
TOTAL									

TOTAL



(B) COARSE GRAINS

SUPPLY 1984 - thousands of tonnes - 1983 in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	534 (510)	31 (71)	6 (69)	571 (650)
Barley	24 (16)	3 (6)	103 (128)	130 (209)
Sorghum	294 (270)	123 (121)	147 (118)	564 (509)
Oats			25 (76)	25 (76)
Rye				
TOTAL	853 (796)	156 (198)	321 (341)	1,300 (1,400)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							1,300 (1,400)

IMPORT TRADE 1983 - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn		46				46 (69)
Barley	100			1		103 (128)
Sorghum		124			22	147 (118)
Oats		5		19		25 (76)
Rye						
TOTAL	100	175		20	22	321 (341)

Principal Others: Ecuador (Barley)  
Panama (Sorghum)  
Chile (Oats)

P E R U

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita GNP(1970)	US\$424	year 1983
Average annual growth 1960-80	1.1%	
Annual inflation rate 1970-80	30.7%	
Annual inflation rate (current)	125.1%	
Volume of imports	2.6 billion US\$	year 1983
Of which food	0.5%	year 1983
Principal foreign exchange earning export:	Mining, petroleum	
Debt service as % of GNP	10.0%	year 1980
Debt service as % of exports	54.9%	year 1983
Population	18 million	year 1980
Annual population growth	2.6%	years 1980-2000
Annual Consumption:		
Flour:	46 kg/capita	year 1982
Meat:	35 kg/capita	year 1982

I. GENERAL INFORMATION

1. Crop Situation and Outlook

The agriculture sector was devastated in 1983 due to climatic conditions. For 1984, the government estimates that agriculture will experience a growth of 3.4 % over 1983 production. No acreage changes on wheat are expected. For 1984, considering the good moisture conditions and an increase in the total crop area, production of grains and feeds is expected to total approximately 1,360,000 tonnes. Corn and rice production account for 80% of Peru's total output of grains and feeds. This year a record production of rice is expected mostly due to an increase in the area planted.

2. Foreign Exchange Situation

The balance of payments shows a current account deficit of US\$865 million, a service balance of US\$1.39 billion and a trade balance of US\$308 million. Net international reserves by January 1984 were US\$1 billion. Debt service figures for 1984 show amortization at US\$1.33 million and interest payments at US\$903 million. Peru is a recipient of international aid.

3. Fertilizer Situation

Although importation and marketing are liberalized, ENCI continues to be the major fertilizer importer and distributor. Fertilizer, use by nutrients, in 1983 was as follows: Nitrogen 65,000 tonnes, Phosphate 12,000 tonnes, Potash 7,000 tonnes.

#### 4. Import Mechanism

Imports of wheat were removed from GOP control effective April 10, 1983. At the same date wheat prices were also freed. ENCI (state owned import agency) continues to handle wheat imports on behalf of the private millers. ENCI's purchases are based on international tenders that are called from time to time. Private importers are now authorized to import rice, but ECASA continues to be the main importer and distributor.

#### 5. Grain Industry Infrastructure

The following firms represent the seven large mills in operation:

Molino Excelsior S.A.  
Mariscal Miller 450 - Callao  
Peru

Federico Cogorno  
Av. Venezuela 120  
Lima, Peru

Molinera Santa Rosa S.A.  
Loreto 475 - Callao  
Peru

Cia. Molinera del Peru S.A.  
Av. Argentina 4695  
Lima Peru

Molitalia  
Av. Venezuela 2856  
Lima, Peru

Nicolini Hermanos S.A.  
Av. Argentina 215  
Lima, Peru

Molinera Inca S.A.  
Casilla 3117  
Lima, Peru

#### 6. Government Policies Affecting Grain and Agriculture

There are no new government policies affecting the grain and agriculture sector.

#### 7. Canadian Grain Marketing Prospects

Peru will continue to import about 1 million tonnes of wheat per year and 45,000 tonnes of barley per year over the next decade.

Financing of grain sales would be a positive marketing initiative.

Marketing opportunities do exist for special crops.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	10	12	1500	800
Compound Feed Mills	13	16	1300	950
Malt Houses	2	2	45	25
Oilseed Crushers	9	9	250	90

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1982

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Salaverry	8	96
Matarani	15	150
Paíta	8	96
Callao	30	740
Total Capacity	61	1062

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					120
Suitable for malting					15

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	23 (23)	Canada/Chile
Malting barley	40 (37)	Canada/Australia/Chile

3. Additional Information

Change in malting capacity: No change.



II. MALT AND MALTING BARLEY cont'd

Malt Exports None.

Trend in beer consumption: Beer consumption has levelled off for the time being.

Market potential for Canadian malt and/or malting barley:

Peru is a long term market for malting barley and no forces are in sight which will change its reliance on imports of about 45,000 tonnes on malting barley per year.

III. OILSEEDS

1. Import Policy

Import Tariffs: (i) Oilseeds - soya 10%, others 10%  
(ii) Crude oil - 1%  
(iii) Oilseed meal - 20%  
(iv) Refined oil - 40%

Importation procedure and structure: ENCI, a government agency imports on behalf of private oil processors.

2. Additional Factors: USA has provided CCC credit for crude soya oil.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Cotton	120		70	
Palm	40		40	
Soya	10	40	50	Brazil, USA
TOTAL	170	40	160	
<u>Oil</u>	<u>Production</u>	<u>Imports</u>		<u>Principal Sources of Imports</u>
		(Crude)	(Refined)	
Soya	8	110		USA
Cotton	26			
Palm	7			
Fish	29			
TOTAL	70	110		
<u>Meal Type</u>				
Cottonseed	71			
Fish	368			
TOTAL	439			

III. OILSEEDS

4. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24hr)</u>
9	Cotton, Soya, Palm	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	100 (78)	80 (80)	980 (968)	1,160 (1,126)
Durum wheat				
Flour/Semolina				
TOTAL	100 (78)	80 (80)	980 (968)	1,160 (1,126)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption			Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal	Industrial				
Wheat	1,060			20		80 (80)	1,160 (1,126)
Durum wheat							
Flour Semolina							
TOTAL	1,060			20		80 (80)	1,160 (1,126)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	
Wheat (including durum)					
Cash				250	250 (533)
Commercial Credit	100	(533)			663 (387)
Aid, concessional		563 (387)			
credit, etc.		67 (48)			67 (48)
Flour (including semolina)					
Cash/Comm. Credit					
Aid, concessional					
TOTAL	100	630 (968)		250	980 (968)

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	600 (620)	60 (50)	400 (530)	1,060 (1,200)
Barley	120 (160)	5 (5)	40 (37)	165 (202)
Sorghum	20 (45)	1 (3)		21 (48)
Oats	110 (110)	5 (5)	6 (6)	121 (121)
Rye				
TOTAL	850 (935)	71 (63)	446 (573)	1,367 (1,571)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	200 (200)	800 (950)				60 (50)	1,060 (1,200)
Barley	80 (80)	80 (117)				3 (5)	165 (202)
Sorghum							
Oats							
Rye							
TOTAL	280 (280)	880 (1,067)			63 (55)		1,367 (1,571)

Of which poultry 70%

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn						
Barley						(154)
Sorghum						(37)
Oats	16 (22)	400 (376)			24	(15)
Rye						6 (6)
TOTAL	16 (22)	400 (376)			24 (169)	446 (573)



## U R U G U A Y

Economic classification: Middle Income economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$3,149		year 1980
Annual per capita GNP	US\$2,810		year 1980
Average annual growth 1960-80	1.4%		
Annual inflation rate 1970-80	62.3%		
Annual inflation rate (current)	50%		
Volume of imports	1.615 billion US\$		year 1980
Of which food	10 %		year 1980
Of which fuels	24 %		year 1980
Principal foreign exchange earning export: Livestock & Products			
Debt service as % of GNP	1.9 %		year 1980
Debt service as % of exports	11.8 %		year 1980
Population	2.9 million		year 1980
Annual population growth	1.0 %		years 1980-2000
Annual Consumption:			
Flour	242,400	tonnes or	84 kg/capita year 1982/83
Meat	262,000	tonnes or	89 kg/capita year 1982
Vegetable Oil	20,400	tonnes or	7 kg/capita year 1982/83

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1983/84 crop was fair and sufficient. As in 1982/83, in order not to need the financing for the whole year, the government encouraged farmers and co-ops to export promptly after harvesting and to import later wheat, sorghum and maize.

#### 2. Foreign Exchange Situation

Free import and export. No exchange controls. No quota system. Not an aid recipient country.

#### 3. Fertilizer Situation

All fertilizer is imported. Consumption is shown in the following table (000 tonnes).

	NPK	N	P2O5	K2O	Utilization
1978	58	14.4	39.6	4.0	160.7
1979	91.8	21.8	65.5	4.5	250.2
1980	80.9	21.0	56.2	3.69	202.0
1981	63.6	20.4	39.7	3.5	143.5

#### 4. Import Mechanism

Grain imports are made through private importers. There are no restrictions on imports.

5. Grain Industry Infrastructure

A new grain silo (capacity - 60,000 tonnes) is to be built at Nueva Palmira Port and is expected to open in 1985.

6. Government Policies Affecting Grain and Agriculture

In 1984/85, the government will leave all decisions to private industry.

7. Canadian Grain Marketing Prospects

Marketing Initiatives: Competitive prices and loan facilities would be useful.

There are no marketing opportunities for Canadian special crops.

8. Processing Facilities

Year: 1984

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	30	30	700	325
Compound Feed Mills	25	25	210	160
Malt Houses	3	3	90	42
Oilseed Crushers	10	10	550	10

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1984

-- thousands of tonnes --

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Nueva Palmira	58	1,400
Fray Bentos	18	450
Montevideo	N/A	300
Total Capacity		2,150

II. MALT AND MALTING BARLEY

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

-- thousands of tonnes --

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
Suitable for malting		30			30

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malting barley	27 (-)	Australia

II. MALT AND MALTING BARLEY continued

3. Additional Information

Domestic malting capacity: Decreasing.

Malt Exports: 50 tonnes to Brazil.

Trend in beer consumption: 25 kgs per capita and decreasing.

Market potential for Canadian malt and/or malting barley: None.

III. OILSEEDS

1. Import Policy

Import tariffs: 20% import tariffs.

Importation procedure and structure: Private importers.

2. Additional factors: Uruguay normally has enough oilseeds in order to cover internal demand. Presently edible oils are being imported, thus internal production in 1983/84 was not sufficient.

3. Export Policy

Export assistance or control measures: None.

Export procedure and structure: Private exporters.

4. Additional factors: Due to farmers economic problems, 1983/84 oilseed crop was a small one.

5. Exports of oilseeds and products by type, thousands of tonnes

Base Year: 1983/84

Oils	Production	Exports	Imports*	Destinations
Sunflower	11.25	0.65	4	Holland, West Germany
Linseed	1.90	3.10	-	Holland
Soya	2.70		4	
<u>Meals</u>				
Sunflower meal Pellets		1.0		Holland, West Germany
Linseed meal Pellets		1.8		Holland
Soyabean meal Pellets		0.9		Holland
Linseed Expellers		0.5		Holland, West Germany

\*Crude oil from Argentina.

## Uruguay

IV. STATISTICAL NOTES

## COARSE GRAINS

SUPPLY 1982/83 est. - thousands of tonnes - previous year in brackets - (Crop year basis January 1982/December 1982)

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	65			65
Millet	90			90
Sorghum	140			140
Oats	42			42
Rye				
TOTAL	337			337

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DISPOSITION 1982/83 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn							65
Barley					50		90
Sorghum					50		140
Oats					5		42
Rye							
TOTAL							337



## V E N E Z U E L A

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Exporter	
Annual per capita income:	US\$5,000	year 1982
Annual per capita GNP	US\$4,781	year 1982
Average annual growth 1960-80	5%	
Annual inflation rate 1970-80	8%	
Annual inflation rate (current)	20%	
Volume of imports	9 billion US\$	year 1984
Of which food	50%	year 1984
Of which fuels	0%	year 1984
Principal foreign exchange earning export:	Oil	
Debt service as % of GNP	4%	year 1982
Debt service as % of exports	25%	year 1984
Population	16 million	year 1984
Annual population growth	3.3%	year 1982
Annual consumption:		
Flour	920,000 tonnes	year 1984*
Meat	700,000 tonnes	year 1984*
Vegetable Oil	260,000 tonnes	year 1984*

\* Figures given are estimates based on previous years imports.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

<u>Crop</u>	<u>Average Production (1978-1982)</u>	<u>Government Production Targets for Year 2010</u>
	- - - - hectares	- - - -
Corn	367,000	660,000
Rice	200,000	300,000
Sorghum	210,000	507,000
Yuca	40,600	96,500
Soya	-	428,400
Sesame	91,600	300,000
Cotton	31,500	160,000
Peanut	9,300	50,000
Wheat	-	not mentioned
African Palm	-	20,000

#### 2. Foreign Exchange Situation

Foreign exchange controls exist and permission for foreign currency must be obtained from the government. The agricultural industry receives top priority from the government. In spite of the expressed desire to develop further domestic production, imports of food and agricultural inputs are still necessary to fill the demand. Currency for wheat imports is available at the preferred

## Foreign Exchange Situation cont'd

rate of Bs 4.30 per US\$1 while corn, soya and sorghum is imported at a 7.5 rate. It is unlikely Venezuela will become an aid recipient.

Although the preferential rate of exchange remains at Bs 4.30 for US\$1, dollars are only available at Bs. 14 per US\$ in limited amount. Consequently, although per capita income remains the same at 4.30 per US\$1, and although most of Venezuela's income comes from oil exports in US\$, the purchasing power of the Venezuelans has declined by 60% in dollar terms.

### 3. Fertilizer Situation

Fertilizer production and importation is handled entirely by the government corporation PEQUIVEN. Approximately 30% of the country's requirements are imported. The price is set by the government. Recently the elected government reduced the price of fertilizer to encourage use. Government hopes to be self-sufficient by 1990 and in fact Venezuela currently exports urea. Fertilizer is presently imported from USA and West Germany. Preferential dollars are available at 4.30 rate for imports. Although self-sufficiency is sought, some imports will continue since some fertilizers are not produced locally.

### 4. Import Mechanism

Grain is imported by private companies and usually through agents (agents are normally used because of the paper work involved in obtaining currency approvals). Normally when a company has a requirement, they simply advise their agent(s) and request a quotation.

### 5. Grain Industry Infrastructure

Infrastructure is basically the same as in previous years. A number of years ago, the government initiated a program to construct silos and other grain storage facilities. Many of the facilities ended up being owned by the government and many fell into a state of disrepair. The recently elected government plans to provide incentives to repair these facilities and to turn many back to the private sector.

### 6. Government Policies Affecting Grain and Agriculture

Corn, rice, sorghum, soya, and sesame production are already being helped by the government to increase production levels. Due to the external debt problem Venezuela is trying to limit imports as much as possible and if possible stimulate exports to attract foreign currency. A campaign has already been initiated to modify the consumers taste for imported staples to replace it with local products.



6. Government Policies Affecting Grain and Agriculture cont'd

The Minister of Agriculture Mr. Felipe Gomez Alvarez, recently expressed the Venezuelan Government's preoccupation regarding a series of negative factors which will induce Venezuela to import 2,719,688 tonnes of cereal and pulses as well as 90% of its requirements in vegetable oils again this year. He stated that Venezuela will be importing 95,000 tonnes of powered milk, 62,000 tonnes of beans, 42,000 tonnes of other pulses, 1,600,000 tonnes of corn and sorghum which could be produced in Venezuela. They will import 920,000 tonnes of wheat and 688,000 tonnes of soya. All of which means that nearly one million hectares of land are cultivated abroad to meet Venezuelan demand. In consequence the government wants to stimulate local production to limit imports.

7. Canadian Grain Marketing Prospects

The past COPEI government recently published a long term Agricultural Development Plan which takes into consideration present production levels, prospective population growth and prospective food needs to year 2010. The objective is to increase local production in order to be less dependent on imports.

Wheat and several pulses cannot be produced here, in consequence Venezuela will have to keep importing these staples. Canada should approach local importers and flour millers who have traditionally imported wheat, corn, oats, soya, sorghum, pulses and oilseeds mainly from U.S. suppliers.

There are marketing opportunities for special crops because except for some beans, special crops are not produced in Venezuela.

8. Processing Facilities

Year: 1984

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	10	12	900	
Compound Feed Mills	30	33	1,150	
Malt Houses	0	0		
Oilseed Crushers	10	10	370	168

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year:1982

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Puerto Cabello		2,334
La Guaira		398
Maracaibo		439
Guanta		110
Sucre		36
Total Capacity		3,308

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84 estimate: Nil
2. Imports, Calendar year 1983 estimated, previous year in brackets:

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	200,000 (200,000)	Czechoslovakia, Canada, France, Belgium, U.K. West Germany, U.S.A.

3. Additional Information

There is no domestic malting capacity.

Malt Exports: None.

Trend in beer consumption: Per capita beer consumption is more or less stable at a high level of 66 litres per year. Because of higher importation costs of malt and hops due to the devaluation of the currency, beer producers will most likely press the government to allow them an increase of price for the finished product which could translate into lowering the per capita consumption.

Market potential for Canadian malt and/or malting barley: It is unlikely that Venezuela would import more barley malt. Therefore, Canada's chance of increasing its market share (10%) depends strictly on the quality of the product, price, shipment conditions and credit facilities that would compete favourably with the other major suppliers i.e France, Belgium, U.K. and Czechoslovakia.



### III. OILSEEDS

#### 1. Import Policy

- Import Tariffs: (i) Oilseeds- 15-40%, ad valorem on CIF price  
Soya imports are granted preferential rate of exchange  
(ii) Crude Oil-20% duty on CIF price, most are granted 4.30 rate of exchange  
(iii) Oilseed meal- 100% duty on CIF price, soya and sesame (1US\$=4.30)  
(iv) Refined oil- Same as for crude oils

Duty not established for canola products and no import licenses have been issued yet. There are no significant barriers for the importation of these products except that importation is restricted to the government. The government gives import licenses to oilseed processors.

Importation procedure and structure: Private oilseed processors must request import quotas and import licenses from the government. Quotas allocations are based on domestic demand.

2. Additional factors: Oilseeds which are granted a preferential exchange rate are definitely favoured over oilseeds which do not get that preferential rate and must be paid for with dollars purchase at a cost of Bs. 7.50 each (this is the case for canola).

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Principal Sources of Imports</u>
Sesame	55		
Cotton	65		
Peanut	15	20	
TOTAL	135	20	
<u>Oil Type</u>	<u>Imports of oils (Crude) (Refined)</u>		<u>Principal Sources of Oil Imports</u>
Soybean	50		U.S.A.
Cotton seed	102		U.S.A.
Sunflower	82		U.S.A., Argentina
TOTAL	234		
<u>Meal Type</u>	<u>Imports</u>		
Soybean	62		U.S.A.
Peanut		130	U.S.A., Brazil
Copra			
TOTAL	192		

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
10		

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat*		(80)	1,000 (1,030)	1,000 (1,100)
Durum wheat			221 (210)	221 (210)
Flour/Semolina	137 (130)		137 (130)	137 (130)
TOTAL	137 (130)	(80)	1,221 (1,240)	1,358 (1,230)

\* Of which N. Spring 727,000 and Soft Red 52,000

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	1,000 (743)	(366)				(94)	1,000 (1,110)
Durum wheat	221						221
Flour Semolina	137 (130)						137 (130)
TOTAL	1,358 (873)	(366)				(94)	1,358 (1,230)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>ATI</u>	<u>Others</u>	<u>TOTAL IMPORTS</u>
Canada							

WHEAT (including durum)

Cash							
Commercial Credit	(262)						(262)
Aid, concessional credit, etc							(45)

FLOUR (including semolina)

Cash/comm. credit							
Aid, concessional							1,000 (1,030)
TOTAL							

(B) COARSE GRAINS (PLUS RICE)

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	610 (450)	(327)	1,000 (1,008)	1,610 (2,054)
Barley			200 (193)	200 (193)
Sorghum	397 (237)	(109)	600 (800)	997 (1,146)
Oats			(0.34)	(0.34)
Rice	747 (509)			747 (509)
TOTAL	1,754 (1,196)	(441)	1,800 (2,000)	3,354 (3,714)

DISPOSITION 1983/84 est. thousands of tonnes - previous year in brackets

	Consumption		Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal				
Corn	(1.6)	(147)			(336)	1,610 (2,104)
Barley		(3.64)			(1)	200 (193)
Sorghum		(1,027)			(65)	997 (1,146)
Oats		(10.6)			(1.5)	(12.1)
Rice		(30.4)				(0.34)
TOTAL	(1.6)					3,354 (3,714)

IMPORT TRADE 1983/84 est. thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn	(.3)	(454)		(24.5)		(529)
Barley	(22.0)	(12)			(105)	(54)
Sorghum	(20.0)	(750)				(30)
Oats	(2.5)	(6)			(1.5)	10
Rye						
TOTAL						1,000 (1,008)
						200 (193)
						600 (800)
						10 (10)
TOTAL						1,800 (2,000)

Principal "Others": Corn: Africa  
Barley: U.K. and Czechoslovakia

PART VI  
ASIA (NEAR EAST)





IRAQ

JORDAN

SAUDI ARABIA

## I R A Q

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Exporter	
Annual per capita income:	US\$2,954	year 1982
Annual per capita GNP	US\$2,258	year 1982
Average annual growth	5.3%	
Annual inflation rate 1970-80	14.1%	
Annual inflation rate (current)	30-50%	
Volume of imports	17.7 billion US\$	year 1982
Of which food	16%	year 1982
Of which fuels	0.5%	year 1982
Principal foreign exchange earning export:	Petroleum	
Population	14.5 million	year 1982
Annual population growth	est. 3.5%	years 1980-2000

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Iraq's crop in 1982/83 of 965,000 tonnes of wheat, 160,000 tonnes of rice and 900,000 tonnes of barley compared very favourably with previous annual harvests. These results were especially encouraging given the growing scarcity of agricultural labour as a result of conscription and the government's decision not to extend the working visas of many workers, mostly Egyptian.

The weather has reduced yields dramatically in 1983/84. At mid-season, the director of the Iraqi Grain Board stated that the drought being experienced in north and central Iraq was the worst in 27 years. In many unirrigated areas of the north, there has been so little moisture the the total crop is expected to be less than the tonnage of the seed. Estimates for national wheat production have fallen to 300,000 - 350,000 tonnes. Domestic wheat production in 1983/84 (a very bad year) met only 15% of consumption. Similarly reduced yields are forecast for other coarse grains.

#### 2. Foreign Exchange Situation

The continuing war with Iran has exacerbated the serious strains on Iraq's finances. Despite severe austerity measures introduced in the civil sector in early 1983, the government was forced to rely on foreign credits to cover all imports except those of greatest national importance or urgency. By mid-1984, prospects for the government's cash-flow had not yet brightened but all observers agreed that the financial authorities had regained firm control over the foreign debt. Extremely strict currency controls are in place and the national currency is non-convertible. Foreign credits and war-related financial assistance from other Arab countries will keep Iraq from becoming eligible for international aid.

### 3. Fertilizer Situation

Currently most fertilizers are imported and utilization is not high. There are ambitious plans to increase local production significantly; the Al Qaim phosphate plant near the Syrian border has come into operation and is satisfying local demand for fertilizers of this type.

Two fertilizer plants near Basrah, utilizing natural gas, were damaged in the early days of the war but will eventually be replaced.

### 4. Import Mechanism

Almost all grain (wheat, barley and rice) are imported through the Grain Board of Iraq, (which falls under the State Organization for Grain which is, in turn, under the Ministry of Trade). Most purchases are made within the framework of long-term agreements with suppliers in which annual minimum and maximum levels are set out. Note that imports since 1982/83 have been financed by the suppliers for a usual term of two years.

Mr. Zuhair Daoud has been the Director of the Grain Board of Iraq for more than twenty-five years and is very well known to the Canadian Wheat Board.

### 5. Grain Industry Infrastructure

The grain industry is exclusively in the public domain. The State Organization for Grain supervises and controls various establishments responsible for milling, bakeries, importation and storage. Storage capacity is being increased: three complexes of "thin-shelled concrete domes" have been built by Howe International at Salman Pak, Khan Bani Saad and Najef (total 130 thousand tonnes in new storage capacity; six other conventional silo complexes under construction at Talafa, Hilla etc. will add another 400,000 tonnes of capacity by the end of 1984. The Iraqis' plan is to eventually have storage capacity for a full year's consumption (2.5 to 3 million tonnes). Current capacity is 1,400,000 tonnes.

### 6. Government Policies Affecting Grain and Agriculture

Grain production and reclamation policies, if successful, will eventually make Iraq self-sufficient in wheat and coarse grains and consequently negate the need for imports. Work is continuing on projects aimed at expanding agricultural production by reclaiming land lost to salinity and extending irrigation to traditionally rain-fed areas. Iraq has more than 13.5 million hectares of arable land of which approximately one-half is under cultivation. The main Tigris-Euphrates drainage project in the southern part of the country restored 200,000 hectares in 1982 and reversed the trend of losing more land each year than was being reclaimed. Major irrigation projects are proceeding and new approaches to irrigation, such as the "drip method" introduced by resident Australian teams, are being tested. Iraq for strategic reasons is attempting to build up grain reserves by increasing storage capacity by at least 500,000 tonnes in the medium term. There is a long term policy to increase livestock production.



## 7. Canadian Grain Marketing Prospects

There are too many variables with respect to local production (war, climate and availability of funds for land reclamation and irrigation) to predict accurately any changes in current import levels to 1990. Imports should grow in the short term.

Marketing initiatives currently underway by the Canadian Wheat Board appear suitable for the short and medium term. There are good marketing possibilities for all coarse grains, especially for cattle feed. Financing will be required, however, for the foreseeable future.

## 8. Storage and Throughput Capacity

### Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Aqaba (Jordan)	150	
Iskunderun (Turkey)	20	
Kuwait	N/A	
Dammam (Saudi Arabia)	N/A	

Note: Iraq's major port (Basrah) has been closed since the beginning of the Iran-Iraq war September 1980.

## II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84: 320,000 tonnes  
1982/83: 900,000 tonnes

2. Additional Information

Change in malting capacity: It is believed that domestic production is stable at about 600,000 HL.

Malt exports: Nil.

Trend in beer consumption: Per capita consumption is believed to be decreasing due to shortages in local production. Imported beer comes from Turkey and is served in the major hotels and restaurants.

## III. OILSEEDS

1. Import Policy

Import Tariffs: Only the government can import so tariffs are irrelevant.

Importation procedure and structure: Imports are handled through the publicly owned State Enterprise for Vegetable Oils.

2. Additional Factors

Virtually all agricultural products are being offered on terms of two years deferred payment. The Grain Board is now seeking three year terms.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat				
Durum wheat				
Flour/Semolina				
TOTAL	350 (965)	2,500 (1,900)		2,850 (2,865)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat							
Durum wheat							
Flour Semolina							
TOTAL							2,850 (2,865)

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IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>EEC U.K., France</u>	
Wheat (including durum)					
Cash					
Commercial credit	583 (177.2)	700 (925)	1,250 (400)	(50)	2,583 (1,550)
Flour* (including semolina)					50
Cash/comm.credit					
TOTAL					

\* Believe no flour has been imported.

## J O R D A N

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$ 1,554	year 1980
Annual per capita GNP	US\$ 1,420	year 1980
Average annual growth 1960-80	5.7%	
Annual inflation rate 1970-80	10.9%	
Annual inflation rate (current)	14.6%	
Volume of imports	2.395 billion US\$	year 1980
Of which food	15.8%	year 1981
Of which fuels	17.4%	year 1981
Principal foreign exchange earning export:	Phosphate, potash, fruit, and vegetables	
Debt service as % of GNP	3.9%	year 1980
Debt service as % of exports	5.4%	year 1980
Population	3 million	year 1984
Annual population growth	3.0%	year 1984
Annual Consumption:		
Flour	500,000 tonnes	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The growing season in 1983/84 was extremely dry causing the average cereal production to decrease sharply. The estimated production of wheat in 1984 is 100,000 tonnes compared to average wheat production of about 110,613 tonnes.

#### 2. Foreign Exchange Situation

Foreign exchange is sufficiently available in Jordan due to remittances from Jordanians working in other Arab countries and aid flows from the U.S., Europe and the Arab Oil countries. Under the foreign exchange control/import licensing system, priority is given to food and agricultural inputs.

#### 3. Fertilizer Situation

Fertilizers of different kinds depend mainly on imports. In Jordan diammonium phosphate (DAP) (337,000 tonnes) and potassium chloride (280,000 tonnes) were produced during 1983. These two kinds of fertilizers are produced only for export. Fertilizer imports (tonnes) follow:

Year	Nitrogen	Phosphate	Potash	Others
1982	24,787	13,601	118	5,216
1983	-	9,801	348	27,906

Eighty five percent of the imported material is used in irrigated areas, whereas, just 15% is used in rainfed areas. Reference: Department of Statistics 1983 Annual Report.

4. Import Mechanism

Wheat is imported to Jordan by the Ministry of Supply on tender basis issued regularly for public. Barley tenders are issued by Jordan cooperative organization for animal feed.

5. Grain Industry Infrastructure

Storage: 6 private mills - total storage 30,000 tonnes  
4 Ministry of Supply sites - Aqaba, Jweidah, Irbid and Ruseifa, reportedly 8,000 tonnes each

Dockside Storage: Aqaba - with bulk unloaders and loaders est. 100 to 150 thousand tonnes

Flour Milling Capacity: 6 private mills - total milling capacity 360 tonnes per 8 hour shift, 1,000 tonnes per day on 24 hour basis  
4 Ministry of Supply mills - capacity 130 tonnes per 8 hour shift, 400 tons per 24 hour shift

6. Government Policies Affecting Grain and Agriculture

The Jordan government encourages investment in agriculture including grain. Imports are controlled by the Ministry of Supply. Jordan maintains grain reserves to cover the country's requirements for 4 months.

Jordan is importing wheat specifying U.S. hard red winter, which effectively excludes Canada from this market.

7. Canadian Grain Marketing Prospects

Marketing possibilities for Canadian special crops: Field peas, lentils, faba and white beans may have potential.

8. Processing Facilities

Year: 1984

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	6	10	500	160

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1984

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Aqaba	150	600



## SAUDI ARABIA

Economic classification:	High Income economy		
Oil exporter or importer (net):	Exporter		
Annual per capita income:	US\$ 12,000		year 1982
Annual per capita GNP	US\$ 18,344		year 1982
Average annual growth 1960-80	8.1 %		
Annual inflation rate 1970-80	7.4 %		
Annual inflation rate (current)	1 %		
Volume of imports	43 billion US\$		year 1982
Of which food	18.0 %		year 1982
Principal foreign exchange earning export:	Petroleum		
Population	9.0 million		year 1982
Annual population growth	4.4 %		years 1980-2000
Annual Consumption:			
Flour	688,000 tonnes	or 76 kg/capita	year 1982
Meat	294,000 tonnes	or 32 kg/capita	year 1982

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1984 crop amounted to 1 to 1.3 million metric tonnes, up from the 1983 total of about 700,000 tonnes. It is expected with a number of new projects coming on-stream that the 1985 crop, which will be harvested March or April, 1985 could amount to almost two million tonnes. In 1984, for the first time, Saudi Arabia became self-sufficient in wheat.

