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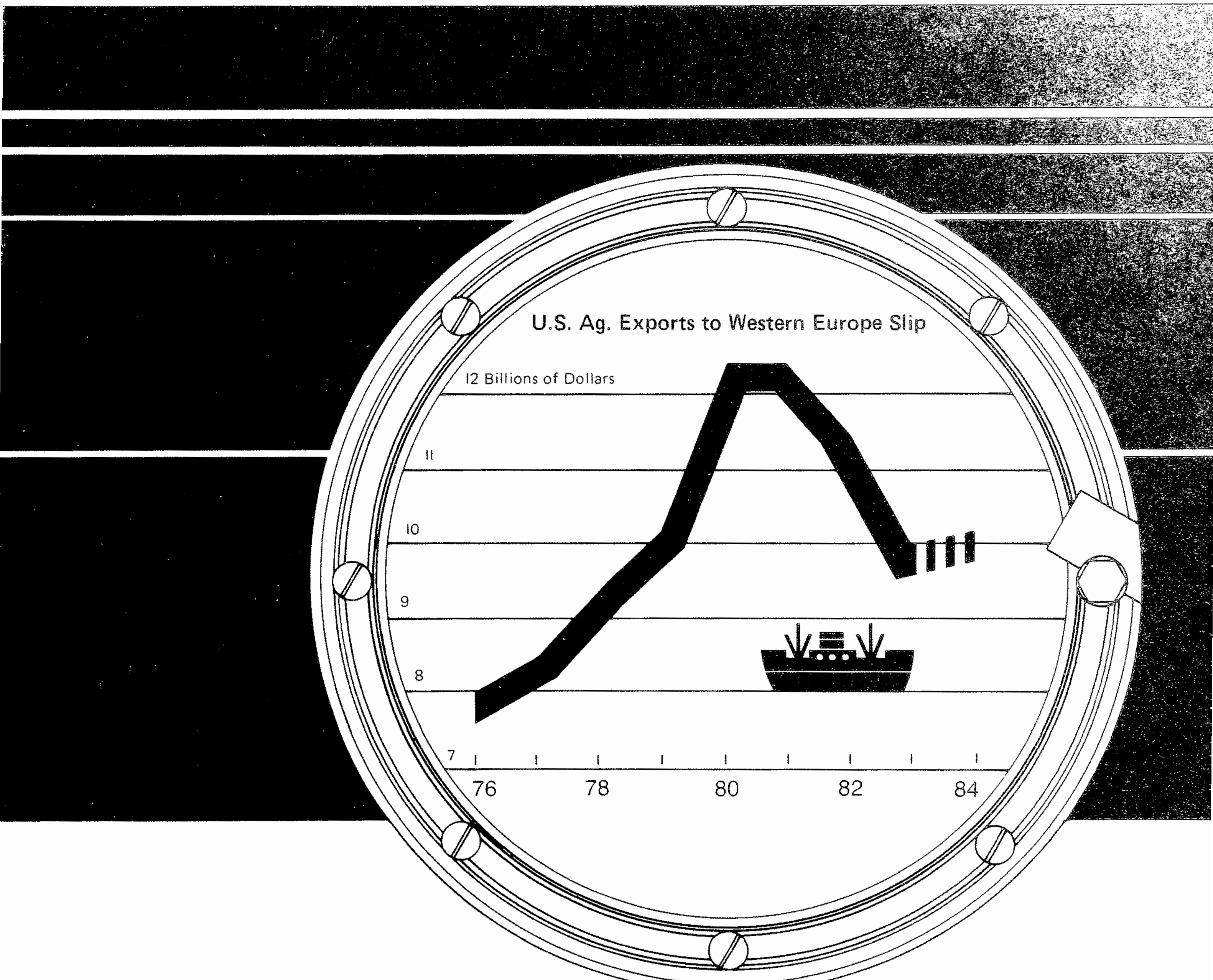

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Summary

Western Europe's agricultural production will likely rise significantly in 1984. Grain production is expected to resume its upward trend after 1983's reduced crop. Weather has been excellent, and near-record yields are forecast. Area will likely to be 1 to 2 percent more than last year's plantings and slightly above the 1982 record.

Milk production, however, will likely decline, mainly because of new milk delivery quotas in the European Community (EC). Under this 5-year program, milk deliveries above the quota level will be taxed heavily. The use of quotas, a departure from traditional EC policies, is designed to restrain burgeoning milk surpluses. As a result of the program, EC beef production will probably jump as dairy farmers cull cows to adjust to the new quotas. Total EC meat production is expected to continue its slow, but steady upward climb.

Western Europe's total production of livestock products is expected to increase in 1984. Economic recovery will probably encourage producers to expand livestock output, but continued low profit margins will likely limit the increases to somewhat less than in recent years.

In addition to the milk delivery quotas, several other policy actions were taken by the EC during the past year. Most were also designed to reduce rising surpluses of major commodities or to restrain expenditures. Overall, the increase in 1984/85 support prices is the smallest on record. In addition, measures were taken to reduce the EC's large grain stocks. Milling-quality wheat is now being subsidized for feed use in both internal an international markets. To promote the use of domestic feed grains, the EC plans to limit imports of nongrain feeds, especially U.S. corn gluten feed. Despite the EC's efforts to cut costs, projected expenditures on agriculture will exceed 1984 budget allocations, and the Community will have to arrange for supplemental financing.

In 1983, total farm output in Western Europe declined about 2 percent from the 1982 record. A wet spring and a hot, dry summer held down crop output. Although large in comparison to recent years, the grain harvest was 5.5 percent below the previous year's record. Most of the drop occurred in the EC—a result of declines in both area and yields. Grain production in non-EC Western Europe also fell, but only slightly. The only major crops showing increased output were cotton and sunflowerseed.

Western Europe's record livestock production was due to increases in beef, pork, and mutton, which offset declines in poultry and egg output last year. All of the increase in livestock production occurred in the EC, as output outside the EC declined slightly. Western Europe's milk production also set a record, with EC output rising at an accelerated pace for the second straight year.

Real farm income in Western Europe declined last year, and the gap between farm and nonfarm incomes widened. Following 1982's marked improvement in real farm income in the EC—after several poor years—per capita farm income dropped 6.3 percent in 1983. Bad weather in many areas, higher input costs, and reduced EC price supports were behind the decline. Prospects for 1984/85 farm prices are not encouraging, so farm income probably won't increase much, especially in the EC where support price increases have been held down.

U.S. agricultural exports to Western Europe fell 13 percent to $10 billion in 1983, the third straight yearly decline. The strong U.S. dollar, economic recession in Western Europe, and the record 1982 grain harvest were the culprits. While economic recovery in the region may help U.S. farm exports, a growing self-sufficiency in many commodities suggests a longer term downward trend.

Last year, Western Europe's agricultural trade deficit declined about 15 percent from 1982's $23 billion. The weaker value of European currencies against the U.S. dollar and use of export subsidies gave Western Europe a competitive edge in international markets.

GENERAL ECONOMIC SITUATION

Economic growth in Western Europe will likely be modest in 1984. Tight fiscal policies, maintained since the 1979 oil crisis, are making the recovery weak by past standards. Even the expected strong export demand and lower inflation rates probably won't significantly boost economic activity or reduce high unemployment rates. The region's balance of payments on the current account is projected to show a sizable surplus this year.

General economic conditions are a major determinant of the agricultural situation in Western Europe. The expected slow growth of aggregate demand and a strong dollar probably will curb imports of U.S. agricultural commodities this year. The lower inflation rates forecast for the region will moderate increases in farm input prices, as well as rises in retail food prices, while higher unemployment rates will discourage farmers from leaving agriculture.

Recovery Remains Sluggish

Real gross domestic product (GDP) for both Western Europe and the EC is forecast to increase 1.5 percent in 1984, according to the Organization for Economic Cooperation and Development (OECD). In 1983, real GDP increased 1 percent for both.

Foreign demand, especially from the United States, is expected to make a major contribution to Western Europe's growth this year, while domestic demand growth is expected to remain low, perhaps 1 to 1.5 percent in mid-1985, according to the OECD. In contrast, the real gross national product (GNP) in the United States is expected to increase from 3.5 percent in 1983 to 5 percent this year. The growth differentials between the two areas arise largely from the U.S. expansionary fiscal stance, compared with budgetary restriction in the majority of European countries. Therefore, to a significant extent, Western Europe's growth in output this year can be attributed to the U.S. strong recovery.

Unemployment Edges Up

The unemployment rate in Western Europe is expected to edge up steadily, from 10 percent at the beginning of 1983 to 11.5 to 12 percent by mid-1985, despite some recovery in output. Double-digit unemployment rates are expected to continue this year in the United Kingdom, Italy, Belgium, Denmark, Ireland, the Netherlands, and Spain. Furthermore, Portugal will be joining that group this year.

The rapid increase in youth entering the labor force will likely hold unemployment high in the near-term, despite some strengthening of demand. The easing of the demographic pressures on the labor market is not expected before 1986. By mid-1983, youth unemployment rates were close to or exceeded 40 percent in Spain, 30 percent in Italy, and 20 percent in France and the United Kingdom.

Inflation Rate Continues To Fall

The rate of increase in consumer prices eased again in 1983, and the OECD projects some further deceleration

Growth of real gross domestic product

Country	1981	1982	1983[1]	1984[2]
	Percent change from previous year			
European Community	−0.6	.5	1.0	1.5
Belgium	−1.7	1.0	0	1.0
Denmark	0.1	3.6	1.75	.75
France	0.3	1.9	.5	0
Germany, West	−0.2	−1.1	1.25	2.0
Greece	−0.7	0	0	1.25
Ireland	1.1	1.2	.5	1.0
Italy	−0.2	−.3	−1.5	2.0
Luxembourg	−1.8	−1.7	−2.5	−1.0
Netherlands	−1.2	−1.6	1.25	1.25
United Kingdom	−2.2	2.0	2.5	2.25
Other Western Europe				
Austria	0	1.1	1.0	1.0
Finland	1.4	2.5	2.75	3.25
Norway	0.8	−.5	1.5	−.5
Portugal	1.7	3.5	.25	−2.0
Spain	0.4	1.4	2.0	2.25
Sweden	−0.8	.6	1.75	2.5
Switzerland	1.9	−1.2	0	2.25

[1]Preliminary. [2]Forecast.

Source: OECD.

in 1984. In the EC, prices are forecast to increase 5.6 percent this year, compared with rises of 6.3 percent in 1983, 8.7 percent in 1982, 10.1 percent in 1981, and 11.2 percent in 1980. The declining inflation rates reflect not only the slack demand of the recent recession, but a significant slowdown in the rise of unit labor costs. A number of countries have enacted strong measures to hold down wage cost increases in order to reduce inflation and improve international competitiveness.

Last year, food prices eased relative to the overall rate of inflation. Only three countries—Belgium, Iceland, and Sweden—experienced larger increases in the price of food than in the general consumer price index. This compares with 11 countries a year earlier.

Payment Surpluses Grow

Western Europe's substantial current account surplus is largely the result of U.S. economic expansion and a strong dollar. The rapid U.S. recovery and appreciation of the dollar is creating a strong American demand for imports from Europe. Appreciation of the dollar is also increasing European exports to third countries.

The surplus for the entire region is forecast at $12.8 billion in 1984, compared with only $1 billion last year. Most countries expect improvement in their current account positions. France's rapid turnaround—from a $5.3 billion deficit in 1983 to a projected $1 billion surplus this year—is the result of devaluation and newly instituted austerity measures. [*Ruth Elleson (202) 447-6810*]

AGRICULTURAL PRODUCTION

Review of 1983

Western Europe's 1983 agricultural production declined moderately from the 1982 record. Grain production was down significantly, and the output of some other prod-

Western Europe's consumer prices and food prices, with expenditures for food and beverages as a percentage of private consumption expenditures

Country	Consumer prices (all items) 1982	Consumer prices (all items) 1983	Consumer prices (all items) 1982 to 1983	Food prices 1982	Food prices 1983	Food prices 1982 to 1983	Expenditures for food & beverage[1] 1981
	1980 = 100		*Percent*	*1980 = 100*		*Percent*	*Percent*
European Community							
Belgium	117	126	7.7	116	126	8.6	21.7
Denmark	123	132	7.3	123	130	5.7	21.8
France	127	139	9.5	129	141	9.3	20.1
Germany, West	112	115	2.7	111	114	2.7	22.4
Greece	151	182	20.5	158	185	17.1	41.3
Ireland	141	156	10.6	130	141	8.5	2/38.6
Italy	137	157	14.6	134	151	12.7	29.0
Luxembourg	118	128	8.5	120	129	7.5	2/18.8
Netherlands	113	116	2.7	112	112	0	17.4
United Kingdom	122	127	4.1	117	121	3.4	18.1
Other Western Europe							
Austria	113	116	2.7	111	113	1.8	23.4
Iceland	226	422	86.7	189	372	96.8	3/25.5
Finland	122	133	9.0	127	136	7.1	25.3
Norway	113	116	2.7	112	112	0	24.9
Portugal	147	184	25.2	149	NA	NA	35.9
Spain	131	147	12.2	131	145	10.7	2/31.4
Sweden	122	133	9.0	129	144	11.6	22.7
Switzerland	113	116	2.7	118	121	2.6	4/27.6

NA = Not available.

[1]Percent of total private consumption expenditures, excluding food and beverages purchased in hotels, as well as most institutional purchases. The comparable figure for the U.S. in 1981 was 14.9. [2]1980. [3]1973. [4]Includes tobacco.

Balance of payments on current accounts

Country	1981	1982	1983[1]	1984[2]
		Billion dollars		
European Community				
Belgium-Luxembourg	−4.0	−2.7	−1.0	−0.25
Denmark	−1.8	−2.3	−1.0	−.5
France	−4.7	−12.1	−5.25	1.0
Germany, West	−6.5	3.5	5.25	5.5
Greece	−2.4	−1.9	−2.0	−2.25
Ireland	−2.1	−1.3	−.5	−.25
Italy	−8.1	−5.5	1.5	1.0
Netherlands	2.9	3.2	4.5	6.5
United Kingdom	13.2	9.5	1.5	2.75
Other Western Europe				
Austria	−1.4	.5	.5	1.0
Finland	−.3	−1.0	−1.0	−1.0
Norway	2.2	.8	1.75	.5
Portugal	−2.8	−3.1	−2.25	−1.75
Spain	−4.8	−4.2	−3.5	−2.75
Sweden	−2.9	−3.5	−.75	−.25
Switzerland	2.8	3.6	3.25	3.5

[1]Preliminary. [2]Forecast.

Source: OECD.

ucts, such as sugar beets, potatoes, tobacco, olive oil, and deciduous fruit, also fell. However, production of livestock products, except for poultry meat and eggs, set new highs. Overall, the 1983 agricultural production index for Western Europe (1969-71=100) dropped 2 percentage points, with the production index down in both EC and non-EC countries.

Grain Production Declines

Western Europe's 1983 grain harvest (including rice) was down to 155 million tons, 4.8 percent below the 1982 record. Most of the drop occurred in the EC, where a decline in area and lower yields reduced production by more than 8 million tons, to slightly over 124 million tons.

Grain production in the non-EC countries was only slightly above the 1982 crop, but 12 percent short of the 1980 record. In Spain, the largest grain producer in the group, the 1983 crop increased about 8 percent because of an easing of dry conditions. Finland's record grain crop helped to offset lower output in all other non-EC countries. In Portugal, continued severe drought reduced grain production to the second lowest level since 1960.

Western Europe's 1983 wheat crop fell marginally from the 1982 record harvest, to roughly 68 million tons. Area was up 2 percent, but bad weather reduced yields. In the EC, wheat output declined more than 1 percent from the 1982 record, to about 59 million tons. Wheat production was down 2 percent in France, the major producer, but it was up significantly in two other producers, the United Kingdom and West Germany. Both Italy and Greece had smaller wheat crops, but a sharp increase in area and yields pushed up the Dutch crop 8 percent to a record 1.04 million tons.

Outside the EC, wheat production was up from 1982. Spain's production was down slightly, while severe drought reduced Portugal's wheat harvest to the lowest in more than 20 years. In contrast, Sweden, Austria, and Finland had a record crop.

Western Europe's 1983 coarse grain crop declined nearly 10 percent to less than 86 million tons, with the EC countries accounting for nearly all the drop. Area was down 3 percent, and an excessively wet spring and dry summer reduced yields. EC barley production fell more

Indices of agricultural production[1]

Country	1979	1980	1981	1982	1983
			(1969-71 = 100)		
Total Western Europe	119	124	121	126	124
European Community	118	123	122	125	124
Belgium-Luxembourg	116	116	118	119	118
Denmark	120	118	122	129	121
France	124	132	131	136	131
Germany, West	111	112	111	117	114
Greece	135	145	158	148	148
Ireland	128	133	118	130	139
Italy	114	118	114	112	115
Netherlands	130	134	142	145	145
United Kingdom	115	122	121	126	125
Other Western Europe	121	129	118	128	125
Austria	112	119	116	126	122
Finland	108	114	100	113	123
Norway	112	117	119	121	117
Portugal	114	116	110	121	114
Spain	135	148	127	140	135
Sweden	115	117	121	124	118
Switzerland	118	120	120	123	121

[1]Only those commodities of considerable significance in their respective countries are included. Thus, these indices may differ from those calculated by the individual countries or other organizations.

than 5 million tons from the previous year. Corn production was down in both the EC and non-EC areas.

Other Crop Output Varied

Sugar beet production in Western Europe continued to decline in 1983. In the EC, production dropped nearly one-fifth from the previous year, reflecting reduced area and yields. Farmers planted less sugar beets because of bad weather and lower world prices for non-quota sugar. Except for Greece, all the EC countries had lower sugar beet outturns in 1983, with the major producers having substantial drops. Outside the EC, higher sugar beet yields, particularly in Spain and Finland, offset a reduction in the harvested area.

Potato production in Western Europe continued its rapid downward trend in 1983, in line with consumption. Potatoes are not covered by the EC's Common Agricultural Policy (CAP).

Western Europe's cotton production recovered from a large drop in 1982, reaching 169,000 tons in 1983. A large production increase in Greece, the major producer, more than offset a poor Spanish crop. Despite the Spanish Government's cotton acreage expansion program, limited irrigation water and producers' concerns about labor problems caused a drop in Spain's cotton area.

Poor weather reduced tobacco production in the EC. Deciduous fruit production varied among countries. Italy's deciduous fruit crop rebounded, while France's production dropped. In spite of drought, Spain's total fruit production (citrus, deciduous fruit, and table grapes) showed a significant increase.

Rapeseed and sunflowerseed are Western Europe's major oilseed crops. EC rapeseed production has expanded rapidly—from 2 million tons in 1980 to 2.7 million in 1982. In 1983, rapeseed production dropped 8 percent to 2.4 million tons, as relatively poor yields offset another increase in the area sown to rape.

EC production of sunflowerseed continued to increase rapidly—more than tripling since 1980. In 1983, the crop reached 1 million tons. A relatively larger increase in the support price for sunflowerseed than for some other competing crops has encouraged production. Outside the EC, Spain is the only significant sunflower producer in Western Europe, with production setting a 750,000-ton record in 1983.

Spain's 1983 olive oil production was less than half of the previous year's 666,000 tons because of drought and the off-year bearing cycle for olive trees. However, Italy's production, at 650,000 tons, was exceptionally large.

