

# Agriculture in the European Union



MINISTÈRE  
DE L'AGRICULTURE  
ET DE LA PÊCHE



# 1999







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

















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# **Agriculture in the European Union**

# **1999**

Data available as of 1 November 1998



MINISTÈRE  
DE L'AGRICULTURE  
ET DE LA PÊCHE

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Service Central des Enquêtes et Études Statistiques





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# Key to abbreviations and symbols

## UNITS

ecu	European Currency Unit
ha	hectare (2.47 acres)
hl	hectolitre (100 litres)
kg	kilogram (2.2 lb)
kW	kilowatt
l	litre
M	symbol for one million (mega)
m <sup>2</sup>	square metre
m <sup>3</sup>	cubic metre
q	quintal = 100 kg
t	tonne
ect	equivalent carcass tonne
AWU	annual work unit
ESU	economic size unit

## SIGNES CONVENTIONNELS

–	No result
...	Information unavailable
///	Not applicable
e	Estimate
ε	Figure lower than half of the unit

## COUNTRY ABBREVIATIONS

(alphabetical order of countries by their native language)

B	Belgium
DK	Denmark
D	Germany
GR	Greece
E	Spain
F	France
IRL	Ireland
I	Italy
L	Luxembourg
NL	Netherlands
A	Austria
P	Portugal
SF	Finland
S	Sweden
UK	United Kingdom
BLEU	Belgium-Luxembourg Economic Union
EU	European Union
IS	Iceland
N	Norway



## FRENCH OVERSEAS DEPARTEMENTS (DOM)

Apart from exceptions noted at the bottom of the tables, the «FRANCE» totals refer to metropolitan France and do not include data relating to the overseas départements (DOM).

## EFFECTS OF GEOGRAPHICAL CHANGES

### ■ European Union

This work includes old statistics, prior to the EU enlargement to 15 (with the admission of Denmark, Ireland and the United Kingdom on 1 January 1973, Greece on 1 January 1981, Spain and Portugal on 1 January 1986, and Austria, Finland and Sweden on 1 January 1995). Unless otherwise stated, the data for Europe (EU in general) are based on EU and new Member State statistics.

### ■ Germany

Germany was legally unified on 3 October 1990. Statistically speaking, this does not always apply. Please refer to footnotes on a case-by-case basis.

By convention :

- Germany = unified Germany (or the former FRG and GDR combined)
- ex-FRG = former FRG (or the western part of present-day Germany)

### ■ CIS, USSR

The dissolution of the Union of Soviet Socialist Republics was declared at the end of 1991. Not counting the Baltic states, the States resulting from this dissolution have formed the CIS, or Commonwealth of Independent States. In this book, you will find series relating to this unit (data prior to 1991 being those of the USSR) or, at times, series relating to the most important State, the Russian Federation usually called Russia).

## FOREIGN TRADE

With the removal of fiscal and customs borders between the countries of the European Union on 1 January 1993, the method of intra-community trade collection was altered. The record of these trade transactions is now made based on the Community Intrastat Regulation, which defines the conditions for recording trade in merchandise between European partners. Caution is advised when making comparisons with the results of previous years.