#### 2. Foreign Exchange Situation

Saudi Arabia is not an international aid recipient nor is it expected that it will be in the foreseeable future. The agriculture section or a sector of it is one which has been singled out by the Saudi government as a high priority area. Even though the Kingdom has reached self-sufficiency in dairy products and broiler meat, 80-90% of total food requirements are imported. There is no restriction on the movement of capital in or out of the country.

#### 3. Fertilizer Situation

Most of Saudi Arabia's fertilizer is imported. In 1982 imports of fertilizers amounted to approximately 148,000 tonnes. Saudi Arabia is, however, exporting urea to the Far East from a plant in Jubail. There are also reports of phosphate deposits which as yet have not been mined.

#### 4. Import Mechanism

By law, all wheat imported into Saudi Arabia must come in through the Government Grain Silos and Flour Mills Organization. As mentioned above, however, in 1984, Saudi Arabia became basically self-sufficient in wheat. So in the future, unless there are crop failures, imports should be limited to some high quality wheat for blending and the occasional shipment required for peak consumption periods such as the pilgrimage. Barley and other coarse grain, however, are imported by the private trade. There continues to be a strong and growing market for barley.

#### 5. Grain Industry Infrastructure

The most noteworthy change in the past 12 months has been installation by the Saudi Ports Authority of facilities to receive bulk grain shipments (basically barley), at the main ports of Jeddah and Dammam (previously all coarse grains had to come in 50 kilo jute bags). In addition, the Ports Authority have installed bagging facilities at Jizan, Yanbu and Jubail.

All wheat is imported, stored and milled in facilities owned by the Saudi Grain Silos and Flour Mills Organization. In addition, this body has a series of elevators located throughout the Kingdom to receive wheat shipments from local farmers. These silos have a total capacity at present of about 700,000 tonnes and will be expanded to about 900,000 tonnes within the next year. The Grain Silos and Flour Mills Organization also operates feedmills as do a number of private companies. The fact that bulk grain shipments can be received should be significant for Canada.

#### 6. Government Policies Affecting Grain and Agriculture

The current government policy is to encourage the production of wheat in order that the Kingdom be self-sufficient. It would appear that in 1984, this goal was reached. There is no indication of whether the guaranteed purchase price offered by the government for all wheat (3.5 Saudi Riyals per kilo or approximately \$US28 per bushel) will be adjusted. It is known, however, that the government is giving consideration to stimulating the production of other grain (barley and maize). It is not known whether the guaranteed price for wheat will be lowered and guaranteed purchase prices for other grains established, although it is a scenario being discussed. Saudi Arabia is committed to maintaining at least a six month wheat reserve (450,000-500,000 tonnes). In future years, should production exceed domestic requirements plus the reserve, it is expected that wheat will be exported either commercially or as food aid to other Muslim countries.

Grain consumption, particularly coarse grain, should continue to increase as the livestock, (particularly sheep), chicken and dairy numbers increase.

The government's policy of stimulating wheat production has already meant that Canada has lost its opportunity to sell wheat to Saudi Arabia. If the government of Saudi Arabia offers the same stimulus to barley and corn as it offered wheat growers, this could have serious implications for Canadian exporters of barley.



7. Canadian Grain Marketing Prospects

It is not expected that any substantial quantities of wheat will be required by Saudi Arabia between 1985 and 1990. At present, imports of barley exceed 1,000,000 tonnes and unless the government stimulates barley production, this figure should increase by perhaps 50% between 1985 and 1990. There are signs, however, that the government may stimulate local barley production.

The major marketing initiative should be continued by visits by the Canadian Wheat Board and Canadian barley exporters to the private sector who are responsible for imports of coarse grains.

There is a large market for peas, beans and lentils in Saudi Arabia; however, our prices have tended to be high in comparison to those of neighbouring countries.

8. Processing Facilities

	Year 1983		Thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	1	4	750	570
Compound Feed Mills	approx. 5	10	500	300
Malt Houses		(Prohibited)		
Oilseed Crushers	1	1	N/A	N/A

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Jeddah	120	
Damman	80	
Jizan	40	
Yanbu	60	
Total Capacity	300 (est.)	

II. MALT AND MALTING BARLEY

Saudi Arabia practices strict prohibition. Thus production or consumption of alcohol of any type is illegal and no malting barley of any kind is grown.

### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: All oilseeds are exempt from tariffs. There are no non-tariff barriers.

Importation procedure and structure: Importation is almost exclusively carried out by the private sector.

2. Additional factors: Saudi Arabia is a major consumer of cooking oil. The premium oil market is held by U.S. Mazola (corn) Oil. The bulk of the market is made up of imported and locally produced palm oil. Prices are fixed by the Government as follows: Palm US\$1.62, per gallon-soya \$2.92 and corn \$2.86.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean		26		U.S.A. (14) India (7)
Sesame		11		Ethiopia(5) Sudan (5)
Others		2		
TOTAL		39		
<u>Oil</u>		<u>Crude/Refined</u>		
Soybean	-	5		Singapore(3) Holland(1)
Corn	-	45		Singapore(27) U.S.A. (12)
Others (probably palm)		91		Singapore(74) Malaysia (12)
TOTAL		141		

Meal - No published data.

#### 4. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
1	Mainly palm for cooking oil	No data available

5. Export Policy: Saudi Arabia is not an exporter of oilseeds.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

## 1982 Figures

SUPPLY 1982/83 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	400 (240)		576 (450)	976 (690)
Durum wheat				
Flour/Semolina	570		118 (186)	688
TOTAL	970 (240)		694 (636)	1,664 (690)

	Consumption	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	976 (690)						976 (690)
Durum/Wheat							
Flour Semolina	688						688
TOTAL	1,664 (690)						1,664 (690)

DISPOSITION 1982/83 est. - thousands of tonnes - previous year in brackets.

IMPORT TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
WHEAT (including durum)						
Cash					16	
Commercial Credit						14 (50)
Aid, concessional						
credit, etc.	8 (0)	366 (300)	172 (100)			576 (450)
FLOUR (including semolina)						
Cash/comm. credit	0 (2)	64 (115)	2		47 (55)	118 (186)
Aid, concessional						
TOTAL	8 (2)	430 (415)	174 (100)		63 (55)	694 (636)

Principal "Others": Lebanon, Greece, U.S.A.

(B) COARSE GRAINS (1982 Figures)

SUPPLY 1982/83 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn				
Barley*	25 ( 25)	942 ( 700)	942 ( 700)	942 ( 700)
Sorghum*		3,860 (2,000)	3,885 (2,025)	3,885 (2,025)
Oats				
Rye				
TOTAL	25 ( 25)	4,802 (2,700)	4,827 (2,725)	4,827 (2,725)

\* Barley v.s. Sorghum not differentiated in Saudi statistics.

DISPOSITION 1982/83 est. - thousands of tonnes - previous year in brackets. No breakdown available.

	Consumption			Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal	Industrial				
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							

IMPORT TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn	0	35 ( 30)	25 ( 20)		882** (650)	942 ( 700)
Barley	379* ( 20)	444 ( 60)	1,120 (600)		1,000 (820)	3,860 (2,000)
Sorghum	No Breakdown Available					
Oats	Virtually Nil					
Rye	Nil					
TOTAL	379 ( 20)	479 ( 90)	1,145 (620)		1,000 (820)	4,802 (2,700)

\* This figure appears in the official Saudi trade publication. However, Canadian Grain Commission data for 1982/83 does not indicate any shipment to Saudi Arabia. CGC data shows 87,473 tonnes to Saudi Arabia in 1981/82.

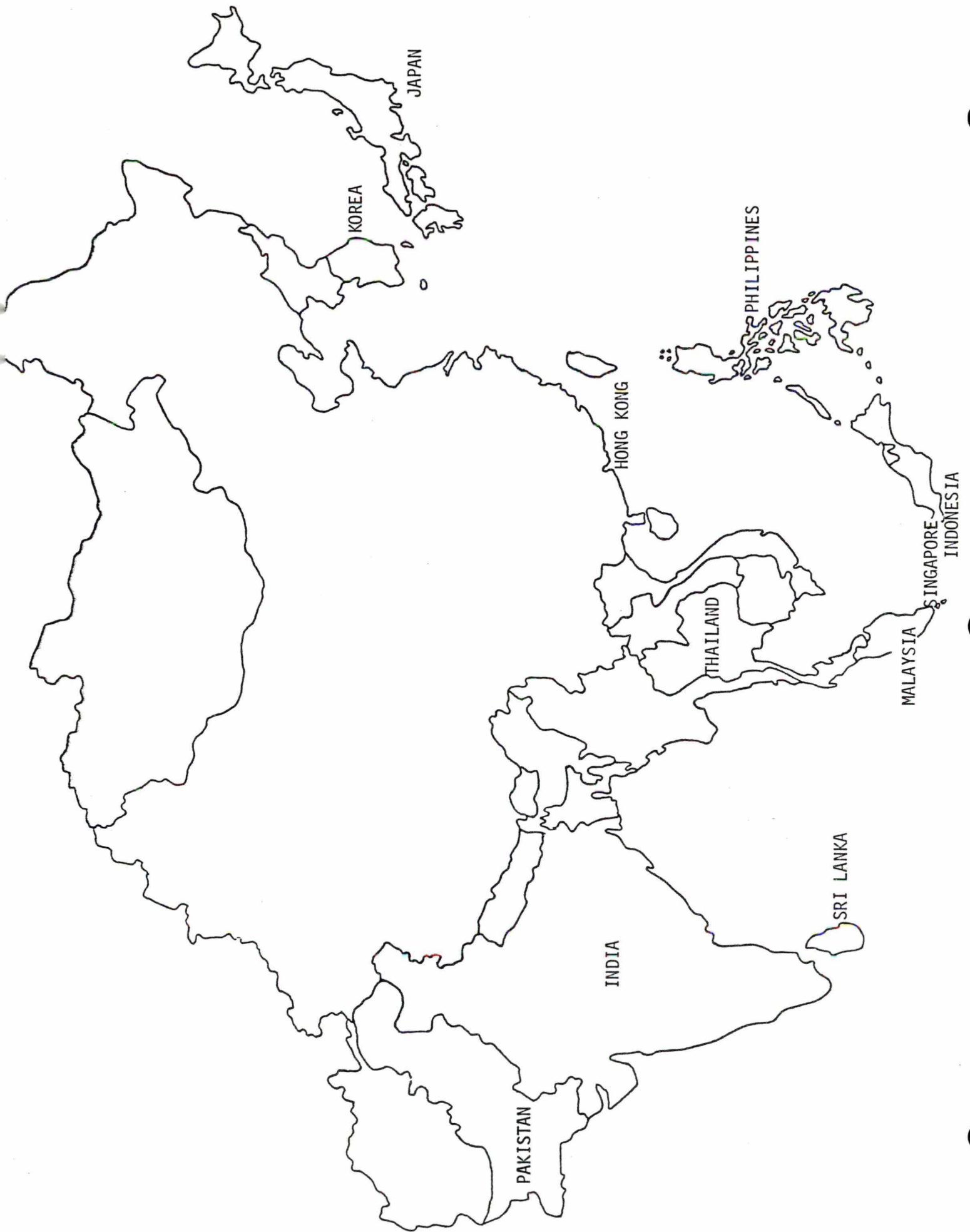
\*\* 501 - Thailand 368 - Sudan

Principal "Others": Thailand  
Sudan



PART VII  
ASIA (FAR EAST)





## H O N G   K O N G

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$4,170	year 1983
Annual per capita GNP	US\$5,360	year 1983
Average annual growth 1960-80	6.3%	
Annual inflation rate 1970-80	8.2%	
Annual inflation rate (current)	10%	
Volume of imports	24.184 billion US\$	year 1983
Of which food	10.8%	year 1983
Of which fuels	6.7%	year 1983
Principal foreign exchange earning export:	Light manufacturing, Tourism	
Population	5.34 million	year 1983
Annual population growth	1.4%	years 1981-1983
Annual Consumption:		
Flour	140,000 tonnes or 26 kg/capita	year 1983
*Meat	478,000 tonnes or 89 kg/capita	year 1983
Vegetable Oil	87,000 tonnes or 16 kg/capita	year 1983

\*Including poultry and red meat.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

There is no wheat or oilseeds grown in Hong Kong and the production of rice dropped considerably. The total area of land used to cultivate rice has dropped from 9,450 hectares in 1954 to less than 10 hectares in 1983. Rice production has given way to intensive vegetable production, which gives a more profitable return.

#### 2. Foreign Exchange Situation

The economy in 1983: As the performance of the economies of several of Hong Kong's major export markets, especially the United States, improved in 1983, the Hong Kong economy experienced an export-led recovery. Preliminary estimates indicate that the growth rate in real terms of the gross domestic product (GDP) was 5.9% which was considerably higher than the 1.1% recorded in 1982. During the year, some areas of the economy were affected by unfavourable political factors.

External trade: Total merchandise trade in 1983 amounted to US \$46,336 million, an increase of 24% over 1982. Imports went up by 23% to US \$24,184 million, domestic exports by 26% to US \$14,392 million and re-exports by 27% to US \$7,760 million.

### Foreign Exchange Situation (cont'd)

China and Japan were the two principal suppliers of imports in 1983, providing 24% and 23% respectively of the total. China alone supplied 46% of Hong Kong's imported foodstuffs. The U.S.A. ranked third, providing 11% of the total imports followed by Taiwan, Singapore, U.K., Republic of Korea and German Fed. Rep.

In 1983, 63% of all domestic exports went to the U.S.A., and E.E.C. Domestic exports to Japan and Canada increased to US \$538.9 million and US \$514.3 million respectively.

Re-exports continued to increase in 1983, accounting for 35% of the combined total of domestic exports and re-exports. The principal commodities re-exported were textiles (US \$1,078 million), electrical machinery, apparatus and appliances (US \$679.7 million), clothing (US \$619.6 million), photographic apparatus, equipment, supplies of optical goods, watches and clocks (US \$587 million). The main countries of origin of these re-exports were China, Japan, U.S.A. and Taiwan. The largest of these re-exports were China, U.S.A., Singapore and Indonesia.

In the financial year 1982-83, total expenditure on the General Revenue Account was US \$4,769.2 million, comprising recurrent expenditure of US \$2,825.7 million and capital expenditure of US \$1,943.5 million. Estimated expenditure in 1983-84 is US \$4,890 million comprising recurrent expenditure of US \$3,281.8 million and capital expenditure of US \$1,608.2 million. In 1982-83, there was a deficit of US \$482.5 million and for 1983-84 a deficit of US \$441.8 million was anticipated in the budget. At March 31, 1983, the accumulated reserves stood at about US \$2,628.8 million and at the same date, the public debt amounted to US \$43 million.

Imports of food and agricultural products will continue to be handled by individual traders to meet the needs of the entire population due to laissez-faire policy of the Hong Kong Government. As Hong Kong is financially self-supporting, it is unlikely that aid will be needed in any form from outside sources.

### 3. Fertilizer Situation

As there is no local production of fertilizers, Hong Kong has to import requirements from various sources. The following are import statistics covering the calendar year 1983:

<u>Type</u>	<u>Source of Supply</u>	<u>Tonnes</u>
Dicalcium phosphate	Japan, U.S.A., Belgium/Luxem.	3,515
Trisodium phosphate	Japan, France	4,015
Nitrogen/phosphate/potash	No imports on record	



#### 4. Import Mechanism

Presently, all wheat imports are handled by agents and purchased by three privately owned flour mills. Feed grains are imported by importers, who sell to distributors, who in turn supply to local farmers, feedmills, etc. There are several feedmills in Hong Kong and most of them are operating on a small scale with the exception of three feedmills which are fully equipped with modern machinery and are capable of producing feed according to the individual customer's specifications. No changes are expected in the import structure or procedures in the future.

#### 5. Grain Industry Infrastructure

There will be no changes in handling, storage or processing facilities in the near future. As mentioned in our last report, Far East Flour Mills Limited has built a new flour mill plant in Shekou, Shenzhen and the construction is now completed. It is reported that the new plant will start production in August 1984. Part of the production will be consumed in China and the balance will be exported to Hong Kong.

#### 6. Government Policies Affecting Grain and Agriculture

As Hong Kong is a free port, there are no government restrictions or duties governing the importation of wheat and flour to this area. The grain trade is entirely in private hands. The only government policy for reserve stocks of grains applies to rice. Licensed importers of this commodity are required to maintain a local stock of rice equivalent to 2½ months consumption. The bulk of animal products for human consumption is imported, China being the main supplier.

#### 7. Canadian Grain Marketing Prospects

Sales of Canadian wheat will continue to depend on price. Canadian high protein wheat is well favoured by the local flour mills. If Canadian wheat suppliers/exporters can arrange shipments for the flour mills in Hong Kong, render better service and obtain favourable ocean freight rates through negotiations with shipping companies - there is a good chance of increasing the sales of Canadian wheat in this region.

Do not foresee any potential for special crops in this market because these products are not consumed by the majority of the Chinese population with the exception of mustard and lentils which have some small demand.



8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	3	3	180	80
Compound Feed Mills				
Malt Houses				
Oilseed Crushers				

9. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Victoria	32.5	120

- - thousands of tonnes - -

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84 estimate:- No local production

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	18 (16)	Australia, Denmark, France
Malting barley	NIL	

3. Additional Information

Change in malting capacity: No local production of malt.

Malt exports: No domestic exports. However, 2,000 tonnes were re-exported to Vietnam in 1982/83.

Trend in beer consumption: The consumption of beer in 1983 showed an increase of 3% over 1982 and the annual per capita beer consumption will continue to grow at the rate of 5% per year.

Market potential for Canadian malt and/or malting barley: Market potential for malt is quite significant in this area, approximately 15,000 tonnes per year, but Canadian malt failed to sell in this area due to price factor. However, if price was in line with the other supplying sources, good opportunity still exists in this region.

### III. OILSEEDS

#### 1. Import Policy:

Non-tariff barriers: Not applicable as Hong Kong is a free port.

Importation procedure and structure: All imports of edible oils are handled by private importers.

2. Additional factors: As there are no crushing facilities in Hong Kong, all requirements of refined edible oils have to rely on imports from various sources to meet the demand for the entire population.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sesame	No	20		China, Vietnam, Korea
Sunflower	Local	1		China
Copra	Production	1		
TOTAL		22		
<u>Oil</u>		<u>Crude/Refined</u>		
Rapeseed	No	52		Germany F.R., Canada, China
Groundnut	Local	38		S. Africa, China, Brazil
Soybean	Production	9		Brazil, German F.R., China
Maize		7		U.S.A., S. Africa, China
<u>Others*</u>		6		China, Singapore, Malaysia
TOTAL		112		

\* Cotton, Linseed, Sunflower, Sesamum

<u>Meal</u>			
<u>Other oilcakes**</u>	No	156	China, Vietnam, Thailand
Maize Bran	Local	9	S. Africa, China
	Production		
TOTAL		165	

\*\*Soybean, Groundnut

III. OILSEEDS cont'd

4. Export Policy

- a) Export assistance or control measures: None
- b) Export procedure and structure: All re-exports of edible oils are handled by local private exporters.

5. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

Oilseed	Production	Exports	Destinations
Sesamum	No	20	Taiwan, Rep. of Korea, U.S.A.
Sunflower	Local	1	Japan, Singapore, Sarawak
Copra	Production	1	Singapore, Taiwan
TOTAL		22	
<u>Oil</u>			
Groundnut	No	10	China, Singapore, Macao
Rapeseed	Local	7	China, Singapore, Macao
Soybean	Production	4	China, Korea D.P.R., Rep. of Korea
Sesamum		1	U.S.A., Rep. of Korea, Australia
Others*		3	China, Indonesia, Singapore
TOTAL		25	

\* Cottonseed, Corn, Palm, Coconut, etc.

<u>Meal</u>			
Other Oilcakes	No	76	China, Indonesia, Thailand
(Groundnut Soybean)	Local Production		
Maize Bran		1	China, Macao
TOTAL		77	

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat *				
Durum wheat		136 (130)	136 (130)	136 (130)
Flour/Semolina		90 (75)	90 (75)	90 (75)
TOTAL	No local production	226 (205)	226 (205)	226 (205)

\* of which spring wheat 65%

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat	99 (95)	37 (35)				1 (-)	136 (130)
Durum wheat					24 (18)		90 (75)
Flour Semolina	66 (57)				24 (18)		226 (205)
TOTAL	165 (152)	37 (35)					

Export Destination: China, Macao, Singapore

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>
WHEAT (including durum)						136 (130)
Cash	12 (10)	123 (120)				
FLOUR (including semolina)						
Cash/Comm.credit	2 (2)				2 (1)	86 (72)
TOTAL	14 (12)	123 (120)			2 (1)	87 (72)
						226 (205)

Principal "Others": Japan, China, Taiwan



(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn			355 (346)	355 (346)
Barley			1 (1)	1 (1)
Sorghum			8 (4)	8 (4)
Oats				
Rye				
No Local Production				
TOTAL			364 (351)	364 (351)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption			Exports	Carry-out	Total
	Human	Animal	Industrial			
Corn		345 (332)		10 (14)		355 (346)
Barley		1 (1)				1 (1)
Sorghum		7 (4)		1		8 (4)
Oats						
Rye						
TOTAL		353 (337)		11 (14)		364 (351)

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Of which poultry: 70%

Export Destination: China, Taiwan, Macau

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	
Corn					355 (346)
Barley					1 (1)
Sorghum					8 (4)
Oats					
Rye					
TOTAL					364 (351)

Principal "Others": China, Thailand, Vietnam

## I N D I A

Economic classification: Low Income economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$183		year 1982/83
Annual per capita GNP	US\$225		year 1982/83
Average annual growth 1960-80	1.4%		
Annual inflation rate 1970-80	8.5%		
Annual inflation rate (current)	9.0%		
Volume of imports	14.4 billion US\$		year 82/83
Of which food	4.1%		year 82/83
Of which fuels	39%		year 82/83
Principal foreign exchange earning export: Textiles, tea, jute, sugar			
Debt service as % of GNP	0.8%		year 1982/83
Debt service as % of exports	8.7%		year 1982/83
Population	730 million		year 1983
Annual population growth	1.9%		years 1980-2000
Annual Consumption:			
Flour	41.7 M tonnes or 57 kg/capita		year 1983
Meat	620,000 tonnes or .85 kg/capita		year 1983
Vegetable Oil	4.5 M tonnes or 5.8 kg/capita		year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Production of major crops for 1982-83 and 1983-84 was as follows: ('000 tonnes)

	<u>1983-84</u>	<u>1982-83</u>
Wheat	44,600	42,500
Coarse Grains	32,900	27,800
Rice	59,000	46,500
Oilseeds	12,500	10,500

The increased production was the result of a combination of factors: Timely and widespread rainfall; increase in area under high yielding varieties; ready availability and increased use of fertilizers at subsidized prices; intensified extension efforts by central and state governments. A target of 153 million tonnes of foodgrains has been set for 1984-85, the terminal year of the Sixth five year plan. Despite sustained efforts on the part of various government agencies, actual production will depend primarily on the behaviour of the monsoon. The meteorological office has forecast normal rainfall throughout the country during the current year.

## 2. Foreign Exchange Situation

India's foreign exchange reserves stood at \$5,840 million at the end of March 1984. Imports continue to exceed exports resulting in an adverse balance of trade. Major imports comprise crude and refined petroleum products, edible oils, foodgrains, fertilizers, etc. India is a large recipient of both project and non-project aid.

## 3. Fertilizer Situation

	- - - 000 tonnes - - -		
	Production		Consumption
	1982-83	1983-84	1983-84
Nitrogen	3,430	3,485	5,236
Phosphate	984	1,052	1,757
Potash	No domestic production		799

The consumption of fertilizers is heavily subsidized by the government. Canada is a major supplier of potash to India.

## 4. Import Mechanism

Foodgrains are imported by means of global tenders by a single government agency - Food Corporation of India. There are no regular imports. Decision to import on ad hoc basis is usually taken depending on the level of indigenous production, the need to build up and maintain adequate buffer stocks, and on economic and political considerations.

## 5. Grain Industry Infrastructure

Government is not encouraging expansion of the flour milling industry. Large port elevators are in operation to facilitate grain handling. Storage capacity is being expanded. Recurrent bumper crops during the last two seasons have created serious problems of storage. It is proposed to set up additional storage capacity of 4-5 million tonnes over the next five years, mostly in conventional sheds and some silos in which imported content will be minimal.

## 6. Government Policies Affecting Grain and Agriculture

Government policy is aimed at increasing production to keep supply of foodgrains ahead of population growth. Despite extensive and sustained efforts to provide facilities and inputs to farmers, Indian agriculture is heavily dependent on the monsoon and a buffer stock of 12-15 million tonnes must be maintained to withstand the vagaries of weather. India imported 2.13 million tonnes of wheat from Canada, USA and Argentina and 770,000 tonnes of rice from Burma and Thailand during 1983-84. Government incurs heavy expenditure on food subsidies.

Due to widespread rainfall, increase in the area under high yielding varieties of seed and timely and easy availability of inputs, India has had bumper crops of foodgrains during the last two seasons. The overall foodgrains position is quite comfortable. India is therefore unlikely to import wheat during 1984-85.



7. Canadian Grain Marketing Prospects

There are good prospects for the export of field peas, lentils and beans to India. The only constraint is competitive pricing as other suppliers enjoy a comparative freight advantage over Canada. Mustard, buckwheat, canaryseed and triticale are not imported.

8. Processing Facilities

Year: 1983

		thousands of tonnes		
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills		426	8,500	3,300
Compound Feed Mills			2,400	1,700
Malt Houses				
Oilseed Crushers		315	20,000	10,000

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type: 1,962 thousand tonnes - breakdown not available.

2. Imports: India does not import barley or products.

3. Additional Information:

Change in malting capacity: Malting capacity is increasing.

Malt exports: None.

Trend in beer consumption: It was more or less stagnant in 1983-84.

Market potential for Canadian malt and/or malting barley: Nil



### III. OILSEEDS

#### 1. Import Policy:

Oilseeds are not imported into India.

The imports of oilseeds is channeled through the State Trading Corporation of India. However, there is currently a ban on the import of oilseeds.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Peanut	7,300			
Rapeseed	2,700			
Sesame	550			
Soybean	600			
Others*	1,350			
TOTAL	12,500			

\* Flaxseed, copra, cottonseeds, sunflower

<u>Oil</u>	<u>Crude/Refined</u>		<u>Principal Sources of Imports</u>
Peanut	1,658		
Rapeseed	810	180	Canada, Argentina, Poland
Sesame	167		
Soybean	93	550	Brazil, U.S.A.
Others*	808	460	Malaysia
TOTAL	3,536	1,190	100

\*Palm oil, palmolein

#### Meal

Peanut	2,400
Rapeseed	1,640
Sesame	250
Soybean	430
Others	2,100
TOTAL	6,820

<u>Number of Plants</u>	<u>Type of seed crushed</u>	<u>Capacity</u>
315		20 million tonnes

III. OILSEEDS cont'd

4. Export Policy:

- a) Export Assistance or control measures: There are no quota restrictions on the export of HPS peanuts.
- b) Export procedure and structure: The export of oilseeds is channeled through the National Agricultural Cooperative Marketing Federation of India Limited (NAFED). However, the export of oilseeds is generally not permitted.

5. Additional Factors: Oilseeds are not imported despite the existence of excess crushing capacity in India.

6. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983/84

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destination</u>
Peanut	7,300	60	U.S.S.R., EEC
Rapeseed	2,700		
Sesame	550	5	EEC
Soybean	600		
Others	1,350		
TOTAL	12,500	65	
<u>Meals</u>			
Peanut	2,400	200	EEC, East Europe
Rapeseed	1,640	200	EEC, East Europe
Sesame	250	30	EEC, East Europe
Soybean	430	250	EEC, East Europe
Others	2,100	320	
TOTAL	6,820	1,000	

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	44,600 (42,500)	13,650 (10,150)	2,130 (3,950)	60,380 (56,600)
Durum wheat				
Flour/Semolina				
TOTAL	44,600 (42,500)	13,650 (10,150)	2,130 (3,950)	60,380 (56,600)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	39,960 (38,450)	300 (300)		4,000 (4,000)	35 (200)	16,085 (13,650)	60,380 (56,600)
Durum wheat							
Flour Semolina							
TOTAL	39,960 (38,450)	300 (300)		4,000 (4,000)	35 (200)	16,085 (13,650)	60,380 (56,600)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	Australia	
Wheat (including durum)			Argentina	
Cash	500	980 (3,950)	650	2,130 (3,950)

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	7,500 (6,274)	300 (400)		7,800 (6,674)
Barley	1,862 (1,993)	100 (100)		1,962 (2,093)
Sorghum	12,300 (10,676)	600 (700)		12,900 (11,376)
Oats				
Rye				
TOTAL	21,662 (18,943)	1,000 (1,200)		22,662 (20,143)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	6,000 (5,034)	750 (750)		650 (590)		400 (300)	7,800 (6,674)
Barley	1,637 (1,770)	20 (20)		200 (200)	5 (3)	100 (100)	1,962 (2,093)
Sorghum	10,350 (9,056)	750 (700)		1,100 (1,020)		700 (600)	12,900 (11,376)
Oats							
Rye							
TOTAL	17,987 (15,860)	1,520 (1,470)		1,950 (1,810)	5 (3)	1,200 (1,000)	22,662 (20,143)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets: Nil



## IV. STATISTICAL NOTES

## WHEAT AND DURUM

## SUPPLY 1983/84 - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	Nil			
Durum wheat	55 (94)	645 (488)	700 (583)	
Flour/Semolina (in wheat equivalent)	65 (84)	15 (23)	80 (106)	
TOTAL	120 (178)	660 (511)	780 (689)	

## DISPOSITION 1983/84 - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat (equivalent of flour)	585 (569)					195 (120)	780 (689)
Durum wheat							
Flour Semolina							
TOTAL	585 (569)					195 (120)	780 (689)

## IMPORT TRADE 1983/84 - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina	EEC		All Others
WHEAT (including durum)							
Cash	140 (nil)	33 (105)	32 (21)	31 (nil)		France 100 (48)	336 (174)
Commercial Credit							
Aid, concessional							
credit, etc.	38 (41)	248 (213)	23 (10)		(37)		309 (301)
FLOUR (including semolina) (in wheat equivalent)						Singapore	
Cash/comm. credit						nil (7)	nil (7)
Aid, concessional:						15 (16)	15 (16)
TOTAL	178 (41)	281 (318)	55 (31)	31 (nil)	15 (53)	100 (68)	660 (511)

## I N D O N E S I A

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Exporter	
Annual per capita income:	US\$590	year 1983
Average annual growth 1973/83	6.9%	
Annual inflation rate 1978/83	5.6%	
Annual inflation rate (current)	11.46%	
Volume of imports	15.7 billion US\$	year 1983
Of which food	4%	year 1983
Of which fuels	20%	year 1983
Principal foreign exchange earning export:	Oil and Gas	
Debt service as % of GNP	N/A	
Debt service as % of exports	15%	year 1983
Population	161 million	year 1984
Annual population growth	2.2%	years 1974-1984
Annual Consumption:		
Flour	8 kg/capita	year 1984
Meat	3 kg/capita	year 1984
Vegetable Oil	N/A kg/capita	year N/A

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Crop situation in 1983 indicated a general increase (see Table I), particularly corn production, which increased from 3.4 million tonnes in 1982 to over 5 million tonnes in 1983, an increase of approximately 32% per annum. Due to pest attacks and prolonged drought in several major rice producing areas, rice production in 1983 increased only 1% from 23.2 million tonnes in 1982 to 23.5 million tonnes in 1983. Official forecast, made by the Department of Agriculture, estimated rice production in 1984 at 24.5 million tonnes, indicating an increase of approximately 4% per annum.