Livestock Production Sets New Highs

Western Europe's production of livestock products, except poultry meat and eggs, set new highs in 1983. Total meat production (including poultry meat) rose nearly 2 percent from 1982, to set a record at close to 27 million tons. Increases in beef and veal, pork, and mutton and lamb were more than sufficient to offset the nearly 3-percent drop in poultry output. All the expansion in meat production was in the EC, with all countries except France showing increases.

Western Europe's beef and veal production recovered nearly 3 percent from 1982's reduced output, but it was still more than 3 percent short of the 1980 record. Beef and veal production declined slightly in the non-EC countries.

Pork production in Western Europe was up 4 percent in 1983. Unfavorable hog prices, coupled with high feed prices, induced a 3-percent increase in slaughter. Production was up 3 percent in the EC, with all countries except France registering increases. Overall pork production in the rest of Western Europe was almost stagnant, although output rose slightly in Switzerland and Spain.

EC mutton and lamb production continued to recover in 1983, sustained by both price support and expanding consumption. In the non-EC countries, however, production declined slightly.

Western Europe's poultry meat production was down 3 percent in 1983. In the EC, production dropped for the first time since the poultry and egg market was organized under the CAP in 1967. Production had grown on an average of about 6 percent a year between 1967 and 1982. In 1983, excessive supplies resulting in low prices, combined with high feed prices, reduced EC broiler production 2.5 percent. France's production was down 4 percent from the 1982 record. Outside the EC, poultry production declined for the second consecutive year. In Spain, the largest producer, poultry meat output continued to decline in the face of escalating feed costs and weak demand caused by high prices.

Milk production in Western Europe, which was over 135 million tons, set another record in 1983. Output in the Community rose at an accelerated pace. After more than a 3-percent increase in 1982, EC output rose nearly 4 percent to over 112 million tons. All the EC countries, particularly the major producers, had larger milk production. Apparently, in anticipation of an EC decision to limit milk production, producers pushed up output in 1983 in the hope of being able to establish higher individual quotas. The number of cows being milked rose more than 1 percent in 1983, and yields continued up in response to wider use of improved dairy breeds and modernization of the dairy industry. Outside the EC, total milk production continued its slow upward trend.

Cattle inventories in Western Europe began to climb again, following 2 years of consecutive decline. Some of the increase was the result of expanded dairy herds. Hog numbers declined in the EC, but they rose sharply in the non-EC countries—the result of a sharp increase in Spain. Shifts in Spanish meat consumption—away from higher priced beef and poultry meat to pork—raised pork prices and encouraged expansion of hog numbers.

1984 Outlook

Grain Production Could Equal 1982 Record

Recovering from last year's reduced harvest, Western Europe's 1984 grain crop is expected to exceed the 1982 record of 163 million tons. Weather has been excellent for 1983 winter grains, and crop conditions have been good in most countries. Average grain yields are forecast close to 1982 levels, while area is projected 1 to 2 percent more than last year's reduced plantings and about the same as 1982. Wheat production could set a record at more than 70 million tons, with an EC crop of more than 60 million tons. However, coarse grain production is not expected to reach the 1982 record, despite a forecast sharp increase in barley production.

Assuming continued good weather, the EC's grain crop is forecast at about 131 million tons, 8 million more than in 1983, and about equal to the 1982 record. EC grain area is expected to rise 1 to 2 percent. The area planted to winter grains increased and average yields will likely be higher than in 1983, when a wet spring and dry summer cut production in some of the major areas.

France's grain production could approach 1982's 49-million-ton record. Winter plantings of wheat and barley, which account for about 70 percent of the country's grain output, were up significantly. Total French grain area (including that to be planted to spring grains) is estimated to be 4 percent more than last year's 9.4 million hectares, or about the same as 1982. However, average yields probably won't equal 1982's record.

Except for the Netherlands, all other EC countries, particularly Denmark and Greece, expect much larger grain harvests in 1984. In Italy, unusually dry fall weather reduced the area planted to soft wheat, and yields may be affected as well. However, Italy's total 1984 grain production is expected to rise sharply because of increased production of durum wheat and feed grains, particularly corn. Corn area is expected to expand, partly at the expense of sugar beets.

Grain production in the non-EC countries is expected to be 1 to 2 million tons above last year's 30.9 million. In Spain and Portugal, yields and production are expected to rise this year because of more adequate rainfall.

Livestock Production Continues To Rise

Western Europe's production of all leading livestock products, excluding eggs, is expected to increase in 1984. Economic recovery will likely encourage producers to further expand livestock production, although continued low profit margins will limit production increases to somewhat lower rates than in 1983.

Beef and veal production is expected to rise slightly in 1984, to just over 8 million tons. Production increases are likely for all the major EC producers except Italy. Cow slaughter in the EC, which was up nearly 3 percent in 1983, will probably climb again in 1984, as producers cull more dairy cows to reduce production in compliance with the EC's new dairy program. Beef and veal production in the non-EC countries probably won't change much in 1984 because of continued sluggish demand and weak price ratios.

Pork production will probably rise again in the EC, but at a much slower pace than the 3-percent increase in 1983, because of continued high feed costs and low hog prices. Hog slaughter will likely rise more modestly this year. The EC hog inventory was down 1 percent at the beginning of 1984 and is not expected to change much during the year.

French pork production is expected to recover somewhat in 1984, as producers are being assisted by a government program of subsidized credit. Pork output in West Germany, the largest producer in the EC, is expected to rise 3 percent. Prices for hogs in West Germany are forecast slightly higher than in 1983, as economic recovery encourages greater consumption. However, other large EC producers, such as Denmark and the United Kingdom, expect lower pork output in 1984.

In non-EC Western Europe, pork production is forecast to stagnate or decline in most countries because of high feed prices and sluggish demand. However, higher pork prices in Spain—resulting from a sharp increase in demand, mainly at the expense of other meats—is expected to induce some growth. Slaughter in non-EC Western Europe is not projected to change much, and numbers will likely continue to trend upward.

Poultry Output To Recover

Poultry meat production will likely recover slightly in 1984, particularly in the EC. Improved prices and better market prospects are expected to raise the EC's output about 1 percent from 1983. Broiler exports to third countries, assisted by EC subsidies, remained large in 1983, and production is forecast to resume its upward trend in 1984.

France's poultry meat production is expected to approach the 1982 record in response to continued growth in exports. France's exports were up 12 percent in 1983, compared with the previous year. Most other EC countries also expect some increase in poultry meat production this year. In the non-EC countries, poultry meat production will likely recover moderately from 1983's sharp drop. Spain's output will probably increase in response to its improved domestic market prospects.

The 1984 outlook for milk production is clouded by uncertainties surrounding the implementation of new dairy policies and their impact on the number of dairy cows and milk yields. The recent EC agreement to impose milk delivery quotas could result in increased culling in some countries. Also, high feed prices and bleak prospects for increases in dairy exports will further dim hopes for EC dairy farmers. With high feed prices and quotas, some farmers will sell their least productive cows and/or use less feed concentrates. In the non-EC countries, continued increases in dairy cow numbers and higher yields from improved breeds will sustain the upward trend in milk production.

A decrease of about 1 percent in egg production is forecast for 1984. Despite reduced production and continuing exports to third countries, producers complain that egg prices are low and production is unprofitable. France, the largest egg producer, has started a layer culling program and has adopted a moratorium on new egg producers and expansion of existing farms. Also, the French Ministry of Agriculture has announced that it does not intend to remunerate losses incurred by French egg producers.

As as result, French egg production may drop 6 to 8 percent in 1984. The EC Commission has suggested that other members consider measures similar to those adopted in France. For the non-EC countries, egg production will likely continue to trend upward, mostly the result of increased production in Spain. [*Jim Lopes (202) 447-8289*]

AGRICULTURAL TRADE

Western Europe's 1983 agricultural trade deficit appears to have declined moderately from 1982's $23 billion. Preliminary data for the EC show the trade deficit for the first three quarters of 1983 at 12.1 billion European Currency Units (ECU's), compared with 13.1 billion ECU's for the same period in 1982. The reduction was due to both a small increase in exports and decline in imports. Because of the 13-percent appreciation of the U.S. dollar, the deficit in dollar terms declined to $10.5 billion, from $12.9 billion in 1982. Although no data are available on the 1983 agricultural trade balance for the non-EC countries of Western Europe, the effect of a stronger dollar, combined with Spain's smaller demand for imported grain, indicate a reduction in that area's deficit as well.

In 1983, the EC profited from the strong U.S. dollar, expanding its exports modestly in a declining world market. This came in part at the expense of the United States, whose exports and market share both declined.

In 1984, several factors mitigate against further reduction in the trade deficit. Economic recovery within Europe will tend to increase the demand for imports. Furthermore, the anticipated weakening of the dollar may reduce Europe's export competitiveness, offsetting possible increased world demand due to economic recovery.

In the long term, the gradual decline in Western Europe's agricultural trade deficit will likely continue. Increasing self-sufficiency and exports of temperate zone products will more than balance growth in imports of tropical products, such as fruit, coffee, and tea.

U.S. Exports Decline

U.S. agricultural exports to Western Europe fell 13 percent, to $10 billion in 1983, the third consecutive year of decline. Percentage declines were about the same for those to the EC (12 percent to $7.4 billion) as for those to non-EC countries (14 percent to $2.6 billion). The high value of the dollar, economic recession in Western Europe, and a record 1982 European grain harvest are the principal reasons for the decline. While economic recovery should provide some stimulus for U.S. agricultural exports in 1984, Western Europe's growing self-sufficiency in many agricultural commodities suggest that the downward trend in U.S. exports will continue in the longer term.

U.S. grain and feed exports to both EC and non-EC countries fell sharply in quantity and value, declining to a total of 18.4 million metric tons valued at $2.7 billion, compared with 24.5 million tons worth $3.3 billion a year earlier. The excellent 1982 harvest and a reduction in industrial grain demand contributed to the decline. While the 1983 grain harvest was below expectations due to dry summer weather, large carryin stocks will limit gains in U.S. exports. On the other hand, nongrain feed exports should continue to expand in both quantity and value as they replace high-priced protein meals from both the United States and other suppliers.

Oilseeds and products (principally soybeans and derivatives), which account for about 40 percent of U.S. exports to the region, declined 4 million tons to a total 17 million in 1983. The decline in value was slightly less—falling to $4.3 billion from $5.1 billion in 1982. Stronger prices in the fourth quarter of 1983 and for at least the first 6 months of 1984 should continue to raise the value of U.S. soybean and product exports, although quantity will be hindered by the higher prices. The sharp runup prices since the 1983 U.S. soybean crop was harvested will also mean that the United States will loose some of its market share to foreign competitors in 1983/84. However, this situation should end with a return to a normal U.S. crop.

Oilseeds, grains, and other feedstuffs account for 70 percent of U.S. agricultural exports to Western Europe. Exports of processed foods and other high-value products are hindered by high protective tariffs that make market access difficult. Improving access to markets for these products will be a lynch pin in determining future growth in agricultural trade.

Increased EC Meat Exports Belie Prices

EC exports of meat products increased 4.4 percent in value in the first three quarters of 1983 as compared with a year earlier. Exports to non-EC countries increased more rapidly than internal trade—9.2 percent compared with 3.4 percent. Imports from non-EC countries declined 8 percent. Increased exports, coupled with a decline in imports, raised the EC's self-sufficiency in meat and meat products, bringing it close to 100 percent.

Prices for meat in the EC were pressured downward by continuing overproduction and accumulation of stocks.

Selected U.S. agricultural exports to Western Europe[1]

Commodity[2]	Quantity			Value		
	1981	1982	1983	1981	1982	1983
	1,000 metric tons			*Million dollars*		
Live animals	—	—	—	94.5	136.3	200.1
Meat[3]	158	146	130	259.1	217.3	163.1
Wheat	3,959	3,380	2,036	702.4	550.8	328.9
Rice	502	462	418	201.4	161.3	148.2
Feed grains	17,705	14,235	10,257	2,412.6	1,810.5	1,371.1
Barley	541	548	303	67.5	61.8	38.1
Corn	16,126	14,580	9,654	2,212.4	1,640.4	1,295.0
Oats	36	3	4	5.8	.4	.6
Sorghum	985	928	286	124.8	107.9	37.4
Fresh fruit	221	145	185	127.1	88.1	99.0
Dried fruit	67	59	55	112.4	93.1	83.8
Nuts & preparations	—	—	—	358.2	307.1	277.2
Vegetables[4]	221	242	188	140.3	132.2	94.7
Soybeans	12,964	15,814	12,040	3,643.1	3,854.5	3,122.0
Other oilseeds	—	—	—	725.8	218.5	123.8
Soybean oilcake & meal	3,811	4,091	4,172	914.6	911.8	953.5
Other feeds[5]	—	—	—	725.8	710.8	897.4
Tobacco	133	130	131	696.6	754.4	788.8
Cotton, raw & linters[6]	144	208	204	235.9	271.4	286.8
Inedible tallow	322	367	260	140.9	147.3	99.8
Subtotal	—	—	—	11,231.6	10,365.4	9,038.2
Other commodities	—	—	—	1,192.0	1,092.0	960.6
Total Western Europe	—	—	—	12,423.6	11,463.4	9,998.8

— = Not applicable.

[1]Data adjusted for transshipments through Canada. [2]Categories conform to Schedule B codes, Bureau of the Census. [3]Fresh and frozen. [4]Fresh, frozen, and dried. [5]Excluding oilmeals. [6]1 metric ton = 4.59 bales.

Source: Compiled from U.S. Bureau of Census data.

Accelerated economic growth in 1984 should improve total disposable personal income and bring with it a modest rise in demand for meat. Nevertheless, this will not entirely relieve the oversupplied market.

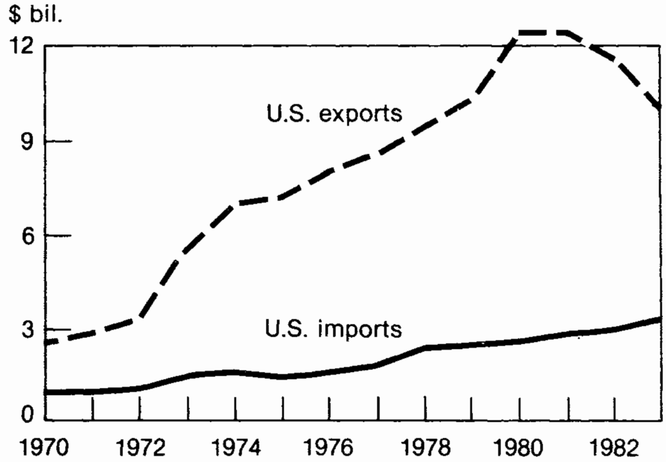
Pork prices declined more than other meat prices in 1983, as farmers continued to expand production in spite of sluggish demand. For example, prices fell 12 percent in West Germany, which imports 14 percent of its total pork consumption.

Outbreaks of African Swine Fever and foot-and-mouth disease occurred in the Netherlands, Belgium, and West Germany. The Netherlands faced a temporary ban on pork exports to France and Italy, and many third-country markets were closed to exports from the affected countries.

On September 1, 1983, Japan lifted a year-long ban on pork imports from Denmark (due to a previous foot-and-mouth outbreak). As a result, Danish pork prices increased 16 percent while prices in the rest of Europe declined. U.S. and Canadian bans on imports of Danish pork were lifted in January and March 1984, respectively. Danish canned pork exports to the United States, which were still allowed under the ban, increased in 1983.

Beef was another poor performer in 1983. Stagnant consumption, after 2 years of decline due to the economic recession, combined with an oversupply to put pressure on prices. Beef is the only meat product for which the EC uses intervention buying to support market prices. Large intervention purchases in 1983 pushed stocks of

U.S. Ag. Trade with Western Europe: Exports Down, Imports Up Slightly



beef to a record 412,000 tons by December, but expanding production maintained pressure on prices. The situation for beef could deteriorate further in 1984, as cows from the dairy herd begin to be culled in greater numbers. The passage of EC dairy reform measures could aggravate the short-term glut of beef.

Signs of increased beef exports include strong sales to both the Soviet Union and the Middle East in 1983. Possibilities also exist for exports to the United States and Japan. With other major exporters such as Australia and Argentina rebuilding herds, prospects for beef exports remain fair in the near future. However, such shipments probably won't offset increased domestic slaughter.

Poultry prices, contrary to those for red meats, increased modestly compared with 1982. This was largely due to cutbacks in production that were agreed to by producers in order to eliminate surpluses. Stocks were drawn down as a result, and prices began to move up at the end of the year.

While Dutch and German poultry meat exports to third countries declined sharply in 1983, France, the largest exporter, increased its shipments 18 percent. The net result was a slight decline in total EC exports. Generous export subsidies aided by a strong U.S. dollar were necessary to maintain even this level of sales.

Both the Soviet Union and Middle East showed increases in poultry imports from France. However, total French poultry production declined significantly, so the increased exports came from a drawdown in stocks. For the long term, world poultry markets promise increasing competition from other traditional suppliers, such as Brazil and the United States, as well as from expanding production in importing countries.

Imports of sheep meat by the EC have been increasing substantially, with Australia, New Zealand, and Argentina as the principal suppliers. Both consumption and production have increased in the EC since the initiation of a CAP program in 1980. While the program doesn't encourage imports, apparently by popularizing the meat, it has benefited both domestic as well as foreign producers of lamb and mutton.

Dairy Exports Decline

Dairy products and eggs are the EC's largest export category according to value—$6.8 billion during January-September 1983. The EC's exports account for over half of world trade in dairy products. EC imports of both products are small and, for dairy products, are limited to negotiated quotas.

EC exports of dairy products and eggs declined 2.5 percent in value in the first three quarters of 1983 as compared with a year earlier. A 12.3-percent decline in exports to non-EC countries more than offset a 3.4-percent increase in intra-EC trade. For eggs, the EC increased its volume of exports to non-EC countries, especially to the Middle East, because of highly subsidized prices.

Demand for exports of dairy products declined for all major commodities—butter, skim milk powder, whole milk powder, condensed milk, and even cheese, which had resisted 1982's drop in exports. The EC's share of the world market declined as exports from the United States and New Zealand accounted for a larger proportion of reduced dairy trade. Prices were weak as competitors from non-EC Western Europe—Sweden, Austria, and Finland—joined major exporters in undercutting subsidized EC shipments.

An exception to the generally depressed external markets was Spain, where 3 years of drought caused a sharp reduction in milk production. Last year, Spain allowed imports of fresh milk from France until sufficient rain and warm autumn weather helped boost domestic production.

Increased consumption and trade in Ultra Heat Treated (UHT) milk has been one of the few bright developments in the Community dairy sector. UHT milk has a very long shelf life without refrigeration. A decision by the European Court rejecting the United Kingdom's ban on UHT imports will allow market development there. Some sales to third-country markets have occurred and could develop further.

A decline in EC consumption of dairy products resulted in an increase in intervention stocks. Stocks of butter and skim milk powder reached records in fall 1983, 0.8 and 1.04 million tons, respectively. These stocks will continue to weigh on Community and international markets.

The outlook for trade in dairy products in Western Europe will be affected by the EC's dairy reform measures. Imposing delivery quotas and a large tax on over-quota deliveries will have some effect on world markets because the EC is such a large world exporter. Controlling EC milk production should improve world dairy prices, although even at quota levels, large surpluses will still exist.

