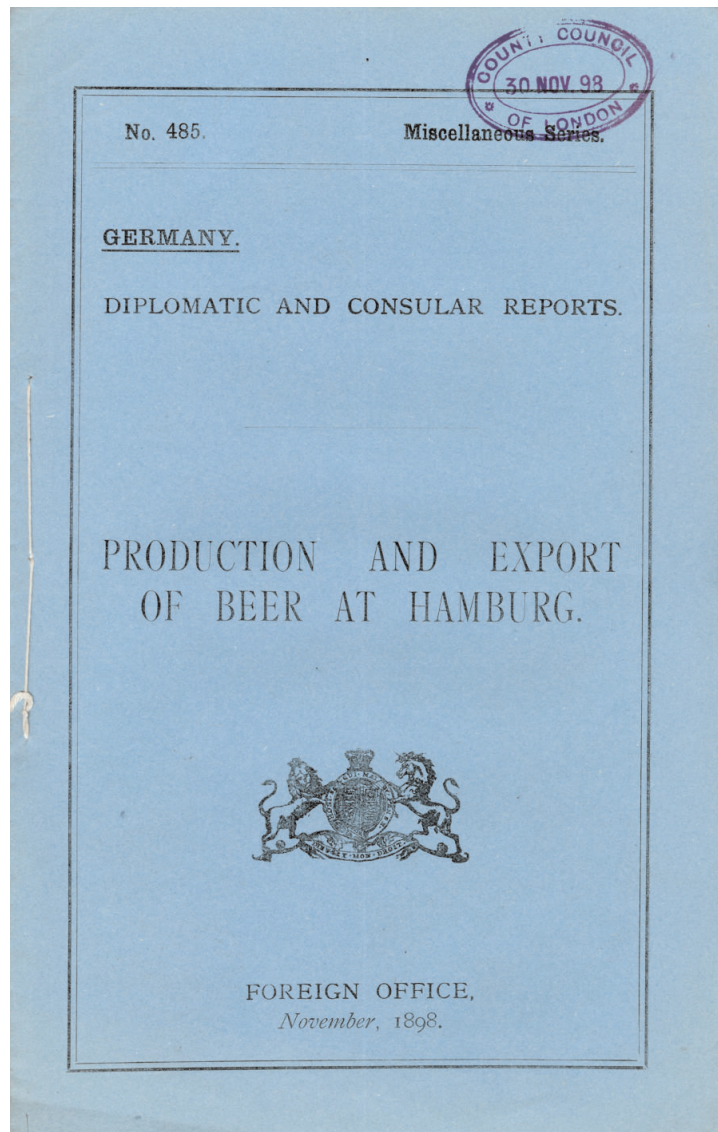


REPORT ON THE PRODUCTION AND EXPORT
OF BEER AT HAMBURG

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(Received at Foreign Office, November 12, 1898.)

The large consumption of beer among all classes at Hamburg as well as in other parts of Germany, is doubtless a well-known fact, which British and other visitors to this country have probably often had occasion to verify, and the truth of which does not need to be proved by statistics. Nor is it the purpose of this short report to afford statistical or other information regarding the consumption of beer, but rather to offer a few remarks regarding the production and export trade of the product in question.

There are at present 15 large breweries in and near Hamburg, the aggregate capital of which amounts to about 1,000,000l. It is stated that all these breweries together produce annually a little over 22,000,000 gallons of beer, but that this quantity could, if required, be easily increased by 8,000,000 or 9,000,000 gallons per annum. The by far larger portion of these 22,000,000 gallons is consumed in this district itself, only a comparatively small proportion of the Hamburg made beer being exported to foreign countries by sea, or by land to the interior of Germany. The beer made for exportation is of a stronger quality than that consumed on the spot, and it is mostly subjected to "Pasteurisation," especially when destined for shipment to hot climates. Most of the beer brewed at Hamburg is of a light colour and medium strength, and is brewed upon the same principles as other good German beer; a small quantity of porter and ale, in imitation of the English, is also brewed at Hamburg, chiefly for exportation. All the Hamburg breweries are stated to be fitted with the newest and best brewing machinery.

