

GREEN EUROPE

NEWSLETTER ON THE COMMON AGRICULTURAL POLICY



**THE COMMON AGRICULTURAL
POLICY AND THE FOOD INDUSTRY**

A separate chapter of the Commission's Report on "The agricultural situation in the Community" (1) in 1982 is devoted to the common agricultural policy and the food industry. In view of their economic importance we are reprinting the complete text in question in this issue of "Green Europe".

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The common agricultural policy and the food industry (1)

The economic importance of the food industry

The proportion of agricultural products reaching the consumer in the unprocessed state is steadily declining, and at the same time there has been a corresponding increase in the proportion of treated or processed products. In the course of time, the food industry has become the most important customer for basic agricultural products as they make their way towards the consumer. In 1981, the food processors took about three-quarters of Community agricultural production, valued at almost 100 000 million ECU, and will be taking an even larger share in the future. It follows that the Community food industry is of key importance for the common agricultural policy; in the main, however, it is still seen as a subsidiary aspect of this policy and not as a main concern. In time, there must be some change of emphasis here, with increasing recognition for the special role of this important economic sector.

Although food processing represents only 3.4% of the gross domestic product of the Community, it accounts for 10% of net value added in industry: it is there-

(%)

	1970	1975	1979
GDP of EEC (EUR 9)	100	100	100
Contribution of agriculture	4.8	4.2	3.7
Contribution of industry	31.2	28.4	29.2
Contribution of the food industry	4.8	4.1	3.4

(1) The figures relate to the nine-country Community. Unless otherwise stated, the sources are the Statistical Office of the European Communities and DG VI.

fore the Community's largest single industry. Agriculture and food processing account for roughly equal shares of GDP.

The food sector has an undeniably stabilizing effect on the employment situation. Providing work for 2.7 million persons (in 1980), ⁽¹⁾ it now has 6.8% of all industrial employees and, in contrast to other sectors, there has been little or no decrease in the numbers employed.

(million)

Numbers employed (EUR 9)	1974	1977	1980
Agriculture	9.1	8.3	7.7
Industry (total)	42.9	40.5	40.1
Food industry	2.8	2.7	2.7

The food industry's contribution to external trade is negative, that is, the value of imports (raw materials and products) exceeds that of exports. Although foodstuffs are produced mainly from Community-grown raw materials, some imports are also processed (approximately 19% of the raw materials used). Exports of food products, which were valued at 12 600 million ECU in 1980 exceeded imports in value by 3 400 million ECU. The overall situation is as follows:

(1 000 million ECU)

External trade	1974	1977	1980
Import of raw materials used by the food industry ⁽¹⁾	13.8	20.2	20.6
Export by the food industry	5.9	8.3	12.6
Imports of food-industry products ⁽²⁾	5.7	7.4	9.2

⁽¹⁾ Nimexe chapters 01, 02, 03, 04.05, 07, ex 08, ex 09, 10, 12.01, 12.04, ex 17.01, ex 18 and 24.01.

⁽²⁾ Nimexe chapters 04, ex 09.01, 11, 15, 16, ex 17, ex 18, 19, 20, 21, ex 22, 23 and 24.02.

⁽¹⁾ The figure of 2.7 million is for the total number of persons employed, including those working in firms employing fewer than 20 persons.

The structure of the food industry

The food industry comprises:

- (i) the food industry proper, which is mainly engaged in the processing of agricultural raw materials such as milk, meat, cereals, sugar, oilseeds, fruit, vegetables, beverages and alcohol;
- (ii) the processors of agricultural raw materials other than for immediate human consumption, including the tobacco industry and the manufacturers of feedingstuffs for farm and domestic animals.

In addition, disregarding certain peripheral activities, the food industry includes the processors of non-agricultural raw materials such as fish and the producers of petrochemically-based foods and feedingstuffs. ⁽¹⁾

(million ECU)

Sector	Sales in 1975	Sales in 1978
Milk processing	23 300	31 842
Meat processing	17 177	25 754
Breweries	10 451	13 810
Bakeries ⁽¹⁾	12 606	15 958
Fruit and vegetable processing	5 729	7 186
Cocoa, chocolate and confectionery	7 338	11 377
Sugar	5 126	7 674
Oils and fats, margarine	6 970	8 666
Beverages (other than wine)	3 600	4 372
Winemaking	7 176	9 339
Tobacco	13 763	18 552
Feedingstuffs	10 338	14 810
Various ⁽²⁾	9 247	14 240
Total	132 824	183 580

⁽¹⁾ Including the processing of grain and the manufacture of pasta products.