Among non-EC countries, Finland has recently taken measures to curtail burgeoning milk production, while both Sweden and Austria—also exporters of dairy products—have made limited proposals to this end. Switzerland has a long-standing quota system that allows only limited surpluses.

EC Cereal Exports Strong

The EC entered its third straight year as a net exporter of cereals, accounting for an increasingly large share of world trade. The EC's record 1982 grain harvest and weakness in European currencies relative to the dollar contributed to a 9.2-percent increase in the value of EC exports of cereals and products for the first three quarters of 1983, compared with the same period a year earlier. Imports declined 3.4 percent.

The value of intra-EC trade was about constant, in spite of an average 3-percent increase in the EC intervention price for cereals, indicating a fall in the quantity traded. Increased self-sufficiency in member countries has decreased intra-EC trade.

Although the EC began the 1983 marketing season with a drought-reduced crop, beginning stocks were at a record 19.6 million tons. World prices improved from the previous season—especially for coarse grains—because of the small crop in the United States.

Because of higher world prices, export subsidies for EC wheat were cut in half in September 1983—$30 a ton compared with $68 a year earlier. Barley export subsidies were reduced to $13, from $63 a ton. Even the subsequent decline in world wheat prices beginning in October did not necessitate higher EC subsidies because the dollar continued to strengthen against European currencies until February 1984.

Large wheat exports and lower barley shipments reflect 1983 crop performance, as well as carryin stocks. Internal market balance and relative grain prices seem to have been restored somewhat by sharply higher wheat feeding, estimated to have risen 4 million tons. A special EC subsidy for the feeding of 2 million tons of bread-quality wheat, although not fully subscribed, added to the shift to wheat feeding.

EC cereal imports, which declined severely during the recession in 1982 and fell again in 1983, show signs of rising. Import licenses increased to 6.5 million tons between August 1983 and March 1984, compared with 4.7 million a year earlier. Of the 6.5 million tons, 2.5 million represent wheat import licenses, and 3.2 million corn. Both wheat and corn licenses have increased compared with a year earlier, but wheat licenses have increased almost twofold, while corn licenses have been only 200,000 tons higher.

Corn imports are largely for the starch industry, with small amounts of feed and seed corn imported. Imports for feed have been declining in recent years as the EC increases its self-sufficiency in feed grains. However, the declines in 1982 and 1983 were unusually severe, so a small recovery is forecast for 1984.

U.S. cereal exports to the Community have declined about 6 percent so far in 1983/84. Wheat exports and sales from June to mid-March fell 19 percent to 1.3 million tons. Corn exports and sales (October to mid-March) fell 8 percent to 2.1 million tons. Only barley sales showed an increase, rising 200,000 tons to 360,000. In 1983, the higher value of the dollar relative to the currencies of other exporters caused the United States to loose some of its market share in EC cereal imports.

Drought in Spain and Portugal, the largest importers among the non-EC countries of Western Europe, continued to affect production and trade in the region for the third consecutive year. Cereal production in Spain and Portugal in 1983/84 totaled only 1.5 million tons above the 1971-75 average. While this was still a considerable improvement from the past 2 years, forecast imports of 12.5 million tons remain more than a million and a half above import levels before the drought. Nevertheless, imports have declined from a high of 15.3 million tons in 1981.

More normal rains in Spain and Portugal last fall could lead to higher grain production and further reduce imports in 1984. U.S. cereal exports to non-EC Western Europe have increased 9.4 percent so far in 1983/84, exceeding those to the EC. Sharply higher wheat exports to Portugal, which had nearly doubled to 607,000 tons by mid-March, and a 100,000-ton increase in corn exports to that country offset a decline in coarse grain exports to Spain. The drought more severely affected 1983 production in Portugal than in Spain. These two countries account for the bulk of U.S. cereal exports to the region. U.S. barley exports to Cyprus also increased significantly, reaching 107,000 tons by mid-March.

Long-term prospects suggest that the EC will become an increasingly strong competitor in world wheat and barley markets. Weather in the region is reliable, and yields show further potential for increasing. The EC's decline in cereal imports is forecast to continue, after a small rise in 1983/84.

Use of Soybeans and Meal Drops

Feed use of soybean meal in the EC is forecast to fall below 14 million tons during October 1983-September 1984, compared with a high of 16.4 million tons in 1981/82. Similarly, soybean meal use in the non-EC countries of Western Europe is forecast to decline to less than 3 million tons, from 3.3 million 2 years earlier. U.S. exports of soybeans and meal to Western Europe are forecast to fall 15 percent in 1984 (meal-equivalent basis), after an 8-percent drop in 1983.

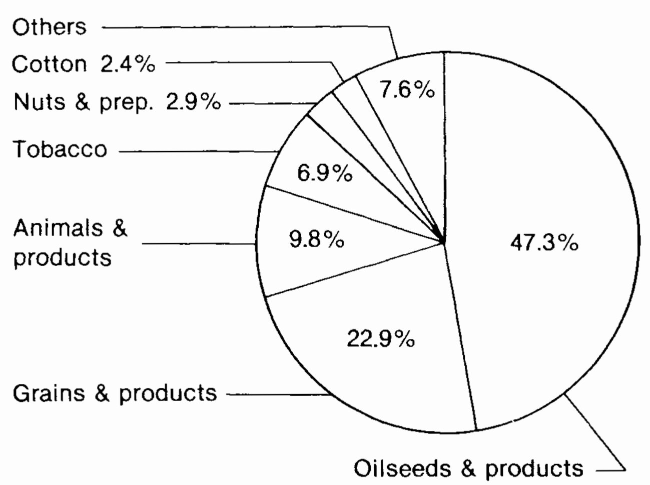
High soybean meal prices are the reason for the forecast decline in feed use, because livestock units over the last 2 years have risen by 1.0 and 2.5 percent in the two areas, respectively. The rise in total livestock inventories, compounded by drought-reduced European fodder crops in 1983, would ordinarily increase the demand for feeds, including imported soybeans and meal. Sharply higher international soybean prices, however, have caused a shift to other feeds. Higher prices for manioc, resulting from the introduction of import quotas, also slowed soybean meal consumption because these commodities are fed in complement.

The reduction in soybean meal use will be offset by increased use of various other feedstuffs. The EC has been increasing its production of rapeseed and sunflowerseed at a rapid pace. A new schedule of premium rates introduced for 1984/85 will increase the production and use of the type of rapeseed that is low in erucic acid and glucosinalates. Before this measure, the market had been unbalanced by the production of varieties unsuitable for use in animal feeds in large quantities.

Increased supplies of other feedstuffs, such as corn gluten feed; bran; skim milk powder; and peanut, palm kernel, and meat meal will also help supply the protein supplement needs of the European livestock industry. Finally, a 4-million-ton increase in the EC's wheat feeding will partially offset the decline in soybean meal use.

Increased production EC rapeseed and sunflowerseed oil will replace declining soybean and palm oil supplies in margarine and cooking oil. The substitution will not be

U.S. Ag. Exports to the EC, 1983



Rate of change in agricultural input prices in the European Community

Country	1978	1979	1980	1981	1982	1983[1]
			Percent change from year earlier			
Belgium	−2.9	5.4	8.0	8.8	10.9	7
Denmark	−1.1	7.6	16.1	17.8	11.3	5
France	5.6	9.8	14.8	13.1	12.0	9
Germany, West	−2.5	5.8	6.8	9.9	3.7	1
Greece	8.0	20.1	34.6	23.3	14.3	24
Ireland	4.2	12.6	14.5	14.8	9.1	9
Italy	7.1	9.1	14.5	16.9	14.3	13
Luxembourg	−1.5	3.9	8.8	9.6	9.4	8
Netherlands	−4.0	7.0	7.6	8.7	3.6	3
United Kingdom	2.9	12.6	14.5	14.8	7.4	7
Total EC-10	2.2	9.2	12.5	12.8	9.8	8

[1]Estimated.

Source: The Agricultural Situation in the Community, 1983 Report, Commission of the European Community, January 1984.

as great in non-EC Western Europe, where processors are less equipped to handle the different raw materials.

The medium-term outlook is for recovery of U.S. soybean and meal exports after 1984—to at least the 16.8 million tons (meal-equivalent basis) reached before the recent decline. In the long term, increased self-sufficiency in rapeseed and sunflowerseed in a mature European market will restrict growth in U.S. exports, as will the Community's new quota system for dairy support. [*Stephen Sposato (202) 447-8289*]

AGRICULTURAL PRICES AND INCOME

The prices of farm inputs and products rose more slowly in 1983 than in recent years, reflecting lower rates of inflation. The gap between farm and nonfarm incomes widened, as real farm income declined in most countries while incomes in other sectors rose slightly.

Input and Producer Prices Rise Slowly

The rate of increase in EC input prices dropped to 8 percent in 1983, compared with 10 percent in 1982. Inflation in many Western European countries rose at a considerably lower rate than in 1982. The rise in purchase prices for energy and fertilizer fell to 5.6 and 4.5 percent, respectively. However, prices of animal feeds and seed rose sharply, 9.7 percent and 11.3 percent, respectively. The short soybean crop in the United States and the strong dollar combined to sharply raise world prices of soybeans in 1983. Prices for other protein feeds were also bid higher as users shifted away from the higher priced soybean meal.

There was considerable variation among EC members in price movements. Input prices in both Greece and Italy were strikingly higher than the EC average. Input prices in Greece soared 24 percent, up from 14.6 percent last year, a reflection of high inflation. Similarly, inflation in Italy was manifested in a 13-percent hike in input prices. However, there has been a long-run tendency for farm income to improve in these two countries, where input costs are a relatively small percentage of final output compared with other EC countries.

Farm prices in the EC increased an average 8 percent in 1983. Crop prices rose a buoyant 10.1 percent above 1982, while livestock product prices were a relatively sluggish 4.1 percent higher. Prices for grains, root crops, olive oil, and seed all rose sharply. Average increases in producer prices were 4.1 percent for slaughter cattle (excluding calves) and 1.4 percent for sheep. A 6.3-percent decline in slaughter hog prices was partly offset by a 5.7-percent rise in poultry prices.

Producer price increases in Greece and Italy soared above the EC average, but they were virtually at a standstill in West Germany and the Netherlands. Small increases occurred in Denmark and the United Kingdom.

Farm Income Worsens in 1983

Following 1982's marked improvement in real farm income in Western Europe—after several years of decline or stagnation—farm income dropped once again in 1983. Poor weather in many regions, higher costs, and reduced guaranteed price supports in the EC were behind the decline. For the EC, real income dropped 6.3 percent in 1983, after recovering by a buoyant 10.6 percent in 1982. Declines in real income were noted in all the EC member states except Ireland and Italy.

In the United Kingdom, real income fell 6.6 percent following a strong recovery in 1982. The 1983 weather pattern was highly abnormal—a wet, cold spring followed by a long, hot summer—resulting in lower yields of most spring-sown crops, particularly barley. However, a serious cost-price squeeze in the livestock sector and a fall in agricultural productivity—the first drop in several years—also contributed to a decline in real income.

In France, Western Europe's major agricultural producer, real net farm income fell 9.7 percent in 1983, the first decline since 1980. In addition to the adverse effect of poor weather on production, a cost-price squeeze was aggravated by relatively high interest rates.

Similarly, real farm income in West Germany, one of the world's most important agricultural producers, dropped more than 20 percent in 1983, after rising 16 percent in 1982. Relatively high costs for purchased feeds and lower prices for livestock products—especially hogs—contributed to the income deterioration. Furthermore, reduced agricultural exports to important trading partners—such as France, Belgium, Denmark, Eastern Europe, and the OPEC countries—worsened the farm income situation.

Rate of change in agricultural producer prices in the European Community

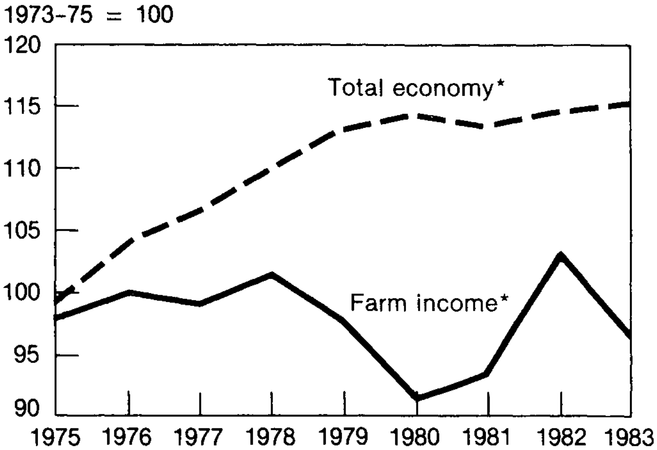
Country	1978	1979	1980	1981	1982	1983[1]
			Percent change from year earlier			
Belgium	−3.8	1.2	3.1	9.5	11.4	8
Denmark	5.6	1.7	11.0	11.3	11.5	3
France	3.3	6.7	5.6	11.1	11.7	7
Germany, West	−3.2	1.4	2.4	5.6	2.6	0
Greece	13.8	18.0	22.2	23.4	23.7	19
Ireland	12.6	5.1	−2.3	18.6	8.1	9
Italy	8.9	9.4	13.4	12.1	16.0	11
Luxembourg	−1.1	2.2	4.5	5.6	17.7	8
Netherlands	−4.1	1.7	4.1	8.5	2.4	1
United Kingdom	3.1	10.4	5.6	10.7	6.7	4
Total EC-10	3.6	6.9	7.9	11.4	11.3	8

[1]Estimated.

Source: The Agricultural Situation in the Community, 1983 Report, Commission of the European Community, January 1984.

EC Real Farm Income Falls as GDP Rises*

1973-75 = 100



*Per capita real income.

The Danish farmer also fared poorly in 1983, in contrast to 1982 when a record harvest occurred and farm debt was reduced. Real farm income is estimated to be 17.7 percent below 1982. A sharp decline in crop output (especially coarse grains) and reduced profits, particularly in the hog sector, were the principal causes of the drop. Some important export markets for fresh meat, including the United States, were closed to Danish exports because of foot-and-mouth disease (see trade section). The financial burden on Danish farmers remains severe, and the number of farm foreclosures—although declining from 1,607 in 1981—remains high at 1,000 in 1983.

Both Ireland and Italy registered moderate increases in net farm income, 3.6 percent and 2.2 percent, respectively. In Italy, important crops such as olives, fruit, and sugar beets recovered in 1983, following severe drought in 1982. Extremely high inflation and tight credit in Italy has, however, held down farm investment. Despite the improvement, Italy's real farm income is still approximately 40 percent below the 1978 peak. The slight improvement in Ireland reflected an increased value of livestock products. However, real income is considerably below the 1978 peak.

In non-EC Western Europe, Switzerland's farmers benefited from a large grain crop, as well as higher prices and larger deliveries of dairy products. Farm prices increased 3.6 percent, compared with a 1.2-percent rise in prices paid by farmers.

Farmers in Sweden and Norway have not fared badly, despite overproduction. Prices are supported at relatively high levels by the Governments; however, farmers bear many of the costs for reducing and disposing of surpluses. In Norway, a new method for calculating income by including nonfarm earnings, capital gains and expenditures, and earnings by other family members indicated that in 1982 Norwegian farmers earned 20 percent more than their industrial counterparts ($27,900 compared with $23,484).

1984 Farm Income Outlook Brighter

Farm income in 1984 could recover slightly in many countries if there are more normal weather and a continued moderation of inflation. Nevertheless, 1984/85 guaranteed support prices, in real terms, were reduced because of EC budget constraints, and a likely continuation of relatively high interest rates could limit capital investment. International feed prices will likely remain relatively high, although below 1983 levels. Marketing prospects will be tight for 1984/85, and other priorities in Western Europe will likely hold increases in subsidies at conservative levels. [*Marshall H. Cohen (202) 447-8289*]

AGRICULTURAL POLICY

The EC's expenditures on agriculture have risen rapidly—19 percent a year—during the past decade. This financial support has contributed to rapidly rising production and self-sufficiency. However, the expenditures, and the resulting surpluses, have become severe problems for the EC. As a result, during the past year the EC's Council of Agricultural Ministers and the EC Commission have taken a number of actions that are designed to reduce surpluses and restrain agricultural expenditures.

After the EC Commission proposed an already-low average increase in farm prices (0.8 percent) for 1984/85, the EC Council of Ministers took the unprecedented step of reducing prices by an average of 0.5 percent in terms of European Currency Units (ECU's). Nevertheless, prices have increased 3.2 percent in terms of national currencies because of a 3-percent revaluation of the ECU for use in the sector. The EC will run out of funds for its agricultural program before the end of 1984, and it remains to be seen how the Community will finance its expenditures at that point. Several crucial changes in the CAP have been proposed, but agreement on them remains uncertain.

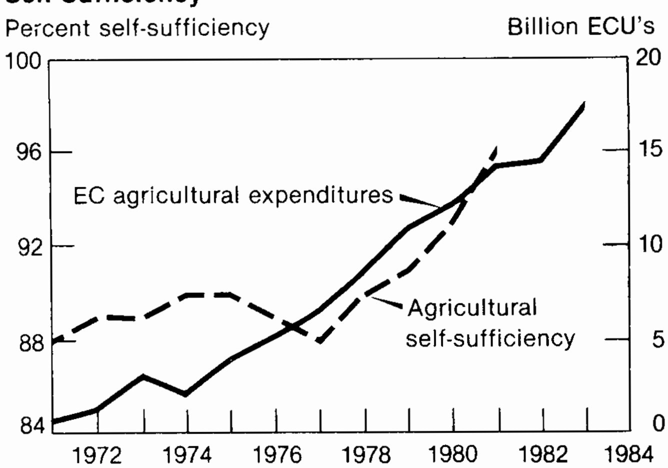
Farm Groups Resigned to Restrictive Price Policy

This year finds the EC finally confronting the long-anticipated budget overrun. The seriousness with which the EC budget problems and commodity price decisions are regarded is perhaps best seen in the attitude taken by farm organizations toward the minimal price increase that the EC Commission had advised. In previous years, farm groups responded by arguing for a specific and larger increase in support prices than the Commission's proposal, and they did so primarily through the Committee of Agricultural Organizations of the EC (COPA). This year, in spite of the poor performance of farm income in 1983, objections were less in the nature of counterproposals on prices, than the staking out of positions on future policy reforms. National farm organizations, in speaking out for their more narrow long-term interests, overshadowed the EC-wide COPA in commentary on the farm price package.

Dairy and Grain: Keys to CAP Reform

The budget crisis has come about through the CAP's overstimulation of production of certain commodities. The resulting surpluses must either be brought into intervention stocks, subsidized for sale to EC consumers, or exported out of the EC with subsidies applied to offset the EC's high prices relative to world prices. All of the choices are costly. The dairy sector is the principal financial problem, but grain has also become a significant burden since 1980. Discussion of CAP reform has thus concentrated on these two sectors, although there are also troublesome surpluses in a number of other commodities, including beef, sugar, and wine.