According to an article recently published in the leading Hamburg commercial paper (from which some of the data contained in this report have been taken) it appears that the quantity of beer annually exported, by land and by sea, from all parts of Germany has been gradually diminishing during recent years. The total value of those exportations in 1897 was about 950,000l., whilst in 1885 their total value is stated to have largely exceeded that figure. The value of the exportations by sea from Hamburg alone fell from 748,061l. in the year 1889, to 498,310l. in 1897. This decline in the annual exportations of beer from Germany has been due on the one hand to the gradual falling-off of the demand in France, which country, it may be observed, has always been and

still is the best customer for German beer, but which during the last 10 years has largely increased its own beer production by the introduction of improved brewing methods; and, on the other hand, the said decline in the exportations may be accounted for to a considerable extent by the fact that, previous to 1888, i.e., the year when Hamburg and Bremen joined the German Customs Union, all goods exported from the Customs Union to those two free cities were counted as exports to foreign countries; so that this naturally had the effect of largely increasing the figures representing the quantity of beer annually exported from Germany at that time via Hamburg and Bremen,

The exportation of German beer to France, and also, though to a minor extent, to Belgium and Holland (for shipment from Antwerp and Rotterdam respectively to oversea countries) is still of considerable importance: but these exportations being, like those to most other parts of continental Europe, effected by land, they of course do not affect Hamburg. The greater proportion, however, of the entire German sea-borne beer exportations pass through, or are made from, this port, whilst only a comparatively small share of this export trade is in the hands of Bremen-Bremerhaven, and the quantity of beer annually shipped from German Baltic ports is quite inconsiderable.

Hamburg is indeed at present the most important continental port for the shipment of German and also of some quantities of Austrian beer; as well as of some small amounts of British, Norwegian, and Danish beers. Of the German beer exported hence a certain proportion is brewed at Hamburg, the remainder being chiefly of Bavarian origin. The Austrian beer comes nearly all from Pilsen in Bohemia.

The export trade of beer from this port, both of that brewed in this district and of that produced elsewhere in Germany, which had experienced a remarkable development between 1880 and 1890, has of late years lost much of its importance in consequence of the growing competition in various oversea countries where breweries have been erected, and where, owing to the improved refrigerating machinery now employed, good beer can be produced even in tropical climates. The excessive production moreover at Hamburg, as well as in most other parts of Germany has depressed prices to such an extent that the profits formerly enjoyed by

the export trade have dwindled down to almost nothing. In addition to these adverse influences economic crises in many Transatlantic States have reduced the consuming power of the inhabitants; whilst in some, high customs duties form a barrier against the importation of beer, as well as of most other European industrial products. It will, after these remarks, not be surprising to find by reference to the figures contained in the following table that a gradual decrease in the annual shipments of beer from this port since the year 1889 has been experienced, viz.:-

Year.	Exportations of Beer (by Sea) from Hamburg.	
	Quantity.	Value.
1889	Gallons 5,158,714	£748,061
1890	4,710,200	689,389
1891	4,788,432	695,023
1892	3,971,858	581,934
1893	3,771,130	566,454
1894	3,567,718	511,811
1895	4,437,574	612,035
1896	4,005,738	529,802
1897	3,784,704	498,310

A glance at the preceding figures will show that the largest annual falling-off in the shipments took place in 1892 ; and this sudden diminution must doubtless be ascribed, to a considerable extent, to the effects of the cholera epidemic prevailing at Hamburg in that year; it must, however, be added that to a certain degree the decrease also in that year was due to one or more of the causes already cited above.

The diminution of late years in the demand for German beer shipped both from Hamburg and also from other ports has, it may be here observed, not been equally striking in all foreign markets. To some few countries indeed the exportations during 1897 have experienced an increase, and among these latter may be mentioned the United Kingdom, the United States of America, Australia, Egypt, and a few others.

The following table will give an idea of the comparative importance of the Hamburg beer export trade to the

various countries of the world during each of the years 1895, 1896, and 1897:-

To	Exportations of Beer from Hamburg		
	1895	1896	1897
	Gallons.	Gallons.	Gallons.
United Kingdom	100,738	104,500	120,824
Spain	24,332	26,048	23,958
All other European countries	80,300	105,402	104,632
United States of America	434,786	574,112	643,500
British India	297,990	350,526	270,512
Brazil	938,938	260,150	209,088
Venezuela	346,192	249,920	155,936
Cape Colony	261,394	258,962	239,228
Australia	87,846	274,428	265,870
German West Africa	32,318	35,684	30,426
German South West Africa	31,746	53,130	66,946
Other parts of West Africa	104,026	86,966	117,106
German East Africa	35,310	24,574	30,580
Zanzibar	30,822	19,778	26,062
Other parts of East Africa	83,572	102,966	133,342
China	121,396	202,136	158,884
Costa Rica	57,706	61,270	89,141
Peru	88,528	103,026	121,264
Columbia	54,208	77,902	89,276
Guatemala	67,232	73,414	67,342
Ecuador	88,988	70,092	90,662
Chili	105,666	86,658	81,136
Dutch East Indies	65,890	66,242	58,366
Porto Rico	72,622	95,656	59,972
Egypt	91,322	48,928	69,828
Staits Settlements	28,622	18,392	52,932
San Salvador	57,280	84,204	36,630
San Domingo	27,148	23,298	24,244
All other non-European countries	423,708	967,280	347,314
Total exports by sea	4,238,966	4,005,644	3,785,004
Add - total exports by land and river to interior of Germany	689,744	669,064	550,726