⁽²⁾ Starch products, coffee, tea, spices, preserved fish and seafood products.

⁽¹⁾ Since definitions may vary from one Member State to another, the statistics are only roughly comparable in some cases.

Branches of the food industry

In the present context one outstanding feature of the food industry is the steady rise in sales figures (in real terms). As can be seen from the table on the preceding page, the most important branch is milk processing, followed by meat processing, breweries and bakeries. These four branches account for 49.3% of food industry sales. Over the past 10 years, the highest growth rates have been recorded in the following sectors: oils and fats, confectionery, meat processing and feedingstuffs.

The trend in the numbers employed has varied greatly from one sector to another. The trend has been clearly upward in feedingstuffs, meat processing and confectionery; the sharpest falls have been recorded in the sugar industry, winemaking and breweries.

Sector	Number of persons employed (1)		
	($\times 1\ 000$)		% TAV $\frac{1978}{1975}$
	1975	1978	
Milk processing	274.0	257.2	-2.1
Meat processing	303.3	314.5	+1.2
Breweries	213.1	197.2	-2.6
Bakeries (2)	419.9	405.7	-1.1
Fruit and vegetable processing	159.3	149.7	-2.1
Cocoa, chocolate and confectionery	206.7	211.2	+0.7
Sugar	69.5	63.9	-2.8
Oils and fats, margarine	52.1	49.1	-2.0
Beverages (other than wine)	84.5	77.9	-2.7
Winemaking	99.6	97.1	-0.8
Tobacco	118.4	115.3	-0.9
Feedingstuffs	84.5	88.4	+1.5
Various (3)	160.1	173.0	+2.6
Total	2 245.0	2 201.0	-0.7

(1) Persons working in firms which employ 20 or more staff.

(2) Including the processing of grain and the manufacture of pasta products.

(3) Starch products, coffee, tea, spices, preserved fish and seafood products.

Geographical distribution of the food industry

The geographical location of the food industry shows the same divergence between north and south as is observed in other sectors. The industry is among the largest industrial sectors in Belgium, Denmark, Ireland, the Netherlands and the United Kingdom.

(million ECU)

Country (in order of size)	Sales in 1975	Sales in 1978
FR of Germany	33 779	50 562
United Kingdom	29 110	38 611
France	27 920	37 833
Italy	14 409	18 865
The Netherlands	13 356	18 196
Denmark	5 628	7 325
Belgium	5 618	8 230
Ireland	2 817	3 749 (1)
Luxembourg	184	209
EUR 9	132 824	183 580

(1) 1977.

In recent years, the industry has undergone considerable structural changes. Originally, it consisted mainly in small and medium-sized firms set up by small-scale processors at local level. Over the period in question the sector has shed 281 firms (1) and 44 000 employees by a process of concentration but has stepped up sales and productivity sharply. In the past three years, the employment situation in the food sector has, generally speaking, been more stable than in other sectors of industry.

In this respect, the food industry has always been one of the mainstays of economic activity.

(1) With more than 20 employers.

Country	Number of firms (1)		Numbers employed (1) (× 1 000)	
	1975	1978	1975	1978
FR of Germany	3 450	3 427	486	510
France	2 875	2 936	393	410
Italy	2 182	2 055	261	237
The Netherlands	956	935	148	132
Belgium	681	666	87	79
Luxembourg	37	32	2.8	2.4
United Kingdom	2 746	2 600	742	709
Ireland	323	337	54	55
Denmark	450	421	67	67
EUR 9	13 700	13 419	2 245	2 201

(1) Firms employing at least 20 persons.

Between 1975 and 1980 the turnover per person employed increased by approximately 25 000 ECU or by 13% per annum. It now stands at 83 400 ECU per person employed and is thus above the average for industry as a whole.

Cooperatives in the food industry

As cooperatives have become more widespread in the agricultural sector and more involved in the processing and distribution of agricultural products, they have steadily increased in importance within the food industry, whether originating as agricultural cooperatives or as artisan cooperatives (e.g. bakery cooperatives).

There are still, however, considerable differences in the share of the market taken by cooperatives in the various countries. There are also wide differences between the various product sectors. The reasons for this are to be found chiefly in the historical development of the cooperative movement.

The countries where cooperatives take a substantial share of the market are Denmark, France, Ireland and the Netherlands; the milk-processing sector is organized mainly along cooperative lines, much more so than any other sector.