EC Ag. Expenditures Rise with Increased Self-Sufficiency



In addition to holding the target price for milk steady at last year's level, the EC Council set delivery quotas on milk at nearly 5 percent below 1983. Milk deliveries above the quota will be subject to a levy (tax) of either 75 percent of the target price at the farm or 100 percent at the dairy, as each member country decides for itself. The milk quota is based on a formula of 1981 deliveries plus 1 percent; Ireland and Italy were allowed to use 1983's higher level as the base for their national quotas. Ireland was also granted exemption from future quota cuts.

The case of Ireland was a major stumbling block to agreement on the milk quota arrangement. Ireland contended that since its dairy sector has not had sufficient time to achieve its potential for efficiency, which would put it on a par with top EC milk producers, it would be disadvantaged by a quota/levy system at this time. The United Kingdom had opposed any exemption from the "1981 + 1 percent" formula in order to assure that its contribution to the budget (often recognized to be disproportionately high) could be reduced in the future.

Also, the United Kingdom was trying to preserve the EC quota for New Zealand butter. Ireland and France oppose this quota on grounds that it displaces EC butter on the British market. France would like to resolve this issue by making continued imports of New Zealand butter contingent on fewer EC restrictions on butter sales to the Soviet Union. In the meantime, the EC Commission is to negotiate a reduction in New Zealand lamb imports in return for further EC concessions on butter access.

As the major means of controlling expenditures on the EC's grain sector, the Commission has been proposing to gradually bring EC grain prices down toward world prices. This will be difficult for the EC to achieve because of the effect on farm income. For 1984/85, the EC Council approved a 1-percent cut in the intervention price (in ECU's) of all grains except rice and durum wheat. Durum will now take its place with the other grains that last year were assigned a production threshold, beyond which price increases are reduced 1 percentage point for every million tons of additional output. However, since the general price increases have so far largely been determined politically, this "guaranteed threshold" system has yet to result in an actual reduction in support prices for grains.

While the EC membership had accepted the inevitability of changes in grain policy, France insists that production restraints via thresholds be conditional on measures that will promote greater use of EC grains at the expense of imported feedstuffs. This concern was behind the linking of price reductions to nongrain feed imports—currently 15 million tons a year. Under this arrangement, if nongrain feed imports exceed 15 million tons, the grain production threshold will be increased by the amount of the excess.

With similar motives in mind, the EC provided special subsidies for two programs to dispose of surplus milling-quality wheat. A program was approved to denature 2 million tons of milling-quality wheat for internal EC use as feed. Under the second scheme, another 1 to 1.5 million tons would be denatured for export as feed wheat (which the EC reckons is justified by its low feed barley exports expected for 1984/85). Progress in disposing of wheat surpluses through these programs has been much slower than anticipated.

The concern about rising imports of feedstuffs is also at play in the EC's much-discussed proposal to inhibit imports of nongrain feed ingredients by imposing quotas or by assigning or raising tariffs. No final decision has yet been taken, but the Council has given the EC Commission the authority to negotiate the issue of corn gluten import restrictions in the General Agreement on Tariffs and Trade (GATT).

Financial and Monetary Measures Proposed

Member countries will not be affected equally by policy changes and, consequently, debate on proposals to modify the CAP has been vigorous, as was clear in the fruitless December 1983 meeting of the EC heads of government. Because of the budgetary problem, the EC no longer has much time for discourse. Especially pressing is agreement on a supplemental budget to fund the extra spending on agriculture that is anticipated for 1984.

Since the EC is obliged under the Treaty of Rome to balance its budget (borrowing to finance a deficit is not permitted), a budget overrun creates a serious problem. In the long run, the EC will likely have to increase its resource base to meet expenditures, especially if enlargement to a Community of 12 is to take place. Enlargement of the EC to include Spain and Portugal will require larger CAP expenditures for Mediterranean products at the same time that northern members will try to minimize cutbacks in support of their principal products.

Italy has been the leading proponent of raising the share of the value-added tax (VAT) collected in each member country and contributed to the EC budget. West Germany, the largest net contributor to the budget, is apparently willing to accept a VAT hike only on the condition that Spain and Portugal enter the EC by January 1986, so that the increase in revenue will not simply encourage greater surpluses of northern products. The British, the second largest contributor, have blocked agreement on increasing the VAT until agreement is reached on a permanent solution to their chronic overpayment status.

An increase from the present revenue limit of 1 percent of each country's VAT base appears inevitable as part of any reform package, but it will be of little help to the EC in the short term. Even after the EC agrees on a revenue package, the national parliaments must give their approval, which means that no increase can possibly come before January 1, 1986.

Italy has also suggested resorting to extraordinary financing through national measures as a way of handling the budget problem with minimal loss to farmers. Hopes of financing agriculture during the remainder of this year appear to hinge on national financing. Of course, it is being resolutely opposed by the United Kingdom, pending EC assurances that, in the future, financing of the budget will not fall disproportionately on it.

As part of the recent reform package, the Council adopted a plan designed to lessen the problems of the EC's special monetary arrangements for the CAP. Farm production is guided by EC prices as expressed in national currencies. To assure that the price effects are equal in countries having currencies of varying strength, so-called "green rates" of exchange are used to convert the ECU-denominated support prices into national currency prices. To avoid distortions in trade flows and market prices due to currency fluctuations, the EC relies on a system of monetary compensatory amounts (MCA's). MCA's are taxes and subsidies administered at member country borders and are designed to compensate for exchange rate fluctuations. Negative MCA's are applied to diminish the trade advantage of a country with a relatively weaker currency, while positive MCA's compensate for the disadvantage of having a relatively stronger one. The EC's goal is to eliminate both green rates and MCA's as part of a more general effort to create a uniform monetary system, and more specifically, as part of CAP reform aimed at more efficient use of agricultural resources.

West Germany, although originally against an elimination of MCA's, submitted a compromise plan for a phase-out of positive MCA's over a 4-year period. The central feature of the plan calls for the eventual calculation of MCA's against the strongest currency, which will have the effect of eliminating positive MCA's by 1987/88. As the country with the highest positive MCA's, West Germany has the most to lose from the plan, since lowering positive MCA's will entail revaluing green rates, thus cutting support prices in positive MCA countries. However, by phasing out MCA's in stages, West German farmers would be buffered somewhat. This year's positive MCA's will be reduced by revaluing the ECU by 3 percent for agricultural purposes (instead of revaluing the green rates of positive MCA countries).

To keep the MCA's of weak currency countries from becoming more negative as a result of phasing out positive MCA's, their green rates will be devalued by an offsetting amount. Farm prices in German marks will be largely unaffected by the move, but there will be a price increase, in national currency terms, for weak currency countries. The plan provides that subsidies and taxes will partly offset any disproportionate effects caused by exchange rate differences in the future.

Most member countries responded favorably to the West German plan, especially France, which has felt West Germany's strong competition on the French market, and Italy, whose heavily deficit dairy sector is stymied by imports from West Germany that benefit from positive MCA's. Also, the phase-out of positive MCA's presumes a VAT contribution increase, which Italy favors.

The United Kingdom, presently a positive MCA country, opposed the original West German proposal because it envisioned changes in green rates. The United Kingdom contended that since the British pound fluctuates more than other EC member currencies—because it is not fully aligned to the European Monetary System—there must be some mechanism to protect the income of British farmers. By not changing the green rates for positive MCA countries, the United Kingdom was placated. Also, there is a provision that there will be no set pattern for phasing out that country's MCA's. [*Miles Lambert (202) 447-8289*]

Future Demand for Major U.S. Feedstuffs in the EC

Dale Leuck[1]

Abstract: U.S. exports of corn to the EC are expected to continue declining, but at a slower rate than in the late 1970's. Exports of soybeans and meal will continue growing, but at a much slower rate than in the previous decade.

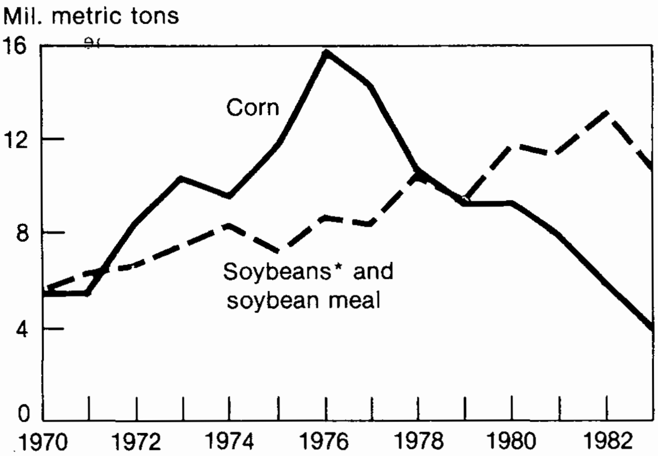
Keywords: Corn, soybeans, soybean meal, grain production, nongrain feeds, protein, dollar appreciation, rapeseed, sunflowerseed, skimmed milk powder.

The EC has been a $5 to $6 billion yearly market for U.S. feedstuffs. Livestock feeding in the EC is a major market for U.S. corn, soybeans, soybean meal, and other nongrain feeds. Approximately 15 percent of U.S. corn exports and one-third of soybean and soybean meal exports are shipped to the EC. In 1983, U.S. exports of corn and soybeans and meal to the EC totaled $0.5 and $3 billion, respectively. Factors affecting livestock feeding influence EC imports of these commodities, as all soybean meal and 75 percent of the corn used in the EC is fed to livestock. Imports from the United States currently account for about 80 percent of total soybean meal and 50 percent of all oilseed meal fed in the EC.

The future for exports of these products to the EC is not nearly as bright as in the past. U.S. corn exports to the EC nearly tripled between 1970 and 1976, when they topped out at 15.8 million metric tons. Nevertheless, they have declined every year since. In 1983, only 3.9 million tons of U.S. corn were sold to the EC.

Soybean and meal exports more than doubled between 1970 and 1982, when they totaled 13.1 million tons, meal equivalent. In 1983, however, exports fell 18 percent to 10.8 million tons. Exports of soybeans and meal are expected to post only modest gains in the future, while exports of corn will probably continue declining.

U.S. Exports to the EC Decline



*In meal equivalent.

Factors Affecting the Decline In U.S. Exports

Expanded EC Output Hinders Corn Imports

Rapid growth in EC grain production was the main factor reducing U.S. corn exports after 1976. From 1970 to 1975, rising energy costs, which limited fertilizer use by increasing real prices 19 percent, and declining acreage kept grain production about constant.

To accommodate increasing livestock production and industrial use of grain, total corn imports rose from 10 million tons in 1970 to 12 million in 1975. Meanwhile, the U.S. share of the EC market climbed above 50 percent in the early 1970's because of rapidly growing U.S. production. Furthermore, a drought in the EC created additional, but temporary demand for corn imports in 1976 and early 1977. Record U.S. sales in 1976 accounted for over 70 percent of the EC market.

Imports of corn began declining by late 1977, when normal weather boosted EC yields and output. By 1978, a 15-percent decline in the real price of fertilizer led to greater use, boosting crop output. Since 1978, planted area has stabilized around 26.8 million hectares, while yields have increased 18 percent—from an average of 3.9 tons a hectare in 1974 and 1975 to 4.6 in 1981 and 1982.

Excluding the drought years, EC grain production increased about 10 million tons between the mid-1970's and 1980, when the EC emerged as a net exporter of grain. Although the annual rate of growth in grain production has dropped more than one-half since 1980, it has continued high relative to the slowing growth in livestock production and industrial use of grain. As a result, the EC's net exports of grain have averaged over 4 million tons since 1980.

The CAP has curbed the demand for imported corn by imposing on imported grain a variable levy that is equal to the difference between the EC's high threshold price and lower world prices. The price of corn is determined by its threshold price because corn is in short supply in the EC, while the prices of wheat and barley, both in surplus, have been more influenced by the intervention price. To encourage greater use of EC-produced wheat and barley, the threshold price for corn has been raised more rapidly than intervention prices have been.

The variable levies have also increased the attractiveness of nongrain feeds, such as soybean and other oilseed meals, cassava, corn gluten, and citrus pellets, because these commodities enter the EC free of levies. For example, from 1964 to 1979, the average corn/soybean meal

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price ratio in the EC rose 18 percent, and the barley/soybean meal price ratio increased about 5 percent.

The relative cheapness of imported nongrain feeds and structural changes in livestock production encouraged the expansion of a compound feed industry. Compound feed production doubled during the 1960's, and it doubled again during the 1970's. By 1980, compound feed production accounted for 80 million tons of the total 121 million tons of concentrate feed used. About one-half of the ingredients in compound feeds were nongrain feedstuffs.

The total use of oilseed meal doubled during the 1960's, and again in the 1970's. It is currently about 20 million tons a year. Cassava is commonly combined with oilseed meal to substitute for about 80 percent of the energy content of grain, while corn gluten feed substitutes for oilseed meal as a source of protein in dairy rations. The use of both cassava and corn gluten nearly doubled between 1970 and 1975. Cassava use doubled again between 1975 and 1980, to over 5 million tons, while corn gluten nearly tripled to over 3.3 million tons.

The reduction in U.S. corn imports was limited by an increase in corn use in the growing starch industries of northern Europe. In France, however, the share of U.S. corn in the starch industry fell from 80 percent to less than 40 percent during the 1970's. In addition, declines in brewing and distilling activities during the recent recession have dampened demand for corn.

Soybean and Soybean Meal Exports To Show Slower Growth

High-protein feed use increased during the 1970's as the production of livestock and poultry increased dramatically. In addition, the use of protein per unit of output also increased as producers responded to the EC pricing system and achieved better feed conversion rates.

Better feed conversion rates were partly achieved because feeds with more oilseeds and other high-protein meals have higher and better balanced amino acid content. Feed conversion rates increased 6, 13, and 20 percent, respectively, for pork, broilers, and layers. A better composition of protein was particularly important for dairy, where the milk yield per cow increased 30 percent during the 1970's. The relative cheapness of nongrain feeds further encouraged their use as sources of both protein and energy. Although the protein content of nonforage feed only increased from 18 to 20 percent during the 1970's, by 1980, 50 percent of this protein was from nongrain feeds, as compared with 35 percent in 1970.

Beginning in 1980, slower growth in livestock production and a rapidly appreciating dollar, which increased soybean meal prices in Western Europe, began softening demand for meal. Therefore, U.S. exports of soybean meal declined slightly in 1981. However, in 1982, a bumper crop in the United States reduced prices, more than offsetting the dollar's appreciation. Consequently, meal prices in Western Europe dropped 2 percent that year, and U.S. exports hit a record.

Several factors reduced the demand for soybean meal imports in 1983. Rapeseed and sunflowerseed crops, which have received increasingly generous price supports in the EC, expanded 37 percent in 1982, to 3.4 million tons, and displaced soybean meal on nearly a one-to-one basis in 1983. In addition, the availability of skimmed milk powder, which is subsidized and used as a high-protein feed in the EC, increased 650,000 tons in 1983, up from 2.6 million tons in 1982. As a result of the rapid increase in milk production and the depressed world market, the EC's feed use of skimmed milk powder increased 48 percent (440,000 tons) last year.

Finally, the appreciation of the U.S. dollar and prospects for a short 1983 U.S. crop forced up prices in dollar terms. As a result, prices of soybean meal in the EC rose more than 15 percent, and demand for U.S. meal plunged.

Outlook for Corn and Soybean Exports

Although economic recovery in the EC will stimulate the demand for feed through higher meat consumption, the demand for U.S. corn will likely continue to decline. Livestock production is expected to only increase modestly because the EC is more than self-sufficient in meat, eggs, and dairy products, and consumption of these products is near a saturation point. Additional livestock production will not be encouraged by the EC because of the financial and political problems associated with surpluses. The EC has set delivery quotas on milk, and growth in the poultry industry, which uses about one-half of all corn, is expected to continue at a slower rate.

Growing EC grain surpluses will continue to displace U.S. corn. Although the EC Commission has proposed narrowing the gap between EC and world prices, it is not clear when or how grain prices will be reduced. In the meantime, advances in technology and favorable fertilizer prices will promote surplus grain production.

Further growth in the starch industry will encourage the use of some corn not used by the livestock sector. However, growth in the starch industry will still be moderate. Furthermore, in northern Europe, French corn is expected to eventually compete with the U.S. product.

After dropping significantly in 1983, U.S. exports of soybeans and meal are expected to climb in 1984, because the price of soybean meal in Europe will likely decline. Oilseed prices, especially those for soybeans, will likely be pressured downward during the next several years by the large soybean harvest just completed in South America and the one expected in the United States this fall. Economic recovery and modest livestock expansion in Western Europe will also encourage the use of oilseeds. Finally, the value of the dollar is expected to decline somewhat, resulting in lower prices for EC importers.

Growth in the EC's imports of soybeans and meal will be limited in comparison with historical standards, as the EC continues disposing of surplus skimmed milk powder and favoring sunflower and rapeseed expansion with price supports. A more fundamental limitation to long-term growth in soybean meal use is the lack of sustained strength in livestock production. Furthermore, in much of the EC, oilseed meal is being used near its maximum level in many feed rations. Because of these limitations, it may be several years before U.S. soybean and meal exports surpass the 1982 record of 13.1 million tons, meal equivalent.

Appendix Table 1.—Area and production of grains in Western Europe, Annual 1979-82[1]

Country and year	Area: Wheat	Rye[2]	Feed grains: Barley	Oats	Corn	Total[3]	Rice, paddy	Total grains	Production: Wheat	Rye[2]	Feed grains: Barley	Oats
	1,000 hectares								*1,000 tons*			
European Community												
Belgium-Luxembourg												
1980	194	12	173	45	6	224	—	430	906	42	866	162
1981	180	9	172	43	6	221	—	410	926	35	824	172
1982	183	7	149	52	7	209	—	399	1,063	33	808	221
1983	207	7	159	34	7	200	—	414	1,084	26	745	136
Denmark												
1980	139	56	1,577	40	—	1,621	—	1,816	652	199	6,044	160
1981	150	50	1,541	42	—	1,587	—	1,787	835	208	6,044	176
1982	180	55	1,485	43	—	1,532	—	1,767	1,207	235	6,357	178
1983	244	77	1,353	28	—	1,384	—	1,705	1,577	321	4,450	83
France												
1980	4,582	128	2,650	534	1,757	5,169	7	9,886	23,683	405	11,758	1,927
1981	4,753	117	2,679	501	1,571	4,968	6	9,844	22,882	342	10,231	1,774
1982	4,849	110	2,388	518	1,646	4,752	5	9,716	25,368	327	10,036	1,802
1983	4,827	109	2,143	443	1,636	4,423	8	9,367	24,785	316	8,865	1,469
Germany, Fed. Rep.												
1980	1,660	567	2,002	856	119	2,977	—	5,204	8,156	2,184	8,826	3,249
1981	1,632	500	2,044	825	129	2,998	—	5,130	8,314	1,793	8,687	3,200
1982	1,578	422	2,021	888	160	3,069	—	5,069	8,632	1,703	9,460	3,777
1983	1,655	456	2,035	729	169	2,933	—	5,044	8,998	1,646	8,994	2,489
Ireland												
1980	47	—	332	26	—	358	—	405	242	—	1,415	101
1981	44	—	330	24	—	354	—	398	230	—	1,320	94
1982	57	—	334	23	—	357	—	414	360	—	1,517	91
1983	59	—	304	22	—	326	—	385	330	—	1,220	92
Italy												
1980	3,405	15	330	226	936	1,506	176	5,102	9,150	35	947	450
1981	3,258	14	338	222	998	1,576	178	5,026	8,828	31	983	422
1982	3,326	13	352	219	1,011	1,602	183	5,124	8,903	32	1,060	359
1983	3,328	11	383	209	976	1,593	180	5,112	8,514	28	1,174	307
Netherlands												
1980	142	10	53	18	1	72	—	224	882	39	258	94
1981	132	7	53	21	1	75	—	214	882	29	249	115
1982	131	6	44	24	1	69	—	206	967	26	247	136
1983	148	7	38	14	1	53	—	208	1,044	26	177	61
United Kingdom												
1980	1,441	6	2,330	148	—	2,491	—	3,938	8,472	25	10,326	601
1981	1,491	7	2,327	144	—	2,482	—	3,980	8,710	25	10,230	620
1982	1,664	7	2,221	130	—	2,362	—	4,033	10,315	25	10,954	575
1983	1,690	7	2,150	110	—	2,271	—	3,968	10,800	25	10,000	460
Total EC-9												
1980	11,610	794	9,447	1,893	2,819	14,418	183	27,005	52,143	2,929	40,440	6,744
1981	11,640	704	9,484	1,822	2,705	14,261	184	26,789	51,607	2,463	38,568	6,573
1982	11,968	620	8,994	1,897	2,825	13,952	188	26,728	56,815	2,381	40,439	7,139
1983	12,158	674	8,565	1,589	2,789	13,183	188	26,203	57,132	2,388	35,625	5,097
Greece												
1980	957	3	331	50	163	544	17	1,521	2,931	6	949	89
1981	1,008	3	312	49	161	522	15	1,548	2,774	5	764	81
1982	1,033	3	311	52	163	526	16	1,578	2,983	6	872	82
1983	1,015	3	312	48	171	531	15	1,564	2,026	9	572	54
Total EC-10												
1980	12,567	797	9,778	1,943	2,982	14,962	200	28,526	55,074	2,935	41,389	6,833
1981	12,645	707	9,796	1,871	2,866	14,783	199	28,337	54,381	2,468	39,332	6,654
1982	13,001	623	9,305	1,949	2,988	14,478	204	28,306	59,798	2,387	41,311	7,221
1983	13,173	677	8,877	1,637	2,960	13,714	203	27,767	59,158	2,397	36,197	5,151

See footnotes at end of table.