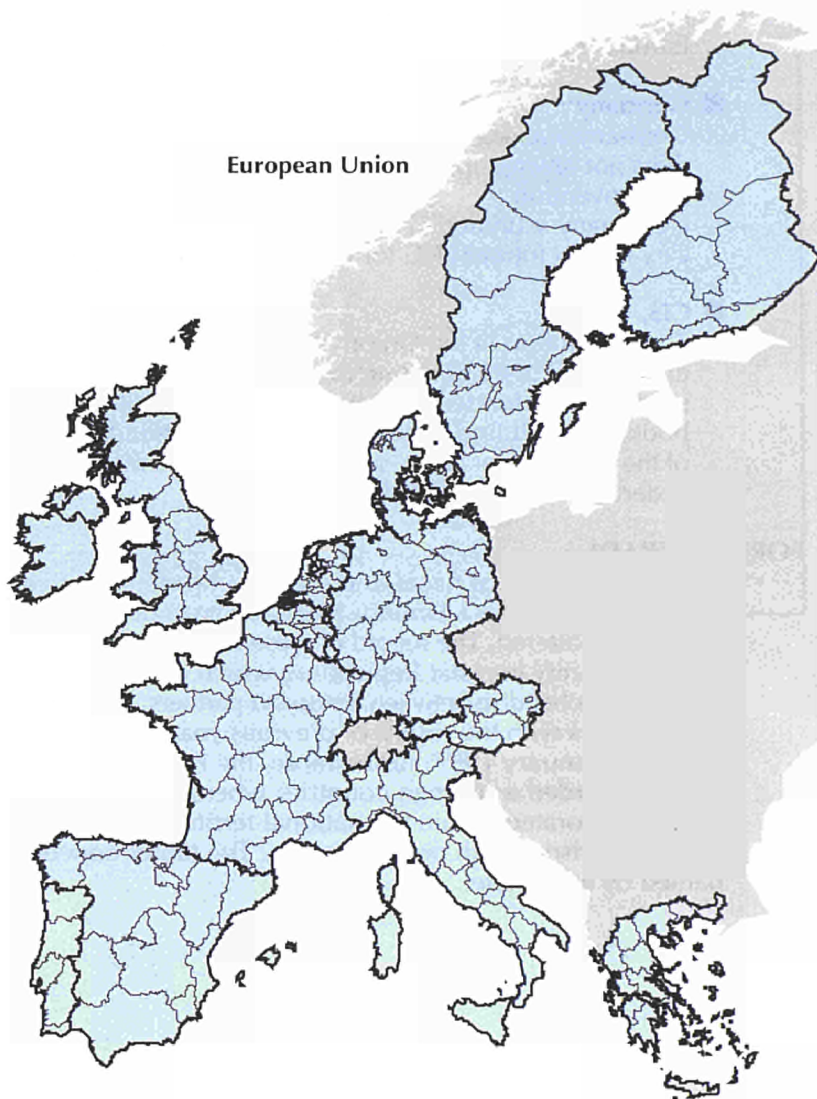
As from 1 January 1997, furthermore, the French overseas départements are no longer regarded as foreign countries where foreign trade is concerned, but are now incorporated within the national territory. In some instances, this may distort comparisons with previous years. The tables concerned have been accompanied by a footnote.

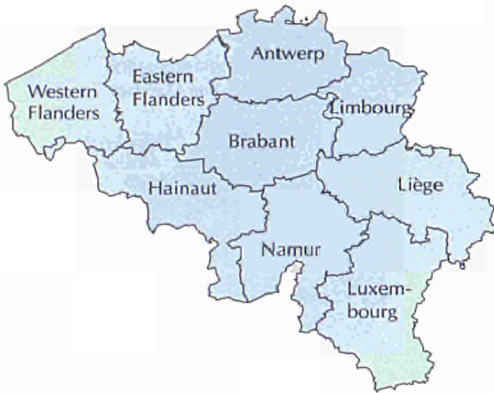




**T**welve of the fifteen countries of the European Union provide Eurostat with regional data. Only Denmark, Ireland and Luxembourg provide just national data, on account either of their size or their population. The number of regions varies markedly from one country to the next. In this publication, we have used five regions in

Portugal and Finland, eight in Sweden, but twenty in Italy and twenty-two in France. In some maps, we have used a 96-zone division for France and a 38-zone one for Germany. These different divisions are based on the nomenclature of the Eurostat statistical territorial units (Nuts).





**Belgium**



**Germany**



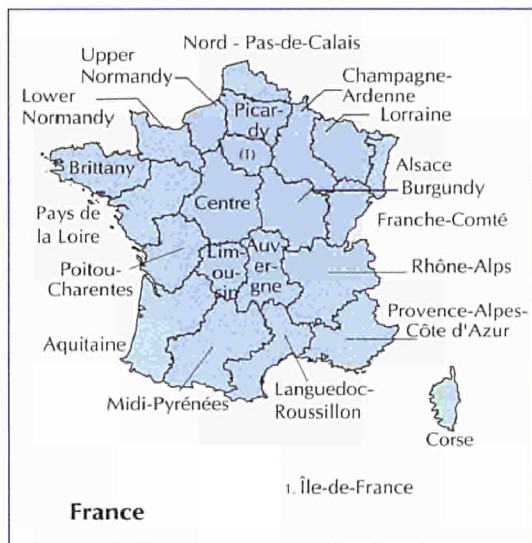
**Greece**



**Spain**



# States and regions







## Portugal



## Finland



## Sweden



## United Kingdom





# Topics



## THE EUROPEAN UNION

With 373 million inhabitants in 1996, the European Union has a larger population than the United States, with 266 million inhabitants and Japan with 120 million. Of the Fifteen, Germany has the largest population, with 81.9 million inhabitants. France has 60.2 million, the United Kingdom 58.8 million and Italy 57.4 million.

Germany also has the largest GDP, representing 27% of the EU's combined GDP, ahead of France with 18%, Italy with 14%, and the United Kingdom with 13%. Expressed as a purchasing power standard (PPS), the GDP per capita ranges from 1 to 2.5, depending on the country. The highest are Luxembourg, with 25,500 ecus (PPS) per capita, Denmark, Belgium, Austria and Germany, where the figure is about 17 000 ecus. The lowest, with about 10 000 ecus per capita, are Greece and Portugal.