#### 2. Foreign Exchange Situation

The foreign exchange situation in 1983 improved and there is strong indication that this will likely continue to proceed in the coming years. Indonesia's balance of trade in 1983/84 posted a surplus of US \$7.6 billion due to the recovery of non oil exports which rose from US \$3.9 billion in 1982/83 to US \$ 5 billion in 1983/84, an increase of approximately 28% per annum. The foreign exchange reserve increased from US \$3,074 million at the end of March 1983 to over US \$5 billion at the end of March 1984.

### 3. Fertilizer Situation

The main feed stock for fertilizers is natural gas. This is available abundantly in the country and has become a great advantage for fertilizer plants in Indonesia. Several more plants in addition to the existing ones are still feasible due to the country's huge gas resources that are found scattered in many parts of the territory. See Table II for fertilizer supply and utilization.

### 4. Import Mechanism

There is no change of grain importation procedure, BULOG (National Logistic Agency) still remains the sole agency for grain importation to Indonesia. BULOG is responsible for importation, stock-piling and distribution of essential food products which include rice, wheat, soybean and sugar.

### 5. Grain Industry Infrastructure

There have been no significant changes in handling, storage or processing facilities in recent months.

### 6. Government Policies Affecting Grain and Agriculture

No current or anticipated government policies will have a significant bearing on grain imports, grain consumption patterns, grain reserves, meat production and consumption.

### 7. Canadian Grain Marketing Prospects

There are no projections officially made by local governmental/private institutions but according to our assessment, Indonesia's wheat consumption will increase by 8-10% per annum.

For Canadian special crops, soybeans definitely have market potential in Indonesia. In addition canary seed from Canada has begun to penetrate this market.

### 8. Processing Facilities

Year 1984

			thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	2	3	2,000	1,800
Compound Feed Mills	20	25	200	150
Malt Houses				
Oilseed Crushers	76	76	5,000	3,000



9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Tanjung Priok	900	800
Tanjung Perak	600	500
Ujung Pandang	500	500
Total Capacity	2,000	1,800

II. MALT AND MALTING BARLEY

1. Domestic Production barley by type: No local production.

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	12 (8)	Australia
Malting barley	4 (3)	Netherlands and China

3. Additional Information

Change in malting capacity: Malt is not produced locally.

Malt Exports: Malt is not exported.

Trend in beer consumption: As the majority of the population (90%) are moslems, Indonesia's per capita beer consumption is very low (0.5 litre). There is a tendency towards increasing consumption but it is not significant.

Market potential for Canadian malt and/or malting barley: Local market potential exists but competition with Australian suppliers is very keen. Canadian malt has never entered this area.



### III. OILSEEDS

#### 1. Import Policy:

- a) Import Tariffs: Import duty is 30% plus 5% sales tax.
- b) Non-Tariff barriers: All imported food products are required to be registered at the Department of Health for which a fee of US \$100 is charged for each label of commodity.
- c) Importation procedure and structure: Oilseeds importation is solely handled by the National Logistic Agency (BULOG).

2. Additional factors: Imported oilseeds are mainly soybeans and the quality is very low (crush beans) which are equal to quality for animal consumption in Canada.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Source of Imports</u>
Soybean	590	391	100	Thailand
Corn	5,060	80	60	U.S.A.
Peanuts	457	80	20	China
Coconuts	1,600		1,500	
TOTAL	7,707	551	1,680	

<u>Oil</u>		<u>Crude/Refined</u>		
Soybean	20	200		Singapore
Maize	200	300		Mozambique
Peanut	50		18	U.S.A.
Coconuts	1,600			
Palm	400			
TOTAL	2,270	500	18	

#### Meal

Soybean	129	Thailand
---------	-----	----------

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
8	Corn	200
50	Coconut	2,000
6	Soybean	20
<u>12</u>	Palm oil	<u>1,000</u>
TOTAL		3,220

III. OILSEEDS (continued)

5. Export Policy

- a) Export assistance or control measures: Palm oil exports are controlled by the Government (Department of Trade) and there is no significant export assistance.
- b) Export procedure and structure: Except palm oil, all other oilseeds are free for exports, both by government agencies or private exporters. All exporters are required to have export licences from the Department of Trade.
6. Additional factors: Soybean imports are mainly used to make soybean cake.
7. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Soybean	590		
Corn	5,060	45	Singapore
Peanuts	457	2	Hong Kong
Coconuts	1,600	4	Japan
TOTAL	7,707	51	
<u>Oils</u>			
Palm Oil	875	280	U.S.A., Japan, EEC

Indonesia

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat				
Durum wheat	211	(243)	1,704 (1,556)	1,915 (1,799)
Flour/Semolina				
TOTAL	211	(243)	1,704 (1,556)	1,915 (1,799)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	1,775 (1,552)		40 (36)			100 (211)	1,915 (1,799)
Durum wheat							
Flour Semolina							
TOTAL	1,775 (1,552)		40 (36)			100 (211)	1,915 (1,799)

Industrial Use: Plywood industry

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>
WHEAT (including durum)						
Cash	152 (86)	878 (876)	352 (440)	51	124 (58)	1,557 (1,460)
Aid, concessional		82 (96)	35		30	147 (96)
credit, etc.						
TOTAL	152 (86)	960 (972)	387 (440)	51	154 (58)	1,704 (1,556)

Indonesia

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	5,060 (3,207)		80 (76)	5,140 (3,282)
Barley			4 (3)	4 (3)
Sorghum			2 (2)	2 (2)
Oats				
<b>TOTAL</b>	<b>5,060 (3,207)</b>		<b>86 (81)</b>	<b>5,146 (3,287)</b>

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn	4,345 (2,932)	250 (200)	100 (50)		45	400 (100)	5,140 (3,282)
Barley			4 (3)				4 (3)
Sorghum			2 (2)				2 (2)
Oats							
Rye							
<b>TOTAL</b>	<b>4,345 (2,932)</b>	<b>250 (200)</b>	<b>106 (55)</b>		<b>45</b>	<b>400 (100)</b>	<b>5,146 (3,287)</b>

Of which poultry: 20% Export Destination: Singapore  
 Industrial Use: Beer industry

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>				<u>TOTAL IMPORTS</u>		
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>		<u>EEC</u>	<u>Other</u>
Corn		10 (6)	4		4 (3)	66 (70)	80 (76)
Barley							4 (3)
Sorghum						2 (2)	2 (2)
Oats							
Rye							
<b>Total</b>		<b>10 (6)</b>	<b>4</b>		<b>4 (3)</b>	<b>68 (72)</b>	<b>86 (81)</b>

Principal "Others": Thailand, Australia, Netherlands



TABLE I

ESSENTIAL FOOD CROP PRODUCTION  
(1977 - 1983)  
IN THOUSAND METRIC TON

<u>CROP</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>
Rice	15,876	17,525	17,872	20,246	22,286	23,195	23,462 (+1%)
Corn	2,143	3,855	3,606	4,012	4,509	3,344	5,060 (+51%)
Cassava	12,488	12,961	13,751	13,532	13,301	12,698	13,772 (+8%)
Sweet potatoes	2,460	2,583	2,194	2,193	2,094	1,956	2,124 (+9%)
Soybeans	523	571	680	642	704	523	590 (+13%)
Peanuts	409	439	424	475	475	442	457 (+3%)

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SOURCE : DEPARTMENT OF AGRICULTURE

TABLE II

FERTILIZER PRODUCTION, IMPORTS, EXPORTS, 1979 - 1983  
(1,000 mt, product basis)

	<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>
<u>PRODUCTION</u>					
Urea	1,828.3	2,001.2	2,011.8	1,961.0	2,241.0
Ammonium sulfate	152.4	180.4	195.3	210.0	208.0
Natural phosphate	5.0	19.5	13.8	13.0	13.0
TSP	114.4	465.0	559.2	577.0	783.0
DAP	2.9	0.0	0.0	0.0	0.0
NPK	8.5	0.0	0.0	0.0	0.0
TOTAL	<u>2,111.5</u>	<u>2,666.1</u>	<u>2,780.1</u>	<u>2,761.0</u>	<u>3,245.0</u>
<u>IMPORTS</u>					
Urea	0.0	210.0	150.0	435.0	0.0
Ammonium sulfate	25.0	82.4	205.0	145.5	84.0
TSP	30.0	160.0	125.0	438.0	20.0
DAP	0.0	0.0	0.0	0.0	0.0
Rock phosphate	64.3	70.9	56.9	26.3	59.1
Muriate of potash	122.1	136.5	248.4	138.5	202.1
NP/NPK	49.8	52.4	42.8	14.0	22.2
Magnesium sulfate	35.4	50.3	52.5	55.8	39.5
Other	20.9	29.0	24.5	12.0	8.2
TOTAL	<u>347.5</u>	<u>791.5</u>	<u>905.1</u>	<u>1,265.1</u>	<u>435.1</u>
<u>EXPORTS</u>					
Urea	0.0	0.0	0.0	0.0	241.0
TSP	0.0	0.0	0.0	0.0	15.0
TOTAL	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>	<u>256.0</u>

SOURCE: P.T. PUSRI; DEPARTMENT OF AGRICULTURE; DEPARTMENT OF TRADE

## J A P A N

Economic classification: Industrial Market economy  
Oil exporter or importer (net): Importer  
Annual per capita income: US\$7,707 year 1983  
Annual per capita GNP US\$10,077 year 1983  
Average annual growth 1960-80\*  
Annual inflation rate 1970-80 24.5% (CY74) to 3.6% (CY79)  
Annual inflation rate (current) 2-3%  
Volume of imports 126 billion US\$ year CY 1983  
Of which food 12% year CY 1983  
Of which fuels 48% year  
Principal foreign exchange earning export: machinery,  
equipment and metal products  
Population 119 million year 1983  
Annual population growth 1.0% years 1975-1980  
Annual Consumption:  
Flour (wheat) 32 kg/capita year 1982  
Meat 23 kg/capita year 1982  
Vegetable Oil (fats and oils) 15 kg/capita year 1982

\*Annual growth ranged from -0.2% for FY 1974 to 13% for FY 1968

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

1984 crop production estimates are as follows:

Wheat: 741,000 tonnes, up 6.6% from 1983

Barley: 396,000 tonnes, up 4.5% from 1983  
(2 row barley, up 18.5% to 295,000 tonnes)  
(6-row barley, down 36.3% to 58,000 tonnes)  
(naked barley, up 10.3% to 43,000 tonnes)

Oats: 8,000 tonnes

Rice: 11.8 million tonnes, up 14.2% from 1983 (October 15th forecast)

Oilseeds: Regarding soybean, the nationwide forecast has not been released, however, according to a production forecast as of September 1st for major growing areas, it shows no change from the 1983 crop. Other forecast released earlier this year predicted about a 10% decline for the 1984 crop. (Incidentally Japanese soybean is not an oilseed because it is not used for crushing but for other processing e.g. "tofn (soybean curd), "miso" (soybean paste), etc.).

Rapeseed: Production of 1984 crop decreased 16% from 1983 crop.

Crop Situation and Outlook (cont'd)

	<u>1983</u> <u>Production</u>	<u>1984</u> <u>Production Forecast*</u>	<u>1984 over</u> <u>1983</u>
	('000 tonnes)		(%)
Wheat	695	741	+ 6.6
Barley	379	396	+ 4.5
(2-row)	249	295	+18.5
(6-row)	91	58	-36.3
(Naked Barley)	39	43	+10.3
Oats	N/A	8	-
Rice	10,366	11,800	+14.2
Soybean	217	N/A	
	(major area 187	major area 187)	
Rapeseed	3.22	2.7	-16.1

\*Except rapeseed - actual 1984 production.

2. Foreign Exchange Situation

Priorities are to secure provisions from domestic production as much as possible and any requirements which cannot be met from local supply are filled with imports.

3. Fertilizer Situation

Annual demand is about 2 million tonnes (1.8-2.3 mil. tonnes for recent years), of which nitrogen (N) about 700,000 (600-800 thousand) tonnes; phosphate (Ph) 700,000 (700-800 thou) tonnes and potash 600,000 (500-700 thou) tonnes. Supply situation: nitrogen imports 40-70 thousand tonnes (import ratio 3-6%) a year and local production 1.1-1.4 million tonnes. Phosphate exports of 300-700 thousand tonnes; phosphate imports 100-160 thousand tonnes (15-20%) and local production 600-650 thousand tonnes. Potash imports 500-700 thousand tonnes (about 95%) and local production 20-40 thousand tonnes. Overall trend for July 83 - March 84 shows 3.6% increase over the same period last year on shipment basis. Nitrogen domestic usage will increase but exports will decline and overall requirement will decrease for current fertilizer year. Phosphate usage will grow 3-4% higher for this year. Potash, most of which is imported, will increase. Projected imports of 495 thousand tonnes are about 4% below last year's level.

\*Note: Fertilizer Year (FY) e.g. FY83 = July 83-June 84



#### 4. Import Mechanism

Transactions of rice, wheat and barley are controlled by the Government, i.e. the Food Agency, an agency of the MOAFF. As Japan heavily depends upon supplies of wheat and barley from overseas sources the Food Agency imports both grains through their weekly import tenders then re-sell to the processors. Other grains such as corn, milo, soybean etc. are considered as free trade commodities. They are imported by private importers. Oats imports are not under Food Agency control but are subject to tariff quota (TQ) system i.e. no tariff for quantity authorized under TQ but 10% duty for imports outside TQ.

#### 5. Grain Industry Infrastructure

Basically there is expansion of existing facilities, be it flour, feed milling or crushing industry.

Flour - Wheat is under Government control and its import is now said to have reached a plateau.

Feed - No new expansions, rather renewals of existing ones by replacing (or phasing out) old plants with new plants for stepped up rationalization. Some increase production by using 2-shift or 3-shift operating conditions without resorting to expansion of facilities.

Crushing - Not operating at full capacity yet i.e. room for increased production under the existing facilities.

Noticeable changes - Japanese are generally more inclined to value-added products or efficiency-oriented measures e.g.:

Flour - Increased production of premixes and pasta products (often by technical tie-up with Italian manufacturers). Also expanding production of health-minded products e.g. wheat germ, wheat germ oil, vitamin E, etc.

Feed - Large compound feed complexes were completed in recent years as part of a total rationalization of the compound feed industry, typically in Kyushu and Tohoku regions.

Crushing - Marketing of high linoleic acid oils (typically safflower, sunflower and corn oils) is pursued by leading crushers. Quite recently vitamins E, F and C are in vogue, making better use of their available resources and coping with consumer reactions to health-consciousness.

## 6. Government Policies Affecting Grain and Agriculture

The Government has started the third 3-year diversification program from April, 1984 as rice consumption should continue to fall, thereby the Government is encouraging the producers to grow other grains than rice. It is therefore expected that production of domestic wheat and barley will continue to increase to a certain extent as consumptions of those grains will remain more steady.

Annual per capita consumption of wheat has recently been steady, coupled with increase in domestic production of wheat it is expected that there will be very little increase in import of foreign wheat to Japan in the future probably one percent or so annually in compliance with population increase. Durum wheat imports may show larger increase in future, but total import quantity is not substantial. Imports of barley for feed use may also show gradual increase due to increase in meat consumption.

## 7. Canadian Grain Marketing Prospects

According to the Japanese Government's long term projections, wheat imports for food use will be 5,190 thousand tonnes in 1990. Feed barley imports will be 2,143 thousand tonnes and soybean (of which non-crushing use soybean) imports will be 4.8-5.0 million (of which non-crush soybean 270,000) tonnes for 1990.

Short Range - Oats: We have encountered complaints by importers that they have some difficulty, obtaining oats from Canada. We should overcome this type of situation.

Long Range - Barley: We should try to seek opportunities for liberalization of barley imports (now under Japanese Government control), at least barley for feed use in order to compete with other imported coarse grains typically maize (corn) and milo (grain sorghum).

Marketing possibilities for Canadian "special crops": Already marketing those special crops. We are virtually the sole supplier of mustardseed and for last year canaryseed as well, and one of the major suppliers of buckwheat, beans (typically faba beans) and peas owing in part to PEMD visitors to Japan particularly for buckwheat, beans and peas and canary seed.

## 8. Processing Facilities

	Year 1983/84			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>thousands of tonnes Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	163	209	approx. 6,100	approx. 5,790
Compound Feed Mills				
Malt Houses	4	11	170	110-120
Oilseed Crushers		159	N/A	

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983/84

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Otaru	117	
Chiba	597	
Yokohama	1,030	
Shimizu	238	
Nagoya	880	
Kobe	664	
Mizushima	224	
Hakata	334	
Kagoshima	272	
Others	1,907	
Total Capacity	6,263	

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	249	Nil	91	Nil	340
Suitable for malting	129	Nil	-	Nil	129

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

	<u>thousands of tonnes</u>	<u>Principal suppliers(s)</u>
Malt	430 (415)	Australia/Canada/France
Malting Barley	18.5 (16.0)	Australia

3. Additional Information

Change in malting capacity: Domestic malting capacity has recently remained unchanged. It is more economical for Japanese breweries to buy imported malt as the Food Agency's domestic malting barley selling price to breweries is set high. Thus, they do not have incentive to increase malting capacity and are only maintaining their present capacity to consume local malting barley.

Malt exports: No malt is exported to overseas markets from Japan.

Trend in beer consumption: Last year annual per capita beer consumption increased by 3%, mainly on account of hot spell in summer,



## II. MALT AND MALTING BARLEY (cont'd)

but this year it is anticipated that consumption will remain unchanged from last year or will slightly decrease as price was increased due to increase in liquor tax.

Market potential for Canadian malt and/or malting barley: Canadian malt is generally well reputed of good quality by Japanese breweries thus price is the main factor to expand market share. Japanese breweries are obliged essentially to use domestic malting barley thus imports of foreign malting barley takes place whenever there is a shortage of supply of domestic malting barley.

## III. OILSEEDS

### 1. Import Policy

Import tariffs: (i) Oilseeds: Free  
(ii) Crude oil: 17 Yen/kg.  
(iii) Oilseed meal: Free  
(iv) Refined meal: 17 Yen/kg.

Importation procedure and structure: By private importers, i.e. under free marketing principles.

### 2. Supply of oilseeds and products by type, thousands of tonnes:

Year: 1983			Quantity	Principal
<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Processed</u>	<u>Sources of Imports</u>
Soybean	217	4,995	4,821	U.S./China/Canada/Brazil
Canola/Rapeseed	3	1,201	1,189	Canada/Sweden/China/U.S.
Flaxseed		111	114	Canada
Mustard Seed		8	2	Canada
Others	550	390	840	
TOTAL	770	6,705	6,966	
<u>Oil</u>		<u>Crude/Refined</u>		
Soybean	696	7		U.S./Brazil
Canola/Rapeseed	489	13		Sweden/Canada/Netherlands
Palm Oil	7	174		Malaysia/Indonesia
Rice Bran Oil	91	2		China/ROK
Others	250			
TOTAL	1,533	320		
<u>Meal</u>				
Soybean Meal	3,052	234		Brazil/U.S./China
Canola/Rapeseed	683	76		China/Canada
Deffatted Rice				
Bran	391			
Linseed	69			
Others	221	13		
TOTAL	4,416	323		



3. Number and Capacity of Oilseeds Crushing Plants (1982 data)

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24hr)</u>
9	soybeans, canola/rapeseed and others	1,000+
2	" " " " "	500 to 1,000
148	soybeans, canola/rapeseed, rice bran and others.	Less than 500

4. Export Policy: Japan is a net importer of oilseeds.

5. Exports of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Sesame			(only 472 tonnes) U.S.
Soybeans	217		(only 3 tonnes) China/Taiwan
Groundnut	49		(Less than one tonne) China
Canola/Rapeseed	3		
Others	501 (rice bran)		(Less than one tonne) ROK/China
TOTAL	770		

Oil

Linseed	45	10	ROK/Taiwan/Indonesia
Soybeans	696	4	N. Korea/Philippines/Taiwan
Sesame	23	3	U.S./Hong Kong/Saudi Arabia
Canola/Rapeseed	489		
Others	280(encl. 4)	6(encl. 4)	Singapore/Hong Kong/Malaysia
TOTAL	1,533	23	

Meal

Soybeans	3,052		China/Thailand/ROK
Canola/Rapeseed	683	1	Taiwan
Others	681(encl. 5)		India/U.S.
TOTAL	4,416	1	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	695 (742)	1,139 (981)	5,419 (5,359)	7,253 (7,082)
Durum wheat		N/A	79 65	79 (65)
Flour/Semolina	5,669 (5,815)			5,669 (5,815)
TOTAL	6,364 (6,557)	1,139 (981)	5,498 (5,424)	13,001 (12,962)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	4,724 (4,670)	*1,320 (1,301)	N/A (194)		1,185 (1,139)	7,253 (7,082)	
Durum wheat	80 65				N/A	79 (65)	
Flour/Semolina	4,133 (4,154)		147 (161)	352 (338)	280 (240)	5,669 (5,815)	
TOTAL						13,001 (12,962)	

\*Including wheat bran use.

Industrial Use: Glue      Export Destination: Hong Kong, China, Singapore

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	ATI	Others	TOTAL IMPORTS
Canada							

WHEAT (including durum)

Cash      1,276 (1,308)      3,040 (3,122)      951 (912)

Aid, concessional  
credit, etc.

5,498 (5,424)

FLOUR (including semolina)

TOTAL      1,276 (1,308)      3,040 (3,122)      951 (912)

5,498 (5,424)

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn Maize	340 (389)	427 (648)	1,581 (1,161)	2,348 (2,198)
Barley				
Sorghum				
Oats				
Rye				
TOTAL				

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets. (Government Fisco Year 1983/4- 1984/3)

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>(seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Corn Maize	171 (193)	1,450 (1,347)			(16)		536 (427)	2,348 (2,198)
Barley								
Sorghum								
Oats								
Rye								
TOTAL								

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets (July/83 - June/84)

	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>ALL Others</u>	<u>TOTAL IMPORTS</u>
Corn							
Barley	820 (973)	348 (135)	429 (115)				1,597 (1,223)
Sorghum							
Oats							
TOTAL							

R E P U B L I C   O F   K O R E A

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$1,472	year 1983
Annual per capita GNP	US\$1,880	year 1983
Average annual growth 1960-80	7.0%	
Annual inflation rate 1970-80	19.8%	
Annual inflation rate (current)	2.0%	
Volume of imports	26.2 billion US\$	year 1983
Of which food *	7.6%	year 1983
Of which fuels	28.4%	year 1983
Principal foreign exchange earning export:	Light manufacturing, heavy industry & overseas construction	
Debt service as % of GNP	6.2%	year 1983
Debt service as % of exports	15.4%	year 1983
Population	40.2 million	year 1983
Annual population growth	1.5%	years 1980-2000
Annual Consumption:		
Flour	36.8 kg/capita	year 1983
Meat	13.3 kg/capita	year 1983
Vegetable Oil	6.5 kg/capita	year 1983

Note: The Korean government has revised the base year effective January 1, 1984 from 1975 to 1980 for calculation of per capita income and GNP.

I. GENERAL INFORMATION

1. Crop Situation and Outlook

As a result of a one percent increase in acreage and moderate weather conditions, rice production in 1983 increased to approximately 5.4 million tonnes, up 3.8% from 5.2 million tonnes in 1982.

Due in part to a 34.5% increase in wheat acreage in 1983, wheat production also increased, up 69.7% to 112,000 tonnes.

Total barley production in 1983 increased to 1,159,000 tonnes (crude weight), including 99,000 tonnes of malting barley, due to approximately 10% increases in food and malting barley acreages.

Due partly to a 3.1% decrease in acreage, corn production decreased 14% to 101,000 tonnes.

The production of soybeans and rapeseed also decreased to approximately 226,000 tonnes (down 3%) and 10,000 tonnes (down 50%) respectively as a result of decreases (0.6% and 35.1%) in acreage.

In 1984, the government plan calls for the production of 5.5 million tonnes of rice, 1,034,000 tonnes (crude weight) of barley, 70,000 tonnes of wheat, 136,000 tonnes of corn, 272,000 tonnes of soybeans and 12,600 tonnes of rapeseed.



## 2. Foreign Exchange Situation

Preliminary estimates indicate that the commodity trade deficit in 1983 reached U.S. \$1,747 million based on total exports of \$24,445 million and imports of \$26,192 million. The current account deficit is estimated at \$1,607 million. Foreign exchange holdings as of the end of 1983, however, reached \$6,910 million and are expected to reach \$7,000 million by the end of 1984. The commodity trade deficit in 1984 is expected to decrease to \$1,300 million (\$27.2 billion in exports versus \$28.5 billion in imports). The current account deficit may also decrease to \$1,450 million in 1984. As the policy of the government is to keep the annual inflation rate below 5%, priority will be given to importing both food (wheat) and feed grains within the constraints of the demand and the supply plan. The UNDP office in Seoul has advised that since 1983 they have discontinued to provide wheat and flour to Korea under the World Food Program. Korea is unlikely to become an international aid recipient.

## 3. Fertilizer Situation

There are nine major fertilizer plants in Korea with a total production capacity of 2.9 million tonnes per year. In 1983, total fertilizer production amounted to approximately 2,687,000 tonnes, a 0.5% decrease from the 2,699,000 tonnes produced in 1982. Total consumption of fertilizer in 1983 reached 1,591,000 tonnes, down 0.3% from 1,630,000 tonnes in 1982. In 1983, Korea exported 1,179,200 tonnes as compared with 1,103,000 tonnes in 1982.

In terms of nutrients, in 1983 Korea consumed 371,250 tonnes of nitrogen, 183,404 tonnes of potash and 172,130 tonnes of phosphate.

## 4. Import Mechanism

Wheat: Regarding wheat for human consumption, the Korea Flour Mills Industrial Association (KOFMIA), individual flour millers and registered trading companies on behalf of millers, are all authorized to import through either tenders (KOFMIA) or price negotiations (millers and trading companies). In the case of feed wheat, however, the Korea Feed Association (KFA), the National Livestock Cooperative Federation (NLCF) and individual millers are authorized to import either through tenders (KFA and NLCF) or price negotiations (millers).

Rice and Barley: The Office of Supply, the Republic of Korea (OSROK) is exclusively authorized to import rice and food barley through either tenders or price negotiations following government guidelines when and if a requirement exists. In the case of feed barley, however, KFA would be the exclusive import organization when and if the government decides to use foreign barley for feed.

Corn: NLCF, KFA and the Korea Corn Processors Industry Association (KCPIA) are the only organizations authorized to import corn through tenders in accordance with both annual food/feed demand and supply plans prepared by the Ministry of Agriculture and Fisheries.

Sorghum: NLCF, KFA and individual feed millers are the only organizations authorized to import sorghum through either tenders (NLCF and KFA) or price negotiations (millers).

#### 4. Import Mechanism cont'd

Rapeseed: Rapeseed may be imported by any private registered traders provided that the oil produced is re-exported. Rapeseed meal may be imported by KFA through tenders or individual feed mills through either tenders or direct negotiations.

Soybeans: OSROK, three soybean oil crushers (Tongbang, Cheil and Samyang), the National Agricultural Cooperative Federation (NACF) and Agriculture and the Fisheries Development Corporation (AFDC) are the only organizations authorized to import soybeans through either tenders (OSROK, NACF and AFDC) or direct negotiations (oil crushers) subject to government quota allocations. However, NACF is allowed to import soybeans only for the manufacture of tofu, soy sauce and soy milk while AFDC is allowed to import only small soybeans for sprouts. Soybean meal may be imported by KFA, NACF and individual feed millers through either tenders (KFA and NACF) or direct negotiations (millers).

Beans (Small Red and Green): AFDC and the Korea Food Industry Association (KFIA) are the only organizations authorized to import beans through either tenders (AFDC) or direct negotiations if and when requirements exist subject to government control and purchasing guidelines.

#### 5. Grain Industry Infrastructure

There are currently two grain handling facilities at Inchon port, one owned by Korea Silo Company Limited, the other by Taihan Bulk Terminal Company Limited. There is a further grain handling facility at Pusan port which is owned by the Korean government and leased to Woosung Industrial Company Limited.

The current unloading and storage capacities are as follows:

	<u>Port</u>	<u>Unloading per hour</u>	<u>Storage</u>
Korea Silo	Inchon	800 tonnes	200,000 tonnes
Taihan	Inchon	1,500 tonnes	138,000 tonnes
Woosung	Pusan	800 tonnes	80,000 tonnes

Ulsan Silo Company Limited has recently obtained a license from the government to build an additional grain handling facility at Ulsan port by the end of 1985. This facility would have two unloaders capable of unloading 1,500 tonnes of grain per hour with a storage capacity of 80,000 tonnes gradually expanding up to 250,000 tonnes when completed. Hanjin Transportation Company Limited had a plan to build a grain handling facility (unloading capacity of 800 tonnes per hour with storage capacity of 150,000 tonnes) at Pusan port, but this plan has been postponed until 1987. However, they have obtained a license from the government to build a temporary grain handling facility (unloading capacity - 900 tonnes per hour and storage capacity - 109,000 tonnes) at Inchon port by the middle of 1985.



## 6. Government Policies Affecting Grain and Agriculture

As a result of the bumper rice crops in the last three years and the reduction in per capita barley consumption (39.7 kg in 1975 to 12.9 kg in 1982), the self-sufficiency rate of Korea's staple food grains improved substantially in 1983. Government estimates indicate that the self-sufficiency rates were 97.7% (92.8% in 1982) for rice, 119.9% (85.9% in 1982) for barley, 6.0% for wheat, 2.7% for corn and 25.7% for soybeans with 50.2% for all good grains.