Appendix Table 1.—Area and production of grains in Western Europe, Annual 1979-82[1]—Continued

Country and Year	Production—Cont.				Yield							
							Feed grains					
	Corn	Total[3]	Rice, paddy	Total grains	Wheat	Rye[2]	Barley	Oats	Corn	Total	Rice, paddy	Total grains
	1,000 tons				Metric tons per hectare							
European Community												
Belgium-Luxembourg												
1980	39	1,067	—	2,015	4.67	3.50	5.01	3.60	6.50	4.76	—	4.69
1981	38	1,034	—	1,995	5.14	3.89	4.79	4.00	6.33	4.68	—	4.87
1982	52	1,081	—	2,177	5.81	4.12	5.42	4.25	7.43	5.17	—	5.46
1983	53	934	—	2,044	5.24	3.71	4.69	4.00	7.57	4.67	—	4.94
Denmark												
1980	—	6,220	—	7,071	4.69	3.55	3.83	4.00	—	3.84	—	3.89
1981	—	6,234	—	7,277	5.57	4.16	3.92	4.19	—	3.93	—	4.07
1982	—	6,551	—	7,993	6.71	4.27	4.28	4.14	—	4.28	—	4.52
1983	—	4,540	—	6,438	6.46	4.17	3.89	2.96	—	3.28	—	3.78
France												
1980	9,219	23,768	25	47,881	5.17	3.16	4.44	3.61	5.25	4.60	2.29	4.84
1981	8,956	21,769	17	45,010	4.81	2.92	3.82	3.54	5.70	4.38	1.83	4.57
1982	10,400	22,976	26	48,697	5.23	2.97	4.20	3.48	6.32	4.84	3.40	5.01
1983	10,143	21,185	42	46,328	5.14	2.90	4.14	3.32	6.20	4.79	3.38	4.95
Germany, Fed. Rep.												
1980	671	12,746	—	23,086	4.91	3.85	4.41	3.80	5.64	4.28	—	4.44
1981	832	12,719	—	22,826	5.09	3.59	4.25	3.88	6.45	4.24	—	4.45
1982	1,054	14,291	—	24,626	5.47	4.04	4.68	4.25	6.59	4.66	—	4.86
1983	934	12,367	—	23,011	5.44	3.61	4.40	3.41	5.53	4.22	—	4.56
Ireland												
1980	—	1,516	—	1,758	5.15	—	4.26	3.88	—	4.23	—	4.34
1981	—	1,414	—	1,644	5.23	—	4.00	3.92	—	3.99	—	4.13
1982	—	1,608	—	1,968	6.32	—	4.54	3.96	—	4.50	—	4.75
1983	—	1,312	—	1,642	5.59	—	4.01	4.18	—	4.02	—	4.26
Italy												
1980	6,377	7,835	969	17,989	2.69	2.33	2.87	1.99	6.81	5.20	5.50	3.53
1981	7,197	8,706	954	18,519	2.71	2.21	2.91	1.90	7.21	5.52	5.36	3.68
1982	6,847	8,357	1,050	18,342	2.68	2.46	3.01	1.64	6.78	5.22	5.74	3.58
1983	6,640	8,221	1,029	17,792	2.56	2.55	3.06	1.47	6.80	5.16	5.72	3.48
Netherlands												
1980	1	353	—	1,274	6.21	3.90	4.87	5.22	1.00	4.90	—	5.69
1981	1	365	—	1,276	6.68	4.14	4.70	5.48	1.00	4.87	—	5.96
1982	2	385	—	1,378	7.34	4.33	5.61	5.67	2.06	5.58	—	6.69
1983	2	240	—	1,310	7.05	3.71	4.66	4.34	2.00	4.53	—	6.30
United Kingdom												
1980	—	10,986	—	19,483	5.88	4.17	4.43	4.06	—	4.41	—	4.95
1981	—	10,890	—	19,625	5.84	3.57	4.40	4.31	—	4.39	—	4.93
1982	—	11,567	—	21,907	6.20	3.57	4.93	4.42	—	5.58	—	5.44
1983	—	10,500	—	21,325	6.39	3.57	4.65	4.18	—	4.53	—	5.37
Total EC-9												
1980	16,307	64,491	994	120,557	4.49	3.69	4.28	3.56	5.78	4.47	5.43	4.46
1981	17,024	63,131	971	118,172	4.43	3.50	4.07	3.61	6.29	4.43	5.28	4.41
1982	18,355	66,816	1,076	127,088	4.75	3.84	4.50	3.76	6.50	4.79	5.72	4.75
1983	17,772	59,299	1,071	119,890	4.70	3.54	4.16	3.21	6.37	4.44	5.70	4.58
Greece												
1980	1,233	2,271	86	5,294	3.06	2.00	2.87	1.78	7.56	4.17	5.05	3.48
1981	1,337	2,182	79	5,040	2.76	1.67	2.45	1.65	8.30	4.18	5.27	3.26
1982	1,449	2,403	81	5,473	2.88	2.00	2.80	1.58	8.89	5.31	5.06	3.47
1983	1,550	2,179	79	4,293	2.00	2.25	1.83	1.12	9.06	4.10	5.27	2.74
Total EC-10												
1980	17,540	66,762	1,080	125,851	4.38	3.68	4.23	3.52	5.88	4.46	5.40	4.41
1981	18,361	65,313	1,050	123,212	4.30	3.49	4.02	3.56	6.41	4.42	5.28	4.35
1982	19,804	69,219	1,157	132,561	4.60	3.83	4.44	3.70	6.63	4.78	5.67	4.68
1983	19,322	61,478	1,150	124,183	4.49	3.54	4.08	3.15	6.53	4.48	5.66	4.47

Continued—

Appendix Table 1.—Area and production of grains in Western Europe, Annual 1979-82[1]

Country and year	Area								Production			
	Wheat	Rye[2]	Feed grains				Rice, paddy	Total grains	Wheat	Rye[2]	Feed grains	
			Barley	Oats	Corn	Total[3]					Barley	Oats
	1,000 hectares								1,000 tons			
Other Western Europe												
Austria												
1980	269	109	374	92	193	691	—	1,069	1,201	383	1,515	316
1981	274	102	362	91	189	674	—	1,050	1,025	320	1,220	304
1982	289	100	340	91	198	663	—	1,052	1,237	348	1,436	325
1983	313	93	339	83	206	660	—	1,066	1,415	348	1,480	348
Finland												
1980	124	53	533	448	—	991	—	1,168	357	124	1,534	1,258
1981	108	41	570	434	—	1,017	—	1,166	235	64	1,080	1,008
1982	143	16	540	459	—	1,010	—	1,169	435	35	1,599	1,320
1983	160	47	550	449	—	1,007	—	1,214	550	116	1,764	1,407
Norway												
1980	16	1	187	113	—	301	—	318	65	5	675	419
1981	13	1	177	126	—	304	—	318	58	3	608	463
1982	17	1	170	134	—	305	—	323	75	2	624	496
1983	20	1	174	131	—	306	—	327	85	2	558	475
Portugal												
1980	342	206	79	175	377	631	35	1,214	430	138	54	96
1981	371	199	74	160	348	582	25	1,177	315	126	41	72
1982	366	194	77	175	352	589	23	1,172	426	119	51	86
1983	393	170	89	140	351	624	25	1,212	276	114	41	66
Spain												
1980	2,699	217	3,575	458	454	4,525	68	7,509	6,039	284	8,705	680
1981	2,635	220	3,507	464	429	4,434	69	7,358	3,408	212	4,758	445
1982	2,602	212	3,556	430	412	4,426	68	7,308	4,368	170	4,900	474
1983	2,615	212	3,634	466	348	4,470	41	7,338	4,330	274	6,570	470
Sweden												
1980	288	66	648	452	—	1,155	—	1,509	1,193	225	2,172	1,567
1981	224	51	635	474	—	1,214	—	1,489	1,066	179	2,452	1,816
1982	283	54	635	477	—	1,173	—	1,510	1,490	211	2,378	1,663
1983	333	62	618	394	—	1,076	—	1,471	1,698	237	2,018	1,224
Switzerland												
1980	85	8	46	11	20	83	—	176	372	35	212	53
1981	82	7	50	12	18	86	—	175	385	30	226	58
1982	83	5	48	14	20	88	—	176	406	28	236	61
1983	83	5	52	11	20	90	—	178	385	24	220	55
Total Other Western Europe												
1980	3,824	660	5,443	1,749	1,044	8,378	103	12,965	9,660	1,194	14,869	4,389
1981	3,708	621	5,422	1,761	984	8,312	94	12,733	6,495	934	10,387	4,166
1982	3,783	582	5,366	1,780	982	8,254	91	12,710	8,437	913	11,224	4,425
1983	3,917	590	5,456	1,674	925	8,233	66	12,806	8,739	1,115	12,651	4,045
Total Western Europe												
1980	16,391	1,457	15,221	3,692	4,026	23,340	303	41,491	64,734	4,129	56,258	11,222
1981	16,356	1,328	15,218	3,632	3,850	23,095	293	41,069	60,876	3,402	49,719	10,820
1982	16,784	1,205	14,671	3,729	3,970	22,732	295	41,016	68,235	3,300	52,535	11,647
1983	17,090	1,267	14,333	3,311	3,885	21,947	269	40,573	67,897	3,512	48,848	9,196

— = None, or negligible

[1]Data for 1983 are preliminary. [2]Rye is considered a bread grain but for the region, about half the crop is used for feed. [3]Includes other grains: millett, sorghum, buckwheat, and mixed grains.

Appendix Table 1.—Area and production of grains in Western Europe, Annual 1979-82[1]—Continued

Country and Year	Production—Cont.				Yield							
							Feed grains					
	Corn	Total[3]	Rice, paddy	Total grains	Wheat	Rye[2]	Barley	Oats	Corn	Total[3]	Rice, paddy	Total grains
	1,000 tons				*Metric tons per hectare*							
Other Western Europe												
Austria												
1980	1,293	3,244	—	4,828	4.46	3.51	4.05	3.43	6.70	4.69	—	4.52
1981	1,374	3,011	—	4,356	3.74	3.14	3.37	3.34	7.27	4.47	—	4.15
1982	1,551	3,442	—	5,027	4.28	3.48	4.22	3.57	7.83	5.19	—	4.78
1983	1,437	3,388	—	5,151	4.52	3.74	4.37	4.19	6.98	5.13	—	4.83
Finland												
1980	—	2,820	—	3,301	2.88	2.34	2.88	2.81	—	2.85	—	2.83
1981	—	2,116	—	2,415	2.18	1.56	1.89	2.32	—	2.08	—	2.07
1982	—	2,948	—	3,418	3.04	2.19	2.96	2.88	—	2.92	—	2.92
1983	—	3,208	—	3,874	3.44	2.47	3.21	3.13	—	3.19	—	3.19
Norway												
1980	—	1,096	—	1,166	4.06	5.00	3.61	3.71	—	3.64	—	3.67
1981	—	1,073	—	1,134	4.46	3.00	3.44	3.67	—	3.53	—	3.57
1982	—	1,122	—	1,199	4.41	2.00	3.67	3.70	—	3.68	—	3.71
1983	—	1,035	—	1,122	4.25	2.00	3.21	3.63	—	3.38	—	3.43
Portugal												
1980	489	639	155	1,362	1.26	0.67	0.68	0.55	1.30	1.01	4.43	1.12
1981	377	490	112	1,043	0.85	0.63	0.55	0.45	1.08	0.84	4.48	0.89
1982	421	558	140	1,243	1.16	0.61	0.66	0.51	1.20	0.95	6.09	1.06
1983	430	537	100	1,027	0.70	0.61	0.49	0.36	1.22	0.86	4.00	0.85
Spain												
1980	2,314	11,885	433	18,641	2.24	1.31	2.43	1.48	5.10	2.63	6.51	2.48
1981	2,157	7,503	444	11,567	1.29	0.96	1.36	0.96	5.03	1.69	6.43	1.57
1982	2,353	7,753	409	12,700	1.68	0.80	1.58	1.10	5.47	1.75	6.01	1.74
1983	1,750	8,871	230	13,705	1.66	1.29	1.81	1.00	5.03	1.98	5.61	1.87
Sweden												
1980	—	3,896	—	5,314	4.14	3.41	3.35	3.47	—	3.37	—	3.52
1981	—	4,453	—	5,698	4.76	3.51	3.60	3.83	—	3.67	—	3.83
1982	—	4,225	—	5,926	5.26	3.90	3.74	3.48	—	3.60	—	3.92
1983	—	3,412	—	5,347	5.10	3.82	3.26	3.11	—	3.17	—	3.63
Switzerland												
1980	91	382	—	789	4.38	4.38	4.61	4.82	4.55	4.60	—	4.48
1981	139	450	—	865	4.70	4.29	4.52	4.83	7.72	5.23	—	4.94
1982	170	493	—	927	4.89	5.60	4.92	4.36	8.50	5.60	—	5.27
1983	130	433	—	842	4.64	4.80	4.23	5.00	6.50	4.87	—	4.73
Total Other Western Europe												
1980	4,187	23,964	588	35,406	2.53	1.81	2.73	2.51	4.01	2.86	5.42	2.73
1981	4,047	19,098	556	27,083	1.75	1.50	1.92	2.37	4.11	2.30	5.91	2.13
1982	4,495	20,541	549	30,440	2.23	1.57	2.09	2.49	4.58	2.49	6.03	2.40
1983	3,747	20,884	330	31,068	2.23	1.95	2.32	2.42	4.05	2.54	5.00	2.43
Total Western Europe												
1980	21,727	90,726	1,668	161,257	3.95	2.83	3.70	3.04	4.36	2.86	5.50	3.03
1981	22,408	84,411	1,606	150,295	3.72	2.56	3.27	2.98	4.77	2.83	5.48	3.00
1982	24,299	89,760	1,706	163,001	4.06	2.74	3.58	3.12	6.12	3.95	4.78	3.97
1983	23,069	82,362	1,480	155,248	3.97	2.77	3.41	2.78	5.99	3.75	5.50	3.83

Appendix Table 2.—Area and production of selected nongrain crops in Western Europe, average 1970-74, annual 1980-83[1]

Country and year	Area				Production							
	Potatoes	Sugar beets	Cotton	Tobacco	Potatoes	Sugar beets	Cotton	Tobacco	Olive oil	Fruit		
										Apples[2]	Pears[2]	Citrus
	1,000 hectares				*1,000 tons*							
European Community												
Belgium-Luxembourg												
1970-74	48	99	—	1	1,458	4,533	—	2	—	245	61	—
1980	47	117	—	1	1,459	5,876	—	1	—	328	75	—
1981	44	130	—	1	1,426	6,936	—	2	—	133	58	—
1982	38	124	—	1	1,342	7,430	—	2	—	263	94	—
1983	35	108	—	1	972	5,069	—	2	—	219	97	—
France												
1970-74	346	451	—	20	8,146	19,313	—	48	2	1,778	489	12
1980	216	526	—	19	7,045	25,248	—	46	2	1,802	413	33
1981	212	616	—	17	6,437	33,332	—	43	2	1,465	428	33
1982	209	565	—	15	4,662	29,968	—	45	2	1,973	427	33
1983	204	500	—	14	3,823	23,506	—	34	2	1,535	421	30
Germany, West												
1970-74	520	334	—	4	14,938	15,214	—	10	—	1,659	411	—
1980	258	414	—	3	6,694	19,083	—	7	—	1,880	394	—
1981	246	464	—	3	7,585	24,353	—	8	—	773	276	—
1982	238	418	—	3	7,049	22,732	—	8	—	2,775	568	—
1983	224	393	—	3	5,669	16,295	—	8	—	2,700	580	—
Greece												
1970-74	52	25	146	89	767	1,341	126	87	212	210	107	620
1980	55	28	141	89	1,083	1,564	117	117	246	288	131	834
1981	52	42	126	91	1,028	2,560	120	127	377	304	164	930
1982	50	40	137	93	1,015	2,547	100	132	230	254	99	874
1983	50	40	173	94	1,030	2,500	140	115	324	314	132	750
Italy												
1970-74	223	248	6	45	3,145	9,285	1	85	471	1,912	1,645	2,583
1980	132	291	3	61	2,940	13,251	1	126	626	1,966	1,342	2,425
1981	153	317	1	61	2,879	17,498	1	131	515	1,773	1,236	2,543
1982	148	255	1	61	2,625	11,093	1	143	470	2,594	1,134	2,300
1983	140	225	1	60	2,700	9,500	1	140	650	2,072	1,454	2,550
Netherlands												
1970-74	155	109	—	—	5,769	5,045	—	—	—	441	112	—
1980	172	122	—	—	6,267	6,175	—	—	—	450	105	—
1981	165	130	—	—	6,444	7,400	—	—	—	260	90	—
1982	163	134	—	—	6,219	7,946	—	—	—	440	105	—
1983	161	122	—	—	5,338	5,450	—	—	—	400	110	—
Denmark												
1970-74	33	56	—	—	828	2,254	—	—	—	75	8	—
1980	34	77	—	—	849	3,056	—	—	—	65	6	—
1981	36	78	—	—	1,052	3,352	—	—	—	43	3	—
1982	35	75	—	—	1,230	3,676	—	—	—	59	5	—
1983	30	74			835	3,500	—	—	—	60	4	—
Ireland												
1970-74	48	29	—	—	1,282	1,110	—	—	—	8	—	—
1980	40	33	—	—	1,125	1,154	—	—	—	10	—	—
1981	38	35	—	—	1,000	1,319	—	—	—	7	—	—
1982	35	34	—	—	1,100	1,659	—	—	—	9	—	—
1983	32	36			700	1,630	—	—	—	8	—	—
United Kingdom												
1970-74	241	191	—	—	7,000	6,502	—	—	—	423	58	—
1980	206	210	—	—	7,105	7,380	—	—	—	321	44	—
1981	191	209	—	—	6,213	7,395	—	—	—	227	49	—
1982	192	202	—	—	6,875	10,007	—	—	—	354	44	—
1983	194	199	—	—	6,000	8,000	—	—	—	330	44	—
Total EC-10												
1970-74	1,666	1,542	152	159	43,333	64,597	127	232	685	6,751	2,891	3,215
1980	1,160	1,818	144	173	34,567	82,787	118	297	874	7,110	2,510	3,292
1981	1,137	2,021	127	173	34,064	104,145	121	311	894	4,985	2,304	3,506
1982	1,115	1,847	138	173	32,117	97,058	101	330	702	8,721	2,476	3,207
1983	1,070	1,697	174	172	27,067	75,450	141	299	976	7,638	2,842	3,330