With regard to the export trade from Hamburg to the United Kingdom in particular, it must be observed that, though an increase took place in the shipments of beer from this port during the last two years, the same have, as compared with former times, diminished very considerably. In 1880 the quantity of beer shipped from this port to the United Kingdom was no less than 1,100,000 gallons; whilst in 1897 it will be seen to have been only 120,824 gallons. Inasmuch as most of the German beer exported to Great Britain is, and always has been, intended for transshipment thence to other countries, the large decrease in these exportations illustrates the unfavourable effect of the development (during the past decade) of direct steam communication between Hamburg and the various oversea countries of the world, upon the transit trade through British ports which was formerly so important.

The most important non-European market for German beer continues to be the United States of America. Though the extent of the annual shipments from Hamburg have fluctuated somewhat of late years, they will be seen to have experienced a gradual and steady increase during the past three years, in spite of the remarkable development of the brewing industry in that country.

Though British India will be seen to be still the largest Asiatic consumer of German beer, a decrease took place in the exportations from this port in 1897 after a sudden rise in the preceding year. It appears that in India also the competition of the home-made product is now beginning to make itself felt.

The exportations of German beer to China, after likewise showing an increase in 1896, diminished in 1897; whilst those to Japan have dwindled down to almost nil. It is stated that the Japanese brewing industry, like many other branches of industry in that country, has made very great strides during the last 10 years; and that the Japanese breweries now produce a sufficient quantity of beer, not only for supplying Japanese consumers, but also an annually increasing number of customers in China, Singapore, and even in Bombay, and some other ports of British India.

Australia and the Cape Colony have continued during the last two years to be the best markets for German beer next to the United States and British India; but the

recent extensive exportations from Hamburg to Australia of various sorts of machinery used for making beer, would seem to point to the probability of some parts of the Australian continent soon being able to provide for their own wants in this respect.

Brazil was not long ago by far the most important market for German beer; and the annual shipments from Hamburg in 1895 are stated to have reached 938,938 gallons, whilst, as will have been seen from the preceding table, the same amounted only to 209,088 gallons in 1897. The causes of this considerable falling-off in the demand are said to have been, on the one hand, the unsatisfactory condition of financial affairs in Brazil, as well as the high import duties on beer, and on the other hand also the establishment of several breweries in Brazil itself.

The same remarks must, in so far as concerns the beer export trade from Hamburg, be also applied to the Argentine Republic which some 10 years ago was the second best transatlantic market for German beer.

Amongst the other more important customers of Germany the Republic of Venezuela used to take a foremost place; but it appears that in this country, as in many others, numerous breweries are being erected (under German superintendence), which will no doubt soon put a stop to the importation of the home-made German product.

It will be gathered from the preceding table that German beer is exported from Hamburg both to East and West Africa, but that the non-German parts consume more than the German colonies of the African continent.

A few remarks on the extent of the importations of beer to Hamburg may here be added. It will, be gathered from the following table that the total annual importations to Hamburg both by sea and by land have experienced a slight diminution during the last three years, and that the importations from the United Kingdom which, it may be added, are inconsiderable, have likewise shared in this decrease.

The most extensive importations by sea to Hamburg are, as will be seen above, made from Bremen, and consist probably in beer brewed in that city and neighbourhood; but by far the largest proportion of beer

imported to this town comes by rail from the interior of Germany, that is to say, chiefly from Bavaria. A certain quantity also comes from Bohemia.

It is stated by competent authorities that seven-tenths of the total annual quantity of beer imported into Hamburg is consumed here, and only three-tenths are consequently re-exported. Comparing the figures of the imports and exports of beer by sea and land respectively to and from Hamburg, it would thus appear, from the foregoing statement, that about two-thirds of the total exportations of beer from this port are produced in Hamburg breweries.

From	Importations of Beer to Hamburg		
	1895 Gallons	1896 Gallons	1897 Gallons
United Kingdom	289,894	290,642	285,738
Bremen (by sea)	712,712	740,432	640,266
United States of America	308	1,012	5,280
Denmark (by sea)	108,306	105,248	103,928
Sehleswig-Holstein (by sea)	40,062	81,224	53,328
Norway and Sweden	55,638	52,228	41,624
Russian Baltic ports	4,840	...	15,708
Rhenish Prussia (by sea)	4,620	1,848	2,222
Belgium (by sea)	7,700	1,320	1,914
Other countries (by sea)	3,542	5,896	1,430
Total (by sea)	1,227,622	1,279,850	1,151,458
By rail and river (from interior of Germany)	5,367,340	5,296,434	5,115,330