Taking the problems involved in the storage and the increasing deficit in the grain management fund (government's subsidy to rice and barley farmers) into consideration, the government decided early this year to use 207,000 tonnes of domestic barley for feed and 65,964 tonnes for alcohol in 1984. As the use of domestic barley would result in a 7-8% inflationary impact on domestic feed prices, however, the government has postponed the use of domestic barley through KFA until the latter part of this year. (If the government finally decides to use the barley for feed, the quantity will likely be reduced to approximately 140,000 tonnes provided that KFA imports the equivalent quantity of foreign barley or other grains to offset the price difference between the domestic and foreign barley). However, the members of Korea Alcohol & Liquor Industry Association (KALIA) began using their portion of the domestic barley last April. In order to reduce the deficit of the grain management fund and the importation of feed grains the government has recently decided to encourage barley growers to increase the acreage planted to rye or other feed grain crops instead of barley. The government will continue to encourage increased rice production.

Due to the expected poor rice crop in Japan this year and Japan's low rice inventory, the Japanese government recently requested the Korean government to "return" 260,000 tonnes of rice this year out of a total of 630,000 tonnes (330,000 tonnes in 1969 and 530,000 tonnes in 1970) which Korea had "borrowed" from Japan. In the meantime, Korea has paid since 1979 in cash equivalent to for 110,000 tonnes of rice. Korea still needs to return 520,000 tonnes of rice to Japan. The recent press reported, however, that the Korean government has agreed to return 150,000 tonnes of rice to Japan this year out of approximately 2,301,000 tonnes of rice in its inventory.

Korea continues to purchase approximately 2 million tonnes of wheat from the United States. In 1983 it imported approximately 69,000 tonnes of feed wheat from the United States and New Zealand. There were no wheat imports in 1983 under the World Food Program.

However, since the submission of last year's report, two major changes took place in the government's wheat import policy. KOFMIA was the exclusive authorized importer of wheat through tenders until the end of June 1983. Furthermore, the price and the quality of flour were controlled by the government until the end of September 1983. Effective July 1, 1983, however, KOFMIA, private millers and registered trading companies on behalf of millers were authorized to import wheat either through tenders or direct negotiations. Effective October 1st, the government also removed its control on prices as well as the quality of flour. As a result of these changes, millers have been allowed to import their wheat requirements from sources other than the United States depending on price and quality. Subsequent to these changes, three millers (Cheil, Daehan and Daesun) purchased a total of 6,000 tonnes of No. 1 CWRS wheat from Canada last December and early in 1984 in order to improve



Government Policies Affecting Grain and Agriculture (cont'd)

the baking quality for their respective customers. These were the first commercial sales of Canadian wheat to Korea. Unfortunately due to perhaps the lack of experience in milling Canadian CWRS wheat and baking (the same formula was used as with flour milled from U.S. DNS), they were unable to improve the quality of their end products. In 1984, Korea will likely import approximately 1.2 million tonnes of food wheat with KFX fund and 800,000 tonnes with \$130 million of CCC fund available for Korea from the United States. Korea will also likely import approximately 800,000 tonnes of feed wheat from Australia.

In addition to the wheat imports, Korea also imported a total of 4,057,000 tonnes of corn from the United States, Argentina, Thailand and Australia for food and feed, of which approximately 620,000 tonnes were imported by KCPA for food and industrial purposes and the balance by KFA and NACF for feed purposes.

As the feed grain import policy of the government in 1983 was to diversify the types of grains as well as the source of supply due to a surge in the price of corn as a result of the U.S. PIK program, Korea imported approximately 651,240 tonnes of various (other than corn) feed ingredients (sorghum - 159,000 tonnes, rye 75,278 tonnes, oats 6,484 tonnes and grain screening pellets 27,278 tonnes) including 383,000 tonnes of vegetable proteins (soybean meal 330,000 tonnes and rapeseed meal 53,000 tonnes). Canada supplied virtually all the rye, oats, grain screening pellets and rapeseed meal to the feed industry.

The 1984 policy of the government is to meet the total import of feed grains with 60% corn and the balance of other grains. Estimates indicate that Canada may be able to export more feed grains to this market than last year. Until the Korean government revised a ministerial decree effective May 1, 1984 on VAT for imported feed ingredients, Canada's major feed ingredients including barley, rye, oats and grain screening pellets were excluded from a 9% exemption of VAT. That exemption had applied only to wheat, corn, soybeans, sorghum, corn flour and sorghum flour.

The current policy of the government is to increase the current ratio (80.3%) of the commodity import liberalization to 91.6% by 1986, to 93.8% by 1987 and to 96.2% by 1988. However, most of the major agro and livestock products, including food products, have been excluded from the list except for items such as wheat flour, coffee, cottonseed oil, margarine etc., for the 1985 plan and horse meat, turkey meat, ham, bacon, soybean oil and sausage etc., for the 1986 plan. The government has also been studying the possibility of allowing the importation of compound feeds and a limited quantity of rapeseed from July 1, 1985.

Due to decreasing per capita consumption of rice and barley, Korea under good weather conditions is likely to achieve self-sufficiency in rice in the long term and barley (for human consumption) in the next few years. Korea's self-sufficiency rate in wheat and corn, however, will continue to decrease due to increasing human and animal populations plus a gradual change in the food pattern from ordinary Korean meals (from rice and barley to the instant foods). The changes in the wheat import mechanism will provide a limited opportunity for Canadian grain suppliers to compete with U.S. suppliers strictly on basis of the price and the quality. As all wheat purchases are made by private organizations, individual Canadian wheat suppliers should more actively pursue the market through their respective agents.



Government Policies Affecting Grain and Agriculture (cont'd)

As the government has lifted restrictions on barley for use as feed, there may be opportunities for Canadian barley if and when the price is competitive in comparison with other feed grains. The policy with regard to reduction in barley production appears to be only a temporary measure in order to reduce the deficit in the grains management fund. However, if the government adopts this as a long term policy, it will pose some implications in exporting Canadian feed grains (barley, rye and oats) to this market. The inclusion of Canadian feed grains in the VAT exemption system, however, puts Canadian feed grain suppliers into a more competitive position in competing with U.S. corn.

7. Canadian Grain Marketing Propsects

Projections to 1985 - 1990: The Korea Development Institute, an advisory research institution to the government in economic planning has made the following grain import projections for wheat and corn:

	Wheat ( '000 tonnes)	Corn
1985	2,050	3,500
1986	2,100	3,800
1991	2,400	5,500

Marketing possibilities for Canadian "special crops": With the exception of mustard seed which became an automatic approval item from July 1, 1983 and a limited quantity of buckwheat which Korea imports when the domestic production is insufficient to meet demand or when required as a raw material for re-export purpose, there are no marketing possibilities for other special crops. Korea imports approximately 350 tonnes of mustard seed per year from Canada.

8. Processing Facilities

Year 1983

	Number of <u>Companies</u>	Number of <u>Plants</u>	Annual <u>Capacity*</u>	Actual <u>Output</u>
Flour (and durum) Mills	12	13	2,724	1,919
Compound Feed Mills	56	78	4,619	5,851
Malt Houses	2	4	81	124
Oilseed Crushers	64	64	1,500**	907**

\* 8 hour operation basis

\*\* In addition, there are thousands of small individual oil stores throughout the country which also crush oilseeds. Therefore, the figures represent only estimates for crushers who own plants.

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Inchon	338	5,520
Pusan	80	1,920
Total Capacity	418	7,440

II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley			1,159		1,159
Suitable for malting	99				99

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	(4)	Australia and U.K.
Malting barley		

3. Additional Information

Change in malting capacity: The total malting capacity of Korea's two breweries in 1983 remained at 81,000 tonnes.

Malt exports: Not available.

Trend in beer consumption: The total beer consumption in 1983 reached approximately 692 million litres, an increase of about 14% over total beer consumption in 1982.

Market potential for Canadian malt and/or malting barley: In addition to a 14% increase in the domestic consumption, Korea exported approximately 2.5 million litres of beer in 1983 while the production of malting barley remained at 99,000 tonnes for the last two years. Therefore, Korea had to import a limited quantity of malting barley or malt, but the export of Canadian products to this market depends entirely on the price and the quality.



### III. OILSEEDS

#### 1. Import Policy

- a) Import Tariffs: (i) Oilseeds: 10% tariff on soybeans. 40% tariff on groundnuts, sunflower, rapeseed, sesame and perilla seeds. 15% tariff applies to all other oilseeds.
- (ii) Crude Oil: With the exception of a 12% tariff on palm oil, 25% on coconut oil and 40% on groundnut, sunflowerseed, rapeseed, sesame and perilla seed oils - a 30% tariff applies to all other crude oils. (However, see b) below.).
- (iii) Oilseed Meal: 15% tariff applies to all oilseed meals
- (iv) Refined Oil: Same as the tariff rates on crude oils.
- b) Non-tariff barriers: With the exception of six kinds of oilseeds (copra, palm and nuts and kernels, linseed, cottonseed, castor oilseed and mustardseed) and nine kinds of oils (palm, coconut, olive, mustard, linseed, palm kernel, castor, tung and camellia) and soybeans which are imported under annual quota - all other seeds and oils are restricted (i.e. prohibited) imports under the current trade plan. For re-export purpose, however, all seeds and oils may be imported.
- c) Importation procedure and structure: For those oilseeds other than soybeans and linseed, end users or registered trading companies import through direct price negotiations. For linseed, either Korea Vegetable Oil Industry Association (KVOIA) or registered trading companies import through direct negotiations. In the case of soybeans, however, with the exception of soybeans required for oil crushing which crushers import directly through price negotiations and for sprouts which the Agriculture and Fisheries Development Corporation imports through tenders when requirements exist, soybeans required for all other food purposes are being imported by the National Agricultural Cooperative Federation (NACF) through regular tenders.

2. Additional Factors: As reported in the last year's report, rice bran oil crushers of KVOIA have been constructing eight new plants (one in each province except Cheju) since 1983. The plants are expected to be completed by the end of this year, with a total crushing capacity of 800 tonnes (based on rice bran) per day on 24 hour basis. Once the construction of new plants is completed, KVOIA may request that the Ministry of Agriculture and Fisheries allow them to import rapeseed from Canada. As explained previously the government plans to remove import restrictions on soybean oil starting July 1, 1986. If this happens, the three existing soybean oil crushers would have to compete with imported soybean oils. In order to maintain their respective marketshare and to operate their plants, they may start to source other oilseed raw materials such as Canadian canola.

III. OILSEEDS cont'd

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean	226	658	608	U.S.A., China
Rapeseed	10	5	19	Canada
Sesame	43	11	30	China
Perilla	18			
Others	17*	12**	136	China, Thailand
TOTAL	314	686	793	

\* Includes peanut and cottonseed.

\*\*Includes peanut, cotton, copra and linseeds

<u>Oil</u>		<u>Crude/Refined</u>		
Soybean	105			Philippine, U.S.A.
Rapeseed	7			
Sesame	11			U.K., Japan
Palm	92	104		Malaysia, Singapore
Others	43*	19*	8**	Japan, Philippine
TOTAL	258	123	8	

\* Includes coconut, corn and cottonseed.

\*\*Includes linseed and cottonseed oil.

<u>Meal</u>				
Soybean	450	330		Brazil, U.S.A., Hong Kong
Rapeseed	5	53		Canada, Pakistan
Others		1*		Hong Kong
TOTAL	455	384		

\*Includes sunflowerseed and groundnut.

<u>Number of Plants</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
3	Soybean	2,725
21	Rapeseed	900
40	Others*	900
TOTAL	64	4,525

\* Includes rice bran, corn, cotton and red pepper seed etc.



IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	112 (66)	220 (220)	1,973 (2,000)	2,305 (2,286)
Durum wheat				
Flour/Semolina		40 (40)		40 (40)
TOTAL	112 (66)	260 (260)	*1,973 (2,000)	2,345 (2,326)

\* Includes 69,000 tonnes of wheat imported from the United States and New Zealand.

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Other</u> (seed, waste)	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>				
Wheat	1,957 (1,916)	69 (7)	31 (58)		188 (220)	2,305 (2,286)
Durum wheat						
Flour Semolina					44 (40)	40 (40)
TOTAL	1,957 (1,916)	69 (7)	31 (58)		232 (260)	2,345 (2,326)

Industrial Use: Manufacture of glue

Note: KOFMIA estimates that approximately 24.5% was used for alcohol, 23.4% for noodles, 19.3% for bakery, 14.4% for restaurants, 9.2% for home, 5.9% for food processing, 0.4% for soy sauce and 2.9% for others in 1983.

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.		Australia		Argentina		EEC		ATT		Others		TOTAL IMPORTS
	Canada												

WHEAT (including durum)

Cash													19	1,195 (1,240)
Commercial Credit														778 (760)
Aid, concessional														
credit, etc.														

FLOUR (including semolina)

Cash/comm. credit

Aid, concessional:

TOTAL	1,954 (2,000)												19	1,973 (2,000)
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Principal "Others": New Zealand

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	101 (150)	265 (265)	4,057 (2,944)	4,423 (3,359)
Barley	1,159 (985)	10 (10)		1,169 (995)
Sorghum	3 (5)	35 (35)	159 (468)	197 (508)
Oats			7 (6)	7 (6)
Rye	4 (5)		75 (30)	79 (35)
TOTAL	1,267 (1,145)	310 (310)	4,298 (3,448)	5,875 (4,903)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	35 (70)	3,573 (2,472)	590 (547)	35 (5)		190 (265)	4,423 (3,359)
Barley	580 (671)	79 (60)	141 (170)	199 (84)		170 (10)	1,169 (1,095)
Sorghum	4 (4)	192 (468)		1 (1)		(35)	197 (508)
Oats		7 (6)					7 (6)
Rye		66 (34)		1 (1)		12 (35)	79 (35)
TOTAL	619 (745)	3,917 (3,040)	731 (717)	236 (91)		372 (310)	5,875 (4,903)

Of which poultry: 38.4%

Industrial Use: corn starch, glucose, fructose, syrup and brewery

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	Australia Argentina EEC All Others	
Corn		3,944 (2,794)		4,057 (2,944)
Barley			55	
Sorghum		56 (418)	21	159 (468)
Oats	7 (6)		78 (50)	7 (6)
Rye	75 (30)			75 (30)
TOTAL	82 (36)	4,000 (3,212)	21 133 (50)	4,298 (3,448)

Principal "Others": Thailand, Hong Kong

## MALAYSIA

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Exporter	
Annual per capita income:		
Annual per capita GNP	US\$1,881.3*	year 1983
Average annual growth 1960-80	4.3%	
Annual inflation rate 1970-80	7.5%	
Annual inflation rate (current)	4.0%	
Volume of imports	*13.44 billion US\$	year 1983
Of which food	9.6%	year 1983
Of which fuels	5.1%	
Principal foreign exchange earning export:	Petroleum, timber manufactured goods, rubber, palm oil	
Debt service as % of GNP		
Debt service as % of exports		
Population	14.744 million**	year 1983
Annual population growth	2.29%**	year 1983

\* Exchange rate: M\$1.00 = US\$2.5

\*\* Estimates.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

##### Palm Oil:

Crude palm oil production in 1983 is expected to decline by 6% to 3,300,000 tonnes from 3,510,950 tonnes in 1982. Decline is due to over-stressed effect of the Cameroon weevil, drought and reduced application of fertilizers. Total area under palm oil in 1983 is estimated to increase by 3.2% to 1,266,000 hectares against 1,226,585 hectares in 1982. Production of processed palm oil in 1983 is estimated to decline 5.7% to 3,243,900 tonnes compared to 3,440,000 tonnes in 1982.

##### Rice

1983 rice output is estimated to increase by 1.8% to 1,364,200 tonnes compared to 1,339,600 tonnes in 1982. The increase is due to a marginal increase in the acreage planted with this crop (from 758,400 hectares in 1982 to 764,160 hectares in 1983). Average yield per hectare is estimated to increase from 2,948 kilograms to 3,088 kilograms given favourable weather. Domestic production of rice is only about 77% of domestic consumption. Total rice imports for 1983 are estimated at 384,000 tonnes, mainly from Thailand, Burma and Pakistan.



## 2. Fertilizer Situation

Consumption of fertilizers in 1983 is estimated to increase by 5% to 1,245,700 tonnes. Domestic supply accounts for about 35.4% of total requirements.

## 3. Import Mechanism

Rice imports are conducted on a government to government basis. All other grains are imported by private companies/importers. In 1983 Malaysia imported 41.6 thousand tonnes of durum and 513.6 thousand tonnes of other wheat.

## 4. Canadian Grain Marketing Prospects

As always, the most important factor is competitive C.I.F. prices at Malaysian ports.

Marketing possibilities for Canadian "special crops": Yes, soyabeans and pearl barley already enjoy a good market in this country.

## 5. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	5	5	477	375
Compound Feed Mills	27	28		
Malt Houses				
Oilseed Crushers	2	2		

## II. MALT AND MALTING BARLEY

1. Imports: Total annual malt imports are about 17,000 tonnes.

### 2. Additional Information

Malt Exports: A small quantity (208 kg.) of malt was exported from Malaysia in 1983.

Trend in beer consumption: Production in Malaysia declined by 19 percent in 1983 after three years of relatively level production at about 118 million litres.



### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: Crude oil - Soyabean, rape, colza, mustard seed oil: 5%  
Oilseed Meal - Rapeseed meal: Nil, Soyabean meal: 13%

Importation procedure and structure: Private companies/importers.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Copra	94	1		
<u>Oil</u>		<u>Crude/Refined</u>		
Palm oil	2,783	104		
Coconut oil	63			
<u>Meal</u>				
Soyabean		147		
Groundnuts		19		
Sunflowerseed		1		
Coconut	36,014	3		

#### 3. Number and capacity of oilseed crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
2	Soyabean	

#### 4. Export Policy

Export procedure and structure: Private exporters require license from the Federal Government.

#### 5. Exports of oilseeds and products by type, thousands of tonnes:

Year: 1983

<u>Oilseeds</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Copra	94	3	
<u>Oils</u>			
Palm oil	2,783	1,435	
Coconut oil(crude)	57	-	
Coconut oil(refined)	6	60	
<u>Meals</u>			
Palm Oil			
Coconut	36		

IV. STATISTICAL NOTES

(A) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous years in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn				
Barley				
Sorghum				
Oats				
Rye				
TOTAL				

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>	<u>(seed, waste)</u>				
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>					<u>TOTAL IMPORTS</u>	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>		<u>All Others</u>
Corn		15.9	.51	134.080	.03	591.7	742.2
Barley			.08		.11	1.05	1.3
Sorghum	.05		.01			2.18	2.2
Oats			7.76				7.8
Rye	2.73		.01			.03	2.8
Total							

Principal "Others": Thailand

## PAKISTAN

Economic classification:	Low Income economy		
Oil exporter or importer(net):	Importer(80% of total consumption)		
Annual per capita income:	US\$350		year 1982
Annual per capita GNP	US\$380		year 1982
Average annual growth 1960-80	5%		
Annual inflation rate 1970-80	13.5%		
Annual inflation rate (current)	8.2%		
Volume of imports	6.55 billion US\$		year 1982-83
Of which food	Nil		
Of which fuels	20.0%		year 1982-83
Principal foreign exchange earning export:	cotton, textile & rice		
Debt service as % of GNP			
Debt service as % of exports	13.2%		year 1982-83
Population	87.1 million		year 1982
Annual population growth: projected	2.8%		years 1980-2000
Annual Consumption:			
Flour	125	kg/capita	year 1983
Meat	12	kg/capita	year 1983
Vegetable Oil	8	kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Wheat: Wheat has the largest area under cultivation in Pakistan and constitutes 30 percent of the total cultivated land.

The 1983-84 wheat crop harvested in May 1984 yielded 12.47 million tonnes from 7.28 million hectares compared to 12.41 million tonnes from the previous crop. Wheat production has been recording sustained increases during the last three years due to intensive use of essential inputs, gradual change over to mechanized cultivation, favourable weather conditions and availability of financial support from the Government in the form of support prices and inputs subsidization. The wheat production target for 1984-85 is 13.2 million tonnes.

Wheat production is projected to increase by 5% annually in the coming years to meet growing domestic demand and also to build up sizeable buffer stocks to offset any production setbacks on account of bad weather. During 1983, Pakistan obtained an export order from Iran for 300,000 tonnes of which 155,000 tonnes were shipped by December 1983. Iran is reported to be negotiating with Pakistan for more wheat supplies in 1984. Government held stocks of wheat on April 30, 1984, were 2.41 million tonnes. In view of adequate domestic production, Pakistan no longer imports wheat; however, 457,000 tonnes of wheat were received in 1982-83 as a donation from international sources for Afghan refugees.



Crop Situation and Outlook cont'd

Rice: Rice production in 1983-84 increased to 3.5 million tonnes compared to 3.4 (revised) million tonnes in the previous year. The area planted to the rice crop also increased slightly to 2 million hectares compared with 1.98 million hectares during 1982-83, due primarily to good weather conditions throughout the maturity period. The Rice Export Corporation of Pakistan procured 1.1 million tonnes of rice from the 1983-84 crop for export shipments. From the current procurement and carryover stocks from the previous year the Rice Export Corporation is reported to have already exported 1.15 million tonnes valued at about US\$400 million. Rice was exported to Saudi Arabia, Iran, Kuwait, Cameroon, Ivory Coast and Cuba.

Coarse Grain: Corn is the principal coarse grain followed by sorghum, millet and barley. The aggregate production during 1982-83 has been estimated at 1.4 million tonnes from 1.83 million hectares. The 1983-84 coarse grains total production is forecast to remain virtually stable. Corn production of 1 million tonnes in 1983-84 was a record harvest.

Oilseeds: Pakistan continues to be deficient in production of oilseeds. The aggregate production of principal oilseeds (cottonseeds, rapeseed, mustard, peanut and sesame) during 1983-84 is estimated at around 1.4 million tonnes from a total of 2.82 million hectares. The production suffered due to heavy rains, flooding and insect pest damage. The domestic edible oil production is estimated at 209,000 tonnes against a consumption requirement of 900,000 tonnes. Consequently, Pakistan will be importing close to 700,000 tonnes of edible oil (soyabean oil and palm oil) during 1984-85.

2. Foreign Exchange Situation

No food imports except edible oil are being planned for 1984-85. Edible oil imports of approximately \$200 million are expected to be financed under consortium aid, US PL480 program and CCC credit while palm oil will continue to be purchased from Malaysia against cash foreign exchange. Pakistan has been and will continue to receive bilateral and multilateral financing for most of its development projects including agricultural inputs where possible.

3. Fertilizer Situation

Pakistan is now a surplus producer of nitrogen (urea) fertilizer and exported in the first half of 1984 a limited quantity of urea fertilizer. The following is the country's fertilizer balance sheet:

	<u>Domestic Production</u>		<u>Imports</u>		<u>Consumption</u>	
	<u>1982</u>	<u>1983</u>	<u>1982</u>	<u>1983</u>	<u>1982</u>	<u>1983</u>
	thousands of nutrient tonnes					
Nitrogen	700.1	999.4	88.8	133.3	832.7	952.3
Phosphate	66.9	73.6	28.4	249.3	225.6	265.3
Potash	-	-	15.5	21.4	21.8	25.7



#### 4. Import Mechanism

Wheat imports, if allowed, are handled by the Ministry of Food and Agriculture, Government of Pakistan, through competitive tender. Vegetable oils (soyabean and palm oils) are imported by Government owned Ghee Corporation of Pakistan as well as by private sector importers.

#### 5. Grain Industry Infrastructure

Grain storage facilities are being erected and expanded in producing areas to accommodate increased production of wheat and rice.

#### 6. Government Policies Affecting Grain and Agriculture

The Government continues to accord a high priority to agricultural development in order to achieve an annual growth rate of over 4 percent. Financial incentives in the form of support prices for major crops and subsidies on inputs are available to farmers. Major programs in agriculture include: construction of additional storage capacity; agricultural research programs in oilseeds, fruits and vegetables; livestock and poultry development; fisheries and forestry.

Pakistan is not a commercial grain importing country. Rice is its traditional export and it also shipped wheat to Iran for the first time in 1983. It may also become a regular wheat exporting country in the future.

#### 7. Canadian Grain Marketing Prospects

Projections to 1985-1990 of national grain import needs: No grain imports are being planned given the adequate domestic production.

Marketing initiatives to increase Canadian sales: No commercial prospects for grain sales to Pakistan.

Marketing possibilities for Canadian "special crops": No market potential for Canadian "special crops".

#### 8. Processing Facilities

Flour mills are located in all the principal towns and cities in Pakistan. The annual milling capacity is 7.7 million tonnes. Information on oilseed crushers and malt houses is not available.

#### 9. Storage and Throughput Capacity

Imported wheat enters through the port of Karachi. There are no covered storage facilities at the docks. Wheat is discharged into open piles at the docks. It is then bagged manually and loaded into rail cars.

## II. MALT AND MALTING BARLEY

There is no malt production since complete prohibition is practiced in Pakistan.

III. OILSEEDS

1. Import Policy

- Import Tariffs: (i) Oilseeds - No duty  
 (ii) Crude oil- No duty on soyabean oil and palm oil. All other varieties are imported by private importers, subject to 70% duty. GCP import will be allowed free of duty.  
 (iii) Oilseed meal - No duty  
 (iv) Refined oil - Same as (ii) above.

Importation Procedure and structure: State-owned Ghee Corporation of Pakistan, imports through competitive tender about 80% of Pakistan's total edible oil requirement. Private importers are guided by price considerations.

2. Additional Factors: Canadian exporters must employ local agents to monitor Ghee Corporation tender calls. There are prospects if they could offer in lots of 5,000-10,000 tonnes at competitive rates.

3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982-83

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Cottonseed	1,648		1,318	
Rape & mustard	240		220	
Soyabean	3.3		3	
Others	106.7		95	
TOTAL	1,998		1,636	

(Oilseeds production in 1983-84 is reported to have declined to 1.4 million tonnes)

<u>Oil</u>				
<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Cottonseed	171			
Rape & mustard	80			
Soyabean	0.5	210		U.S.A.
Palm oil		335		Malaysia
TOTAL	251.5	545		

<u>Meal</u>	
<u>Oilseed</u>	<u>Production</u>
Cotton	612
Rape & mustard	135
Sunflower	9
TOTAL	956

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
-	Cottonseed	400,000 PA (Expellers)
-	Rape & Mustard	80,000 PA (Solvent Extraction)

Information on number of plants could not be obtained. Because of lack of seed availability, the plants operate at 10 percent capacity.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	12,470 (12,410)	800 (600)		13,270 (13,010)
Durum wheat				
Flour/Semolina				
TOTAL	12,470 (12,410)	800 (600)		13,270 (13,010)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	11,223 (11,169)			1,247 (1,241)	300	500 (600)	13,270 (13,010)
Durum wheat							
Flour Semolina							
TOTAL	11,223 (11,169)			1,247 (1,241)	300	500 (600)	13,270 (13,010)

Export Destination: Iran

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

Pakistan did not import wheat on commercial basis. However, some wheat was received as a charitable donation for Afghan refugees totalling 457,000 tonnes in 1982-83. Figures for 1983-84 not available.



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	1,009 (1,005)			1,009 (1,005)
Barley	160 (185)			160 (185)
Sorghum	228 (222)			228 (222)
Oats				
Rye				
TOTAL	1,397 (1,412)			1,397 (1,412)

DISPOSITION\* 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
--	-------------	--------	------------	---------------------	---------	-----------	-------

Corn  
Barley  
Sorghum  
Oats  
Rye

TOTAL

\*A major portion of these grains are used in the production of poultry feed. Corn is also used for production of starch. Since coarse grain is traded privately, stock figures are not available.

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
--------	--------	-----------	-----------	-----	------------	---------------

Corn  
Barley  
Sorghum  
Oats  
Rye

TOTAL



## PHILIPPINES

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$525	year 1983
Annual per capita GNP	US\$654	year 1983
Average annual growth 1970-80	6.4%*	
Annual inflation rate 1972-83	13.5%	
Annual inflation rate (current)	55.0% (as of June 84)	
Volume of imports	7.5 billion US\$	year 1983
Of which food	5.7 %	year 1983
Of which fuels	29.0 %	year 1983
Principal foreign exchange earning export:	Coconut, sugar, forest products, copper, electronics, garments	
Debt service as % of GDP	58.0%	year 1983
Debt service as % of exports	33.0%	year 1983
Population	52.6 million	year 1983
Annual population growth	2.7 %	years 1972-1983
Annual Consumption:		
Flour	531.26 M tonnes or 10.1 kg/capita	year 1983
Meat	547.04 M tonnes or 10.4 kg/capita	year 1983
Vegetable Oil	168.32 M tonnes or 3.2 kg/capita	year 1983

\* Note: GNP growth rate for 1983 was 1.3% and for 1984 it is expected to decline to -6%

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

	<u>Area (000 hectares)</u>			<u>Production (000 tonnes)</u>		
	1982-83	1983-84	Change (%)	1982-83	1983-84	Change (%)
Rice	3,240	3,169	-2.2	7,731	7,850	1.6
Corn	3,157	3,307	4.7	3,126	3,366	7.7

1983-84 production increases for rice and corn were due to better weather conditions and availability of fertilizer.

#### Medium term forecast for rice and corn:

	<u>Average Annual Growth Rates (%)</u>		<u>% Increase over Previous Year</u>				
	<u>1979-1983</u>	<u>1984-1988</u>	<u>1984</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>	<u>1988</u>
Rice	4.0	4.0	1.5	3.5	3.5	3.2	3.0
Corn	4.4	6.0	4.0	5.5	6.5	6.5	7.0

Government forecasts indicate that rice production will increase by only 1.5% in 1984 due to the reduced availability and higher price of fertilizer and pesticides and belt-tightening measures of consumers. Yellow corn production will increase more so because of continuing support of both government and private sectors to increase corn supply for livestock feeds.

## 2. Foreign Exchange Situation

The balance of payments performance in 1983 suffered from a capital outflow that largely commenced in the third quarter and contributed to more than a US\$1 billion increase in the balance of payments deficit which reached \$2.59 billion in 1983. The trade deficit declined by \$276 million with a small reduction in exports and a somewhat larger fall in imports.

Total outstanding debt at the end of 1983 was estimated at \$24.6 billion consisting of \$9.9 billion in short-term debts and \$14.7 billion in medium and long-term obligations. Of the total debts, \$14.99 billion is owed by the public sector.

The country's large deficit on balance of payments and maturing foreign debt has created a scarcity of foreign exchange for normal trading activities. This problem has led the government to allow only vital items such as food and agricultural inputs to be imported under a priority system.

1983 average foreign exchange rate was estimated at P11.1127 to US\$1, an increase of 30.1% from last year's P8.5401. Currently, the rate is at P18.001.

## 3. Fertilizer Situation

The current shortage of foreign exchange has led to a severe reduction in import financing. As a result, there is a serious and worsening shortage of essential agricultural inputs particularly fertilizer and pesticides which are vital in the agricultural sector.