The average GDP per capita of EU-15 is 15 200 ecus. It is 44% lower than that of the United States and 20% lower than that of Japan.

The percentage of the working population in the total population varies considerably from coun-

try to country. The highest levels occur in the northern states: Denmark (53%), Sweden (49%) and the United Kingdom (48%). The lowest levels, from 39 to 40%, occur in Italy, Greece, Ireland and Spain.

### Definitions

**Gross domestic product (GDP):** this measures the productive activity achieved in the national economy. The GDP corresponds to the sum of the value of goods and services available for end use in the economic territory and of the balance of total foreign trade. It is also equal to the sum of the added values of the different sectors, plus the VAT levied on products and taxes, net of subsidies, on imports.

**Purchasing power standard (PPS):** because monetary parities do not reflect domestic purchasing powers of currencies, comparisons in ecus do not measure the real differences between countries. The purchasing power standard makes it possible to eliminate the effects of price level differences and make real value comparisons.

**Active population:** all those persons either exercising or seeking a professional activity at a given date in the various sectors of economic activity.

## Principal economic indicators in 1996

Population			Gross domestic product			Active population		
Number	Share per country		Nominal	Share per country	GDP per capita	Number	Share per country	Share in total population
thousand	%		billion ecus	%	ecu (PPS)	thousand	%	

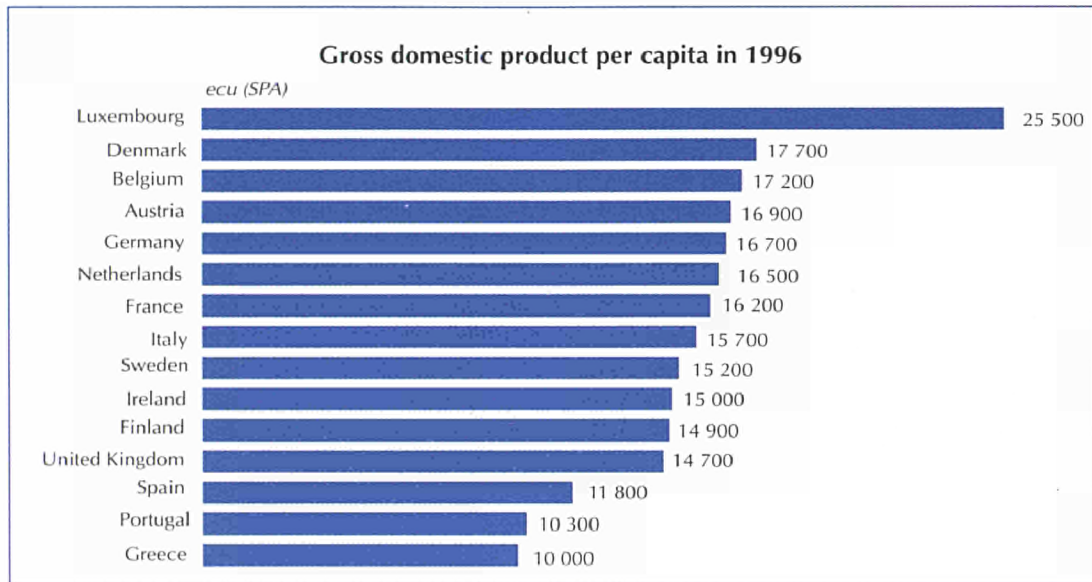
Belgium	10 157	2.7	211	3.1	17 200	4 164	2.5	41.0
Denmark	5 262	1.4	138	2.0	17 700	2 791	1.7	53.0
Germany	81 896	22.0	1 854	27.4	16 700	38 736	23.4	47.3
Greece	10 476	2.8	96	1.4	10 000	4 145	2.5	39.6
Spain	39 270	10.5	461	6.8	11 800	15 754	9.5	40.1
France	58 375	15.6	1 210	17.9	16 200	25 211	15.2	43.2
Ireland	3 626	1.0	56	0.8	15 000	1 448	0.9	39.9
Italy	57 397	15.4	956	14.1	15 700	22 479	13.6	39.2
Luxembourg	416	0.1	13	0.2	25 500	170	0.1	40.9
Netherlands	15 531	4.2	312	4.6	16 500	7 349	4.4	47.3
Austria	8 059	2.2	180	2.7	16 900	3 779	2.3	46.9
Portugal	9 927	2.7	82	1.2	10 300	4 540	2.7	45.7
Finland	5 125	1.4	99	1.5	14 900	2 426	1.5	47.3
Sweden	8 841	2.4	198	2.9	15 200	4 346	2.6	49.2
United Kingdom	58 802	15.8	908	13.4	14 700	28 081	17.0	47.8
<b>EU-15</b>	<b>373 158</b>	<b>100.0</b>	<b>6 774</b>	<b>100.0</b>	<b>15 200</b>	<b>165 420</b>	<b>100.0</b>	<b>44.3</b>