Cooperatives share of the market for various products (1977)

(%)

Product	D	F	I	NL	B	L	UK	IRL	DK
Milk	78	48	35	87	65	90	—	88	87
Beef and veal	19	19	5	18	—	} 22	6	33	60
Pigmeat	20	52	3	26	15		7	25	90
Poultrymeat	—	42	10	32	—	—	2	50	50
Eggs	—	25	5	20	—	90	19	25	59
Cereals	52	67	15	60	15	90	17	23	50
Sugar	—	17	15	61	—	—	—	—	14
Fruit	26	40	62	10	40	30	19	14	65
Vegetables	36	30	5	84	55	—	10	22	70

Source: COGECA and national cooperative associations.

The food industry and the direct effects of the common agricultural policy

EAGGF guarantee payments to the food industry

To enable the aims of the common agricultural policy to be achieved with minimum administrative expenditure, the food industry was accorded an important role from the very beginning of the CAP. Under the common policy on markets and prices, most of the intervention or support mechanisms operate at the first stage of processing. The food industry has thus forged permanent links with the CAP and a substantial percentage of EAGGF guarantee expenditure is channelled through this sector so that farmers can be paid the prices which have been set by the Council of Ministers and which could not be obtained without government intervention. It is therefore not true that dealers and processors receive aid under the CAP at the expense of the farmers. Another portion of guarantee expenditure is used to enable the processing industries to market their products at competitive prices both at home and abroad, especially in the case of products which enjoy little external protection. Such expenditure should also be seen as a means of ensuring a market for those Community agricultural products which are increasingly surplus to requirements.

The table on the following page shows that, of the total EAGGF Guarantee expenditure of 10 980 million ECU in 1981, at least 70% was channelled through

EAGGF Guarantee expenditure in 1981 in the form of payments in favour of the food industry

(million ECU)

A.	Payments under the direct farm price policy (with effect transmitted to the food industry)	
	Aid for potato starch	38.7
	Colza and rape, sunflower	571.4
	Tobacco premiums	286.1
		<hr/>
		896.2
B.	Payments under the indirect farm price policy and under the agricultural, markets and competition policies (effect on the food industry)	
	I. Support for consumer prices	
	Consumer subsidy for olive oil	102.3
	School milk	62.1
	Consumer subsidy for butter	211.8
	Aid for skimmed milk (powder)	987.2
		<hr/>
		1 363.4
	II. Support for the disposal of agricultural products to the processing industry	
	Aid for starch, semolina, etc.	90.5
	Sugar: reimbursement of storage costs	344.2 (1)
	Aid for sugar used in chemical industry	2.4
	Aid for use of olive oil in preserved foods	11.9
	Production of feedingstuffs (peas, beans, dried fodder)	65.4
	Cotton	54.9
	Processing of citrus fruit	61.9
	Processing of fruit and vegetables	412.7
	Tinned pineapples	5.7
	Distillation of wine	314.9
	Casein	170.3
	Private storage of butter	83.3
	Butter for pastry products and ice cream	116.2
	Storage of cheese	30.9
	Milk: market development and improvement of quality	44.1
	Private storage of meat	35.0
		<hr/>
		1 844.3
C.	Payments to maintain competitiveness on world markets (in some cases, indirect effect via export trade)	
	Export refunds on sugar	409.2 (1)
	Export refunds on butter	699.8
	Export refunds on cheese	853.5
	Export refunds on other milk products	174.6
	Export refunds on processed fruit and vegetables	1.9
	Export refunds on pigmeat	132.6
	Export refunds on poultrymeat	63.8
	Export refunds on beef and veal	825.2
	Export refunds on processed products	241.3
	Export refunds on whisky	41.1
	Export refunds on cereal products (estimate)	422.0 (2)
		<hr/>
		3 865.0

(1) The sugar sector itself finances this expenditure through the sugar levies.

(2) The export refunds on processed cereal products are not recorded separately from those on grain.

the food industry to achieve the ends of the policy on prices and markets and to reach the ultimate beneficiaries, that is, the farmers and the consumers.

Discounting export refunds, direct payments under the farm price policy and expenditure on the sugar sector (which is self-financing), there remains 2 902 million ECU (or 26.4%) as support for the food industry and about half of this sum goes on consumer subsidies. The remaining 14% (1 538.8 million ECU) could be regarded as the real extent of CAP support for the food industry, helping the processors to make fuller use of Community raw materials.

In addition, the commercial policy of the Community confers advantages on industries processing agricultural raw materials which can be imported without payment of levies or at low rates of duty. Thus, in the oils and fats sector, certain raw materials for the margarine and vegetable-oil industry may be imported without any levy being charged. The same applies to cereal substitutes imported for the feedingstuffs industry.