The Philippine Phosphate Fertilizer Corp (PHILPHOS) will start commercial operations of ammonium sulfate by August 1984. Three other plants which produce sulfuric acid, phosphoric acid, and granulates will be in full operation by the second quarter of 1985. This fertilizer complex joint venture with Nauru costing US\$336 million will be the largest in Southeast Asia. The ammonium sulfate plant will have a 520 tonne capacity per day, with projected exports of US\$21.8 million in 1984. By August 1984, the Philippines are not expected to be significant importers of fertilizers.

The rice harvest for the second semester of 1984 is expected to be low due to reduced usage by farmers of fertilizer and pesticides. To assure no shortage of rice, the National Food Authority had contracted to import from Thailand and the Peoples Republic of China 150,000 tonnes of rice.

The Asian Development Bank and World Bank have extended long-term loans totalling \$280 million for agricultural inputs, of which US\$175 million was allocated to fertilizer and pesticides requirements.



3. Fertilizer Situation cont'd

1982-83 Fertilizer Supply (tonnes)

<u>Grade</u>	<u>1982</u>		<u>1983</u>	
	<u>Production</u>	<u>Imports</u>	<u>Production</u>	<u>Imports</u>
Urea	-	364,973	-	320,166
Ammosul	1,318	122,324	7,357	103,109
Amchlor	-	29,200	-	15,299
N P & P	24,028	94,628	36,362	72,875
N P K	100,465	43,648	120,464	27,332
Potash	-	110,676	-	74,598
TOTAL	125,811	765,449	164,183	613,379

4. Import Mechanism

The National Food Authority (NFA), a government agency, is the sole importer of wheat, rice, yellow corn and soya meal through tenders. For other coarse grains, private importers are required to secure an import license from NFA prior to importation.

Besides importing food and feed grains, NFA purchases local production and distributes to millers and retailers. NFA can directly engage in production, manufacturing, processing or packaging of food products.

5. Grain Industry Infrastructure

Since 1975, the government has embarked on a massive grain infrastructure build-up. A total of 287 modern grain warehouses were built during the 8 year period covering 1975-1983.

The National Food Authority has an ongoing "Agro-Processing and Marketing Project" to minimize the rice post-harvest losses of about 30%. Estimated project cost is US\$52 million of which the Asian Development Bank will partially provide loan assistance of US\$36 million. The major project components are grain dryers and storage plants, rice mills, parboiling plants, bran oil extraction plants, feed mills and power plants.

6. Government Policies Affecting Grains and Agriculture

By 1985, the Agricultural sector is expected to play a significant role in the country's economic recovery. The government is expected to provide more incentives and to move toward less government monopoly in production and distribution. Government policies are as follows:

- To provide better support prices in order to offset high cost of agricultural inputs and to encourage private investors to venture into the agricultural sector.
- To provide financial assistance to increase local production of livestock feeds such as soya bean, yellow corn, cassava, azolla and sweet potatoes in

6. Government Policies Affecting Grains and Agriculture cont'd

order to reduce imports (US\$72 million). The Ministry of Agriculture is expected to release about US\$25 million for financial assistance to yellow corn production for livestock feed.

- To encourage consumers to change their consumption habits to food grown locally to minimize imports.

7. Canadian Grain Marketing Prospects

Projection of grain import needs for 1985-90 are not available. 1984 projection for wheat imports is 787,000 tonnes. It is worthy to note that Filipinos have traditionally consumed high levels of wheat flour products such as "PAN DE SAL" which maintains demand at a high level. Also, difficulties in rice production and the high population growth rate should increase the demand for wheat in the longer term.

Canada could increase wheat sales by providing credit terms competitive to US and Australian offers. NFA received commercial credit from the U.S. Commodity Credit Corp. for 584,000 tonnes of wheat in the first semester of 1984. For livestock feeds, canola meal may be a possible substitute for soya meal because of its price, protein content and low erucic acid and glucosinate.

Marketing possibilities for Canadian special crops are not foreseen. The Philippines have a limited demand for special crops which is largely provided for under US food aid.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	8	10	1,200	913
Compound Feed Mills	10	12	942	885
Malt Houses				
Oilseed Crushers	57	57	13	

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Manila	106	
Hondagua	20	
Iligan	16	
Lapu-Lapu	30	
Batangas	16	
Total Capacity	188	



## 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.

### III. OILSEEDS

#### 1. Import Policy

Import Tariffs: (i) Oilseeds - Soybean 10%, other 30%  
(ii) Crude oil - Soy, linseed 10%, palm 20%, other 40%  
(iii) Oilseed meal - Soy, rape, sun 10%  
(iv) Refined oil - Same as crude

Importation procedure and structure: Prior to importation, private importers of oilseeds must acquire an import license from the National Food Authority (NFA), except for soya meal which NFA solely imports.

2. Additional Factors: Due to the country's foreign exchange scarcity, credit facilities will be needed.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Principal Sources of Imports</u>
Copra	2,096		
Soya	7	31	U.S.A.
TOTAL	2,103	31	

<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u>		<u>Principal Sources of Imports</u>
		<u>(Crude)</u>	<u>(Refined)</u>	
Coconut	1,273			
Soya	8	7	4	USA, Japan, Singapore
Linseed		0.5	2	Netherlands, U.K. Japan
Palm		0.6	20	Malaysia
TOTAL	1,281	8.1	26	

<u>Meal</u>	<u>Production</u>	<u>Imports</u>	<u>Principal Source of Meal Imports</u>	
Coconut	679			
Soya	30	275	U.S.A.	Brazil
Rape or Colza		5	India	
TOTAL	709	280		

#### 4. Number and Capacity of oilseed crushing plants:

	<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
	54	Coconut	11,407
	2	Soya bean	550
	1	Palm oil	850
TOTAL	57		12,807

5. Export Policy

- a) Export Assistance or control measures: Copra export has been banned since September 1982. The government has been directing the coconut industry to produce semi-finished or finished coconut products. Government has been assisting the coconut industry through product research and diversification.
- b) Export procedure and structure: Coconut products are exported by private firms. However, prior to accepting export orders, private exporters have to coordinate with United Coconut Oil Mills Inc. (UNICOM). UNICOM, a private firm, was assigned by the President to centralize export marketing activities.
6. Additional Factors: Due to improved world price, coconut export receipts from January to May 1984 increased by 68% compared to same period last year, even though production in 1984 was 22.5% lower than in 1983. Affected by severe drought in 1982-83, the 1984 coconut production is still expected to decline by 29%. Coconut experts believe that it will take about 1½-2 years for coconut trees to return to normal production.

7. Exports of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed Type</u>	<u>Production</u>	<u>Exports</u>	<u>Destination</u>
Copra	2,096	12*	Europe
<u>Oils</u> Coconut	1,273	1,020	USA, Europe, Japan and PRC
<u>Meals</u> Coconut	679	616	Europe

\* Export commitments prior to export ban in September 1982

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM (Data given refer to calendar year 1983 and (1982)

SUPPLY - thousands of tonnes - previous year in brackets

	Production	Carry-in, Jan. 1	Imports	Total Supply
Wheat				
Durum wheat		60 (110)	795 (875)	855 (985)
Flour/Semolina				
TOTAL		60 (110)	795 (875)	855 (985)

DISPOSITION - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	845 (925)					10 (60)	855 (985)
Durum wheat							
Flour Semolina							
TOTAL	845 (925)					10 (60)	855 (985)

IMPORT TRADE - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	ATI Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash						(787)
Commercial Credit						(88)
Aid, concessional(CCC)	795					795
credit, etc.						(88)

FLOUR (including semolina)

Cash/comm. credit						
Aid, concessional						
TOTAL	795					795 (875)



(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	3,368 (3,126)	104 (172)	321 (406)	3,793 (3,704)
Barley				
Sorghum				
Oats				
Rye				
TOTAL	3,368 (3,126)	104 (172)	321 (406)	3,793 (3,704)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption			Exports	Carry-out	Total
	Human	Animal	Other (seed, waste)			
Corn	1,397 (1,479)	1,985 (1,893)	66 (63)	174 (104)	3,793 (3,704)	
Barley						
Sorghum						
Oats						
Rye						
TOTAL	1,397 (1,479)	1,985 (1,893)	66 (63)	174 (104)	3,793 (3,704)	

Industrial Use: Cooking oil

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Corn		186 (311)			135 (95)	321 (406)
Barley						
Sorghum						
Oats						
Rye						
TOTAL		186 (311)			135 (95)	321 (406)

Principal "Others": Thailand

## S I N G A P O R E

Economic classification:	Industrial Market	economy
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$ 5,500	year 1982/83
Annual per capita GNP	US\$ 5,200	year 1982/83
Average annual growth 1960-80	5.6 %	
Annual inflation rate 1970-80	8.5 %	
Annual inflation rate (current)	3.0 %	
Volume of imports	28 billion US\$	year 1983
Of which food	8.0 %	year 1983
Of which fuels	31.0 %	year 1983
Principal foreign exchange earning export:	Processing Raw Materials	
Debt service as % of GNP	2.5 %	year 1983
Debt service as % of exports	2.0 %	year 1983
Population	2.5 million	year 1983
Annual population growth	1.2 %	years 1980-1984

### I. GENERAL INFORMATION

#### 1. Foreign Exchange Situation

In spite of great fluctuation in major world currencies for the past twelve months, Singapore dollar remains strong and stable. The present exchange rate (August) is Cdn \$1.00 = SIN\$1.60.

There will be priorities for imports of food and agricultural inputs.

Singapore is considered as a developed country and is presently not receiving aid from other countries.

#### 2. Fertilizer Situation

Singapore is not a grain producing country.

#### 3. Import Mechanism

Grain trading companies and grain millers are the importers of grains in Singapore.

#### 4. Government Policies Affecting Grain and Agriculture

Owing to the recent Government's intention to phase out all livestock farms due to pollution and economic factors, the Government encourages its people to consume imported frozen meats.

## 5. Canadian Grain Marketing Prospects

Locally obtainable projections to 1985 or 1990: Nil

Marketing initiatives: Price competitiveness is the main factor.

Marketing possibilities for Canadian "special crops": Yes

Local millers do not require high quality Canadian wheat and therefore source lower priced wheat to suit their purpose.

## 6. Processing Facilities

Year: 1983

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	3	3		70%-80% of capacity

## II. MALT AND MALTING BARLEY

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

	<u>thousands of tonnes</u>	<u>Principal Suppliers</u>
Malt*	16 (16)	Australia and France

\* Source: United Nations/EEC statistics

2. Additional Information

Barley malt is not produced in Singapore. The annual per capita beer consumption has increased, mainly due to the younger generation's preference for beer rather than liquor. In 1983, Singapore imported over 13 million litres of beer compared to 11 million litres in 1982. The imports, mainly from China, Malaysia and Japan, are more than offset by exports of beer to a variety of markets.

There is market potential for Canadian malt in this market provided prices are competitive, although geographic proximity gives Australia a strong advantage.

## III. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	NIL		200 (132)	200 (132)
Durum wheat	NIL			
Flour/Semolina	NIL		47 (66)	47 (66)
TOTAL	NIL		247 (198)	247 (194)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat					64 (37)		- 342 -
Durum/Wheat					8 (5)		
Flour Semolina					72 (42)		247 (194)
TOTAL							

Export Destination: Hong kong, Democratic Kampuchea, Malaysia, Saudi Arabia

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
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## WHEAT (including durum)

Cash	46	9 (14)	76 (121)	9	59 (1)	200 (136)
Commercial Credit						
Aid, concessional						
credit, etc.						

## FLOUR (including semolina)

Cash/comm. credit	4			2	41 (5)	47 (5)
Aid, concessional						
TOTAL	46	13 (14)	76 (121)	11	100 (6)	247 (141)

Principal "Others": Japan.



## (B) COARSE GRAINS

SUPPLY 1982/83 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
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Corn				
Barley				
Sorghum				
Oats				
Rye				
TOTAL				

DISPOSITION 1982/83 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					

Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL							

TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina	EEC		All Others
Corn		166 (48)	329 (38)		43	388 (16)	926 (102)
Barley		119 (206)	224 (600)		2 (1)	35 (49)	379
Sorghum			30 (14)			2 (4)	32
Oats			1 (1)				1
Rye	5					5	
TOTAL	5	285 (254)	584 (653)		45 (1)	425 (69)	1,345 (102)

Principal "Others": People's Republic of China, Malaysia, Thailand

1983 Government import statistics include corn under SITC 0481200 prepared food of cereals, swelled or roasted.

## THAILAND

Economic classification: Middle Income economy		
Oil exporter or importer (net): Importer		
Annual per capita income:	US\$642	year 1983
Annual per capita GNP	US\$791	year 1983
Average annual growth 1960-80	4.7 %	
Annual inflation rate 1970-80	9.9 %	
Annual inflation rate (current)	3.8 %	
Volume of imports	8 billion US\$	year 1983
Of which food	2.7 %	year 1983
Of which fuels	25.5 %	year 1983
Principal foreign exchange earning export: Agriculture		
Debt service as % of GNP	23.6 %	year 1983
Debt service as % of exports	19.5 %	year 1983
Population	49.2 million	year 1983
Annual population growth	2.0 %	year 1983
Annual Consumption:		
Flour	191,923 tonnes or 4 kg/capita	year 1983
Meat	800,000 tonnes or 16 kg/capita	year 1983
Vegetable Oil	120,000 tonnes or 2.5 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

According to the Ministry of Agriculture and Cooperatives, rice production (paddy) for 1983/84 season amounted to 18.5 million tonnes.

#### 2. Foreign Exchange Situation

International reserves for December 1983 stood at US\$2,525 million.

#### 3. Fertilizer Situation

Nitrogen, phosphate and potash are the major fertilizer ingredients used. Demand for fertilizer is between 150,000 - 200,000 tonnes.

#### 4. Import Mechanism

All flour mills are owned by private companies. Normal import procedure applies.

#### 5. Government Policies Affecting Grain and Agriculture

Thailand still places irrigation projects high on its list.

6. Canadian Grain Marketing Prospects

Export opportunities for Canadian special crops are relatively limited in the Thai market.

7. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	4	4	214	165
Compound Feed Mills				
Malt Houses*				
Oilseed Crushers	14	14	190	100

\*One or more believed planned. Details not available.

8. Storage and Throughput Capacity

Grain Import Capacity by Port

<u>Name of Port</u>	Year 1983	
	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Port of Bangkok	No grain storage facility available at port	

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1983/84 estimate: None
2. Imports, Calendar year 1983 estimated, previous year in brackets:

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	30.0 (20.6)	Germany, Austria Australia, Denmark, U.K.

3. Additional Information

Change in brewery capacity: Production of beer for 1983 was approximately 145 million litres. It is expected that Thailand will double beer production in one or two years.

Malt exports: None

Trend in beer consumption: Annual per capita beer consumption in 1983/84 was 2.9 litres, a slight increase over last year.

Market potential for Canadian malt and/or malting barley: Market potential does exist in this market.

### III. OILSEEDS

#### 1. Import Policy

Import tariffs: (i) Oilseeds - import ban  
(ii) Crude oil - Baht 1.45/litre  
(iii) Oilseed meal - 6.6% of CIF value  
(iv) Refined oil - Baht 2.20/litre  
(US\$1 = Baht 23.05)

Imports of all oilseeds are controlled by the Government.

Importation procedure and structure: Refiners are allowed to import soya bean oil (import permit required) and palm oil (on a quota basis).

2. Additional factors: The Thai government intends to put a restriction on crude oil imports and encourages refiners to utilize raw materials which are available locally.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Seed Type</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean	113	4	113	China
Rice bran	1,800		800	
Coconut	1,067	8	1,067	Philippines
Groundnuts	145	-	100	
Others*	310	-	20	
TOTAL	3,435.0	12	2,100	
<u>Oil Type</u>	<u>Production</u>	<u>Imports of Oils</u>		
		(Crude)	(Refined)	
Vegetable oil	190	25	-	Soyabean oil - USA Palm oil - Malaysia

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/24h)</u>
14	Soybean ) Cottonseed ) Kapok seed )	190.0

#### 5. Export Policy

Local production of oilseeds is not yet sufficient for domestic demand. There are no exports of oilseeds.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat*				
Durum wheat	30 (30)	157 (106.9)	187 (136.9)	
Flour/Semolina		13 (20.8)	13 (20.8)	
		49.5 (15.9)	49.5 (15.9)	
TOTAL	30 (30)	219.5 (143.6)	249.5 (173.6)	

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	157 (106.9)					30 (30)	187 (136.9)
Durum wheat	13 (20.8)					13 (20.8)	13 (20.8)
Flour Semolina	49.5 (15.9)					49.5 (15.9)	49.5 (15.9)
TOTAL	219.5 (143.6)					30 (30)	249.5 (173.6)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
WHEAT (including durum)						
Cash		123.5 (79.6)	45.5 (48.1)			170.0 (127.7)
FLOUR (including semolina)						
Cash/comm. credit	0.4 (0.6)	8.8 (0.6)	0.3 (0.3)			40.0 (14.4)
TOTAL	0.4 (0.6)	132.3 (80.2)	45.8 (48.4)			219.5 (243.6)

Principal Others: Japan (38.7 thousand tons)  
Malaysia (1.1 thousand tons)

Thailand

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	3,880 (4,200)			3,880 (4,200)
Barley				
Sorghum	236 (320)		NIL	236 (320)
Oats				
Rye				
<b>TOTAL</b>	<b>4,116 (4,520)</b>			<b>4,116 (4,520)</b>

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Corn		1,246 (1,500)			2,634 (2,700)		3,880 (4,200)
Barley							
Sorghum		11 (40)			225 (280)		236 (320)
Oats							
Rye							
<b>TOTAL</b>		<b>1,257 (1,540)</b>			<b>2,859 (2,980)</b>		<b>4,116 (4,520)</b>

Export Destination: Malaysia, Singapore, Japan

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>TOTAL IMPORTS</u>		
	<u>Canada</u>	<u>U.S.A.</u>	<u>U.S.A. Australia Argentina EEC All Others</u>

Corn  
Barley  
Sorghum  
Oats  
Rye  
**TOTAL**

- NIL -



PART VIII  
AFRICA





## C A M E R O O N

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Oil exporter	
Annual per capita income:	US\$ 880	year 1983
Average annual growth 1960-80	7.0%	
Annual inflation rate 1970-80	12.0%	
Annual inflation rate (current)	17.0%	
Volume of imports	6.62 billion US\$	year 1983
Of which food	21.0%	year 1983
Of which fuels	27.0%	year 1983
Principal foreign exchange earning export:	Oil and agriculture	
Debt service as % of exports	9.0%	year 1983
Population	9 million	year 1983
Annual population growth	2.4%	year 1984
Annual consumption:		
Flour	133,214 tonnes or 75 kg/capita	year 1983

NOTE: United Nations and other data were used to complete this part of the report.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1984 crop has been seriously affected by the severe drought of 1983. Wheat is produced in small quantities on an experimental scale. Rice acreage remains unchanged from last year when it totalled 17,000 ha.

Maize production in 1983 was estimated at 425 thousand tonnes, sorghum and millet at 360,000 tonnes. There is no current information available on oilseeds. However, annual production of groundnuts is about 170,000 tonnes and cottonseed 80,000 tonnes.

#### 2. Foreign Exchange Situation

Oil and agricultural exports have helped to give the country an average annual growth rate of 7% between 1960-1980. Food exports include grains, vegetables and livestock products to neighboring countries. However, the severe drought in 1983 was expected to reduce agricultural exports.

Cameroon is not expected to be a recipient of international aid.

### 3. Fertilizer Situation

Volume of imports about 120,000 tonnes in 1983 made up as follows:

37%	ammonium sulphate	7.0%	miscellaneous complex
14.1%	potash	17.0%	20-10-10 and 18-9-9
6.4%	urea	13.0%	specialized fertilizer for cotton
2.4%	magesium	5.1%	Others

### 4. Import Mechanism

Wheat flour importation is regulated through import permit requirement. Private importers are approved by government. Government agencies enter the market in cases of extreme shortage.

No changes are forecast, but, due to the recent drought, a significant increase in grain imports may be expected, which will lead the government to relax import restrictions and simplify procedures.

### 5. Grain Industry Infrastructure

Existing Plant-Mill: The Societe Camerounaise de Minoterie (Cameroon Milling Co.) specializes in processing soft wheat from France. Capacity: 90,000 tonnes/year

Planned Mill: Soci t  Africaine de Minoterie mill will specialize in processing durum wheat for durum semolina and animal feed.

Parastatal Facilities: The Cameroon Grain Agency, the inventory regulating body, has a number of storage elevators. Their capacity is estimated at close to 25,000 tonnes (1981 figure).

### 6. Government Policies Affecting Grain and Agriculture

The grain consumption pattern changes suggests increased durum imports.

### 7. Canadian Grain Marketing Prospects

There are no locally obtainable projections to 1985 or 1990.

Marketing initiatives: Increased contacts between Canadian maltsters and existing breweries.

8. Processing Facilities

Year: 1984

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	2	2	150	60
Compound Feed Mills	4	4		
Malt Houses				
Oilseed Crushers	1			

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type: Not produced.

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

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
Malt	64	(64)	France, Ireland, U.K., West Germany
Malting barley	--	--	

3. Additional Information

Annual per capita beer consumption: Increasing. In 1982 it was 39.7 litre per capita. In 1983 it rose to 43.9 litres/capita. Beer production is also increasing. In 1984 it was 3.4 million hl and in 1983 it increased to 3.85 million hl.

Market potential for malt/malting barley: There is a market here for high quality barley malt at promotional prices. Malt imports have increased over 50% since 1978. The market potential for Canadian malt is 10,000 to 15,000 tonnes if prices are competitive. Increased promotional work with existing and planned breweries would help Canadian maltsters interested in this market.

III. OILSEEDS

Import Policy

Import tariffs: (i) Oilseeds - 37.50%  
(ii) Crude oil - 55%  
(iii) Refined oil - 55%

Importation procedure and structure: Private Importers by licensing.



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	(0.9)		78 (58)	78 (59)
Durum wheat				
Flour/Semolina	61 (48)		75 (70)	137 (118)
TOTAL	61 (49)		154 (129)	215 (177)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat							
Durum wheat							
Flour Semolina	133				4		137

Export destination: Chad, C.A.R., Gabon

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS

WHEAT (including durum)

Cash  
Commercial Credit  
Aid, concessional  
credit, etc.

FLOUR (including semolina)

Cash/comm. credit  
Aid, concessional:

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	424,995 (410,784)			424,995 (410,684)
Barley Malt				
Sorghum	351,000			351,000
Oats				
Rye				
TOTAL	775,995			775,995

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Corn							
Barley							
Sorghum							
Oats							
Rye							
TOTAL					100		

Export destination: Chad, Gabon, Nigeria

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>ATI</u>	<u>Others</u>	<u>TOTAL IMPORTS</u>

Corn  
Barley  
Sorghum  
Oats  
Rye  
TOTAL

## IVORY COAST

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$ 1,016	year 1983
Annual per capita GNP	US\$ 1,100	year 1982
Average annual growth 1960-80	7.0%	
Annual inflation rate 1970-80	10.0%	
Annual inflation rate (current)	17.0%	
Volume of imports	1.76 billion US\$	year 1983
Of which food	25%	year 1983
Of which fuels	18.6%	year 1983
Principal foreign exchange earning export:	coffee, cocoa, wood	
Debt service as % of GNP	75.0 %	year 1982
Debt service as % of exports	40.0 %	year 1983
Population	9.0 million	year 1983
Annual population growth	4.5%	year 1983
Annual Consumption:		
Flour	185,000 tonnes or 20.5 kg/capita	year 1983
Meat	135,000 tonnes or 15.0 kg/capita	year 1983
Vegetable Oil	120,000 tonnes or 13.3 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Prospects for the 1984 crop are better than 1983, a year when the Ivory Coast experienced unprecedented drought and bush fires, leading to the loss of 50% of the crops. This year no official figure has yet been announced in regard to grains, however, a shortfall is forecast for paddy rice (56,900 tonnes) and corn (101,000 tonnes). Wheat is not produced in this country.

#### 2. Foreign Exchange Situation

Foreign exchange and outlook: a) balance of payments deficit for many years. b) money situation linked to fluctuations of the French franc in relation to the U.S. dollar and other currencies, as well as the sale of coffee, cocoa, and wood, the main sources of foreign exchange. c) Priority is to be given to food production within the framework of the government's policy of self-sufficiency in food. This could result in progressive curbs on imports.

#### 3. Fertilizer Situation

The Ivory Coast has only one company producing fertilizers (SIVENG) with a capacity reaching 150,000 tonnes per year. This company manufactures complex granulated fertilizers of ammonium sulphate. The Ivory Coast market went from 70,000 tonnes in 1981 to 40,000 tonnes in 1983. This reduction resulted from difficulties in maintaining the policy of subsidies for fertilizers to growers.

#### 4. Import Mechanism

Trade with other countries is limited to persons holding an import permit, issued by the bureau of foreign trade. Permits are issued subject to presentation of (a) a certificate from the Registry of Commerce (issued by the tribunal of commerce); and (b) an affidavit from the Import Bureau confirming payment for the imports corresponding to the fiscal year in question.

#### 5. Grain Industry Infrastructure

There are two flour mills in the Ivory Coast, Les Grands Moulins d'Abidjan (GMA) with a capacity of 165,000 tonnes of flour, and Les Moulins du Sud-Ouest with a capacity of 40,000 tonnes. The current trend to substitute flours based on manioc and corn in place of wheat flour could increase in the future.

#### 6. Government Policies Affecting Grain and Agriculture

The policy of self-sufficiency in food decided in 1981 could in the medium term, effect imports of grains (rice and corn) and meats and favour an increase in local production of wheat, now being grown on an experimental basis. Under this policy the country would continue to import commodities which cannot be produced in quantity locally.

The only handicaps involved in the importation of Canadian grains are the distance between Canada and the Ivory Coast and the rather high exchange rate of the dollar compared to the franc.

#### 7. Canadian Grain Marketing Prospects

Import Projections to 1985 - 1990: 1) rice 569,000 tonnes in 1985 - 861,000 tonnes in 1990; 2) corn 101,000 tonnes in 1985 - 230,000 tonnes in 1990.

Marketing initiatives to increase Canadian sales: 1) establish direct supply links, if possible, between Canada and the Ivory Coast; 2) establish a Canadian bank in the Ivory Coast to facilitate trade; and 3) promote Canadian soft wheat in the Ivory Coast through meetings and periodic missions of businessmen of both countries.

Marketing possibilities for Canadian special crops: These products are not yet familiar to the local general public, therefore they are not part of their eating habits. Their introduction to the market would require a strong marketing effort.



8. Processing Facilities

Year: 1984

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	2	2	190	185
Compound Feed Mills	5	5		
Malt Houses	0	0		
Oilseed Crushers	2	2		

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1984

-- thousands of tonnes --

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Abidjan	30	220
San Pedro	N/A	25

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type: NIL
2. Imports, Calendar year 1983 estimated, previous year in brackets:

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt*	10.4 (22)	EEC
Malting Barley	0.5	EEC

\* EEC export statistics

3. Additional Information

Malt Capacity: There are no malting companies in the Ivory Coast. All malt requirements are imported. Imports rose by 10% on average between 1970 and 1980.

Trend in beer consumption: Per capita beer consumption is 16.1 litres. Current consumption is down about 15% due to the general decrease in purchasing power (the Ivory Coast is in the middle of severe economic problems).

Market potential for Canadian malt and/or malting barley: There is good market potential for barley malt. Developments will be linked to beer consumption which is expected to increase as a result of economic recovery and population growth.

### III. OILSEEDS

#### 1. Import Policy:

Import Tariffs: (i) Oilseeds - Taxes 10%; duty 5%, VAT 0% + .06%  
 (ii) Crude oil - Taxes 28% (15%)\*; duty 15%, VAT 25% + .06%  
 (iii) Oilseed Meal - Taxes 15%; duty 5%, VAT 25% + .06%  
 (iv) Refined Oil - Taxes 28% (15%)\*; duty 15%, VAT 25% + .06%

\* Taxes - 28% if packaged in containers less than 5 litres for the retail market  
 - 15% if not packaged for retail

Importation procedure and structure: Importing is done by private importers who require authorization from the bureau of foreign trade.

#### 2. Supply of oilseeds and products by type, thousands of tonnes:

Base year 1983

<u>Oil</u>	<u>Production</u>	<u>Imports of oils</u>		<u>Principal Sources of Imports</u>
		(crude)	(refined)	
peanut			.017	Senegal
Palm	147		.002	Nigeria
Olive			.500	France, Tunisia
Soya			.315	EEC, U.S.A.
Rapeseed			3.0	EEC, U.S.A.
TOTAL	147		3.834	
<u>Meal Type</u>		<u>Imports</u>		
Various types		3		EEC, Brazil

#### 3. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tones/24h)</u>
	Cotton	
	Palm	

#### 4. Export Policy

Export assistance or control measures: Under these measures permission to export certain oilseeds (palm kernel, oil palm) can be withheld. The others are under control of the bureau of foreign trade and customs.

Export procedure and structure: By private exporters after agreement of above-mentioned services.

Additional factors: The Ivory Coast is going to equip a new processing plant for oilseeds. Also we think the volume of exports of these products is diminishing, at least as far as oil palms and cotton are concerned.

III. OILSEEDS cont'd

5. Exports of oilseeds and products by type, thousands of tonnes:

Base year 1983

<u>Oilseeds</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Karite		20	EEC, Japan, Scandanavian Countries
Oil palm		4	
Cotton & Sesame		1	
TOTAL		25	
<u>Oils</u>			
Crude palm	147	30	EEC (24) *CEDEAO (6)
Refined palm		24	CEDEAO
Coconut	19	17	EEC
Oil palm & karite		14	
TOTAL		85	

\* CEDEAO - Economic Community of the States of South Africa

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat				
Durum wheat			245 (215)	245 (215)
Flour/Semolina	185 (165)		4.1* (7.5)	189.1 (172.5)
TOTAL	185 (165)		245 (222.5)	434.1 (387.5)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	245 (215)						245 (215)
Durum wheat	189 (172.5)						189 (172.5)
Flour							
TOTAL	434 (387.5)						434 (387.5)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	ALL Others	TOTAL IMPORTS
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WHEAT (including durum)

Cash					235 (205)	10 (10)	245 (215)
Commercial Credit							
Aid, concessional							
credit, etc.							

FLOUR (including semolina)

Cash/comm. credit	1.3 (1.2)	0.6** (2.1)			2.1 (4.1)	0.1 (0.3)	4.1 (7.5)
Aid, concessional:							
TOTAL	1.3 (1.2)	0.6 (2.1)			237 (209)	10.1 (10.3)	249 (222.5)

\* This figure includes the import statistics for wheat flour and meslin, none of which is flour and semolina.  
 \*\* Only flour and semolina.



## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	217 (200)			
Barley		3 (6)		220 (206)
Sorghum	37 (15)		2 (2.5)	37 (17.5)
Oats				
Rye				
TOTAL	254 (215)	5 (8.5)		257 (223.5)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	215 (136)	110 (70)					325* (206)
Barley							
Sorghum	37 (17.5)		0.05				37 (17.5)
Oats							
Rye							
TOTAL	252 (153.5)	110 (70)	0.05				362 (223.5)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	All Others
Corn	.016 (.037)	3.14 (3.179)			.02 (.007)	(2.77)	3.1 (6)
Barley					.05 (.043)		.05 (.043)
Sorghum						(2.5)	(2.47)
Oats					.06 (.041)		.06 (.041)
Rye							
TOTAL	.016 (.037)	3.14 (3.179)			.13 (.091)	(5.2)	3.2 (8.6)

\* (325,000 tonnes) This figure corresponds to the total requirement of the Ivory Coast market not covering current resources. There is in effect a deficit for corn of 105,000 tonnes forecast for this year.

Principal Others: Thailand, Israel,

## K E N Y A

Economic classification:	Low Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$419	year 1980
Annual per capita GNP	US\$420	year 1980
Average annual growth 1960-80	2.7 %	
Annual inflation rate 1970-80	11.0 %	
Annual inflation rate (current)	14.6 %	
Volume of imports	2.305 billion US\$	year 1980
Of which food	4 %	year 1980
Of which fuels	3.3 %	year 1980
Principal foreign exchange earning export:	Petroleum	
Debt service as % of GNP	21.5 %	year 1982
Debt service as % of exports	12.2 %	year 1981
Population	18 million	year 1983
Annual population growth	4.1 %	years 1980-2000
Annual Consumption:		
Flour	242,800 tonnes	year 1982

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The 1982 maize harvest was good enough to enable the National Cereals and Produce Board (NCPB) to build up sizeable reserves. However, concern over lack of storage space led to exports through WFP of 150,000 tonnes of maize during 1983/84. The tardiness of 1983 long rains (March/May) resulted in delayed planting in many areas leading to a drop in production from 26.1M bags in 1982/83 to 24.2M bags during 1983/84. Several areas which are normally self-sufficient in maize, suffered a severe drought and became net importers. As a consequence the area under maize cultivation dropped from 1.5M hectares to 1.4M hectares. Despite the deficit in overall production, purchases made by the National Cereals and produce Board appeared to rise during 1983, possibly due to increased producer price levels.

Wheat production increased slightly during 1983 from 234,700 tonnes to 242,300 tonnes, although it failed to keep pace with the continued increase in demand and shortfalls were met through imports. Although efforts are being made to intensify production through expansion of acreage and increased producer prices, clearly population pressures will cause increasing fragmentation of land, providing a significant restraint on production.

The outlook for both wheat and maize for 1984/85 is extremely bleak. The failure of the 1984 long rains in the major food producing areas, has extended the drought situation. Although there appears to be adequate stocks of maize in the NCPB stores to last until the next harvest, the Government has already taken steps to import 1.5M tons of both maize and wheat, both commercially and on a concessional basis.

## 2. Foreign Exchange Situation

Kenya's foreign exchange reserves made a major recovery in 1983. This improvement reflects higher export prices for coffee and tea, combined with a continued restraint on imports. However, the likelihood of widespread crop failure, and the necessity of importing large quantities of food will once again place a heavy burden on the already strained economy.

## 3. Fertilizer Situation

Kenya consumes about 40-50,000 tonnes TSP MAP and DAP, of this about 16-20,000 tonnes is supplied through US aid. The whole fertilizer marketing and transportation structure combined with the unfavourable relationship between cost and value of production seems to discourage the wider usage of fertilizers.

## 4. Import Mechanism

All grain imports are officially through the NCPB, a parastatal body of Government, answerable to the Ministry of Agriculture. Imports on concessional terms are secured through activity at political levels.

## 5. Grain Industry Infrastructure

In addition to bulk handling facilities in the major towns the NCPB has numerous conventional stores in producing and consuming areas. Most NCPB stores are served by railway. Many private warehouses are also available to the Board for leasing if required. The Government has been re-examining its storage strategies since the previous food shortage in 1980, and a World Bank financed study of existing and future storage needs was released in 1982.

## 6. Government Policies Affecting Grain and Agriculture

Producer price increases acted as an incentive to increase production. The National Food Policy launched in 1980 which aims at self-sufficiency in food production will be revised to guide future requirements through more effective land utilization, input and extension services, and initiatives to increase district level participation and responsibilities through decentralization of financial management and planning.

Shortfalls in production of maize and wheat will continue to be met by imports mainly on concessional terms, but in times of severe shortage there will be imports on a commercial basis, through Government tender.



7. Canadian Grain Marketing Prospects

Projections of national grain imports needs to 1985 or 1990 are unobtainable. Changeable and unpredictable weather and economic conditions would preclude the publication of such projections.

In times of severe shortage such as the country is experiencing at the present time, there is potential for grain sales on a commercial basis and the NCPB WILL issue tenders directly to the Canadian Wheat Board. However, the majority of the necessary food imports will be met through aid and concessionary financing.

There is very little market potential for Canadian "special crops" and limited demand can be met through local production.

The expense of sponsoring a grain industry mission to Canada would not justify the benefit. On the other hand it might be useful to invite officials of the National Cereals and Produce Board to participate in a technical seminar. This would assist in efforts to overcome Kenya's serious grain handling and storage problems.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	7	12	n/a	
Compound Feed Mills	7			
Malt Houses	1			
Oilseed Crushers	1			

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Mombasa	53	



## II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					30
Suitable for malting					25

### 2. Imports, Calendar year 1983: NIL

### 3. Additional Information

Change in malting capacity: Malting capacity, depending on forecast projections, will remain static. Kenya Breweries maintain a fully integrated self-financed barley growing scheme based on a contract system with local farmers. Under the scheme, barley production could reach 38,000 tonnes which is adequate for current barley malt production but well under total required when malt plant operating at capacity of 52,000 tonnes.

Malt exports: A small amount of malt exported to Uganda. Otherwise most domestic malt consumed internally.

Trend in beer consumption: Despite increased pricing structure, upturn in economy has served to increase overall beer consumption. Kenya Breweries have opened a new plant in Kisumu which relieves production pressures on two breweries, in Mombasa and Nairobi.

Market potential for Canadian malt and/or malting barley: The prevailing drought situation is expected to affect the next harvest in January, 1985 in which case the shortfall will be covered by imports of barley.

## III. OILSEEDS

### Import Policy

Importation procedure and structure: Very small amounts of rapeseed imported from time to time by Unilever Company for their subsidiary, E.A. Industries. This is solely for planting purposes, as E.A. Industries are in their third year of producing oilseed crops through a self-financed rapeseed and sunflower growing scheme based on a contract system with local farmers. The acreage under seed has expanded 40% over last year.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	251 (247)	(72)	114 (117)	365 (364)
Durum wheat				
Flour/Semolina				
TOTAL	251 (247)	(72)	114 (117)	365 (364)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>			<u>(seed, waste)</u>			
Wheat	365 (364)						365 (364)
Durum wheat							
Flour Semolina							
TOTAL	365 (364)						365 (364)

IMPORT TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

<u>ORIGIN</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>ALL Others</u>	<u>TOTAL IMPORTS</u>
Canada						

WHEAT (including durum)

Cash						
Commercial Credit						
Aid, concessional	68.7 (66)	(20)		16 (14)	15.5 (17)	100 (117)
credit, etc.						

FLOUR (including semolina)

Cash/comm. credit						14
Aid, concessional:						
TOTAL	68.7 (66)	14	16	15.5		114 (117)

Principal Others: Germany, Japan, FFH

Kenya

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn	637 (571)			637 (571)
Barley	30 (45)			30 (45)
Sorghum				
Oats				
Rye				
TOTAL	667 (616)			667 (616)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>	<u>Animal</u>	<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
Corn	637 (571)						637 (571)
Barley	30 (45)						30 (45)
Sorghum							
Oats							
Rye							
TOTAL	667 (616)						667 (616)

M A L A W I

Economic classification:	Low Income economy		
Oil exporter or importer (net):	Importer		
Annual per capita income:	US\$230		year 1982
Annual per capita GNP	US\$200		year 1982
Average annual growth 1960-80	3.2%		
Annual inflation rate 1970-80	9.4		
Annual inflation rate (current)	18.3%		
Volume of imports	0.214 billion US\$		year 1982
Of which food	6.0%		year 1982
Of which fuels	17.0%		year 1982
Principal foreign exchange earning export:	Agriculture, mainly tobacco		
Debt service as % of GNP	8.5%		year 1983
Debt service as % of exports	22.2%		year 1983
Population	6.05 million		year 1980
Annual population growth	2.9%		years 1966-1977
Annual Consumption:			
Flour	27,600 tonnes or	4.6 kg/capita	year 1983
Meat	45,375 tonnes or	7.5 kg/capita	year 1983
Vegetable Oil	4,542 tonnes or	.08kg/capita	year 1983

I. GENERAL INFORMATION

1. Crop Situation and Outlook

Malawi has a predominant agricultural economy. Ninety percent of the population reside in rural areas engaged in subsistence farming while 90 percent of all exports are agricultural products. Tobacco, tea and sugar exports alone realized US\$133.3 million and US\$154.9 million in 1981 and 1982 out of total exports of US\$171.7 million and US\$177.7 million respectively.

The difficulty in obtaining statistical information on Malawi food products is that a great percentage of the crops grown are consumed by individual producers. Most production does not enter the cash economy unless it is surplus production which is sold to the parastatal marketing agency ADMARC. The volume of ADMARC's purchases is therefore a reliable measurement of the success or failure of the maize crop, relative to domestic consumption requirements. In 1982 maize prices increased by 67% which accounted for a sharp increase in production and sales to the government agency.

Information available on domestic crops as follows:

<u>Wheat</u>	<u>Tonnes</u>
Domestic production	3,000
Imports	25,000 (mainly from South Africa)

If proposed irrigated wheat projects materialize domestic wheat production may reach 20,000 tonnes per annum by 1990.



Corn

Amounts sold to ADMARC were:

<u>Year</u>	<u>Tonnes</u>	
1981	136,647	(estimated total harvest 2 million tonnes)
1982	246,062	(similar estimate of 1981)
1983	244,899	(first 11 months of 1983)

Sales by ADMARC of maize amounted to 95,821 and 84,212 tonnes respectively in 1981 and 1982.

The 1981 bumper maize crop, effectively duplicated in 1982/83, restored Malawi to self-sufficiency. Maize exports totalling an estimated 150,000 tonnes are expected to be made in 1984 to neighbouring drought affected countries, mainly Zimbabwe, to where 32,500 tonnes have already been despatched. These are Malawi's first exports of maize - the other recipient is Zambia.

Other Crops

	<u>Sales to ADMARC</u>		<u>Export</u>	
	1981	1982	By Value US\$ fob	
	- - - tonnes - - -		1981	1982
			000\$	- - -
Groundnuts	19,494	10,432	7,000	3,200
Seed Cotton	21,739	14,800	980	222
Rice	14,682	12,543	860	780
Pulses	7,202	5,791	-	-

2. Grain Industry Infrastructure

Local milling capacity is down to 11,500 tonnes per annum due to poor maintenance and repairs. Two agencies, Grain Milling and Press Bakeries import about 8,000 tonnes of grain and 12,000 tonnes of flour annually from South Africa. There are no bulk handling facilities (all imports in bags) and storage capacity is only 9,000 tonnes.

Due to bandit activity in Mozambique, and the poor condition of the rail link between the port of Nacala and Malawi, most of Malawi's imports travel by rail via South Africa to Zimbabwe and then by road transport to Malawi - a lengthy and costly route. Port handling facilities in Mozambique and South Africa are very adequate.

3. Canadian Grain Marketing Prospects

Apart from wheat there is little potential for Canadian exports to Malawi. With South Africa having experienced a severe drought in 1984, there will be an opportunity for wheat exports (about 25,000 tonnes).

II. MALT AND MALTING BARLEY \*

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

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	2.0 (2.0)	Denmark, France
Malting barley	NIL	

3. Additional Information

Change in malting capacity: Malawi does not produce malt.

Trend in beer consumption: No data available but based on growth in malt imports and population growth rate potential for increase in beer consumption is good.

\*Note: Our post in Harare (Zimbabwe) was unable to complete this section. Limited information from United Nations and EEC sources have been used instead.

## M O R O C C O

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita GNP	US\$820	year 1983
Average annual growth 1960-80	2.5%	
Annual inflation rate 1970-80	8.1%	
Annual inflation rate (current)	6.2%	
Volume of imports	3.48 billion US\$	year 1983
Of which food	14.8%	year 1983
Of which fuels	27.5%	year 1983
Principal foreign exchange earning export:	Phosphates	
Debt service as % of GNP	9.3%	year 1982
Debt service as % of exports	35.6%	year 1982
Population	22.0 million	year 1983
Annual population growth	3.0%	years 1980-2000
Annual Consumption:		
Flour	2,991,000 tonnes or 135.9 kg/capita	year 1983/84
Vegetable Oil	173,000 tonnes or 7.9 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

The official figure for total area planted in 1984 is 4.7 million hectares, of which 20% was lost because of drought and another 10-15% was in critical condition. However, abundant rainfall in most areas this spring proved beneficial to most winter and spring grains. Total winter grain production is estimated officially at 2.9 million tonnes but there are strong indications that the Ministry of Agriculture may revise its estimate upwards to 3.2-3.3 million tonnes. Moroccan grain imports in 1984/85 are expected to be the highest ever, reflecting continuing low production, near zero stocks, and growing domestic consumption requirements. Reuter reports project 1984/85 imports at 2.5 million tonnes wheat, about 30,000 tonnes barley and 200,000 tonnes of corn.

#### 2. Foreign Exchange Situation

The Moroccan economy in general is not doing well and its balance of payments position continues to be serious. Morocco has almost completed rescheduling the foreign debt, the level of which (plus the scarcity of foreign exchange) requires that this country do everything possible to obtain the maximum amount of foreign credit assistance. Food and agricultural imports will continue to be the most important import priorities.



### 3. Fertilizer Situation

The apparent total consumption of fertilizer was 500,000 tonnes, of which approximately 250,000 tonnes was locally produced phosphates. Imports accounted for the balance, composed as follows:

Urea (46-0-0)	48,000 tonnes
Ammonium nitrate (0-33.5-0)	75,000 tonnes
Ammonium sulphate (0-21-0)	63,000 tonnes
Potassium sulphate (0-0-50)	33,000 tonnes
Potassium chloride (0-0-61)	30,000 tonnes

### 4. Import Mechanism

Office National Interprofessionnel des Cereales et Legumineuses (ONICL) decides upon the quantity and quality of grains to be imported, delivery dates and ports of destination. ONICL issues regular tenders to local licensed importers who in turn are agents for major international grain traders. These importers then submit their offers to ONICL who then authorizes one or more importers to import wheat. Concurrently, ONICL gives importer access to foreign exchange, which is controlled by the Office des Changes. Due to the present financial situation tenders specify origin of imports, reflecting particular financial agreements, e.g. present situation tenders specify USA origin due to PL-480 title I and blended credit programs available.

### 5. Grain Industry Infrastructure

Imported grains arrive at one of three ports: Casablanca, Safi and Kenitra. The grain is stored in silos at these ports owned by SOSIPO ( a state company) for future delivery to the mills. Since there is insufficient storage capacity at the ports some wheat ends up in piles on the dock. There it is picked up by the mills and/or delivered to storage silos in most major towns that are owned by regional branches of SCAM (Société Cooperative Agricole Marolaine). This grain is in turn eventually delivered to the mills. There are plans underway at present to expand grain storage capacity both at ports and the regional level through the various SCAM's. It is estimated that this country loses approximately 15% of its total supply through inadequate storage capacity.

ONICL has plans to construct grain silos at the ports of Nador, Tangier, Agadir, Mohammedia, Laayoun and Dakhla. Current financial constraints will likely delay completion of these projects.

### 6. Government Policies Affecting Grain and Agriculture

All government policies are aimed at improving Morocco's grain production. The latest measure waives all agricultural taxes until the year 2000 and also exempts all imported agricultural equipment from custom duties. The government also encourages producers by promoting, by all media means, the use of machinery-fertilizer-selected seeds and proper land preparation. These policies, if successful, will over time have a significant impact on grain imports, grain consumption, reserves, and meat production/consumption.



7. Canadian Grain Marketing Prospects

There are no locally obtainable projections to 1985-1990 of national grain import needs. It is very difficult to estimate this far into the future as this country's harvests can vary tremendously from year to year depending on rainfall. With regard to special crops, Morocco is a producer of all these items and an exporter of most.

8. Processing Facilities

Year: 1983

thousands of tonnes

	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	80	80		
Compound Feed Mills	11	11	850	500
Malt Houses	1	3		
Oilseed Crushers	2	2	180	90

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1982/83 estimate:

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					2,334
Suitable for malting					90

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	(.76)	Belgium, U.K.
Malting barley	6.5	France, Holland

3. Additional Information:

Change in malting capacity: Stable in accordance with beer consumption.

Trend in beer consumption: Stable at 400,000 hl

Market potential for Canadian malt and/or malting barley: Malt is produced from local malting barley. When domestic barley supply is inadequate, malting barley is usually imported from France. Some barley malt is also imported from EEC, with which it would be difficult for Canada to compete, given the low level of imports.

### III. OILSEEDS

#### 1. Import Policy

There is no tariff on oilseeds, crude oil or oilseed meal. Morocco is prohibited to import refined oil.

Importation procedure and structure: Ministry of Industry and Commerce calls international tenders on behalf of crushers and authorizes the crushers to buy the seed from most competitive bidder

#### 2. Additional Factors:

Oilseed imports are limited by capacity of crushers. Seed is primarily imported for production of meal not for oil since crushing capacity is very limited. Crude degummed oil is imported for local refining.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982/83

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Sunflower	18		18	
Cotton	13		13	
Olive	450		450	
Soyabeans		24	24	
TOTAL	481	24	505	

<u>Oil Type</u>	<u>Production</u>	<u>Imports of Oils</u> (Crude) (Refined)	
Soyabean	3	111	
Sunflower	4		
Cotton	2		
Rapeseed	2	3	
Olive	48		
TOTAL	59	114	

<u>Meal Type</u>	<u>Production</u>
Sunflower	5
Cotton	5
Soya	11
Rapeseed	3
TOTAL	24

#### 4. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of Seed Crushed</u>	<u>Capacity (tonnes)</u>
2	All seeds	180,000/year

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	732 (777)	192 (423)	2,016 (1,331)	2,940 (2,531)
Durum wheat	1,239 (1,406)	31 (61)		1,270 (1,467)
Flour/Semolina*				
TOTAL	1,971 (2,183)	223 (484)	2,016 (1,331)	4,210 (3,998)

\* Wheat flour production for 3 years ending 1981 averaged 1.5 million tonnes per annum, according to IMC.

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	2,708 (2,218)	90 (90)			2	140 (223)	2,940 (2,531)
Durum wheat	1,270 (1,467)						1,270 (1,467)
Flour Semolina							
TOTAL	3,978 (3,685)	90 (90)			2	140 (223)	4,210 (3,998)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash							
Commercial Credit							
Aid, concessional credit, etc.	1,530 (1,018)			443 (303)	43 (10)	2,016 (1,331)	

Principal Others: UN/WFP

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	261 (247)	18 (31)	172 (139)	451 (417)
Barley	1,228 (2,334)	207 (116)	(1)	1,435 (2,451)
Sorghum	31 (29)			31 (29)
Oats	44 (74)	3 (1)		47 (75)
Rye				
TOTAL	1,564 (2,684)	228 (148)	172 (140)	1,964 (2,972)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	148 (245)	293 (154)				10 (18)	451 (417)
Barley	630 (1,590)	705 (654)	90			10 (207)	1,435 (2,451)
Sorghum	3 (3)	28 (26)					31 (29)
Oats	9 (9)	36 (63)				2 (3)	47 (75)
Rye							
TOTAL	790 (1,847)	1,062 (897)	90			22 (228)	1,964 (2,972)

Of which poultry: 85% Type of industrial use: Brewery

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS		
	Canada	U.S.A.	Australia	Argentina		EEC	All Others
Corn		80 (108)		39		53 (31)	172 (139)
Barley					(0.6)		(0.6)
Oats					(1.0)		(1.0)
TOTAL		80 (108)		39	(1.6)	53 (31)	172 (140.6)

Principal Others: Yugoslavia 40; Spain 1; Canada 12



## M O Z A M B I Q U E

Economic classification: Low Income economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$163		year 1981
Average annual growth 1960-80	-0.1%		
Annual inflation rate 1970-80	11.2%		
Annual inflation rate (current)	22.0%		
Volume of imports	0.414 billion US\$		year 1981
Of which food	17.8%		year 1981
Of which fuels	16.0%		year 1981
Principal foreign exchange earning export: Agriculture, Shellfish			
Debt service as % of exports	70.0%		year 1983
Population	13.0 million		year 1982
Annual population growth	2.9%		years 1980-2000
Annual Consumption:			
Flour	147,000 tonnes	or 1.13 kg/capita	year 1982
Meat	15,529 tonnes	or 1.0 kg/capita	year 1982
Vegetable Oil	19,200 tonnes	or 1.5 kg/capita	year 1982
Fish	48,100 tonnes	or 3.7 kg/capita	year 1983

### 1. General Information

Despite a low level of development of the country's immense agricultural potential, agriculture is still the dominant sector of the economy. It accounts for 80% of the country's employment, 42% of the GDP and 75% of the commodity exports. The country has grown from a near basic food self-sufficiency position in 1974 to a substantial importer to meet minimum consumption needs. As a percentage of total imports, food imports increased from about 9.2% in 1974 to about 17.8% in 1978. Successive droughts, a cyclone and crippling floods have occurred resulting in an estimated total of 250,000 tonnes of grain being necessary to feed the victims. Official reports state that in one province alone 5,000 people have died as a result of drought with over 300,000 others suffering from its effects. The outflow of the expatriate population contributed largely to the falling level of production of agriculture products and the formation of state run communal farms has not been a success. According to the African Economic Digest the UK based Lonhro is to take over 3,000 to 5,000 hectares belonging to Complex Agroindustrial de Limpopo (CAIL), a giant irrigation scheme which has proven to be the most disastrous of the state farms. State operated firms are reported to have run up debts of US\$500 million - the sugar estates tend to experience the largest debt.

### 2. Crop Situation and Outlook

Maize production in 1981 reached 78,300 tonnes. Wheat is not grown, although project plans exist for its production. Mozambique's normal requirements for wheat and corn is in the region of US\$41 million per annum, wheat comprising 41% of this total. Reliable statistics are not normally available but a rough estimate of import requirements are 125,000 tonnes of wheat and 175,000 tonnes of corn. Reports indicate that the 1984 crops have been a complete failure.

### Crop Situation and Outlook cont'd

The target for rice production had been 1,550 tonnes, but the figure actually reached was a mere 71.5 tonnes. The projected potato harvest of 19,000 tonnes realized only 54 tonnes; and of the 5,000 tonnes of maize which Maputo should have produced barely 532 tonnes were harvested. Some 2,500 hectares of corn were sown but the crop on 1,000 hectares was completely lost and the yield from the rest was extremely low.

Vegetable oils, rationed to the population, are only freely available in the hard currency shops. Based on 1982 figures oilseeds when available (most likely cotton) are utilized in processing plants. Production of local oil is thought to be in the region of 96,000 tonnes per annum.

### 3. Foreign Exchange

In February 1984 Mozambique joined the ever lengthening queue of Third World Nations seeking to reschedule their foreign debt - the total debt is about US\$1.4 billion of which U.S.\$242 million was scheduled to be repaid in 1984. With insufficient funds and no immediate economic upturn in sight there was little option but to seek the rescheduling.

While there is likely to be a continued demand for imports of wheat and corn, foreign currency limitations will require such imports to be made under food aid programs. Approved food aid from the United Nations, according to a UN representative will amount to 300,000 tonnes of grain. The Japanese government also offered Mozambique some US\$2.5 million for 1983/84 to purchase rice and fertilizer as aid to the flood victims.



## N I G E R I A

Economic classification: Middle Income economy			
Oil exporter or importer (net): Exporter			
Annual per capita income:	US\$ 356		year 1983
Annual per capita GNP	US\$1,010		year 1980
Annual inflation rate 1970-80	15%		
Annual inflation rate (current)	25%		
Volume of imports	9.7 billion US\$		year 1983
Of which food	55.0%		year 1983
Principal foreign exchange earning export: Crude oil			
Debt service as % of exports	23%		year 1983
Population	90 million		year 1983
Annual population growth	2.25%		years 1980-1983
Annual Consumption:			
Flour	1.2 million tonnes or 13.3 kg/capita		year 1983
Meat	180,000 tonnes or 2 kg/capita		year 1983
Vegetable Oil	500,000 tonnes or 5.6 kg/capita		year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook \*

Although for years a net exporter of agricultural commodities, Nigeria is now a net importer of foodstuffs. Food production is increasing at a rate of 1% - 2% annually but this does not keep pace with the population growth rate of between 2% - 3% per annum. Agricultural productivity is low but the necessary conditions exist for vigorous agricultural development of many crops for both domestic and export markets. The principal cash crops are cocoa, sugar, cotton, tobacco and oil palm. Staples include cassava, coco, yams, sweet potatoes, guinea corn and millet. Maize, sorghum and rice are also grown and rice production is increasing in response to government incentives. Wheat production averages under 50,000 tonnes annually.

Reasons given for low crop production and yields include inferior crop varieties, inadequate distribution and use of fertilizers, insufficient farm credit, research and extension services. Other constraints in the food supply chain include the land tenure system and inadequate storage and handling for domestic crops. The latter factors result in substantial crop losses every year.

Total grain production in 1983, including guinea corn, millet and rice, was about 10 million tonnes - a substantial decrease from the 1982 estimate of 14 million tonnes. Widespread drought in Africa accounted for most of the decrease. Drought conditions are cyclical, occurring every 10 years.

\*Note: Supplementary data from the United Nations and other sources was used in this section to update the post report.

### 1. Crop Situation and Outlook cont'd

The wheat production target for 1985 is 250,000 tonnes or about 12% of the 1.8 million tonnes operating capacity of Nigeria's nine flour mills. Wheat imports were 1.6 million tonnes in 1983 but were expected to drop to 1.3 million tonnes in 1984 due to the depressed oil market and lack of foreign exchange.

Millet, maize, guinea corn and sorghum account for the major share of the country's grain production. Although close to self-sufficiency in these grains, Nigeria has imported an average of just over 200,000 tonnes of maize annually since 1980 of which about 70% goes to feed use.

A target of self-sufficiency in rice by 1985 is considered unrealistic. Production has increased in recent years to 1.2 million tonnes. Imports between 1980-83 averaged about 600,000 tonnes.

Groundnuts, oil palms, and palm kernel are the source of most of the country's vegetable oil production. Small quantities of cottonseed, soyabeans and sesame seed are also produced. Vegetable oil imports between 1980-83 averaged close to 300,000 tonnes.

Weather conditions are favourable for crops in 1984 but problems of financial support for the necessary inputs could affect production. Consequently, imports of grain and vegetable oils are expected to maintain levels of the past few years.

### 2. Foreign Exchange

It is estimated that 1984 foreign exchange earnings from oil exports will amount to US\$10 billion. Although imports are subject to restrictions due to foreign exchange problems, priority is being given to the importation of essential food stuffs (e.g. rice, wheat, evaporated tinned milk, etc.). These will be followed by essential raw materials for the manufacturing sector.

In the May 1984 budget, agriculture was allocated about 21% of the Naira 3.94 million capital expenditures. In the capital expenditure allocations, agriculture placed third after defence and the steel industry. Nigeria will continue to receive international aid based on the transfer of know-how and technology leading toward greater self-sufficiency.

### 3. Fertilizer Situation

Regular and adequate imports of fertilizer are essential to Nigeria's agricultural growth. Nearly one-third of the outlay allocated to agriculture under the current development plan (1980-85) is committed to fertilizer. Increased use should account for nearly two-thirds of the plan's target of an increase of 3.4 million tonnes of grain by 1985. Prior to the 1983-84 growing season, supplies were in jeopardy. As a result, the World Bank approved a loan of US\$250 million to cover the cost of 2 million tonnes of fertilizer over the 1983-84 and 1985-86 growing seasons.



### 3. Fertilizer Situation cont'd

Consumption is expected to rise from the current 800,000 tonnes per annum to 1.3 million tonnes by 1985\* (the equivalent of 16.5 kg of nutrients per hectare - still well below the world average in 1980 of 77 kg, and only slightly above the average for Africa that year).

\* Source: Financial Times, January, 1984

### 4. Import Mechanism

Estimated production capacity of private flour millers is 1.8 million tonnes per annum. Since the millers have developed the only viable storage facilities they control the source and importation of wheat, mainly from the U.S.A.

Pressure from the poultry producers has led to the perpetuation of middlemen to acquire import licenses for maize to be imported from the U.S.A. in 1984. This preempts the Nigerian Grain Board (NGB), which has an import license of only 20,000 tonnes (to date) in 1984. In the long term, the NGB plans to control the importation of quality maize and wheat into Nigeria.

One of the major objectives of the current Military Government is to remove middlemen from negotiating overseas supplier contracts and reduce the price to the end user. This objective has yet to be realized with respect to wheat and maize. The Federal Ministry of Commerce is at present responsible for assigning sales representatives to negotiate with the suppliers and issuing import licenses. This policy should continue for some time.

### 5. Grain Industry Infrastructure

The four major millers (9 mills) control the importation and storage of wheat as well as the milling and distribution of flour. The Nigerian Grains Board, a government parastatal organization, buys locally produced grains for re-sale at government subsidized prices. However, it lacks storage facilities to cope with the production of guinea corn, maize, millet, sorghum, cowpeas, and rice. It is estimated that up to 40% of local production is wasted in post-harvest due to inadequate storage and handling operations.

The National Grains Production Co. Ltd. is the major miller of locally produced grains for livestock feed. It is a joint private and public sector company dealing only in production. It also has a number of joint venture investments with foreign shareholders in crop and livestock production.

There are a small number of private feed mill operations throughout Nigeria. However, production is small-scale and geared to localized farming.

In regards to domestic production the lack of adequate storage facilities, transportation and trained manpower make it difficult to reduce the level of grain imports. The Nigerian Grains Board and the Federal Ministry of Agriculture are implementing a plan to find solutions to the foregoing impediments. It includes proposals to construct additional storage facilities beyond 1984-85.

## 6. Government Policies Affecting Grain and Agriculture

Government policies are as follows:

(a) grain production: private sector investment incentives to promote output in grain production, and a pricing policy which protects the producer against cheaper imports.

(b) grain imports or exports: improved storage and distribution systems along with a stable pricing policy to compete with cheaper imports.

(c) grain consumption patterns: with a population growth rate of 2.25% per annum, human consumption of maize continues to outstrip the supply of feed to livestock resulting in a reliance on the importation of yellow maize (grade 3) for livestock.