Source : Eurostat - Newcronos

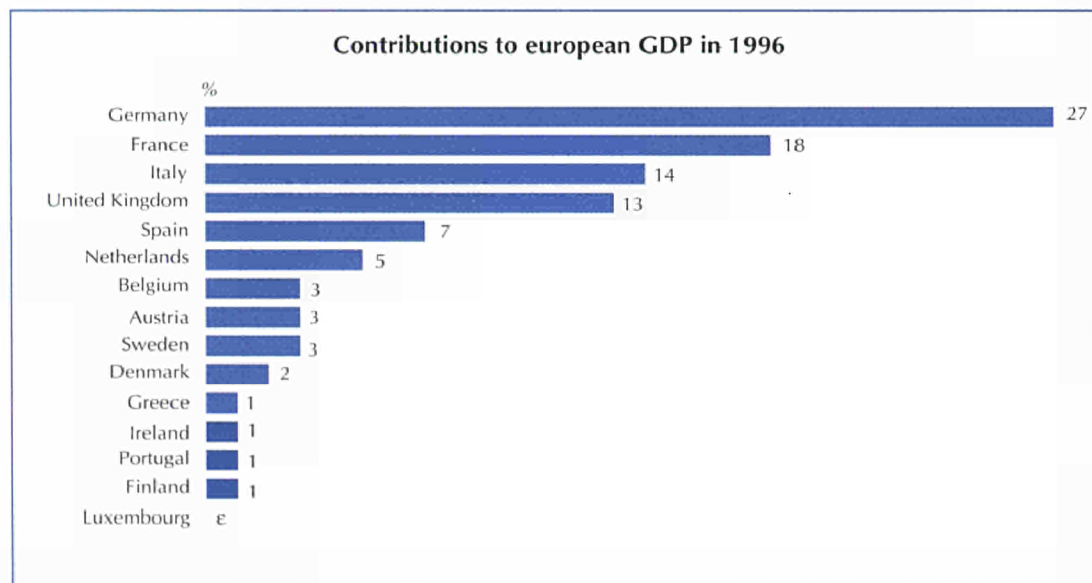


## THE EUROPEAN UNION

### Luxembourg, the highest GDP per capita



### Germany, the highest contribution to the European GDP



Source : Eurostat - Newcronos





## OVERALL BUDGET

In 1997, the community budget resources exceeded 82 billion ecus. Four-fifths derive equally from VAT and GNP resources, these later having risen by a factor of eight between 1990 and 1997. Customs dues contribute a little more than one-seventh.

In 1997, Germany provided slightly more than one-quarter of these resources. If we add the contributions from France, Italy and the United Kingdom, we have 70% of community resources. The EAGGF Guarantee Fund represented one-half of community expenditures in 1996. It has nevertheless increased less markedly in the last few years than almost every other item. In 1997, the Regional and Transport Fund was the number two expenditure item, ahead of the Social Fund. The Regional and Transport Fund expenditures have risen more than any other since 1985, by a factor of 7.9.

### Definitions

**Ecu** : an abbreviation of European currency unit, the ecu is the linchpin of the European monetary system and is defined by a basket of Member state currencies. The ecu will be replaced on 1 January 2002 by the euro.

**Gross National Product (GNP)** : the gross national product of a country is equal to its gross domestic product, i.e. the sum of gross added values, plus the external balance of the payment of employees and revenues from property and business.

**European Agricultural Guidance and Guarantee Fund (EAGGF)** : funding agency for the common agricultural policy, which implements the CAP's essential principles: community preference and financial cooperation. It is made up of a « guarantee » section funding various operations concerning the agricultural market, and a « guidance » section funding agricultural structural improvement.