Appendix Table 2.—Area and production of selected nongrain crops in Western Europe, average 1970-74, annual 1980-83[1]—Continued

Country and year	Area				Production							
	Potatoes	Sugar beets	Cotton	Tobacco	Potatoes	Sugar beets	Cotton	Tobacco	Olive oil	Fruit		
										Apples[2]	Pears[2]	Citrus
	1,000 hectares				*1,000 tons*							
Other Western Europe												
Austria												
1970-74	96	47	—	—	2,375	2,059	—	1	—	170	47	—
1980	53	51	—	—	1,264	2,587	—	1	—	330	126	—
1981	50	59	—	—	1,310	3,007	—	—	—	243	97	—
1982	47	59	—	—	1,121	2,900	—	—	—	429	162	—
1983	47	59	—	—	1,200	2,900	—	—	—	325	130	—
Finland												
1970-74	51	19	—	[illegible]	770	563	—	—	—	—	—	—
1980	41	31	—	—	736	900	—	—	—	8	—	—
1981	39	32	—	—	480	676	—	—	—	10	—	—
1982	39	32	—	—	601	790	—	—	—	10	—	—
1983	45	32	—	—	804	900	—	—	—	10	—	—
Norway												
1970-74	31	—	—	—	744	—	—	—	—	49	10	—
1980	24	—	—	—	527	—	—	—	—	41	6	—
1981	24	—	—	—	530	—	—	—	—	54	11	—
1982	25	—	—	—	530	—	—	—	—	44	8	—
1983	21	—	—	—	410	—	—	—	—	50	7	—
Portugal												
1970-74	111	—	—	—	1,123	—	—	—	52	132	55	163
1980	116	1	—	1	1,122	30	—	2	57	110	50	130
1981	115	1	—	1	889	40	—	2	38	100	44	115
1982	115	1	—	1	1,100	54	—	2	22	85	62	120
1983	110	1	—	1	1,150	54	—	—	57	70	65	115
Spain												
1970-74	401	195	94	16	5,250	5,270	51	25	399	766	414	2,524
1980	355	183	63	20	5,737	6,909	59	34	466	859	437	2,953
1981	343	218	72	20	5,470	7,941	62	44	297	1,007	525	2,635
1982	338	260	49	22	5,081	8,956	48	42	666	647	449	3,009
1983	340	270	32	22	5,072	9,194	28	45	277	983	531	3,428
Sweden												
1970-74	49	42	—	—	1,214	1,925	—	—	—	30	5	—
1980	42	51	—	—	1,153	2,258	—	—	—	89	11	—
1981	42	52	—	—	1,220	2,484	—	—	—	92	14	—
1982	40	53	—	—	1,030	2,432	—	—	—	97	11	—
1983	42	53	—	—	960	1,950	—	—	—	99	12	—
Switzerland												
1970-74	27	10	—	1	1,075	463	—	2	—	109	22	—
1980	13	13	—	1	980	675	—	1	—	120	19	—
1981	14	14	—	1	1,100	902	—	2	—	83	15	—
1982	15	15	—	1	1,050	910	—	2	—	140	20	—
1983	14	15	—	1	1,000	910	—	2	—	99	20	—
Total Other Western												
1970-74	766	313	94	17	12,551	10,280	51	28	451	1,256	553	2,687
1980	644	330	63	22	11,519	13,352	59	38	523	1,629	649	3,083
1981	627	376	72	22	10,999	15,050	62	48	335	1,590	706	2,750
1982	619	420	49	24	10,513	16,042	48	46	688	1,658	712	3,129
1983	619	430	32	24	10,596	15,908	28	47	334	1,636	765	3,543
Total Western Europe												
1970-74	2,432	1,855	246	176	55,884	74,877	178	260	1,136	8,007	3,444	5,902
1980	1,804	2,148	207	195	46,086	96,146	177	335	1,397	8,739	3,159	6,375
1981	1,764	2,397	199	195	45,063	119,195	183	359	1,229	6,575	3,010	6,256
1982	1,734	2,267	187	197	42,630	113,100	149	376	1,390	10,379	3,188	6,336
1983	1,689	2,127	206	196	37,663	91,358	169	346	1,310	9,274	3,607	6,873

[1]Data for 1983 are preliminary. [2]Dessert and cooking only.

— = None or neligible.

Appendix table 3.—Production of principal livestock products in Western Europe, average 1970-74, annual 1980-83[1]

Country and year	Principal red meats: Beef and veal	Sheep and goat meat	Pork[2]	Total	Poultry meat[3]	Cow's milk[4]	Eggs
				1,000 tons			
European Community							
Belgium-Luxembourg							
1970-74	281	3	534	818	111	4,011	223
1980	311	4	700	1,015	134	3,898	195
1981	319	4	716	1,039	132	4,059	192
1982	287	5	700	992	140	4,066	192
1983	300	7	725	1,032	144	4,100	188
France							
1970-74	1,577	129	1,341	3,047	727	24,092	668
1980	1,836	179	1,597	3,612	1,122	26,859	851
1981	1,834	173	1,640	3,647	1,236	26,795	892
1982	1,698	180	1,610	3,488	1,330	27,358	935
1983	1,775	176	1,601	3,552	1,278	27,905	885
Germany, West							
1970-74	1,291	11	2,403	3,705	266	21,458	882
1980	1,564	30	2,726	4,320	374	24,778	805
1981	1,532	28	2,700	4,260	376	24,858	776
1982	1,471	27	2,673	4,171	379	25,465	771
1983	1,480	29	2,735	4,244	344	27,000	753
Greece							
1970-74	93	96	76	265	79	611	121
1980	100	120	144	364	144	713	141
1981	94	121	152	367	146	714	148
1982	89	120	154	363	156	684	148
1983	90	119	155	364	159	690	151
Italy							
1970-74	1,072	48	626	1,746	775	8,691	626
1980	1,148	72	981	2,201	953	10,749	628
1981	1,111	69	992	2,172	947	10,637	672
1982	1,107	68	994	2,169	976	10,800	660
1983	1,140	66	1,040	2,246	976	11,125	641
Netherlands							
1970-74	311	11	753	1,075	314	8,904	262
1980	376	21	1,062	1,459	377	11,785	530
1981	428	16	1,149	1,593	410	12,147	577
1982	413	12	1,165	1,590	419	12,708	628
1983	434	11	1,185	1,630	382	13,090	636
Denmark							
1970-74	195	1	753	949	86	4,706	76
1980	245	1	971	1,217	97	5,117	77
1981	238	1	992	1,231	104	5,037	80
1982	232	1	991	1,224	110	5,217	84
1983	238	1	1,045	1,284	112	5,425	79
Ireland							
1970-74	241	44	146	431	37	3,899	41
1980	444	42	157	643	50	4,859	30
1981	315	44	153	512	49	4,803	38
1982	344	42	155	541	53	5,172	36
1983	350	40	160	550	54	5,550	36
United Kingdom							
1970-74	952	232	1,001	2,185	631	13,212	851
1980	1,102	278	947	2,327	754	15,958	823
1981	1,059	263	972	2,294	745	15,857	806
1982	960	268	977	2,205	805	16,745	794
1983	1,020	281	1,040	2,341	810	17,415	771
Total EC-10							
1970-74	6,013	575	7,633	14,221	3,026	89,584	3,750
1980	7,126	747	9,285	17,158	4,005	104,716	4,080
1981	6,930	719	9,466	17,115	4,145	104,907	4,181
1982	6,601	723	9,419	16,743	4,368	108,215	4,248
1983	6,827	730	9,686	17,243	4,259	112,300	4,140

Appendix table 3.—Production of principal livestock products in Western Europe, average 1970-74, annual 1980-83[1]—Continued

Country and year	Principal red meats: Beef and veal	Sheep and goat meat	Pork[2]	Total	Poultry meat[3]	Cow's milk[4]	Eggs
	1,000 tons						
Other Western Europe							
Austria							
1970-74	167	1	259	427	46	3,290	88
1980	200	2	358	560	64	3,396	98
1981	199	2	353	554	65	3,495	102
1982	200	2	375	577	66	3,554	99
1983	199	2	376	577	66	3,590	103
Finland							
1970-74	107	3	131	241	7	3,175	73
1980	112	1	167	280	15	3,277	79
1981	120	1	178	299	17	3,171	80
1982	115	1	183	299	16	3,166	82
1983	119	1	184	304	18	3,224	85
Norway							
1970-74	58	16	73	147	8	1,732	37
1980	70	19	86	175	12	1,946	44
1981	76	21	83	180	12	1,965	45
1982	81	23	81	185	11	2,023	45
1983	80	21	80	181	11	1,992	45
Portugal							
1970-74	80	25	106	211	74	458	40
1980	97	24	155	276	140	644	66
1981	105	23	178	306	166	791	68
1982	116	24	177	317	158	793	72
1983	116	25	178	319	155	700	72
Spain							
1970-74	344	143	545	1,032	556	3,914	490
1980	422	138	986	1,546	762	5,871	690
1981	418	140	1,021	1,579	885	5,881	692
1982	420	141	1,115	1,676	853	5,947	729
1983	410	140	1,125	1,675	810	6,050	725
Sweden							
1970-74	145	3	258	406	30	3,030	100
1980	157	5	317	479	44	3,465	115
1981	158	5	321	484	47	3,496	114
1982	160	5	325	490	48	3,654	117
1983	160	5	317	482	47	3,715	117
Switzerland							
1970-74	133	3	209	345	18	3,234	41
1980	169	4	279	452	24	3,655	44
1981	156	4	275	435	24	3,658	43
1982	161	4	290	455	24	3,663	43
1983	154	4	298	456	25	3,670	42
Total Other Western Europe							
1970-74	1,034	194	1,581	2,809	739	18,833	869
1980	1,227	193	2,348	3,768	1,061	22,254	1,136
1981	1,232	196	2,409	3,837	1,216	22,457	1,144
1982	1,253	200	2,546	3,999	1,176	22,800	1,187
1983	1,238	198	2,558	3,994	1,132	22,941	1,189
Total Western Europe							
1970-74	7,047	769	9,214	17,030	3,765	108,417	4,619
1980	8,353	940	11,633	20,926	5,066	126,970	5,216
1981	8,162	915	11,875	20,952	5,361	127,364	5,325
1982	7,854	923	11,965	20,742	5,544	131,015	5,435
1983	8,065	928	12,244	21,237	5,391	135,241	5,329

[1]Data for 1983 are preliminary. [2]Excludes commercial lard. [3]On ready-to-cook basis. [4]As reported; it does not always include amounts fed young animals.

Appendix table 4.—Agricultural imports by country, European Community and Other Western Europe, 1980-82

Commodity and year		SITC Numbers: Major headings	SITC Numbers: Sub-headings	European Community: Belgium Luxembourg	France	West Germany	Italy	Nether-lands	Denmark	Ireland
				Million dollars						
Live animals	1980	00		281.8	505.1	347.8	1,655.3	58.6	2.3	121.3
	1981			256.4	448.3	291.8	1,367.7	54.1	2.0	171.6
	1982			280.6	424.3	257.1	1,476.0	74.2	1.7	153.4
Meat and meat preparations	1980	01		534.2	2,291.5	2,680.4	2,396.2	649.0	20.2	50.6
	1981			452.4	2,051.0	2,345.3	2,135.3	534.9	20.1	70.3
	1982			432.5	2,043.3	2,269.1	2,458.5	439.0	18.7	57.4
Dairy products and eggs	1980	02		934.2	567.7	1,646.9	1,623.1	1,120.9	79.8	49.7
	1981			904.2	498.6	1,610.8	1,496.1	1,083.2	103.7	67.0
	1982			1,000.4	422.4	1,571.1	1,683.6	1,083.4	60.7	44.0
Cereals and cereal preparations	1980	04		1,444.2	755.4	1,578.4	1,666.8	1,406.6	159.1	259.7
	1981			1,407.8	760.3	1,464.8	1,591.3	1,263.1	171.3	252.3
	1982			1,319.9	916.8	1,395.6	1,393.0	1,156.9	136.4	184.5
Wheat and flour	1980		041, 046	370.5	192.5	341.7	770.3	368.1	15.1	93.4
	1981			305.5	190.0	324.4	681.4	348.5	9.8	90.4
	1982			263.0	258.9	352.2	696.5	321.3	12.4	54.6
Rice	1980		042	79.5	152.3	95.8	49.6	93.3	9.7	2.9
	1981			95.3	140.6	107.8	80.1	121.6	9.2	2.7
	1982			93.1	146.0	92.8	102.7	65.1	8.3	2.4
Feed grains	1980		043-045	800.8	153.4	740.9	733.1	751.1	76.6	66.9
	1981			825.8	178.2	666.6	729.4	646.2	102.9	62.7
	1982			790.9	238.2	594.2	487.0	612.8	67.6	38.4
Fruit and vegetables	1980	05		1,142.5	2,619.4	5,914.4	751.9	1,706.2	274.3	208.8
	1981			1,031.0	2,491.1	5,329.9	651.7	1,640.3	258.9	201.6
	1982			982.0	2,451.5	4,917.6	707.3	1,709.9	235.1	214.3
Sugar, sugar preparations, and honey	1980	06		136.1	323.1	422.2	284.9	241.4	83.6	94.4
	1981			136.0	268.4	355.6	121.6	193.5	71.8	75.4
	1982			124.4	249.4	375.5	177.6	183.4	77.1	68.1
Coffee, tea, cocoa, spices, etc.	1980	07		722.7	1,983.6	2,994.8	1,106.1	1,369.8	313.8	143.8
	1981			574.3	1,393.9	2,375.5	805.7	1,030.9	255.4	111.0
	1982			544.0	1,396.0	2,438.6	825.0	1,040.1	241.2	109.2
Animal feed	1980	08		660.0	1,068.7	1,650.7	676.3	1,558.6	524.9	162.1
	1981			594.4	1,159.2	1,583.0	653.7	1,427.5	573.9	194.3
	1982			581.8	1,023.6	1,525.9	651.1	1,354.8	506.9	157.1
Oilseed cake and meal	1980		0813	267.1	881.5	1,016.9	327.8	512.1	450.0	88.0
	1981			238.4	970.5	1,017.1	339.8	597.9	505.4	111.7
	1982			245.9	851.7	954.3	319.8	567.5	441.3	90.0
Meatmeal and fishmeal	1980		0814	23.8	34.7	135.4	37.4	44.8	3.5	7.6
	1981			26.4	30.7	96.3	31.4	36.0	4.4	6.6
	1982			31.6	30.1	123.7	33.7	46.6	3.2	5.5
Miscellaneous food preparations	1980	09		203.2	192.6	271.1	68.1	205.2	36.4	52.9
	1981			174.1	188.8	246.3	56.7	165.2	33.3	50.9
	1982			162.5	191.6	233.2	62.2	152.6	30.6	47.8
Lard	1980		0913	10.2	4.9	4.1	5.6	34.5	3.6	0.9
	1981			12.3	2.9	3.2	0.1	29.8	3.0	0.7
	1982			10.0	2.5	3.5	0.4	29.0	1.2	0.5
Margarine and shortening	1980		0914	16.6	44.8	27.8	8.2	22.3	0.2	2.4
	1981			15.1	42.6	19.8	7.3	9.2	1.0	1.9
	1982			13.8	40.8	15.9	9.0	7.8	0.2	1.6

See footnotes at end of table.