The meat-processing sector imports about 400 000 tonnes of beef and veal per annum, at low or zero rates of duty.

The influence of the CAP on the food industry

The policy on imports and exports

The import and export arrangements adopted under the common agricultural policy are factors which may have a decisive influence on the attitude of some food manufacturers towards the purchase of supplies or the marketing of their products. Where raw materials from non-member countries (which are in some cases subject to widely fluctuating world market prices) come into direct competition with home-grown agricultural products, the levy system provides the food industry with a stable basis for calculation. The fixing of export refunds, on the other hand, enables the products processed from Community raw materials to be sold on the world market at competitive prices.

In 1981 the EAGGF paid out more than 3 800 million ECU in export refunds for processed products of agricultural origin (excluding processed cereal products).

In a few sectors where the import levy system is not applied (cereal substitutes, untreated oils and fats), the fluctuations in world market prices, which are mainly quoted in US dollars, regularly lead to disturbances on the markets for competing

Community products. Such disturbances then have to be brought under control by means of expensive intervention measures on the agricultural markets concerned.

The policy on prices and markets

The attitude adopted to prices and markets under the common agricultural policy has brought relative stability to the offer prices for agricultural products, the raw materials used by the food industry (that is, such prices are subject only to slight variations). Another aim of the policy on markets is to ensure that adequate supplies of products are available. This provides the food industry with a solid basis where its raw materials are concerned: adequate supplies of raw materials, mostly subject to quality standards, and relatively stable and (consequently) predictable prices. In addition, in the case of some agricultural products which are imported in the processed or unprocessed state from non-member countries without payment of levies, the food industry receives processing aid so that it can use Community raw materials and still remain competitive. ⁽¹⁾

In other product sectors, particularly those which are periodically affected by market imbalances and where the full volume of processed products cannot be marketed directly, intervention mechanisms have been introduced so that the food industry can dispose of any surpluses while still covering its costs. In this context mention may be made of buying-in for public storage (meat, butter, etc.), private storage aid and the aid for school milk. A vigorous export policy, using the export refund system, also contributes towards the reduction of market surpluses.

Structural aid from the EAGGF Guidance Section

In addition to payments through the EAGGF Guarantee Section, the food industry also receives support from the Guidance Section, chiefly for purposes of structural improvement and sales promotion.

⁽¹⁾ A similar instrument is the consumer subsidy used to bring the market price for such processed products into line with that for substitute products (e.g. skimmed-milk powder for the feeding of live-stock).

Aid systems

Implementing policy on structures, the Community provides direct finance for investment projects, that is, the Commission grants aid from the EAGGF Guidance Section directly to the investor in respect of a specific project which has been submitted to the Commission for approval. Thus the Commission is directly responsible for both the selection and the financing of the projects, which may relate only to processed products listed in Annex II to the Treaty.

Between 1964 and 1977 aid was granted for individual projects, according to the merits of each specific case and pursuant to Regulation No 17/64/EEC. (1) Since 1978 the legal basis for aid has been Regulation (EEC) No 355/77, (2) which differs from Regulation No 17/64/EEC in that it is concerned solely with the processing and marketing of agricultural products, lays down more precise criteria for the financing of projects and, above all, stipulates that the projects must be part of a sectoral programme drawn up by the Member States and approved by the Commission.

Apart from providing a framework for the projects receiving aid, the programmes are supposed to direct investment along structurally desirable lines. The extent to which this has been successful cannot yet be finally assessed. However, the fact that programmes have now been approved for practically all the sectors concerned in each of the Member States (with the total volume of investment so far standing at over 7 000 million ECU) would indicate that the Member States have placed greater emphasis on achieving quantitative targets than on making aid more selective.

As a rule, aid from the Fund is 25% of eligible investment (50% in certain less-favoured areas) but in certain circumstances it may be less than 25% (e.g. in the milk sector or where the level of national aid is very low). Apart from one or two formal conditions (e.g. the Member State and the beneficiary must make certain minimum contributions) the main criteria are that the project must be in line with Community policy on the sector concerned and that the farmers producing the goods concerned must share in the economic benefits resulting from the project. This latter condition derives from the fact that, here again, the Fund is using the aid to the food industry only as a means of achieving its objectives.

(1) OJ 34, 27.2.1964, p. 1586.

(2) OJ L 51, 23.2.1977, p. 1.