**DC** : Developing country.

## Community resources and expenditures<sup>1</sup>

	1985	1990	1995	1996	1997
	million ecus				
Own resources					
Agricultural levies	1 122	1 056	852	729	786
Sugar contributions	1 057	820	1 112	1 092	1 229
Customs dues	8 310	10 285	12 942	11 762	12 203
VAT resources	15 592	27 440	39 423	35 677	34 588
GNP resources	...	95	21 681	19 251	31 789
Other resources	2 325 <sup>2</sup>	6 773	517	961	1 770
<b>Total resources</b>	<b>28 406</b>	<b>46 469</b>	<b>76 527</b>	<b>69 472<sup>3</sup></b>	<b>82 366</b>
Annual payments by sector					
Total farm fund	20 546	28 595	37 813	43 385	45 578
incl. EAGGF guarantee	19 744	26 475	34 511	39 042 <sup>4</sup>	...
incl. EAGGF guidance	721	1 825	3 102	3 911 <sup>4</sup>	...
Social Fund	1 491	3 546	5 918	7 357	7 850
Regional fund and transport	1 677	4 902	11 028	13 784	14 976
Research, energy and industry	756	1 739	3 089	3 527	3 907
DC and non-member country coop.	1 085	1 225	3 374	3 805	4 827
Reimbursement to Member States	1 248	1 020	1 619	936	945
Other expenditures	1 296	2 298	3 916	4 007	4 284
<b>Total expenditures</b>	<b>28 099</b>	<b>43 325</b>	<b>66 757</b>	<b>76 800<sup>3</sup></b>	<b>82 366</b>

1. Ten member states in 1985, 12 in 1990, and 15 with the extension of Germany in 1995.

2. Including advances of Member States.

3. Expenditures are greater than resources; the difference has been met by surpluses in previous years.

4. Apart from payments made directly by the Commission.

Source : Commission européenne

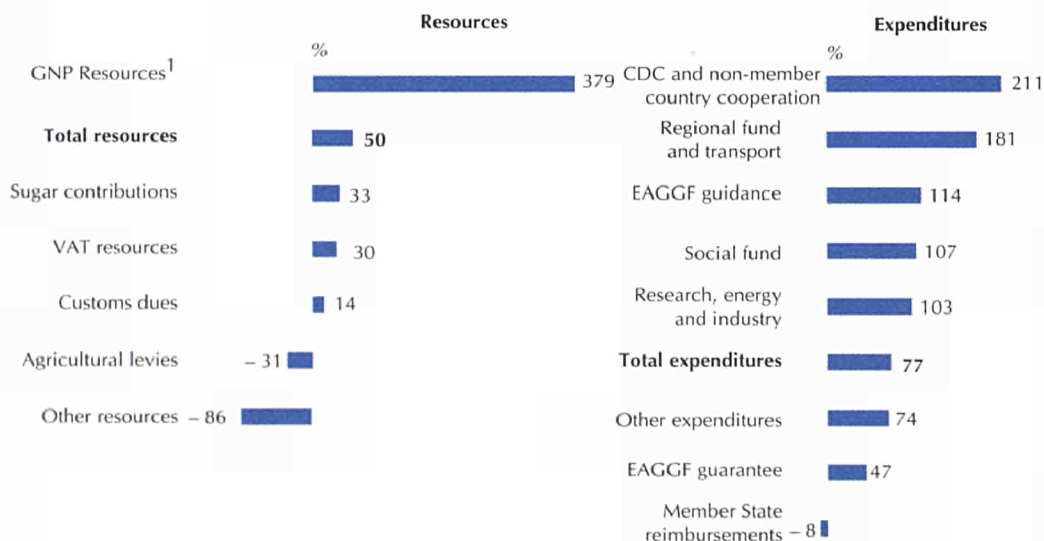


## OVERALL BUDGET

### Distribution of the five main resources by Member State in 1997

	Agricultural levies	Sugar contribution	Customs dues	VAT resources	GNP resources
<i>million ecus</i>					
Belgium	54	75	930	1 050	1 037
Denmark	7	42	217	670	663
Germany	116	339	2 982	10 982	9 066
Greece	7	19	125	574	485
Spain	122	50	474	2 653	2 333
France	52	337	1 289	6 913	5 933
Ireland	2	13	228	274	224
Italy	72	131	1 132	4 246	4 589
Luxembourg	0	0	17	91	71
Netherlands	69	82	1 499	1 759	1 540
Austria	15	33	257	1 050	874
Portugal	45	1	110	514	420
Finland	20	9	194	518	481
Sweden	34	24	329	938	901
United Kingdom	171	75	2 421	2 355	4 331
<b>EU-15</b>	<b>786</b>	<b>1 229</b>	<b>12 203</b>	<b>34 588</b>	<b>32 947</b>

### Development of budget expenditures and resources, 1990-1996



1. Average for 1989, 1990, 1991 for the year 1990.





## AGRICULTURAL BUDGET

The four main agricultural producers in the European Union – France, Germany, Italy and Spain – are also the major recipients of EAGGF Guarantee and Guidance expenditures. This situation has remained more or less the same over the past few years. With the exception of Italy, the Netherlands and Ireland, all the countries in the Union have benefited from an increase in the sums allocated by EAGGF Guarantee between 1990 and 1996.

In 1997, the European Union disbursed 41.8 billion ecus to support agriculture, with 43 % earmarked for arable crops, 14 % for beef and 9 % for dairy products. Assistance for arable land has more than doubled since 1990. Assistance for beef rose between 1996 and 1997 as a result of credits in the wake of the BSE crisis. Support for dairy products has been dropping since 1993. In 1996, these three items represented two-thirds of expenditures, as opposed to one-half at the beginning of the 1980s.