(d) grain reserves: grain reserves are minimal due to inadequate infrastructure and trained manpower.

(e) meat production and consumption: meat production is based on the consumption of 180,000 tonnes of meat per annum for a population of 90 million. About 40% of meat consumption is from beef and 24% from poultry. There is also a domestic swine industry which numbers about 1.3 million head.

Should the Nigerian Government decide to throw open the importation of high protein wheat to international tender and monitor the C and F imported price, Canada would stand a chance of acquiring a greater share of Nigeria's annual imports of 2 million tonnes of wheat.

Nigeria is the second largest producer of beer in Africa, the country operates over 25 breweries and 4 major distilleries and with barley malt imports of about 150,000 tonnes annually is in the process of developing a domestic barley malt industry. This new industry will require imports of malting barley but could also be an impetus to develop indigenous production of barley suitable for malting.

## 7. Canadian Grain Marketing Prospects

There are no available projections to 1985 or 1990 due to the lack of organized data collection banks.

Marketing initiatives: Short-term: aid/commercial packages to solve Nigeria's grain storage problems to include manpower training.

Long-term: regarding wheat, a more liberal policy with respect to credit lines based on C and F landed price.

Longer term: an aid/commercial program to assist Nigeria to develop improved strains of wheat. The program could include assistance in barley varietal development leading toward self-sufficiency in barley required for malt plants which are now being built.

An aid program to determine the viability of special crops would be required before any marketing in these could be done.

8. Processing Facilities

	Year 1983			
	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	4	9	1,800	1,300
Compound Feed Mills	N/A	N/A	N/A	N/A
Malt Houses	"	"	"	"
Oilseed Crushers	"	"	"	"

9. Storage and Throughput Capacity

Grain Import Capacity by Port\*

Year 1983

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Apapa	450	1,500
Calabar	30	100
Port Harcourt	60	200
Total Capacity	540	1,800

\* Unloading facilities exist at Lagos (Tin Can Island) and Sapele (Life Flour Mills, 50,000 tonne storage silo) on the Benin river. Warri and Koko have sacked grain unloading capabilities.



II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley Suitable for malting	U n a v a i l a b l e				

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

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
	Malt	125	(150)
Malting barley	u n a v a i l a b l e		

\*United Nations and EEC statistics - other sources estimate 1983 malt imports to be 150,000 tonnes.

3. Additional Factors

Change in malting capacity: In the period 1983-84 malting capacity has decreased due to the lack of foreign exchange for the importation of essential raw materials. It is anticipated that in the 1984-85 period there will be a marginal increase for imports, but far below requirements to enable local production to operate at capacity. (Details on the size and number of plants were not available.)

Malt exports: Malt is not exported.

Trend in beer consumption: Per capita beer consumption is increasing.

Market potential for Canadian malt/malting barley: Canadian malt has potential especially if aid assistance could be given to establish the viability of growing barley in Nigeria.



### III. OILSEEDS

#### 1. Import Policy

Import tariffs:	i) oilseeds	30%
	ii) crude oil:	30%
	iii) oilseed meal:	n/a
	iv) refined oil:	35%

2. Additional factors: Private and public sector organizations can import, but only if they have an approved import license from the Federal Ministry of Commerce and Industries.

#### 3. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1982

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Source of Imports</u>
Palm kernel	450	Nil		
<u>Oil</u>	<u>Production</u>	<u>Imports of Oils</u>		
		(crude) (refined)		
Palm	550			

#### 4. Number and capacity of oilseed crushing plants:

There are numerous plants but type of seed crushed and capacity is unavailable.

#### 5. Export Policy

Export Assistance or control measures: An export license approved by the Federal Ministry of Commerce and endorsed by the Nigerian Export Promotion Council is required in order to export oilseeds (palm kernel).

Export procedure and structure: Export licenses are controlled and issued by the Federal Government Oilseeds Marketing Board, and monitored by the Federal Ministries of Agriculture and Commerce/Industry.

Additional factors: Most of the oilseeds are exported to the Far East to acquire foreign exchange. However, the processed oil is imported back into Nigeria from the Far East. A Federal Government program is now underway to rehabilitate the Nigerian vegetable oil industry.

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	25 (24)	12.5 (12)	1,600 (1,300)	1,637.5 (1,336)
Durum wheat				
Flour/Semolina				
TOTAL	25 (24)	12.5 (12)	1,600 (1,300)	1,637.5 (1,336)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	1,625 (1,324)						1,637.5 (1,336) <sup>387</sup>
Durum wheat							
Flour Semolina							
TOTAL	1,625 (1,324)						1,637.5 (1,336)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS					
	Canada	U.S.A.	Australia	Argentina		EEC	ATI	Others		
Wheat (including durum)										
Cash		30 (36)	1,570 (1,264)							1,600 (1,300)

Commercial Credit  
Aid, concessional  
credit, etc.

USA has a revolving line of credit for C&amp;F value US\$30 million and concessional credit of US\$100 million through Eximbank.

Flour (including semolina)

Cash/comm. credit  
Aid, concessional

TOTAL

## SOUTH AFRICA

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$ 2,440	year 1982
Annual per capita GNP	US\$ 2,300	year 1980
Average annual growth 1960-80	2.3%	
Annual inflation rate 1970-80	12.5%	
Annual inflation rate (current)	12.4%	
Volume of imports	18.4 billion US\$	year 1982
Of which food	4.0%	year 1982
Principal foreign exchange earning export:	Gold	
Debt service as % of exports	6.0%	year 1982
Population	32.0 million	year 1981 est
Annual population growth	2.9 %	years 1980-2000

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Maize: The crop harvested in late 1983/early 1984 was the lowest in recent history being some 4 million tonnes below the reduced crop level attained in 1982/83. The drop in production is solely due to an extended period of drought which has influenced production over the past two years. South Africa, for the first time in many years is a substantial importer of maize rather than an exporter. Given good rains the 1984/84 maize crop could reach 9 million tonnes. This should be sufficient for local requirements and also provide a margin for stock replenishment and limited exports.

Wheat: Some 400,000 tonnes of Australian wheat is being imported in 1984 as stockfeed material to replace more expensive yellow maize from the United States. This importation has occurred due to a shortfall in maize production, rather than that of wheat. A slight tendency for maize producers who have borne the brunt of the drought, to move into wheat is apparent and acreage planted over the past three to four years has increased by approximately 15%. It is not South Africa's intention to become a wheat exporter but rather to achieve self sufficiency in the commodity. Crop prospects for 1984 look good at present with a harvest of 2.2 million tonnes anticipated, a 25% increase over 1983. This is sufficient for domestic requirements.

#### 2. Foreign Exchange Situation

A favourable balance of payments situation exists but the external value of the Rand has fallen and a hard currency surplus has been created by a drop in imports and increased earnings for commodity exports such as gold and coal. Because of the drought, foreign exchange is being made available for imports of basic agricultural commodities.



### 3. Fertilizer Situation

Fertilizers are provided locally from raw material which is, in the main, imported. Because of the depressed state of the agriculture sector, demand is low and the fertilizer industry is suffering from high stocks.

### 4. Import Mechanism

Imports continue to be made upon the issuing of import permits by government on the recommendations of the various marketing boards. No changes are anticipated.

### 5. Grain Industry Infrastructure

No changes are imminent. South Africa has modern facilities for the handling, storage and utilization of grain products.

### 6. Government Policies Affecting Grain and Agriculture

Government continues to look towards a situation of self-sufficiency in wheat and to one of surplus in maize. The exceptional drought which has persisted over the past two years has necessitated the importation of grains but this can be regarded as a temporary measure.

### 7. Canadian Grain Marketing Prospects

There are no locally obtainable projections to 1985 or 1990.

Marketing possibilities for Canadian special crops: Mustard, peas and lentils are already being imported.

### 8. Processing Facilities

	Year: 1982/83			
			thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	41	72	2,284	1,717
Compound Feed Mills		49		
Malt Houses	1	2	117	117
Oilseed Crushers		12	1,500	



9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year: 1982

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Durban	38	1,045
Cape Town	27	410
East London	76	2,831
Total Capacity	141	4,286

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley	139				139
Suitable for malting	139				139

2. Imports, 1983/84 estimated, previous year in brackets:

	<u>thousands of tonnes</u>		<u>Principal supplier(s)</u>
Malt (Grain equivalent)	100	(91)	
Malting Barley	1	(7)	

3. Additional Information

Malting Capacity: Although domestic malting capacity has been increased substantially over the past 10 years, it is still not adequate to meet local demand for malt for beer brewing. Further developments can therefore be expected.

Malt exports: None

Trend in beer consumption: No recent statistics have been located but beer consumption per capita continues to increase.

Market potential for malt/malting barley: Imports of barley malt are continuing to increase and it is known that S.A. breweries are in contact with Canadian suppliers and are importing a portion of their requirements from Canada.

### III. OILSEEDS

#### 1. Import Policy

##### Import tariffs

- (i) Oilseeds - Groundnuts: Free  
Soya: 65 cents/100 kg  
Sunflower: 10%
- (ii) Crude Oil - Groundnut: 25% or 180 cents/100 kg  
Soya: 25% or 3000 cents/100 kg  
Sunflower: 25% or 180 cents/100 kg
- (iii) Oilseed Meal - All flours or meal of oilseeds: 20%
- (iv) Refined Oil - Groundnut: 25% or 180 cents/100 kg  
Soya: 25% or 3000 cents/100 kg  
Sunflower: 25% or 180 cents/100 kg

Non-tariff Barriers: Importation of any of the above is subject to the granting of an import permit by the Department of Agriculture on the recommendation of the Oilseeds Board.

Importation procedure and structure: The availability of permits is made known to the expressing industry which in turn invite bids from international trading houses. This procedure is in respect of oil and oilmeals. With regard to oilseeds the Board is the sole buyer and seller.

#### 2. Additional Factors:

Trade agreements with Zimbabwe and Malawi favour imports from those countries.

#### 3. The number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Annual Capacity (tonnes)</u>
12	Sunflower Groundnuts Soybeans	1,500,000

IV. STATISTICAL NOTES

(A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	1,719 (2,282)	1,063 (787)	400	3,182 (3,069)
Durum wheat	3 (3)		7	10 (3)
Flour/Semolina	1,480 (1,469)	26 (33)		1,506 (1,502)
TOTAL	3,202 (3,754)	1,089 (820)	407	4,698 (4,574)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	1,906 (1,811)	400		45 (45)	83 (150)	748 (1,063)	3,182 (3,069)
Durum/Wheat	10 (3)						10 (3)
Flour Semolina	1,451 (1,464)				25 (12)	30 (26)	1,506 (1,502)
TOTAL	3,367 (3,278)	400		45 (45)	108 (162)	778 (1,089)	4,698 (4,574)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
Canada						

WHEAT (including durum)

Cash					7	407
Commercial Credit						
Aid, concessional credit, etc.		400				

FLOUR (including semolina)

Cash/comm. credit						
Aid, concessional						
TOTAL		400			7	407

South Africa

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, May 1	Imports	Total Supply
Corn	4,075 (8,359)	1,333 (4,548)	2,380 (89)	7,788 (12,996)
Barley	139 (100)	40 (48)	101 (98)	280 (246)
Sorghum	194 (270)	108 (180)		302 (450)
Oats	56 (52)	15 (12)		71 (64)
Rye	5 (6)	3 (5)		8 (11)
TOTAL	4,469 (8,787)	1,499 (4,793)	2,481 (187)	8,449 (13,767)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	(3,219)	(3,232)	(141)	(65)	285 (5,096)	(1,333)	(13,086)
Barley	210 (196)	8 (3)		9 (7)	18 (40)	35 (246)	280 (437)
Sorghum	250 (221)	37 (70)		5 (1)	(37) (108)	1 (64)	71 (11)
Oats	36 (29)	8 (7)		15 (12)	(1) (3)	2 (11)	8 (11)
Rye	1 (3)	4 (4)		1 (1)			
TOTAL	(3,668)	(3,316)	(141)	(86)	303 (5,134)	(1,499)	(13,844)

Industrial Use: mainly starch

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	Canada	U.S.A.	Australia	Argentina	EEC	All Others	TOTAL IMPORTS
Corn							
Barley							
Sorghum							
Oats							
Rye							

Note: Country of origin not revealed by Maize Board but majority of imports from United States with small quantity from Argentina.

TOTAL



## TUNISIA

Economic classification: Middle Income economy		
Oil exporter or importer (net): exporter		
Annual per capita income:	US\$1,400	year 1983/84
Annual per capita GNP	US\$1,420	year 1983/84
Average annual growth 1960-80	4.8%	
Annual inflation rate 1970-80	7.8%	
Annual inflation rate (current)	3%	
Volume of imports	3.5 billion US\$	year 1980
Of which food	16.5%	year 1981
Of which fuels	19%	year 1980
Principal foreign exchange earning export: Oil, olive oil, textiles		
Debt service as % of GNP	5%	year 1981
Debt service as % of exports	13%	year 1981
Population	6.7 million	year 1981
Annual population growth	3%	year 1983
Annual Consumption:		
Flour	700 kg/capita	year 1983
Meat	40 kg/capita	year 1983
Vegetable Oil	60,000 tonnes or 8.9 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

In general, the 1983-84 crop year was blessed with fairly favourable climatic conditions. However, the rainfall recorded in the fall of 1983 and the first few months of 1984 varied considerably from one part of the country to another. In the north and northwest regions, rainfall was abundant and good grain and fodder crops are expected. However, in most of the central and southern parts of the country, rainfall was inadequate and this has adversely effected dryland field crops, pasture land, and livestock production.

For 1984, the forecast increase in the value of agricultural production over 1983, at 1980 constant prices, is around 15%, which corresponds to a growth rate of 14% in the value-added. This forecast is based in part on:

- production of 12 million quintals of grain, as compared to 9.2 million in 1983;
- an increase of 34% in fruit production, owing to good harvests of olives (700,000 tonnes) and citrus fruits.

Crop Situation and Outlook cont'd

Using these various assumptions, the following levels of production have been established for Tunisia's main agricultural products:

<u>Main Agricultural Products</u>		
'000 tonnes		
<u>Products</u>	<u>1983</u>	<u>1984</u>
Grains	921	1,200
Olive oil	55	140
Beef and Veal	50	56
Mutton and Lamb	62	64
Poultry Meat	54	50
Milk	269	280

Climate, one of the major factors influencing grain production, has proved to be fairly favourable during the 1983-1984 season.

Although farmers in the north of Tunisia have been enjoying good weather this year, the same cannot be said of those in the central and the southern regions, where rainfall has been scarce. In comparison with the 1981-82 season, in which there were very similar weather conditions, the increase in the amount of land sown has once again been nearly 100,000 hectares.

The amount of land sown in northern Tunisia increased by 18.6%, up almost 100,000 hectares from 1982-1983. The amount of land sown in the central and southern regions is expected to total 800,000 hectares, down 20% from last year.

The following chart shows the changes in prices paid to producers:

<u>Grain Prices</u>					
(Dinars per quintal) <sup>1</sup>					
	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>
Hard wheat	8.6	9.6	11	12.8	14
Soft wheat	7.7	8.7	10	11.7	14

The average annual rate of growth in producer prices over the past three years has been higher for soft wheat (18.1%). This is the result of a policy aimed at encouraging the production of soft wheat in order to decrease dependence on foreign sources (70% of Tunisia's soft wheat needs are met by imports). The immediate impact of this pricing policy is evident in the increases in the amount of land sown. In the north, there has been an increase of over 20% in fields sown with soft wheat and 19% in fields sown with hard wheat.

Barley growing remains very popular. An additional 50,000 hectares have been sown with barley, in the past two years. Moreover, from 1977 to 1984, land sown with barley increased from almost 10,000 hectares to 267,000 hectares, in the north alone. This popularity is primarily attributable to the

<sup>1</sup>one quintal = 100,000 grams, ten quintals = one tonne.



Crop Situation and Outlook cont'd

increased demand for this product in the livestock production sector. Barley production has been further encouraged by the elimination of compensation for essential products used for animal feed. In addition, the increase in producer prices has made this a fairly profitable crop.

Area under cultivation  
(1,000 ha)

1984 harvest

	<u>Durum</u>			<u>Soft Wheat</u>			<u>Barley</u>
	<u>ordinary</u>	<u>high yield</u>	<u>total</u>	<u>ordinary</u>	<u>high yield</u>	<u>total</u>	<u>Total</u>
North	197	321	518	15	84	99	267
Central and South	340	2	342	36	-	36	422
<b>TOTAL</b>	<b>537</b>	<b>323</b>	<b>860</b>	<b>51</b>	<b>84</b>	<b>135</b>	<b>689</b>

Estimate of Grain Production (83-84 season): Grain production for 1983-84 is expected to reach 12 million quintals but could rise to 13.5 if acreage targets have been attained. This is comparable to 1980-81 and 1981-82 production and exceeds 1982-83 production by almost 3 million quintals. This superior performance can be ascribed to increased yields and increases in areas sown in the northern regions.

Grain Production  
'000 quintals

	<u>1983</u>	<u>1984<sup>1</sup></u>
Hard wheat	5,090	7,100
Soft wheat	1,090	1,700
Barley	3,030	3,200
<b>Total</b>	<b>9,210</b>	<b>12,000</b>

2. Foreign Exchange Situation

The situation has stabilized somewhat, after the significant increase in the current accounts deficit in 1981-82. In 1983, the deficit totalled US\$681 million. As in 1982, this large deficit was caused by decreased oil export revenues, a reduction in agricultural exports, a slow down in tourism and an increase in food imports. Reserves dropped approximately US\$37 million, going from US\$478 million in 1982 to US\$440 million by the end of 1983 - the equivalent of 1.3 months of imports and the lowest level since the early 1970s. By the end of 1983, Tunisia's foreign debt was estimated at US\$3,925 million. The balance-of-payments deficit at the end of 1983 represented 8.8% of the GDP. Tunisia is a recipient of food aid.

<sup>1</sup>Projected

### 3. Fertilizer Situation

The 1983-1984 grain season has been a good one in so far as the use of fertilizers is concerned. An increase in the use of triple superphosphate and ammonium nitrate has been observed.

#### Use of Fertilizers in Grain Production ('000 tonnes)

	<u>1980-81</u>	<u>1981-82</u>	<u>1982-83</u>	<u>1983-84</u>
SUPER 16	15	15	10	10
SUPER 45	50	61	68	70
AMMONIUM NITRATE	63	75	63	80

It should be noted that this increase in the amount of fertilizer used was accompanied, as noted elsewhere, by an increase in the amount of land sown. As a result, in the northern regions, the average rate of nitrogen use, which dipped from 96 kg/ha in 1981-82 to 80 kg/ha in 1982-83, rose again to 90 kg/ha in 1983-84.

Chemical wheat control: Chemical weed control operations got off to a poor start in the 1983-84 year because of weather conditions ill-suited to that type of activity (rain and wind). Special incentives and other measures were necessary to ensure the success of weed control operations. Some 107,000 ha were weeded with polyvalents and 177,000 ha with 2-4-D as of March 22, 1984.

It was forecast that, by the end of season, a total of 245,000 ha would be weeded. This is 60,000 ha less than originally forecast, but is nevertheless an unprecedented level and is 10,000 ha higher than the level attained in 1980-81.

### 4. Import Mechanism

In general, control over foreign trade (import/export) is the responsibility of the foreign economic relations branch of the Ministry of the National Economy, in co-operation with the Central Bank, which controls foreign exchange operations.

Certain "sensitive" products and major consumer goods are imported by government agencies only (state trade). Grains and their by-products fall into the latter category. The national grains office (Office national des céréales, ONC) is responsible for the supply, importing and marketing of grains in Tunisia. Import volumes are established in September/October of each year. Once the purchasing program has been determined, the grains office examines available supplies under bilateral food aid programs (USA/EEC). After these sources have been exhausted, international calls for tenders are issued.

### 5. Grain Industry Infrastructure

Many new projects have been undertaken and a number of silos have been restored (e.g. Manouba, 45,000 tonnes). In addition, wharf facilities are being developed at the Bizerte silo. The IBRD has awarded a U.S.\$42 million loan to finance these projects (scheduled to be carried out in 1986). Significant changes expected soon include construction of eight new units in the milling sector.



## 6. Government Policies Affecting Grain and Agriculture

Agriculture continues to have a major influence on Tunisia's economic, social and financial development, despite a drop in production (8.7%).

Agriculture accounts for only 10.2% of the gross domestic products and 9.7% of exports, and the chronic inadequacy of harvests continues to weigh heavily on the balance of trade. The government is stepping-up its efforts to combat the financial and social repercussions of this situation, mainly by taking steps to encourage investment. Two acts have been passed in this regard: the first promotes investment in the agricultural and fishing sectors, while the second act deals with the organization and operation of the agricultural investment promotion agency (Agence de Promotion des Investissements Agricoles, APIA). The main objectives of the country's leaders are to meet the food needs of a growing population (+2.7%/yr) and to attain a higher level of food self-sufficiency, a major concern in all developing countries. This remains a difficult goal. It is estimated that 100,000 hectares of arable land are lost annually through water erosion, deforestation and even neglect, and it is doubtful whether this land can ever be recovered.

No major changes in the meat importing structure are anticipated. Most imports continue to come from Europe, particularly France, West Germany, Ireland, Great Britain, Holland and Spain.

With the exception of sheep farming, the animal husbandry sector appears to be experiencing growth in 1983-84. The drought which hit certain governorates in the southern and central regions caused fodder supply problems for sheep farmers and special measures were needed in order to remedy the situation.

In the area of poultry raising, various measures taken since June 1983 have led to an improvement in egg production and a pick-up in broiler production.

Total production of concentrated feed in 1983 was estimated at 358,000 tonnes down from 556,000 tonnes in 1982. This drop is linked to the slump in broiler production caused by the decrease in subsidies for the primary products used in animal feed.

Tunisia is still a major importer of soft (bread) wheat and barley (for fodder). Only 75% of the country's requirements are satisfied by domestic production, making imports necessary to ensure that the food needs of Tunisians are met. Because of the country's economic situation, the government is promoting maximal use of farm credits and the use of available supplies under bilateral food aid programs.

## 7. Canadian Grain Marketing Prospects

Forecasts and projects on Tunisia's needs, production and objectives are available from the economic studies and surveys conducted at the beginning of each crop year. Forecasts are also made during the preparation of plans. For example, in the Sixth Plan (1982-1986), the level of grain production set for 1985 is 15 million quintals with an average production of 13 million quintals, as opposed to 10 million quintals during the Fifth Plan. Import requirement forecasts for the 1981/1986 period are: 6,600,000 tonnes of wheat/corn; 1,500,000 tonnes of barley; and 180,000 tonnes of fertilizer.

Canadian Grain Marketing Prospects cont'd

The United States subsidizes exports at low rates and has thereby managed to capture traditionally European markets.

Moreover, Tunisians favour the use of calls for tenders, which gives them the advantage of letting competition rule, and they are very unlikely to show interest in a bilateral agreement.

Tunisia expects to import 300,000 tonnes of hard wheat, 400,000 tonnes of soft wheat, 360,000 tonnes of corn and 80,000 tonnes of soybean meal in 1984. C & F prices required are as follows: US\$180/tonne for hard wheat; US\$160/tonne for soft wheat; US\$140/tonne for corn; and US\$250/tonne for soybean meal.

Since a general agreement is unlikely, for the reasons given above, we are suggesting a study of the possibility of Canada's exporting the amounts of wheat, corn and soybean meal not covered by American credits.

8. Processing Facilities

	Year 1983			
	Number of Companies	Number of Plants	Annual Capacity	Actual Output
Flour (and durum) Mills	160	50		1,260
Compound Feed Mills	165	130	1,194	1,172
Malt Houses	1	1		
Oilseed Crushers (mainly olive)	30	1,650	190	130

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Name of Port	Year 1983	
	Grain Storage Capacity	Annual Throughput Capacity
Tunis	1	--
Goulette	588	--
Bizerte	178	--
Sousse	37	--
Sfax	211	--
Gabés	174	--
Total Capacity	1,189	



## II. MALT AND MALTING BARLEY

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

	- - thousands of tonnes - -				<u>Total</u>
	<u>2-Row</u>		<u>6-Row</u>		
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley					338

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

	<u>thousands of tonnes</u>	<u>Principal supplier(s)</u>
Malt	1.6 (1.0)	Belgium, France
Malting barley	18	USA, France, UK

### 3. Additional Information

Change in malting capacity: Domestic capacity is increasing, but is still insufficient to meet local demand, hence the need to import small amounts.

Malt exports: No malt is exported.

Trend in beer consumption: Annual per capita beer consumption is increasing (according to SFBT figures). Demand is highest in summer.

Market potential for Canadian malt and/or malting barley: The sole brewery (SFBT) imports small quantities to meet its requirements.

## III. OILSEEDS

### 1. Import Policy

The ONH (national oils office) is wholly responsible for the importing, exporting and marketing of these products.

Inadequate domestic olive oil production has resulted in an increase in soybean oil and peanut oil imports (bulk liquid).

### 2. Supply of oilseeds and products by type, thousands of tonnes:

#### Year 1983

<u>Oil</u>	<u>Production</u>	<u>Imports</u>	<u>Quantity Processed</u>	<u>Principal Sources of Imports</u>
Soybean		80		Spain, Italy
Peanut oil		20		Spain
TOTAL		100		
<u>Meal</u>				
Soybean		140.7		Spain

OILSEEDS cont'd

3. Export Policy

Exports play an important role in the Tunisian economy. Tunisia encourages industrialists and farmers to export, hence the creation of the export promotion centre (Centre de promotion des exportations, CEPEX), which is responsible for assisting and supporting exporters and promoting Tunisian products.

The national oils office (Office National de l'Huile) has a monopoly on the importing, exporting and marketing of oils in Tunisia.

The recent bread shortage in Tunisia, combined with a Canadian donation of flour and the sudden interest of a number of influential Tunisian lobbyists, has revived interest in the grain sector, which - until now - has seemed a very unpromising market. This lack of interest on our part was, and still is, explained in part by:

- The Canadian tendency to favour large markets and long-term contracts. This is contrary to Tunisian practices and the size of the Tunisian market.
- The subsidies war being waged between the United States and the EEC in the agricultural sector.

Because of these two very significant factors, we have not really been in the running until now. Although recent events have not changed the situation, they do suggest a need for re-examination of this market and our approach to it, given the large volume of commercial imports in 1983.

Prospects and limitations; The Tunisian grain market does not compare with the Algerian market and still less the huge Chinese market. The size and rigidity of these two markets make long-term, comfortable contracts essential. The smaller Tunisian market, however, is more flexible and "spot" operations are readily used when market supply and price justify them. Thus the need for a different Canadian approach in this market.

Potential opportunities for Canada: Given the 600,000 tonnes of grain imported commercially by Tunisia in 1983, there is most likely a place for Canada despite the advantages created by aid programs and the comfortable habits developed by traditional suppliers - with all the inherent implications. Although Canada does not have much room to maneuver because of the strong competition between the EEC and the United States, particularly over soft wheat, we still have not explored niches created by exchange rate differences or the 200,000 tonne corn market.

Strategy: The use of corresponding local agent seems essential in order to ensure adequate representation in Tunisia for purposes of obtaining information on the market, competitors' prices and shipping and delivery procedures.

4. Supply of oilseeds and products by type, thousands of tonnes:

Year 1983		Destinations	
Oils	Production	Exports	
Olive	140	90	Italy, France, Syria, Libya, U.S.A., Jordan, Hungary, Yemen, Yugoslavia, Lebanon, Belgium, Czechoslovakia, Egypt

5. Number and Capacity of oilseeds crushing plants

Number	Type of seed crushed	Capacity
1,351	Olive oil	180,000 tonnes



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	200 (163)		700 (621)	
Durum wheat	700 (752)		300 (119)	
Flour/Semolina	300 (224)		90 (41)	
TOTAL	1,200 (1,139)		1,090 (781)	

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Wheat	600 (518)		12 (6)				612 (524)
Durum wheat	900 (848)		20 (12)				920 (860)
Flour Semolina	600 (773)						600 (773)
TOTAL	2,100 (2,139)		32 (18)				2,132 (2,157)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

ORIGIN	TOTAL IMPORTS	
	U.S.A.	ALL OTHERS
Canada		
Australia		
Argentina		
EEC		

WHEAT (including durum)

Cash			
Commercial Credit	50 (10)	400 (269)	400 (325)
Aid, concessional credit, etc.			300 (264)

FLOUR (including semolina)

Cash/comm. credit			
Aid, concessional:	11	70 (30)	30 (10)

TOTAL

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn			500 (404)	
Barley	370 (338)		510 (418)	
Sorghum			70 (50)	
Oats				
Rye			23 (31)	
TOTAL	370 (338)	1,123 (903)		2,350 (1,915)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	150 (147)	300 (215)	420 (350)				(712)
Barley	200 (150)	510 (470)	500 (400)	150 (90)			(1,110)
Sorghum							
Oats			120 (93)				(93)
Rye							
TOTAL	350 (297)	930 (778)	920 (750)	150 (90)			2,350 (1,915)

IMPORT TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	ORIGIN					TOTAL IMPORTS
	Canada	U.S.A.	Australia	Argentina	EEC	
Corn	(358)	400 (100)			100 (36)	600 (494)
Barley		500 (398)			400 (203)	900 (601)
Sorghum					80 (20)	80 (50)
Oats		90 (30)				90 (30)
Rye					40 (31)	40 (31)
TOTAL	(358)	990 (528)			620 (290)	1,710 (1,176)

## REPUBLIC OF ZAIRE

Economic classification:	Low Income economy	
Oil exporter or importer (net):	Importer	
Average annual growth 1960-80	0.2 %	
Annual inflation rate 1970-80	32 %	
Annual inflation rate (current)	40%	
Volume of imports	0.140 billion US\$	year 1982
Of which food	20 %	year 1983
Of which fuels	10 %	year 1983
Principal foreign exchange earning export:	copper, other minerals	
Population	30 million	year 1983
Annual population growth	2.9 %	year 1983
Annual Consumption:		
Flour	200,000 tonnes or 6.7 kg/capita	year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Wheat - Very little wheat is cultivated in Zaire. Cultivation is still in the experimental stage in the Kivu and North Shaba region.

Projections for 1984:

- Wheat cultivation project financed by the Department of Agriculture in Kivu: 4,000 tonnes (4,120 hectares)

- Wheat cultivation project financed by Minoterie de Matadi (MIDEMA) in Kivu. Harvest in March 1984: 7,500 tonnes.

Other tests have been carried out in Shaba by missionaries and schools, but the results are not known.

Corn: Is a basic item in the diet. The annual shortfall is 200,000 tonnes. In 1983 commercial corn production was 90,000 tonnes but to this must be added about 300,000 tonnes produced through subsistence farming.

Because of the drought in southern Africa in 1983/84, it will be necessary to import corn from the United States. It should be noted, however, that despite the 200,000-tonne shortfall, imports have been limited to 80,000 tonnes.