Financing: the overall pattern

Between 1964 and 1977, the aid granted pursuant to Regulation No 17/64/EEC amounted to roughly 1 000 million ECU, whereas the aid granted between 1978 and 1981 pursuant to Regulation (EEC) No 355/77 totalled approximately 600 million ECU. This corresponded to a total volume of investment of roughly 7 500 million ECU.

Only approximate values can be obtained for the ratio of directly-aided investments to total investments in the food industry, since, on the one hand, the scope of the regulations is narrower than that of the statistics on investments in the food industry ⁽¹⁾ and, on the other hand, the year in which aid is granted is not necessarily the same as the year in which the investments are carried out.

A comparison is of some interest, however, since the original proposal for Regulation (EEC) No 355/77 (which was, admittedly, based on somewhat out-of-date information) saw aid amounting to 10% of investments in the food sector as feasible and sufficient. This order of magnitude still seems fairly realistic if one compares the annual resources currently available (approximately 150 million ECU, corresponding to about 600-800 million ECU in total investments) with the investments made in the food sector as a whole (1978: 5 300 million u.a.; ⁽²⁾ 1979: 5 700 million u.a.). ⁽³⁾

The informative value of such overall assessments is restricted, however, since the ratio varies considerably from one Member State to another and from one sector to another. Thus, the following rounded-off percentages are obtained for the various Member States in 1979 (1978 for the Federal Republic of Germany and 1977 for Ireland):

Ireland	50%
Italy	35%
France, the Netherlands, Belgium and Denmark	10%
FR of Germany	5%
United Kingdom	3%

⁽¹⁾ For example, no aid is granted for fast-moving items such as chocolate, confectionery, beer, cigarettes and cigars, etc.

⁽²⁾ 1977 figures for Ireland.

⁽³⁾ 1977 figures for Ireland; 1978 figures for the Federal Republic of Germany and France.

Of greater interest are the values obtained by comparing investments with the aid granted by the Fund to certain sectors where the investment statistics have roughly the same scope as the regulation, although these figures should also be treated cautiously, for the same reason as given above:

(%)

	Meat		Milk		Wine	
	1978	1979	1978	1979	1978	1979
FR of Germany (1)	20	20	10	10	80	60
France	13	15	5	1	80	100
Italy	20	10	12	12	200 (3)	150 (3)
The Netherlands	1	20	5	25	—	—
Belgium	35	35	5	10	—	—
United Kingdom	20	10	10	5	—	—
Ireland (2)	120 (3)	—	10	—	—	—
Denmark	30	130 (3)	20	10	—	—

(1) 1977 and 1978.

(2) 1977.

(3) The figures are in excess of 100% because the year in which aid is granted is not the same as the year in which the investment is carried out.

The figures show that in certain Member States and certain sectors the proportion of investment directly influenced by aid is very substantial. The same is probably true of other, smaller sectors, although there are no statistics to prove this. In the fruit and vegetables sector the percentage of investments assisted by the Fund is also very high (particularly in the Netherlands, Belgium and Italy: over 50%), but here again there are problems of definition.

In recent years the fruit and vegetables sector has been taking an increasing share of the aid distributed by the Fund. In 1981, its share exceeded 27%, followed at some distance by wine and meat (15% each), cereals (12%) and milk (just under 10%). This contrasts with the situation when aid was granted under Regulation No 17/64/EEC: during that period most aid went to the milk sector, with meat and wine lagging far behind and the fruit and vegetables sector in fourth place.

The situation has changed because the aid has to be suited to the problems of the market: as the restrictions on aid for milk products have become tighter (in practice, it is now granted only for rationalization measures and for fresh milk products), aid has been redirected towards those products for which marketing oppor-

tunities still exist or which producers could find very advantageous if investments were made in the processing and marketing spheres. The trend also reflects Community policy on Mediterranean agriculture, on behalf of which special action is to be taken. Lastly, one is dealing with products the sales of which are more difficult to guarantee, for reasons peculiar to the products themselves (e.g. they may be highly perishable).

Generally speaking, the above figures show that Community policy has a considerable influence in that part of the food industry which is located relatively close to the producers.

Conclusions

Community aid for the food industry shows how it values the latter as the main user of agricultural produce. It is certain, however, that in the years to come the changing relationship between agriculture and the food industry will cause the Community to devote still more attention to the specific problems of this manufacturing industry, by gradually completing the 'agricultural policy' with a 'strategy on agriculture and food'. Far from minimizing the importance of agricultural problems, this will enable the Community to place them in a new context. In times like the present, when established practice is constantly being called into question, agriculture and the food industry must face the same challenge. They must adapt to changes in demand by making innovations and by breaking new ground.

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