The 1992 Reform of the Common Agricultural Policy brought far-reaching changes to the cre-

dit breakdown of the credits distributed by EAGGF Guarantee. It reduced guaranteed prices, for arable crops and beef, in favour of direct aid to producers. It introduced accompanying measures from 1993 onward. Between 1990 and 1996, the share of compensatory aid packages rose from 45 % to 78 %, whereas the share of refunds dropped by one-half, sliding from 30 % to 15 %. Over the same period, the share of credits earmarked for storage went from 2.0 to 3.5 %

### Definitions

**European Agricultural Guidance and Guarantee Fund (EAGGF)**: funding agency for the Common Agricultural Policy [CAP], which implements the CAP's main principles: community preference and financial cooperation. It is made up of a «guarantee» section funding various operations to do with the agricultural market, and a «guidance» section funding agricultural structural improvement.

**Ecu**: an abbreviation of European currency unit, the ecu is the linchpin of the European monetary system and is defined by a basket of Member state currencies.

## Development of EAGGF Guarantee and Guidance expenditures

	EAGGF expenditures, guarantee section				EAGGF expenditures, guidance section			
	1985	1990	1995	1996	1985	1990	1995	1996
	million ecus							
Belgium	917	874	1 622	1 146	20	23	40	43
Denmark	829	1 114	1 389	1 356	26	17	17	29
Germany	3 626	4 355	5 380	6 048	91	204	808	804
Greece	1 193	1 950	2 439	2 817	138	270	464	328
Spain	///	2 121	4 562	4 047	///	302	710	692
France	4 638	5 142	8 377	9 558	161	384	348	521
Ireland	1 169	1 668	1 418	1 700	82	125	157	260
Italy	3 413	4 150	3 364	4 220	236	283	454	419
Luxembourg	5	5	14	20	1	5	6	4
Netherlands	2 048	2 869	1 930	1 535	20	11	13	27
Austria	///	///	86	1 212	///	///	98	123
Portugal	///	214	706	645	///	242	283	378
Finland	///	///	62	648	///	///	110	102
Sweden	///	///	75	622	///	///	25	65
United Kingdom	1 901	1 976	2 954	3 468	124	103	74	116
Community <sup>1</sup>	6	16	125	—	—	—	4	—
<b>EU<sup>2</sup></b>	<b>19 707</b>	<b>26 528</b>	<b>34 503</b>	<b>39 042<sup>3</sup></b>	<b>898</b>	<b>1 968</b>	<b>3 609</b>	<b>3 911<sup>3</sup></b>

1. Direct payments to operators, made by the Commission for the EAGGF, «guarantee» section and «multi-State» expenditures for the EAGGF, guidance section.

2. Ten member states in 1985, 12 in 1990 and 15 with the extension of Germany in 1995.

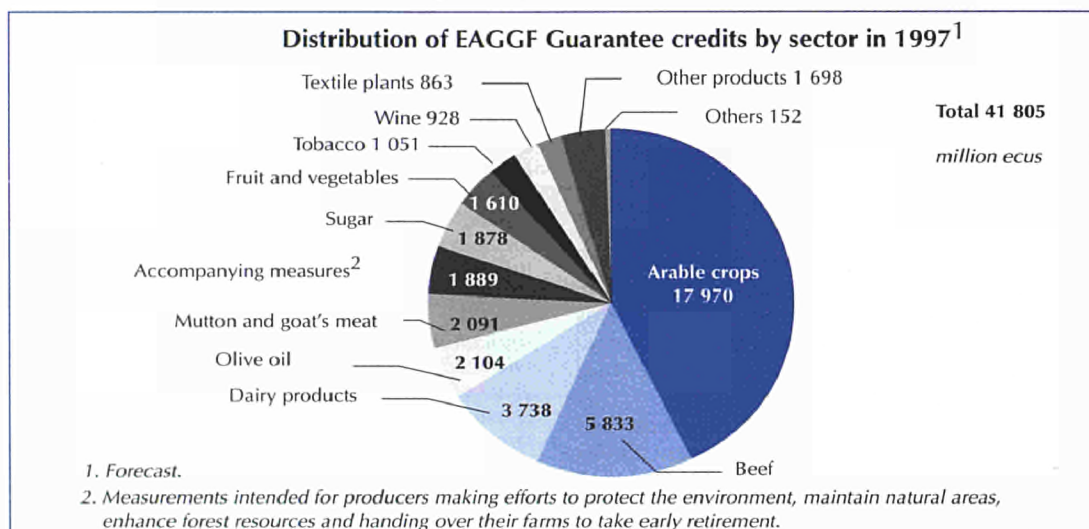
3. Apart from payments made directly by the Commission.