Corn projects: A number of projects have been undertaken in recent years. One of these produced 70,000 tonnes in 1982 and 76,000 tonnes in 1983.

Rice: Cultivation is being extended with Chinese help. Production in 1983 at 258,000 tonnes, slightly higher than the 1982 figure. United Nations sources estimate 1983 imports at 57,000 tonnes, more than double the 1982 figure.



## Crop Situation and Outlook (cont'd)

Soya: Can be cultivated in many parts of Zaire but production is small-scale at present, 1,150 tonnes in 1982. The possibility of using 10% soya in making wheat bread is being considered.

### 2. Foreign Exchange Situation

The negotiations entered into by the Government of Zaire with the International Monetary Fund resulted in 1983 in a series of measures intended to liberalize the economy. The measures adopted made it possible, among other things, to provide foreign currency needed to pay for imports. The country is an aid recipient.

### 3. Fertilizer Situation

There is no fertilizer produced in Zaire. Imports are insufficient, and mainly used for export crops. The Programme National Engrais (national fertilizer program) financed by the FAO aims at making the use of fertilizer more widespread. A study is underway on a proposed project to build an ammonia-producing plant which could produce 200,000 tonnes a year. A Canadian company, Electrofertilizers International of Toronto, carried out a pre-feasibility study.

### 4. Import Mechanism

As indicated above (section 2), importers are now able to obtain foreign currency from commercial banks. As a result, users of flour can import the flour that they need themselves, whereas formerly only the companies Quo Vadis and Midema had access to foreign currency. Thus the number of importers has been increasing over recent months.

### 5. Grain Industry Infrastructure

#### a) MIDEMA

Owns bulk storage elevators for wheat in the port of Matadi. Electric unloading system on docks. Unloading capacity: 1,800 tonnes/24hr. Storage capacity: 20,000 tonnes. By-product capacity: 3,500 tonnes. Flour production capacity: 600 tonnes/day, but this is currently working at only 40% of capacity. Boats having draught exceeding 21.6 feet cannot sail upriver to unload.

#### b) QUO VADIS

Largest industrial bakery in the country. Capacity: 150 tonnes of flour per day. Present production: 79 tonnes/day. Flour transported from Matadi to Kinshasa by tanker-truck. Have their own elevators but dispose of flour on a day-to-day basis. Distribution: bread to Kinshasa and flour throughout the country. Until December 1982, they received their flour from Midema. Imports: 15,000 tonnes/month of flour from Holland and Germany, made from Canadian or American wheat. Prices are competitive since both Holland and Germany use by-products. Price CIF Matadi: US\$ 160/tonnes, which is equal to the price of wheat imported by Midema.



### Grain Industry Infrastructure (cont'd)

In 1983 Quo Vadis imported 60,000 tonnes of flour from Holland and France. At the beginning of 1984, Quo Vadis began work on a modern plant capable of using any quality of flour for bread-making. The flour will be enriched with vitamins and proteins by means of an additive which will give greater homogeneity to the dough.

#### B.K.T.F. (Masina bakery SPRL-1981):

Capacity - 2 French-bread production lines using about 10,000 sacks a month or 15 tonnes daily. The B.K.T.F. industrial bakery came into operation in August 1981. As of July 1983, the plant was using 8,000 sacks of flour a month. To meet demand it would have to receive about 16,000 sacks.

#### U.P.A.K. (Kinshasa bakery, SPRL-1977):

Capacity - 624,000 sacks yearly or 75 tonnes daily. 3-shifts. Specialized in the production of all sizes of French bread, in April 1983 this industrial baker installed a third production line. At the beginning of 1984 there were plans to instal 18 silos (capacity of 50 tonnes of flour) and to transport flour from Matadi to Kinshasa.

### 6. Government Policies Affecting Grain and Agriculture

Although agriculture is a priority for the Zairian government, nothing has been done to encourage wheat cultivation in the country. Midema has launched a wheat cultivation project in North Kivu and Shaba. It has distributed seed to 1,900 peasants. The wheat harvested in March 1984 was milled into flour by the Minoterie de Kivu (Minoki), a subsidiary of Midema.

### 7. Canadian Grain Marketing Prospects

Grain (especially wheat) and flour imports will be necessary for a long time yet in Zaire since cultivation is, as we have already pointed out, in the experimental stage and the country is consuming increasing amounts of bread.

In the short term: Contact the importers directly (with the exception of Midema which obtains its supplies in the U.S.A.) and submit pro forma invoices with prices that are competitive with the prices of the European suppliers.

Representatives of one Canadian grain trader made an exploratory visit to Zaire in 1983.

### 8. Processing Facilities

	Year: 1983			
			thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	3	7		

## II. STATISTICAL NOTES

### a) Wheat

Imported by MIDEMA.

- thousands of tonnes -

1983:		
	Direct purchases	87.0
	Aid (EEC, France, Spain)	11.2
	PL 480	<u>50.8</u>

Total	149
-------	-----

1984 (PL 480):	50
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### b) Wheat Flour

Imported by MIDEMA

1984: PL 480	6
--------------	---

1983: Imported by QUO VADIS (see section 5 above)

Imported by B.K.T.F.: Since July 1983, the bakery has used 8,000 sacks of flour a month.

Imported by U.P.A.K.: Imports not known.

### (c) Crude palm oil

Production 1982:	86,827 tonnes
Exports in 1982:	9,222 tonnes

Production fell in 1983 because of drought.

### d) Cottonseed oil

In 1982, 2,400 tonnes of seeds processed yielded:

Crude oil:	268 tonnes
Refined oil:	238 tonnes
Meal:	1,038 tonnes
Linter:	68 tonnes

### e) Beer

Production in 1981:	2.7 million hectolitres
Production in 1982:	2.9 million hectolitres

Supplies to breweries have improved thanks to local corn production. EEC statistics record barley malt exports to Zaire of 22,000 tonnes in 1982.

## Z A M B I A

Economic classification:	Low Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$560	year 1981
Annual per capita GNP	US\$600	year 1981
Average annual growth 1960-80	1.9%	
Annual inflation rate 1970-80	10.0%	
Annual inflation rate (current)	19.1%	
Volume of imports	0.85 billion US\$	year 1982
Of which food	5.0%	year 1982
Of which fuels	21.0%	year 1982
Principal foreign exchange earning export:	Copper (95%)	
Debt service as % of GNP	7.0%	year 1983
Debt service as % of exports	25.0%	year 1983*
Population	6.2 million	year 1982
Annual population growth	3.5%	years 1972-1982
Annual Consumption:		
Flour	120,000 tonnes or 19 kg/capita	year 1983
Meat	24,800 tonnes or 4 kg/capita	year 1983
Vegetable Oil	22,000 tonnes or 3.6 kg/capita	year 1983

\* 1984 estimates show debt service as 65% of export earnings.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Maize: In April 1984, at which time the rainy season usually comes to an end, the official forecast put the harvest at only 270,000 tonnes. The Southern Province, the traditional bread basket and the area hardest hit by drought produced only 60,300 tonnes. However, the planting of late crops during December 1983 and the unusual late rains appear to have increased the harvest to 540,000 tonnes leaving a shortfall of 300,000 tonnes over requirements. Some of this shortfall has already been imported from Malawi. The bulk is being obtained from the USA via South African ports which are expected to handle an estimated 5.5 million tonnes of maize due to successive droughts in the region and a upsurge in imports.

Wheat/Barley: Wheat and barley is grown on the Mpungwe wheat scheme (Copperbelt). The area under wheat cultivation is insignificant in the face of Zambia's overall needs. Wheat imports are normally between 90,000 and 120,000 tonnes per annum. The National Milling Company has been importing wheat (prime hard 12-13% protein) from Australia, from January 1983 through to 1984, in quarterly shipments through Dar-es-Salaam or South African ports. Malted barley is imported from Zimbabwe's Kwekwe malting plant.

Cotton: The 1984 crop has benefited from the weather conditions and in spite of the drought a record harvest of 50,000 tonnes is expected to be achieved - the previous record was 32,000 tonnes in 1983.



Other Crops: The former EC financed wheat scheme on the Copperbelt has been reformed as the Mpungwe Development Company with a 51% government shareholding. The government is to connect the scheme to the electricity grid, and K12 million (US\$7.27 million) is to be invested in the scheme by the IFC, CDC of the UK, DEG of West Germany and IDESA of Switzerland. Phase one of the project covers 1,000 ha. which will be planted mainly to soya beans, burley tobacco, coffee and maize with some of the output geared towards export markets.

## 2. Foreign Exchange

With copper earning 95% of all export earnings, the failure of metal prices to participate fully in the world economic recovery together with agricultural difficulties brought on by another year of drought, has made it impossible for Zambia to meet all the conditions laid down by the Paris Club of Creditors in 1983 for debt rescheduling. In May Zambia met its creditors in Paris at a consultative meeting organized under IBRD auspices. At this meeting the Finance Minister, Luke Mwananshiku, emphasized the problems facing his country. He said that debt servicing costs in 1984 are put at K933.5 million (US\$566 million), equivalent to 65% of expected foreign currency earnings.

Balance of payment deficits have been a recurrent feature in Zambia since 1957, but with IMF support and a long process for converting Kwacha to hard currency Zambia has so far managed to stay solvent. Currently, payments for imports in December 1979 are being cleared. The government has announced its intention to clear outstanding payments by the end of 1988 by means of staggered payments.

## 3. Fertilizer Situation

The USA is to provide a \$15 million import grant for agricultural inputs. Two-thirds will be spent on raw materials that can be combined with locally produced ammonium nitrate to make compound fertilizers and the balance is to be spent on spare parts for agricultural equipment.

## 4. Government Policies Affecting Grain and Agriculture

As an incentive to increase maize production in 1984/85, producer prices were increased from K24.5 (US\$14.85) to K28.32 (US\$17.16) for a 90 kg. bag. Also, the producer prices for wheat and barley increased from K42.5 (US\$25.76) to K45.2 (US\$27.39) for a 90 kg. bag.

## 5. Canadian Grain Marketing Prospects

In view of severe foreign exchange limitations, Zambia's imports of wheat and maize will have to be on an aid or long-term financing basis for the foreseeable future.

No prospects appear to exist for other produce, beans, etc.



## Z I M B A B W E

Economic classification:	Middle Income economy	
Oil exporter or importer (net):	Importer	
Annual per capita income:	US\$683	year 1983
Annual per capita GNP	US\$683	year 1983
Average annual growth 1960-80	0.7%	
Annual inflation rate 1970-80	8.8%	
Annual inflation rate (current)	18.5%	
Volume of imports	1.082 billion US\$	year 1982
Of which food	0.9%	year 1982
Of which fuels	14.3%	year 1982
Principal foreign exchange earning export:	Agriculture	
Debt service as % of GNP	5.5%	year 1984
Debt service as % of exports	25.0%	year 1984
Population	7.7 million	year 1984*
Annual population growth	4.3%	years 1980-2000
Annual Consumption:		
Flour	200,000 tonnes or 26 kg/capita	year 1984
Meat	80,000 tonnes or 11 kg/capita	year 1984
Vegetable Oil	62,000 tonnes or 8 kg/capita	year 1984

\* Official figure but most likely in region of 8.5 million.

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Zimbabwe entered 1984 with a deficit relating to stocks of corn and wheat. Successive droughts resulted in decreased yields of corn. Wheat, a winter crop requiring irrigation, also suffered a decline due to reduced area necessitated by limited availability of water. The forecast for wheat is that the area planted in April 1984 was only 15,000 ha mainly in Middle Sabi, where the yield is lower, about 4 tonnes per hectare. The 1984 wheat crop is projected to be 60,000 tonnes against a requirement of 250,000 tonnes to meet full demand. The 1984 corn crop question is even more disastrous with expected deliveries of about 750,000 tonnes against a need for 1,200,000 tonnes. Large imports of yellow maize have taken place resulting in consumer resistance (market traditionally consumes a white corn), and an increased demand for bread. Rice is only grown on an experimental basis and rice imports from January to August 1983 were valued at \$4.7 million. With an ailing economy Zimbabwe has looked to aid and even barter arrangements to obtain wheat/maize stocks to meet shortfalls. Corn stocks as of April 1984 were reported to have been 53,000 tonnes, a half month's supply. Official reports (July 1984) stated that although the drought has forced the government to import 400,000 tonnes of maize to feed the population, there has been a record crop this year of export products such as tobacco, cotton and soya beans.

## 2. Foreign Exchange Situation

Zimbabwe will be hard pressed to find foreign exchange to finance even a small portion of food imports to meet the shortfalls already experienced in 1984. Aid on an international basis or long term financing will be necessary. Under normal circumstances the country is an exporter of corn and other food products.

## 3. Fertilizer Situation

There are ample stocks of fertilizer as a result of a reduced planted area, the drought, domestic production of fertilizer and aid given in 1982/83. Phosphate-based fertilizers are largely available from local industry and deposits. Urea has been imported from Europe (Bulgaria, East Germany and Romania) as a result of barter deals for tobacco, asbestos and ferro chrome.

## 4. Import Mechanism

Imports are conducted through the parastatal Grain Marketing Board. Tenders are issued where aid funds are involved and for imports utilizing existing foreign exchange. The 1984 yellow maize importation of 100,000 tonnes was awarded to Thailand and Argentina while the EEC and UK financed packages were for Malawi maize.

## 5. Grain Industry Infrastructure

No changes - all imports are handled by the Grain Marketing Board (GMB). Storage capacity is 700,000 tonnes. Bulk maize storage silos recently constructed at Chegutu and Norton (68,000 tonnes) were financed by the USA and Denmark at a cost of \$11 million.

## 6. Government Policies Affecting Grain and Agriculture

About 70% of the grains grown are on large commercial scale farms. Price per tonne for corn in 1980 was \$75-increased to \$120, \$140 and then in 1984 to \$180. Commercial growers were looking for \$200 per tonne as an incentive to increase plantings for the 1984/85 season. 1983 plantings were only 190,000 ha., down from 245,000 ha.

Government policy is to encourage increased agricultural production, but at the same time keep prices down. Meat production has increased to cater to the increased export markets. However, meat price increases have caused consumer resistance and a decrease in local demand resulting in losses being reported by the Cold Storage Commission.

With normal rains Zimbabwe has self-sufficiency in all agricultural products except rice. Opportunities which exist at this time were presented by successive droughts.



7. Canadian Grain Marketing Prospects

The 1984 winter planting of wheat will cover 15,000 ha. mainly in the Middle Sabi area, where low yields are expected. At 4 tonnes per ha the anticipated crop will be 60,000 tonnes against a minimum requirement of 200,000 tonnes. The Zimbabwe government through the GMB will be seeking sources of supply to make up for corn and wheat shortfalls. Canadian exporters were advised in earlier 1984 of a tender for 100,000 tonnes of corn (yellow maize).

There may be limited marketing possibilities for beans when droughts exist.

8. Processing Facilities

	Year 1983		thousands of tonnes	
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	3	10	350	200
Compound Feed Mills				
Malt Houses	2	2	36	22
Oilseed Crushers	3	5	100	40

9. Storage and Throughput Capacity

Grain Import Capacity by Port

Year 1983/84

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Durban - South Africa	All capacities are more than adequate for Zimbabwe's needs.	
Port Elizabeth "		
Maputo - Mozambique		
Beira "		

II. MALT AND MALTING BARLEY

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

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley*	22	-	-	-	22

\* Malting barley only grown - all under irrigation.

2. Imports, Calendar year 1983 estimated. Nil

3. Additional information:

Change in malting capacity: Remains constant (see also under processing). National Breweries, who run a malting plant, contract out to farmers to grow on their behalf at a fixed price. Types of barley are Triumph and Diamant.

Malt exports: Zimbabwean malt is exported to Zaire, Zambia, Botswana, Namibia and South Africa. Exports have been as follows:

<u>Year</u>	<u>Tonnes</u>	<u>Valued at US\$</u>
1983	8,750	US\$3.5 million
1982	12,291	3.6 million
1981	13,119	3.5 million

Trend in beer consumption: Spending power remains fairly constant. Breweries report little change in market pattern.

Market potential for Canadian malt and/or malting barley: Under normal circumstances no potential. However, successive droughts have reduced availability of water for irrigation with the result that the 1983 crop was only 11,500 tonnes and the 1984 crop is estimated at 10,500 tonnes. This will be sufficient to November 1985 although a continued drought will result in curtailment of exports.

III OILSEEDS

1. Import Policy:

Import tariffs are 20% ad valorem on oilseeds, crude oil, oilseed meal and refined oil.

Due to local production, foreign currency is not allocated for imports except in occasions of scarcity.

Importation procedure and structure: Only in cases of shortfall in local production are imports resorted to and only then with approval of economic ministries.

2. Additional factors: Zimbabwe has been an exporter of vegetable oils - groundnut \$2.9 million in 1978 but reduced to \$200,000 in 1983 due to drought. Cotton seed and other oils have also shown reduced export earnings.

3. Number and capacity of oilseed crushing plants.

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity</u>
3	Cotton, Groundnut, Soya, Sunflower, Maize	100,000 tonnes/annum



4. Export Policy:

Export assistance or control measures: All agricultural products require clearance from Ministry of Agriculture which requires proof that products are surplus to requirements.

Export procedure and structure: Normally through Grain Marketing Board but private enterprises do participate.

5. Supply of oilseeds and products by type, thousands of tonnes:

Base year: 1983

<u>Oilseed</u>	<u>Production</u>	<u>Exports</u>	<u>Destinations</u>
Soya	87		
Groundnuts	5.3		
Sunflower	7.5		
Cotton	250.0		
TOTAL	349.8		
<u>Oil</u>			
Maize	10		
Soybeans	22		
Cotton	38		
TOTAL	70		
<u>Meal</u>			
Soya	38	20	Zambia, Botswana,
Cotton	62		South Africa
TOTAL	100	20	

## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Wheat	60 (210)	(10)	138	200 (220)
Durum wheat				
Flour/Semolina				
TOTAL				

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption Human	Animal	Industrial	Other (seed, waste)	Exports	Carry-out	Total
Wheat	200 (220)						200 (220)
Durum wheat							
Flour Semolina							
TOTAL							415

IMPORT TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

	ORIGIN				TOTAL IMPORTS	
	Canada	U.S.A.	Australia	Argentina		EEC
Cash		25				25
Aid, concessional			35 (25)		56.7	3.0 (W. Germany)
credit, etc.						18.3 (France)
TOTAL						138

## (B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Corn Maize	800 est (670)	53 (835)	180	1,033 (1,747)
Barley	11.5 (33)			11.5 (33)
Sorghum	5.0 *		85	90.0
Oats				
Rye				

TOTAL 816.5 (703) 53 (835) 265 1,134 (1,780)

\* This refers to deliveries made to the Grain Marketing Board. Crop will be above this but difficult to estimate.

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>		<u>(seed, waste)</u>			
Corn Maize	1,000 (1,200)	9	20	3	(296)		1,134 (1,780)
Barley							
Sorghum							
Oats							
Rye							

TRADE 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>ORIGIN</u>					<u>TOTAL IMPORTS</u>	
	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>		<u>All Others</u>
Corn		30		80	50	20	180
Barley							
Sorghum				85			85
Oats							
TOTAL		30		165	50	20	265

Principal Other Sources: Thailand, Malawi

PART IX  
OCEANIA



## NEW ZEALAND

Economic classification: Industrial Market economy			
Oil exporter or importer (net): Importer			
Annual per capita income:	US\$6,934		year 1983/84 Mar/April
Annual per capita GNP	US\$7,540		year 1981/82 June-July
Average annual growth 1960-80	1.8%		
Annual inflation rate 1970-80	12.5%		
Annual inflation rate (current)	5.4%		
Volume of imports (CIF)	4.9 billion US\$		year 1983
Of which food	4.8%		year 1983
Of which fuels	17.7%		year 1983
Principal foreign exchange earning export: Meat, Wool, Dairy Products			
Debt service as % of GNP	37.8%		year 1983
Debt service as % of exports	14.1%		year 1983
Population	3.27 million		year 1983
Annual population growth	1.1%		years 1983-1984
Annual Consumption:			
Wheat	229,300 tonnes		year 1983
Meat	335,600 tonnes		year 1983
Vegetable Oil	18,900 tonnes		year 1983

### I. GENERAL INFORMATION

#### 1. Crop Situation and Outlook

Domestic grain production in 1983/84 is estimated at 1.216 million tonnes which represents a 32% increase above the 1982/83 production of 0.918 million tonnes. This increase is attributed to a shift to barley production from wheat due to better markets. Forecast 1984 acreage as follows: (1983 in brackets)

Wheat	-	63,197 ha.	(74,037)	-14.6%
Oats	-	13,316 ha.	(13,477)	- 1.2%
Barley	-	130,017 ha.	(79,349)	+63.8%
Corn	-	22,230 ha.	(21,973)	+ 1.2%

#### 2. Foreign Exchange Situation

New Zealand has a large foreign currency deficit and large overseas debts. After the New Zealand general election (14 July 1984) the N.Z. dollar was devalued by 20% moving from 0.838 Cdn to present (01 Oct) 0.649 Cdn. No priorities are set for agricultural inputs nor food imports. New Zealand will not be an international aid recipient.

### 3. Fertilizer Situation

Forecast 1984/85 (June year) fertilizer sales are 2 million tonnes which is up 5% over 1983/84 sales. 1984/85 sales are broken down as follows: 1.85 million tonnes superphosphate and 0.15 million tonnes other. Increase expected due to expected 18% increase in gross farm returns coupled with increased cost of import fertilizer components caused by devaluation (20% July 1984).

### 4. Import Mechanism

The New Zealand Wheat Board is the sole authority for wheat and flour imports. The policy of Closer Economic Relations (CER) with Australia will see a gradual (10% per annum) increase in import quota for flour until 1995 when flour imports from Australia will enter free and with no quotas.

### 5. Grain Industry Infrastructure

The New Zealand Wheat Board is the sole purchaser and importer of wheat in New Zealand. NZWB purchases wheat from the farmer, distributes to flour millers, buys flour from millers then sells to wholesalers. All grain storage is on farm. NZWB makes storage payments to producers. Most production of wheat is in the South Island while milling facilities are in the North Island. No terminal or port storage facilities exist.

### 6. Government Policies Affecting Grain and Agriculture

Recent government review of New Zealand wheat industry presently being reviewed by new Labour government. Review may result in policy changes but they are 12-18 months away. Review urges less New Zealand Wheat Board control of system. Production of wheat declining while barley production is increasing. Oilseeds production is insignificant.

Canada will continue to be the third choice supplier of milling wheat, after Australia and the U.S.A., at times of New Zealand wheat shortfall only.

### 7. Canadian Grain Marketing Prospects

There are no locally obtainable projections of national grain import needs to 1985 or 1990. New Zealand is attempting to be self-sufficient in grain production. Shortfalls are sourced from Australia. Canadian opportunities would only arise if Australia is unable to supply New Zealand due to any shortfall and only if Canada is price competitive with U.S.A.

Very small amount of mustard and various beans enter New Zealand from Canada. This trade will continue.

8. Processing Facilities

Year: 1984

	thousands of tonnes			
	<u>Number of Companies</u>	<u>Number of Plants</u>	<u>Annual Capacity</u>	<u>Actual Output</u>
Flour (and durum) Mills	22	23	400	300
Compound Feed Mills				
Malt Houses	1	2		
Oilseed Crushers	1	1	0.4	0.2

9. Storage and Throughput Capacity

Grain Import Capacity by Port: None

- - thousands of tonnes - -

<u>Name of Port</u>	<u>Grain Storage Capacity</u>	<u>Annual Throughput Capacity</u>
Auckland	None	0.030 - 0.1

II. MALT AND MALTING BARLEY

1. Domestic Production of barley by type, 1982/83 estimate:

- - thousands of tonnes - -

	<u>2-Row</u>		<u>6-Row</u>		<u>Total</u>
	<u>Winter</u>	<u>Spring</u>	<u>Winter</u>	<u>Spring</u>	
All Barley Suitable for malting					652.3

2. Imports: No imports.

3. Additional Information:

Domestic malting capacity remains static.

Malt Exports: There are large exports to S.E. Asia plus (recent development) and Australia plus South Pacific (South) countries.

Trend in beer consumption: Slight decrease in beer consumption, no figures available. Very small move to higher wine consumption at expense of beer.

### III. OILSEEDS

1. Import Policy

Oilseeds, crude oil, oilseed meal and refined oil all enter New Zealand duty free and exempt of import license requirements.

Importation procedure and structure: Private importers.

2. Supply of oilseeds and products by type, tonnes:

Base Year 1983

<u>Oilseed</u>	<u>Production</u>	<u>Imports</u>	<u>Processed</u>	<u>Principal Sources of Imports</u>
Soyabean		179		Australia
<u>Oil</u>	<u>Produciton</u>	<u>Imports of Oils</u>		
		(crude)	(refined)	
Soyabean			16.6 milion litres	U.S.A.
Rape Colza & Mustard	200-300 tonnes		132,391 litres	Netherlands, Canada

3. Number and capacity of oilseeds crushing plants:

<u>Number</u>	<u>Type of seed crushed</u>	<u>Capacity (tonnes/year)</u>
1	rapeseed	200 - 300



## IV. STATISTICAL NOTES

## (A) WHEAT AND DURUM

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	<u>Production</u>	<u>Carry-in, July 1</u>	<u>Imports</u>	<u>Total Supply</u>
Wheat	308 (324)		115 (100)	423 (424)
Durum wheat Flour/Semolina				
TOTAL	308 (324)		115 (100)	423 (424)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	<u>Consumption</u>		<u>Industrial</u>	<u>Other (seed, waste)</u>	<u>Exports</u>	<u>Carry-out</u>	<u>Total</u>
	<u>Human</u>	<u>Animal</u>					
Wheat	240 (232)	143 (67)			40 (15)		423 (314)
Durum/Wheat Flour Semolina							
Total	240 (232)	143 (67)			40 (15)		423 (314)

IMPORT TRADE 1982/83 est. - thousands of tonnes - previous year in brackets

ORIGIN	<u>Canada</u>	<u>U.S.A.</u>	<u>Australia</u>	<u>Argentina</u>	<u>EEC</u>	<u>All Others</u>	<u>TOTAL IMPORTS</u>

WHEAT (including durum)

Cash						(29)	115 (100)
Commercial Credit			115 (70.8)				
Aid, concessional credit, etc.							

FLOUR (including semolina) of wheat or meslin

Cash/comm. credit	91 kg	16 kg	18,300 kg	16,725 kg	106,140 kg	141,000 kg.
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Principal Others: USSR

(B) COARSE GRAINS

SUPPLY 1983/84 est. - thousands of tonnes - previous year in brackets

	Production	Carry-in, July 1	Imports	Total Supply
Corn	199 (176)		(125 kg)	199 (176)
Barley	652 (367)		(3,677 kg)	652 (367)
Sorghum				
Oats	57 (50)		(36,000 kg)	57 (50)
Rye				
TOTAL	908 (593)			908 (593)

DISPOSITION 1983/84 est. - thousands of tonnes - previous year in brackets.

	Consumption		Industrial	Other (seed, waste)	Exports	Carry-out	Total
	Human	Animal					
Corn	63	100			36		199
Barley	50	352			250		652
Sorghum							
Oats							
Rye							57
TOTAL	113	452			286		908

Export Destination: Singapore, Fiji, PRC, Australia

IMPORT TRADE 1983/84 est - thousands of tonnes - previous year in brackets

	ORIGIN			TOTAL IMPORTS
	Canada	U.S.A.	U.S.A. Australia Argentina EEC All Others	
Corn			125 kg	125 kg
Barley				
Sorghum				
Oats				
Rye			36,000 kg	36,000 kg
			1,800 kg	1,850 kg
				3,650 kg

APPENDIX I  
LIST OF CONTRIBUTING TRADE OFFICERS

APPENDIX I

List of Contributing Trade Officers

<u>Geographic Area/Country</u>	<u>Trade Officers</u>
<u>I. European Economic Community</u>	
Belgium-Luxembourg	R. Lejeune
Denmark	Embassy
France	P. Laveau
Greece	G. Cadieux/C. Swift
Ireland	J. Sullivan
Italy	M.J. McDermott
Netherlands	P. Drager
United Kingdom	P. Westdal*/G.D. Cooper
<u>II. Western Europe (Non-EC)</u>	
Austria	L.N. Decrinis
Finland	K. Valjakka
Malta	M.J. McDermott
Norway	B. Onsager
Portugal	J.A. Feir/M.J.D. Lima
Spain	F. Veenema/M.F. Crawcour
Sweden	U. Hansson
Switzerland	P. Williams
Turkey	D.G. Summers
<u>III. Eastern Europe</u>	
Czechoslovakia	R.B. MacKenzie/I. Boldová
German Democratic Republic	Z. Gesicki
Hungary	G. Rush
Poland	D.B. Collins
Romania	O. Bonea
Union of Soviet Socialist Republics	P. MacArthur
Yugoslavia	Embassy

\* Canadian Wheat Board, London, England.



<u>Geographic Area/Country</u>	<u>Trade Officers</u>
IV. <u>North and Central America</u>	
Costa Rica	H.E. Campbell
Cuba	J.S. Sotvedt/J.L. Callado
Dominican Republic	M.P. de Araujo
Guatemala	H. Cerezo
Honduras	H. Cerezo
Jamaica	P. Wright
Mexico	J.A. Pahnke
Nicaragua	H.E. Campbell
Panama	H.E. Campbell
V. <u>South America</u>	
Argentina	H. Glansdorp
Brazil	M. Lopes
Chile	R. Déry
Colombia	R. Bosenberg
Peru	J. Collantes
Uruguay	H. Glansdorp
Venezuela	M.P. de Araujo
VI. <u>Asia (Near East)</u>	
Iraq	J.A. McNab
Jordan	M.G. Stinson/R. Stephan
Saudi Arabia	M. Ellis/R. Awaidah
VII. <u>Asia (Far East)</u>	
Hong Kong	F. Chau
India (and Sri Lanka)	K.L. Khanna
Indonesia	P. Hutasoit
Japan	G. Parsons/Y. Kagi
Korea	C.W. Chang
Malaysia	B.S.L. Chee
Pakistan	D.E. Carl/M.Y. Farooqi
Philippines	J.L. Swanson
Singapore	P.C.M. Ho
Thailand	T. Thaiprasithiporn

<u>Geographic Area/Country</u>	<u>Trade Officers</u>
VIII <u>Africa</u>	
Cameroon	Embassy
Ivory Coast	B. Sangare
Kenya	G.C. Dunford
Malawi	T.S. Mercer
Morocco	D. Temsamani
Mozambique	T.S. Mercer
Nigeria	G.N. Hinton
South Africa	B. Fraser
Tunisia	L. Bourguiba
Zaire	P. Pichette
Zambia	T.S. Mercer
Zimbabwe	T.S. Mercer
IX. <u>Oceania</u>	
New Zealand	T. Hayward



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