Appendix table 4.—Agricultural imports by country, European Community and Other Western Europe, 1980-82—Continued

United Kingdom	Greece	Total EC-10	Other Western Europe							Total OWE	Total Western Europe
			Austria	Finland	Norway	Portugal	Spain[2]	Sweden	Switzer-land		
						Million dollars					
244.5	22.5	3,239.2	18.9	2.5	1.3	10.1	16.9	5.7	15.5	70.9	3,310.2
219.8	12.1	2,823.7	23.5	3.9	0.9	13.0	18.9	5.9	15.1	81.2	2,906.1
233.0	17.7	2,918.0	6.6	3.5	1.6	8.7		4.1	12.8		
2,846.2	304.4	11,772.9	74.5	6.0	50.8	35.9	121.4	97.7	230.9	617.2	12,390.0
2,529.5	264.3	10,403.0	77.2	2.3	20.9	15.7	116.4	56.2	243.5	532.2	10,946.8
2,399.2	442.5	10,560.2	52.8	1.2	14.5	12.3		54.8	209.6		
1,161.4	142.8	7,326.6	75.9	0.8	11.7	7.2	130.7	41.9	151.1	419.3	7,745.8
1,189.0	207.3	7,160.0	63.5	1.0	5.8	12.9	113.8	40.2	149.9	387.1	7,555.0
994.3	236.4	7,096.3	55.3	1.9	5.0	23.2		33.7	151.5		
1,402.5	97.2	8,769.8	94.0	90.9	184.6	550.6	940.5	114.1	321.3	2,296.0	11,065.8
1,136.1	77.1	8,124.0	82.1	115.1	178.3	742.1	964.6	122.4	306.1	2,510.7	10,630.0
962.4	172.2	7,637.7	78.5	182.5	160.0	498.8		98.6	280.5		
541.7	1.3	2,694.7	0.3	64.6	63.0	110.4	70.7	11.1	78.3	398.4	3,093.1
418.5	0.2	2,368.7	0.4	65.4	83.5	178.9	44.3	13.6	76.0	462.1	2,833.1
319.2	6.0	2,284.1	0.8	56.6	61.3	107.8		9.8	63.5		
98.3	—	581.3	21.5	7.8	4.9	19.6	0.8	16.0	17.7	88.3	669.6
101.7	2.0	661.1	20.6	9.5	5.6	53.2	0.1	15.2	17.0	121.2	782.7
106.1	5.2	621.7	19.8	8.2	5.5	45.9		15.6	18.4		
612.9	69.6	4,005.3	27.3	6.0	64.4	412.1	851.8	12.7	163.4	1,537.7	5,543.0
460.8	46.9	3,719.6	19.7	27.3	43.9	504.0	908.5	25.7	153.3	1,682.4	5,404.1
383.1	129.8	3,342.0	14.9	103.7	47.6	338.3		9.6	128.2		
2,879.9	22.5	15,519.9	457.6	258.0	252.3	40.2	192.2	613.7	741.6	2,555.6	18,075.4
2,789.9	21.2	14,415.7	397.3	240.1	238.9	41.8	199.6	560.7	665.9	2,344.3	16,772.6
2,815.2	27.2	14,060.1	385.1	231.0	238.6	53.8		528.6	648.4		
935.7	5.1	2,526.5	41.9	129.3	128.5	143.6	18.4	76.9	89.8	628.4	3,154.9
790.6	75.9	2,088.8	35.5	78.8	130.5	151.5	18.3	64.6	110.0	589.2	2,681.6
751.8	5.1	2,012.4	36.2	66.9	80.5	68.3		46.8	95.5		
1,572.0	136.8	10,343.5	319.8	340.2	258.7	52.3	701.3	526.9	420.0	2,619.2	12,962.6
1,163.3	94.7	7,804.7	255.4	231.8	198.3	47.0	392.6	398.6	335.1	1,858.8	9,668.0
1,264.3	103.8	7,962.2	274.1	244.1	187.6	53.2		387.4	306.6		
578.7	7.9	6,888.0	165.4	65.5	49.4	118.6	58.1	209.3	139.3	805.6	7,693.6
659.9	48.7	6,894.6	161.6	64.9	37.4	141.9	67.7	194.5	143.9	811.9	7,709.1
781.5	42.3	6,625.0	153.7	62.1	41.0	65.9		171.9	136.7		
255.8	2.1	3,801.3	116.9	—	27.4	77.0	20.8	77.3	5.6	325.0	4,126.3
289.1	4.7	4,074.6	121.0	—	19.1	106.4	35.6	78.3	12.3	372.7	4,448.2
358.5	5.1	3,834.1	115.1	—	20.4	42.6		67.6	8.8		
125.6	1.5	414.2	20.3	54.2	0.1	4.6	14.9	54.0	45.2	193.3	607.6
98.2	16.5	345.9	18.2	53.7	—	2.6	12.9	48.7	52.5	188.6	535.1
96.6	17.3	388.3	15.5	47.5	—	0.6		49.9	41.8		
344.9	16.6	1,391.0	34.4	37.4	32.8	5.9	50.1	71.6	49.9	282.1	1,673.1
326.0	17.6	1,258.8	31.2	35.6	30.8	6.6	44.5	70.6	48.1	267.4	1,527.8
316.2	19.9	1,216.6	34.1	36.0	36.0	7.5		66.5	49.7		
134.5	—	198.4	—	—	0.1	0.2	—	—	0.4	0.70	199.1
104.2	—	156.2	—	—	0.1	0.2	—	—	0.5	0.80	157.5
97.3	—	144.4	—	—	0.1	0.2		—	0.4		
40.5	0.5	163.0	3.2	—	—	—	2.6	6.8	0.7	13.3	176.4
42.7	0.7	140.3	1.9	—	0.2	0.2	2.8	5.1	0.7	9.0	146.6
39.3	2.1	130.5	2.0	—	0.1	—		4.5	0.7		

Continued—

Appendix table 4.—Agricultural imports by country, European Community and Other Western Europe, 1980-82—Continued

Commodity and year		SITC Numbers		European Community						
		Major headings	Sub-headings	Belgium Luxembourg	France	West Germany	Italy	Nether-lands	Denmark	Ireland
				Million dollars						
Beverages	1980	11		607.0	638.1	1,216.0	304.6	456.6	125.0	64.9
	1981			496.6	565.3	1,095.7	261.0	394.9	118.0	59.7
	1982			437.3	548.9	991.3	250.9	379.2	116.3	53.6
Nonalcoholic	1980		111	70.4	23.5	72.0	12.4	71.6	2.7	4.9
	1981			68.9	30.3	66.9	5.6	68.5	2.8	4.7
	1982			55.7	36.6	61.9	5.6	63.9	2.9	5.9
Wine	1980		1121	353.5	332.2	761.2	90.9	277.7	91.5	25.7
	1981			287.1	289.4	693.3	74.0	235.0	86.5	23.9
	1982			264.5	275.5	651.4	52.4	235.7	86.7	19.5
Tobacco, unmanufactured	1980	121		142.8	84.9	545.1	128.1	326.4	35.8	27.3
	1981			108.0	71.1	489.1	92.2	252.0	33.4	26.9
	1982			124.7	64.8	548.1	131.7	290.8	39.1	32.8
Tobacco, manufactured	1980	122		87.2	417.0	111.3	326.3	275.3	7.1	24.6
	1981			73.6	447.2	108.6	273.9	199.3	6.8	19.8
	1982			90.9	465.1	143.0	304.8	199.5	5.7	20.1
Hides, skins, and furs, undressed	1980	21		110.4	334.8	675.4	949.7	80.8	303.4	8.2
	1981			81.1	262.5	452.8	842.2	67.9	300.7	7.3
	1982			80.3	240.4	391.3	934.5	89.1	281.4	3.2
Oilseeds, oil nuts, and oil kernels	1980	22		319.3	404.8	1,771.5	536.4	1,154.1	132.7	3.6
	1981			447.3	304.5	1,635.4	459.0	1,119.5	106.2	4.2
	1982			480.3	330.2	1,567.8	445.7	964.1	84.2	4.2
Soybeans	1980		2214	261.9	241.2	1,110.4	392.5	993.4	82.5	1.1
	1981			365.1	168.9	900.0	354.1	910.3	63.5	1.4
	1982			408.9	234.2	958.7	369.5	735.7	48.9	2.2
Natural rubber	1980	2311		42.1	306.2	281.3	210.2	33.0	6.3	11.8
	1981			36.8	225.3	220.9	162.7	25.2	4.8	9.7
	1982			27.4	157.4	165.9	135.1	18.2	4.8	7.1
Natural fibers	1980	261-		402.2	910.2	960.1	1,501.9	112.3	27.6	80.7
	1981	265		308.2	857.1	816.1	1,355.0	92.0	22.6	80.0
	1982			274.7	750.4	796.8	1,188.8	78.6	19.7	60.2
Raw cotton	1980		2631	64.1	334.2	349.4	477.1	33.0	3.9	30.6
	1981			50.7	288.7	283.8	391.2	22.4	4.1	36.6
	1982			55.3	266.2	324.6	336.3	24.2	4.2	28.4
Crude animal & veg. matls. not elsewhere spec.	1980	29		214.4	692.9	1,677.5	356.1	333.3	139.3	27.7
	1981			176.7	620.9	1,425.3	305.6	289.9	124.1	33.6
	1982			177.2	599.7	1,386.3	316.4	297.2	126.4	34.0
Agricultural fats and oils	1980	4		323.5	844.4	795.9	568.7	640.7	93.1	51.0
	1981			292.9	725.8	764.3	303.5	581.0	99.0	48.7
	1982			281.9	674.4	715.8	382.5	556.8	99.0	44.2
Animal & vegetable oils & fats, processed	1980		431	84.5	127.6	138.4	40.2	96.8	44.8	12.3
	1981			74.5	104.8	134.3	33.7	76.9	39.1	9.8
	1982			63.3	107.0	141.0	36.3	73.8	42.8	10.4
Total agricultural[1]	1980			8,308.0	14,940.3	25,540.8	15,110.9	11,728.8	2,364.6	1,443.1
	1981			7,551.8	13,339.6	22,611.3	12,934.7	10,414.2	2,306.2	1,484.1
	1982			7,402.5	12,950.2	21,690.1	13,525.4	10,066.8	2,085.0	1,295.8
Total imports	1980			71,192.0	134,328.2	185,921.6	98,118.6	76,889.0	19,314.9	11,132.6
	1981			61,416.6	120,278.6	162,691.2	88,996.2	66,108.9	17,520.8	10,594.5
	1982			57,213.4	115,453.7	154,049.1	83,834.1	62,652.3	16,834.2	9,696.2

— = None or negligible. [1]Totals may not add because of rounding. [2]Estimated. 1982 data for Spain are not yet available. Compiled from UN Trade Statistics, 1978-1982. SITC is the Standard International Trade Classification, revised.

Appendix table 4.—Agricultural imports by country, European Community and Other Western Europe, 1980-82—Continued

United Kingdom	Greece	Total EC-10	Austria	Finland	Norway	Portugal	Spain[2]	Sweden	Switzer-land	Total OWE	Total Western Europe
			Other Western Europe								
						Million dollars					
1,021.4	17.0	4,450.5	59.9	25.7	51.9	8.7	84.4	154.0	344.4	729.0	5,179.6
968.9	16.2	3,976.2	46.5	22.1	49.0	14.6	77.1	138.6	344.8	692.7	4,673.5
905.8	29.2	3,712.5	44.7	20.6	35.4	18.1		138.4	321.8		
19.4	0.1	277.0	13.8	2.9	1.9	0.1	4.2	7.5	22.4	52.8	329.8
37.8	5.2	290.8	7.6	2.7	2.7	0.2	3.0	7.0	20.9	44.1	335.0
46.2	8.1	286.8	4.8	2.7	4.4	—		7.5	22.2		
660.6	0.8	2,594.1	21.3	10.4	22.3	0.2	3.1	74.1	277.4	408.8	3,002.9
638.3	0.8	2,304.4	19.0	8.5	21.2	0.3	3.8	65.0	280.9	398.7	2,729.9
576.1	0.8	2,162.6	19.9	8.1	13.8	0.2		65.7	255.8		
416.0	15.3	1,721.7	35.0	36.6	25.8	38.7	205.9	38.4	94.7	475.1	2,196.8
441.1	20.8	1,534.7	40.8	50.9	23.0	22.8	229.9	38.6	102.8	508.8	2,045.4
438.2	25.5	1,695.7	35.9	34.5	22.9	32.4		41.7	105.0		
130.1	4.4	1,383.3	7.4	4.0	26.6	0.8	105.3	33.0	15.9	193.0	1,576.2
99.8	7.8	1,236.7	6.5	2.1	22.1	0.6	66.3	27.5	16.1	141.2	1,378.5
120.5	12.7	1,362.3	6.4	1.8	21.9	1.5		30.9	14.8		
527.0	43.0	3,032.7	36.3	49.5	12.5	48.1	166.7	58.2	15.1	386.4	3,419.1
386.5	21.4	2,422.3	22.9	33.8	17.1	28.9	173.0	48.3	11.3	335.3	2,759.5
331.6	29.7	2,381.5	25.2	33.2	20.9	33.5		47.6	10.7		
615.6	33.1	4,971.2	11.1	39.2	111.1	141.4	945.7	27.7	51.2	1,327.4	6,298.6
612.9	33.0	4,722.1	11.9	35.9	117.8	162.6	916.4	20.6	48.0	1,313.2	6,038.1
454.3	40.8	4,371.6	12.1	35.2	80.6	218.4		23.4	39.6		
346.2	13.2	3,442.3	0.1	34.2	97.0	54.0	909.1	1.3	31.2	1,126.9	4,569.3
341.0	25.0	3,129.2	0.5	30.4	105.7	68.4	855.5	1.6	25.2	1,087.3	4,218.1
286.4	30.3	3,074.8	0.4	31.1	68.9	114.0		2.2	19.9		
202.1	12.4	1,105.5	40.6	13.4	5.0	14.8	146.3	20.3	4.6	245.0	1,350.5
148.0	9.5	843.0	29.4	8.3	3.3	15.7	123.3	10.6	4.0	194.6	1,038.2
128.4	7.9	652.2	22.1	7.2	2.8	10.8		9.6	2.8		
687.5	198.5	4,881.1	109.9	42.8	16.1	327.7	250.7	22.8	216.0	986.0	5,867.1
591.6	145.6	4,268.2	101.4	40.0	15.2	305.9	173.8	15.2	200.6	852.1	5,123.1
561.2	123.6	3,854.0	87.5	34.9	12.8	248.8		20.1	186.3		
131.5	117.5	1,541.2	46.4	23.0	3.5	258.4	142.3	7.1	118.5	599.2	2,140.5
85.8	84.4	1,247.7	46.1	21.0	3.1	249.2	65.2	2.4	103.0	490.0	1,738.1
83.0	70.1	1,192.3	40.8	19.3	2.7	204.7		7.1	96.6		
429.0	20.9	3,891.1	157.9	115.0	64.7	22.8	108.9	204.0	211.1	884.4	4,775.6
418.3	19.2	3,413.7	132.9	91.9	53.9	23.6	107.2	176.4	190.7	776.6	4,192.1
425.8	17.4	3,380.4	130.3	102.0	52.4	23.4		165.9	189.7		
604.6	35.7	3,957.6	103.6	20.6	38.2	22.2	130.9	95.2	76.7	487.4	4,445.0
528.6	21.8	3,365.8	94.5	23.1	23.3	20.5	116.4	85.5	56.7	420.0	3,788.0
554.7	16.8	3,326.1	85.1	16.1	20.6	32.9		76.6	57.1		
93.1	32.5	670.3	24.5	8.8	3.7	5.5	8.4	24.8	10.9	86.6	757.0
90.8	17.8	581.7	21.0	11.3	3.0	5.0	11.0	21.6	9.1	82.0	668.7
110.4	14.5	599.5	20.2	7.5	2.3	4.3		23.9	10.5		
16,599.2	1,136.0	97,171.8	1,844.2	1,277.3	1,321.8	1,589.7	4,374.5	2,411.5	3,188.9	16,007.9	113,179.7
14,999.9	1,114.1	86,756.0	1,613.9	1,081.6	1,166.4	1,767.8	3,919.8	2,075.2	2,992.8	14,617.5	101,444.2
14,438.3	1,370.7	84,824.8	1,525.6	1,114.7	1,035.2	1,411.4	3,800.0	1,946.7	2,819.2	13,652.8	98,477.6
117,902.1	10,531.3	725,330.3	24,414.8	15,632.4	16,951.5	9,292.9	33,900.7	33,425.9	36,148.1	169,776.3	895,096.6
101,152.7	8,780.6	637,540.3	21,012.9	14,190.4	15,637.8	9,787.4	32,081.3	28,842.2	30,607.2	152,159.2	790,234.1
99,031.8	10,012.2	608,777.0	19,514.4	13,380.1	15,471.0	9,006.8		27,533.0	28,577.1		

Appendix table 5.—Agricultural exports by country, European Community and Other Western Europe, 1980-82

Commodity and year		SITC Numbers		European Community						
		Major headings	Sub-headings	Belgium Luxembourg	France	West Germany	Italy	Nether-lands	Denmark	Ireland
				Million dollars						
Live animals	1980	00		267.7	1,020.3	322.5	7.6	675.4	48.2	380.1
	1981			210.3	973.9	348.5	17.6	585.6	42.9	382.7
	1982			188.4	970.9	362.5	17.7	575.1	27.8	240.3
Meat and meat preparations	1980	01		1,016.2	1,430.0	1,186.2	266.3	2,644.1	2,298.4	1,224.6
	1981			994.8	1,539.1	1,255.9	256.0	2,693.6	2,296.6	785.8
	1982			875.7	1,433.7	1,233.6	258.5	2,488.8	2,186.1	744.9
Dairy products and eggs	1980	02		934.8	2,075.6	2,445.0	148.8	2,933.1	852.6	592.1
	1981			846.3	2,169.4	2,356.7	163.6	3,142.4	837.5	601.1
	1982			890.0	1,903.8	2,220.9	172.3	3,128.5	850.4	530.0
Cereals and cereal preparations	1980	04		1,163.2	4,909.9	935.5	786.8	754.8	355.2	87.6
	1981			1,123.7	4,770.2	855.2	915.6	746.0	244.0	53.3
	1982			1,088.2	3,911.4	799.5	942.8	536.4	295.9	61.6
Wheat and flour	1980		041,	249.2	2,552.4	411.6	279.0	220.2	23.4	15.7
	1981		046	203.1	2,735.9	299.7	361.3	225.2	32.9	4.7
	1982			180.0	2,075.5	289.5	366.6	124.1	36.9	10.0
Rice	1980		042	90.8	9.8	21.5	287.2	70.2	1.5	0.9
	1981			90.2	2.9	21.5	292.9	96.4	1.4	0.1
	1982			104.9	3.9	23.5	271.5	66.1	1.0	0.3
Feed grains	1980		043-	508.1	1,826.0	129.0	19.1	179.1	186.6	41.1
	1981		045	528.6	1,522.1	184.1	45.1	157.4	65.1	15.4
	1982			511.3	1,365.5	128.4	52.2	71.4	103.7	20.5
Fruit and vegetables	1980	05		590.6	1,507.4	573.4	2,416.4	2,261.3	75.9	50.9
	1981			567.9	1,411.3	588.4	2,193.3	2,279.0	76.1	41.2
	1982			597.3	1,325.2	594.2	2,113.0	2,445.4	88.9	41.3
Sugar, sugar preparations, and honey	1980	06		444.5	1,590.6	608.6	99.1	373.1	180.3	77.9
	1981			475.5	1,442.8	785.5	309.2	407.5	184.8	52.4
	1982			354.4	1,004.7	561.7	155.0	363.1	139.4	60.2
Coffee, tea, ocoa, spices, etc.	1980	07		348.3	393.9	764.3	145.8	1,051.9	62.3	93.5
	1981			306.9	288.7	695.9	136.7	807.3	62.4	73.0
	1982			278.8	293.2	719.2	139.6	812.5	51.1	83.9
Animal feed	1980	08		285.9	646.8	801.8	111.6	877.6	219.0	62.2
	1981			397.7	591.2	930.9	131.2	892.3	207.4	56.4
	1982			462.1	578.0	941.3	138.5	771.7	167.6	49.0
Oilseed cake and meal	1980		0813	136.1	50.8	278.3	17.2	490.4	9.7	3.3
	1981			224.5	49.1	358.1	8.0	515.3	3.7	2.3
	1982			255.9	36.0	371.5	26.1	398.9	2.5	1.2
Meatmeal and fishmeal	1980		0814	23.0	35.6	53.2	21.7	11.5	164.0	7.9
	1981			23.4	35.1	56.6	21.8	11.9	147.3	5.1
	1982			23.8	34.9	79.4	22.5	13.7	113.9	5.2
Miscellaneous food preparations	1980	09		227.6	265.1	384.9	81.6	575.7	155.2	258.5
	1981			287.6	238.4	378.1	83.3	552.3	141.9	249.2
	1982			221.2	254.4	354.8	88.8	547.0	134.3	267.1

See footnotes at end of table.