Source : European Commission



## AGRICULTURAL BUDGET

### 42 % of EAGGF guarantee credits for arable crops



Source : Commission européenne - Direction générale de l'Agriculture

### Development of breakdown of EAGGF guarantee credits by sector and type

	1985				1990				1996 <sup>1</sup>			
	Total	Refunds	including Price-support	Stocks	Total	Refunds	including Price-support	Stocks	Total	Refunds	including Price-support	Stocks
million ecus												
Arable crops	3 676	1 080	1 845	751	7 869	2 501	4 115	1 253	16 998	368	16 570	60
Beef	2 746	1 339	197	1 094	2 833	1 110	694	998	6 744	1 794	4 264	686
Dairy prod.	5 933	2 028	1 891	1 973	4 972	1 947	1 209	1 082	3 718	1 703	1 501	153
Olive oil	692	19	668	5	1 170	136	1 059	- 26	2 113	44	2 059	- 8
Sugar	1 805	1 353	12	440	1 391	929	79	383	1 843	1 344	106	377
Fruit and veg.	1 231	75	943	-	1 253	81	831	2	1 575	97	1 067	1
Mutton and goat meat	502	-	502	-	1 452	-	1 452	-	1 447	-	1 443	4
Tobacco	863	32	819	12	1 232	62	1 081	89	1 043	4	1 026	- 23
Textile plants	241	-	241	-	580	-	580	-	850	-	850	-
Wine	921	19	214	90	745	55	123	207	805	50	160	164
Other prod.	907	643	185	63	1 438	902	418	109	2 298	895	1 037	16
Accompan. measures	-	-	-	-	-	-	-	-	1 866	-	1 866	-
Others	190	128	61	-	1 592	-	231	1 361	- 472	6 299	30 083	1 430
<b>Total</b>	<b>19 707</b>	<b>6 716</b>	<b>7 577</b>	<b>4 428</b>	<b>26 528</b>	<b>7 722</b>	<b>11 873</b>	<b>5 458</b>	<b>40 828</b>	<b>6 299</b>	<b>31 949</b>	<b>1 430</b>

1. Provisional.

Source : European Commission





## AGRICULTURE IN THE ECONOMY

In 1996, the share of agriculture, forestry and fisheries represented 1.6 % in EU-15 and 1.7 % in the United States. Within the Union, there are marked disparities between countries. These sectors contribute 6 % of the Greek GDP and only 0.5 % of the Swedish GDP.

In EU-15, in 1996, 5 % of the working population worked in agriculture, forestry and fisheries as opposed to just 2.8 % in the United States. This rate is higher than 20 % in Greece and only 2 % in the United Kingdom.

In the bulk of EU Member States, agricultural production is much greater than forestry production. But the new members are an exception to this rule. In Finland, forestry is every bit as important as agriculture. It represents more than one-third in Sweden and a quarter in Austria.

Imports of foodstuffs, live animals, beverages and tobacco in the European Union represent almost 8 % of total imports, but much more in Portugal, the United Kingdom and Germany. These agri-products represented 7 % of total exports of EU-15 but much more in Denmark and the Netherlands.

Since 1990, EU foreign trade in farm and forestry products, and fish and IAA (imports + exports, in value) rose by an average of 4.4 % per annum. Germany, France, the Netherlands and the United

Kingdom account for 58 % of this trade. Denmark, Greece and the Netherlands carry out much of their trade with non-member countries.