Appendix table 5.—Agricultural exports by country, European Community and Other Western Europe, 1980-82—Continued

			Other Western Europe								
United Kingdom	Greece	Total EC-10	Austria	Finland	Norway	Portugal	Spain[2]	Sweden	Switzerland	Total OWE	Total Western Europe
						Million dollars					
325.5	4.2	3,051.4	109.6	2.1	0.2	0.9	15.7	3.1	20.0	151.6	3,203.1
354.0	3.4	2,919.1	93.5	2.0	0.2	0.5	14.6	3.6	16.6	131.0	3,050.1
312.7	2.5	2,697.9	88.6	2.7	1.7	0.5		3.9	17.2		
760.9	3.6	10,830.3	88.6	60.1	5.0	8.5	46.3	92.5	11.9	312.9	11,143.2
663.2	2.4	10,487.5	76.1	108.4	10.1	6.8	52.5	104.2	8.3	366.4	10,853.9
604.3	1.8	9,827.4	85.7	96.9	26.4	3.9		162.4	8.4		
694.2	6.4	10,676.2	154.0	167.2	51.8	5.0	44.9	35.1	304.2	762.2	11,444.8
619.4	6.5	10,742.9	172.0	174.8	61.7	11.2	46.7	47.7	284.2	798.3	11,541.2
556.7	9.6	10,262.2	164.4	147.3	59.2	7.4		65.2	271.5		
1,061.0	161.6	10,215.6	76.0	23.8	11.7	11.1	81.0	206.5	29.8	439.9	10,655.5
1,406.9	135.9	10,250.9	96.9	38.2	14.3	8.3	373.1	197.8	33.3	761.9	11,012.8
1,351.5	171.5	9,158.8	120.5	24.7	12.5	4.9		188.1	30.5		
279.6	120.7	4,151.8	22.4	—	0.1	—	43.7	75.0	0.2	141.4	4,293.2
361.6	97.9	4,322.4	42.3	4.2	—	0.1	228.1	70.8	0.1	345.4	4,667.8
508.0	145.0	3,735.6	47.6	0.1	—	—		72.4	0.1		
1.6	9.4	492.9	—	0.1	—	1.0	21.8	0.1	—	23.0	515.9
1.1	1.4	507.8	—	0.1	0.1	1.2	34.5	0.1	—	36.0	543.8
1.7	1.0	473.9	—	0.1	0.1	0.6		0.2	—	36.0	
378.0	1.0	3,267.9	14.9	1.5	0.1	—	3.1	82.9	0.5	103.0	3,370.9
619.9	18.6	3,156.2	17.5	2.6	2.3	—	94.7	77.7	0.1	194.9	3,351.1
442.5	9.7	2,705.2	30.2	—	1.9	—		66.2	—		
361.1	778.0	8,615.0	61.4	31.8	7.2	99.2	2,001.6	40.8	41.2	2,283.2	10,898.2
309.9	634.5	8,101.6	61.5	22.3	7.9	93.9	1,818.9	48.3	40.0	2,092.8	10,194.4
271.9	702.3	8,179.5	68.3	12.2	5.4	82.9		44.6	49.1		
261.0	7.6	3,642.7	73.0	32.1	2.1	16.3	31.2	53.0	27.8	235.5	3,878.2
234.6	7.8	3,900.1	39.8	56.9	1.7	1.7	39.0	41.6	29.4	210.1	4,110.2
211.4	6.8	2,856.7	32.3	37.7	2.1	1.4		34.4	27.8		
610.7	8.7	3,479.4	24.2	40.5	10.6	1.9	122.1	51.4	145.4	396.1	3,875.5
494.4	8.2	2,873.6	30.3	45.2	8.6	1.4	100.4	54.3	142.9	383.1	3,256.7
436.4	7.8	2,822.5	33.2	38.8	9.1	1.1		48.9	145.8		
148.0	44.3	3,197.3	5.9	3.5	196.3	3.2	42.1	10.4	13.1	274.5	3,471.8
122.8	51.1	3,381.0	6.7	14.4	188.9	2.4	101.2	9.1	16.1	338.8	3,719.8
119.2	25.5	3,252.9	10.9	1.4	137.9	11.5		10.7	19.0		
11.9	11.9	1,009.5	0.1	—	45.2	0.7	7.4	1.2	0.3	54.9	1,064.4
8.4	9.5	1,178.8	0.1	—	39.5	0.1	47.4	1.8	0.1	89.0	1,267.8
3.6	2.9	1,098.6	0.1	—	33.2	8.7		1.7	—		
6.7	—	323.4	1.8	0.2	137.2	0.6	2.5	0.3	0.5	143.1	466.5
2.8	—	304.1	1.3	0.1	134.5	0.8	3.5	0.3	0.5	141.0	445.1
1.7	—	295.1	1.6	—	94.8	1.6		0.4	0.5		
215.2	5.4	2,169.1	20.3	2.1	18.8	5.1	52.5	31.9	174.8	305.5	2,474.6
206.8	11.6	2,149.1	14.9	40.3	16.6	5.3	49.0	28.8	168.8	323.7	2,472.8
212.5	5.1	2,085.2	11.3	24.2	15.9	3.9		32.0	174.6		

Appendix table 5.—Agricultural exports by country, European Community and Other Western Europe, 1980-82—Continued

Commodity and year		SITC Numbers: Major headings	SITC Numbers: Sub-headings	European Community: Belgium Luxembourg	France	West Germany	Italy	Nether-lands	Denmark	Ireland
				Million dollars						
Beverages	1980	11		190.3	2,948.3	613.6	1,023.2	480.8	124.9	135.6
	1981			183.3	2,756.1	614.5	1,008.8	459.8	115.2	165.8
	1982			167.7	2,509.6	643.9	1,051.4	481.7	116.7	197.7
Nonalcoholic	1980		111	61.8	121.6	65.1	23.4	117.2	12.6	7.3
	1981			70.9	113.6	63.7	22.9	132.4	16.2	8.7
	1982			64.3	105.4	60.5	17.1	127.5	13.3	11.7
Wine	1980		1121	32.0	1,775.4	344.6	918.9	5.9	3.9	0.9
	1981			26.7	1,647.1	344.9	899.3	5.8	3.9	0.7
	1982			27.6	1,541.6	353.5	946.1	8.3	3.7	0.7
Tobacco, unmanufactured	1980	121		8.8	10.9	15.9	81.2	72.5	1.8	0.2
	1981			10.4	10.1	14.1	91.4	67.4	1.7	0.3
	1982			13.0	14.9	19.6	119.2	69.5	2.1	1.3
Tobacco, manufactured	1980	122		205.0	94.2	358.9	11.7	611.0	43.2	36.5
	1981			194.5	77.5	367.0	4.1	541.7	40.6	36.4
	1982			226.6	76.9	390.0	3.6	584.8	39.5	41.2
Hides, skins, and furs, undressed	1980	21		70.5	270.1	178.4	27.5	164.5	449.2	54.0
	1981			66.6	292.8	165.2	28.1	155.0	461.1	38.3
	1982			60.7	254.7	159.5	27.1	181.9	435.4	41.1
Oilseeds, oil nuts, and oil kernels	1980	22		18.1	161.4	31.3	1.8	113.7	104.8	0.4
	1981			14.7	296.8	38.5	1.9	92.3	122.0	0.6
	1982			16.2	351.2	38.2	1.9	82.4	120.0	0.6
Natural rubber	1980	2311		1.0	6.1	2.8	3.4	6.1	0.1	0.1
	1981			0.7	7.2	3.3	2.0	3.1	0.1	—
	1982			0.9	3.9	3.3	3.0	2.9	—	—
Natural fibers	1980	261-265		263.4	564.7	199.3	44.8	51.3	1.4	18.0
	1981			204.8	552.3	182.5	48.0	49.9	1.4	16.3
	1982			192.9	486.3	164.5	40.4	45.1	1.5	14.5
Crude animal & veg. matls. not elsewhere spec.	1980	29		183.0	347.3	383.4	257.8	1,716.4	319.9	30.7
	1981			161.3	314.2	375.8	524.9	1,540.0	281.8	34.1
	1982			147.7	277.0	339.0	216.6	1,554.3	295.1	37.0
Agricultural fats and oils	1980	4		233.3	416.7	848.2	160.3	734.0	119.4	18.9
	1981			254.1	341.3	779.3	180.6	644.0	115.2	11.2
	1982			253.4	315.4	705.7	155.7	577.0	99.4	10.7
Animal and vegetable oils and fats, processed	1980		431	45.3	55.6	307.2	16.2	252.4	40.5	2.4
	1981			31.8	41.1	275.3	31.4	203.3	43.3	1.1
	1982			30.7	38.9	246.1	21.2	202.0	41.9	1.0
Total agricultural[1]	1980			6,452.3	18,659.4	10,653.8	5,675.5	16,097.3	5,411.6	3,121.8
	1981			6,301.2	18,073.3	10,735.2	6,096.2	15,659.2	5,232.6	2,598.3
	1982			6,035.1	15,965.4	10,251.4	5,645.0	15,247.6	5,051.4	2,422.6
Total exports	1980			63,967.2	110,865.5	191,646.7	77,640.4	73,871.1	16,407.3	8,473.1
	1981			55,227.7	101,246.3	175,284.3	75,246.3	68,758.0	15,696.8	7,784.4
	1982			51,694.6	92,358.1	175,455.9	73,437.6	66,438.7	14,952.8	8,060.0

— = None or negligible. [1]Totals may not add because of rounding. [2]Estimated. 1982 data for Spain are not yet available. Compiled from UN Trade Statistics, 1978-1982. SITC is the Standard International Trade Classification, revised.

Appendix table 5.—Agricultural exports by country, European Community and Other Western Europe, 1980-82—Continued

United Kingdom	Greece	Total EC-10	Other Western Europe: Austria	Finland	Norway	Portugal	Spain[2]	Sweden	Switzer-land	Total OWE	Total Western Europe
						Million dollars					
2,088.6	49.3	7,654.8	91.7	21.1	4.9	245.7	462.5	5.6	31.4	862.9	8,517.6
1,918.6	36.7	7,258.7	83.8	25.7	5.0	210.6	393.8	5.8	24.5	749.2	8,007.9
1,849.9	35.1	7,053.7	93.5	21.6	3.6	197.8		7.0	28.1		
39.7	1.6	450.3	25.8	1.9	0.5	0.8	2.7	3.4	15.2	50.3	500.6
40.7	2.9	472.1	18.7	0.9	0.5	0.9	3.5	3.0	15.0	42.5	514.6
39.7	1.5	441.0	30.7	0.6	0.6	0.8		3.2	19.9		
57.2	17.8	3,156.5	50.6	0.1	—	240.5	404.1	—	4.6	699.9	3,856.4
52.0	17.7	2,971.5	49.7	—	—	205.5	332.3	—	2.8	590.3	3,561.8
51.0	18.4	2,950.9	45.1	—	—	192.8		—	2.8		
16.4	203.9	411.6	1.4	0.1	0.1	—	10.7	0.5	27.5	40.3	451.9
12.4	176.2	384.1	1.3	—	0.1	0.3	3.6	0.5	15.7	21.5	405.6
14.7	191.7	446.0	0.8	—	0.1	—		0.4	20.0		
699.8	0.1	2,060.3	2.5	30.4	4.3	1.9	16.0	17.2	104.5	176.8	2,237.1
713.5	0.2	1,975.5	2.3	57.9	4.1	1.8	11.5	16.9	100.5	195.0	2,170.5
668.9	1.0	2,032.5	2.3	13.2	6.3	1.7		17.4	92.8		
441.7	45.4	1,701.2	13.4	227.5	78.6	9.6	15.6	94.9	41.0	480.6	2,181.9
350.5	37.5	1,595.0	12.1	285.8	76.0	7.4	22.2	79.8	36.0	519.3	2,114.3
315.2	35.4	1,511.0	14.2	231.8	72.1	6.9		72.3	36.1		
6.7	0.7	439.0	4.1	0.1	—	—	3.2	27.1	0.3	34.8	473.7
9.1	1.6	577.3	4.4	—	0.1	—	2.2	24.6	1.8	33.1	610.4
13.9	0.8	625.2	3.3	—	0.5	—		23.9	1.7		
5.3	—	25.0	0.4	—	—	0.1	0.2	1.1	0.1	1.9	26.9
2.4	0.2	18.9	0.4	—	—	—	0.2	0.5	—	1.1	20.0
3.3	—	17.3	0.5	—	—	—		0.4	—		
341.0	42.3	1,526.1	7.6	0.5	5.5	3.1	42.5	2.4	31.4	93.0	1,619.1
317.3	27.4	1,400.0	5.5	0.4	4.5	6.0	44.7	2.1	30.1	93.3	1,493.3
289.5	36.0	1,270.7	5.0	0.2	4.0	5.9		1.9	26.3		
113.1	12.4	3,363.9	27.2	6.8	28.0	21.0	102.8	37.5	34.3	257.6	3,621.5
94.6	10.9	3,337.6	22.6	4.5	19.5	17.3	81.5	33.9	29.5	208.8	3,546.4
100.1	11.5	2,978.3	17.6	5.0	15.8	16.4		32.8	31.6		
165.3	34.9	2,730.9	12.6	15.5	114.3	34.1	474.2	74.7	20.3	745.7	3,476.6
131.3	32.9	2,489.8	11.1	11.9	103.0	37.8	329.9	62.5	16.7	572.9	3,062.7
81.2	82.5	2,281.0	14.2	13.5	86.3	59.9		63.7	16.2		
84.9	3.1	807.6	2.5	9.1	53.7	3.3	4.1	27.6	8.8	109.1	916.7
72.7	1.4	701.4	1.6	6.9	42.6	5.2	4.1	25.0	6.3	91.7	793.1
43.3	1.5	626.6	1.7	9.2	36.2	1.3		21.4	7.3		
8,315.8	1,408.9	75,789.9	773.9	665.3	539.6	466.8	3,565.2	785.6	1,059.0	7,855.4	83,651.8
7,961.7	1,185.0	73,842.7	735.0	888.8	522.5	412.8	3,485.2	762.1	994.5	7,800.9	83,110.3
7,413.3	1,327.0	69,358.8	766.6	671.3	459.0	406.1	3,100.0	810.1	996.5	7,209.6	76,568.4
114,380.5	5,141.7	662,393.5	17,478.2	14,140.3	18,481.1	4,629.0	20,826.7	30,787.5	29,470.8	135,813.6	798,207.1
102,136.2	4,249.5	605,629.5	15,840.0	14,006.6	17,967.6	4,147.1	20,336.5	28,492.5	26,716.6	127,506.8	763,770.1
96,542.4	4,296.7	583,236.8	15,689.9	13,127.1	17,583.2	4,167.3		26,739.6	25,617.7		

Appendix table 6.—EC support prices in European Currency Units[1]

Commodity	1981/82 Price	1981/82 Percent change	1982/83 Price	1982/83 Percent change	1983/84 Price	1983/84 Percent change	1984/85 Price	1984/85 Percent change
	ECU/MT	*Percent*	*ECU/MT*	*Percent*	*ECU/MT*	*Percent*	*ECU/MT*	*Percent*
Common soft wheat	165.23	6.0	179.27	8.5	184.58	3.0	182.73	−1.0
Bread wheat	192.72	7.5	209.10	8.5	215.29	3.0	213.14	−1.0
Durum wheat	274.99	7.5	298.36	8.5	312.08	4.6	312.14	0
Barley	165.23	6.0	179.27	8.5	184.58	3.0	182.73	−1.0
Corn	165.23	6.0	179.27	8.5	184.58	3.0	182.73	−1.0
Rice	259.42	11.0	290.55	12.0	306.53	5.5	314.19	2.5
Sugar beets	35.91	8.5	39.32	9.5	40.89	4.0	40.89	0
White sugar	469.50	8.5	514.10	9.5	534.70	4.0	534.70	0
Olive oil	1,963.30	9.0	2,179.30	11.0	2,299.20	5.5	2,276.20	−1.0
Rapeseed	397.10	8.0	421.30	8.5	438.00	4.0	429.20	−1.0
Sunflowerseed	440.60	10.0	497.30	14.0	527.10	6.0	532.70	−1.0
Soybeans	416.30	7.6	464.10	11.5	494.30	6.5	501.70	1.5
Dried fodder	148.08	10.0	168.81	14.0	178.94	6.0	177.15	−1.0
Cotton	722.00	--	815.90	13.0	881.20	8.0	894.40	1.5
Wine (Type RI)	2.95	10.0	3.27	11.0	3.45	5.5	3.42	−1.0
Milk target price	242.60	9.0	268.10	10.5	274.30	2.3	274.30	−1.0
Butter	3,178.40	9.0	3,497.00	10.0	3,578.60	2.3	3,197.00	−10.8
Skimmed milk powder	1,324.50	9.0	1,462.30	10.4	1,496.40	2.3	1,658.80	10.9
Cheese	3,842.70	9.8	4,295.10	11.8	4,395.20	2.3	4,727.50	5.8
Beef & veal	1,591.60	10.0	1,726.80	8.5	1,863.80	5.5	1,845.20	−1.0
Pork	1,761.80	11.0	1,946.80	10.5	2,053.87	5.5	2,033.30	−1.0
Sheep meat	3,708.80	7.5	4,098.20	10.5	4,323.60	5.5	4,280.40	−1.0
Exchange rate[2] US$/ECU	1.18		1.00		.93		.85	

[1]Generally intervention prices or target prices tied to intervention purchasing mechanisms. When measured in the national currencies in which farmers are actually paid, the percent changes in prices vary widely among countries because of the effects of changes in MCA's and rates of currency exchange. [2]Exchange rate in April, at beginning of EC marketing year for most commodities.

— = Not available.

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DEFINITIONS

Measures—The metric system is used in this report, unless otherwise indicated. The following are conversions to the U.S. system of weights and measures: 1 hectare, 2.471 acres; 1 metric ton, 2,204.6 pounds; 1 kilogram, 2.2046 pounds; 1 liter, 1.0567 quarts; and 1 hectoliter, 26.418 gallons.

EC-10—European Community, also referred to as the Community. An economic and customs union of six original members—Belgium, Luxembourg, France, Italy, West Germany, and the Netherlands, as well as Denmark, Ireland, and the United Kingdom, which joined January 1, 1973, and Greece, which became the tenth member on January 1, 1981.

CAP—Common Agricultural Policy of the European Community.

GATT—General Agreement on Tariffs and Trade.

Unit of Account (u.a.)—Prior to April 9, 1979, the standard value used by the EC for transactions within the CAP. In mid-March 1979, the agricultural unit of account was equal to about $1.60. A different unit, called the European unit of account (EUA), was introduced in 1975. Its value in relation to the dollar is announced daily, and it is generally worth more than the agricultural unit of account.

European Monetary System (EMS)—A common monetary arrangement for the Community, implemented in March 1979. It includes credit mechanisms and compulsory intervention to ensure greater stability of European exchange rates.

European Currency Unit (ECU)—The core of the EMS, the ECU serves as the monetary denominator for the exchange rate, credit, and intervention mechanisms of the EMS. On April 9, 1979, the ECU became the standard value for transactions within the CAP, including the determination of support prices, import levies, and export subsidies. The value of the ECU is calculated from a weighted basket of all EC-10 member currencies, identical to the basket used for the EUA and equal to an average of 98 cents during 1982.

Green rate of exchange—The exchange rate used to convert ECU's into national currencies (and vice versa) in all financial and commercial transactions covered by the CAP.

Green currency (e.g., green pound, green lira)—Indicates the use of green rates of exchange for CAP purposes.

Monetary Compensatory Amounts (MCA's)—Border taxes or subsidies that offset the divergence between the green rate of exchange and the actual market rate of exchange. For those countries in which currencies have depreciated, MCA's (negative MCA's) act as subsidies on imports and taxes on exports. For those countries in which currencies have appreciated, MCA's (positive MCA's) act as taxes on imports and subsidies on exports.

LIST OF TABLES

Appendix Tables

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