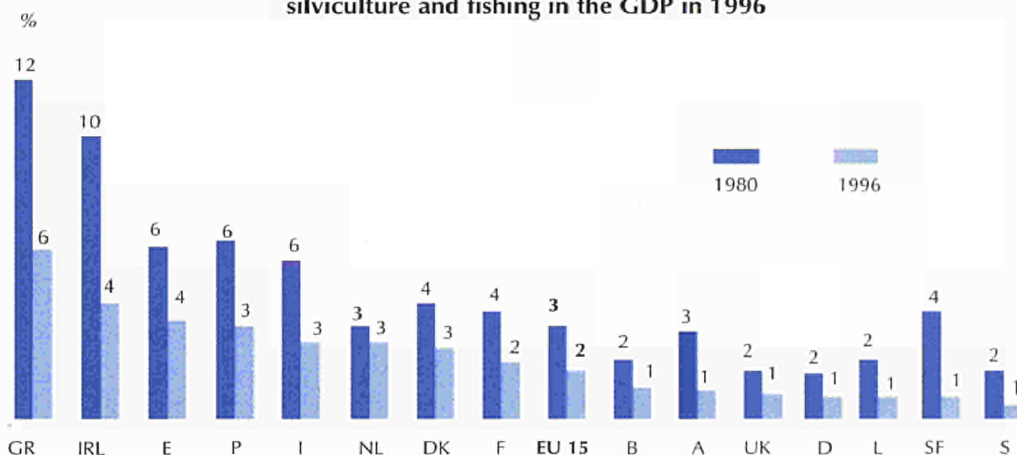
### Definitions

**Gross domestic product (GDP):** in terms of national accounting, this measures the productive activity achieved in the national economy. The GDP corresponds to the sum of the value of goods and services available for end use in the economic territory and of the balance of total foreign trade. It is also equal to the sum of the added values of the different sectors, plus the VAT levied on products and taxes, free of subsidies, on imports.

**Agricultural end production:** this concept of economic accounts for agriculture corresponds to the value of farm goods produced for marketing or self-consumption. It represents the sum of deliveries of farm products, variations in farm product stocks at the farm and the gross formation of personal fixed capital in farm products (herds and flocks, plantations).

**Value added:** in national accounting, the value added denotes the value created by each production unit. The gross value added to the price of goods is measured by the difference between the value of the production of goods and services and the value of intermediate consumption, prior to deduction of amortizations.

Share of value added in agriculture, silviculture and fishing in the GDP in 1996







## AGRICULTURE IN THE ECONOMY

### Main indicators of the farming, forestry and fishing sector in 1996

Gross value added	Share in employment	Final agricultural production	Final forestry production	Share of food products and live animals, beverages and tobacco in	
				Imports	Exports
% of GDP <sup>1</sup>	% <sup>1</sup>	million ecu		% <sup>2</sup>	

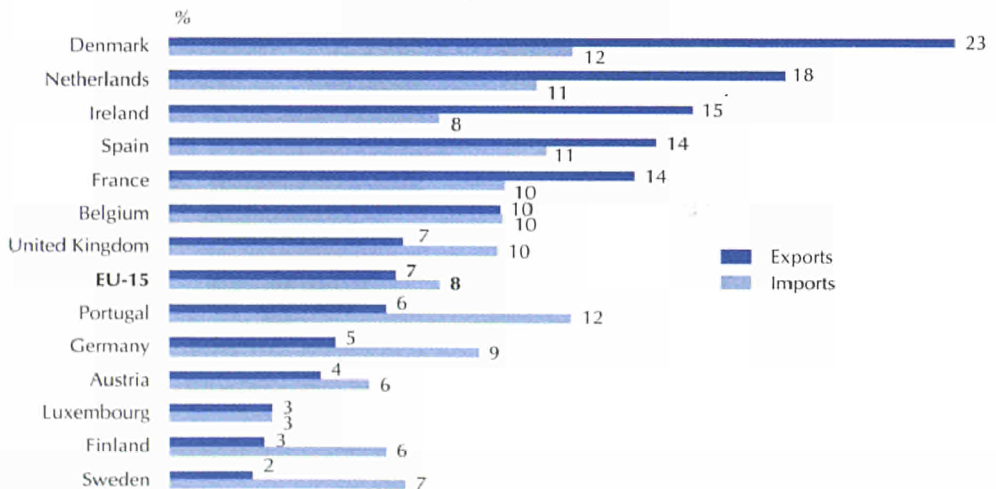
Belgium	1.1	2.7	6 817	200	9.7 <sup>3</sup>	9.6 <sup>3</sup>
Denmark	2.5	3.9	6 915	180	11.8	22.9
Germany	0.8	2.9	33 348	1 686	9	4.8
Greece	6	20.3	8 889	106	...	...
Spain	3.5	8.6	27 523	842	11	14.2
France	2	4.8	46 897	2 751	9.8	13.6
Ireland	4.1	11.2	4 404	...	7.9	15.3
Italy	2.7	6.7	35 694	430	...	...
Luxembourg	0.8	2.4	185	...	/// <sup>3</sup>	/// <sup>3</sup>
Netherlands	2.7	3.8	17 156	...	10.7	18
Austria	1	7.4	3 637	954	5.8	4.4
Portugal	3.3	12.2	4 937	...	11.7	6.3
Finland	0.8	7.9	2 274	2 292	6.3	2.8
Sweden	0.5	3.3	3 484	2 396	6.9	2.4
United Kingdom	0.9	2	18 185	420	9.6	6.8
<b>EU-15</b>	<b>1.7</b>	<b>5.1</b>	<b>220 346</b>	<b>...</b>	<b>7.9</b>	<b>6.6</b>

1. The whole agricultural, forestry and fishing sector

2. Farming and fisheries sector and farming and food industry

3. Belgian-Luxembourg Economic Union

### Share of food products, live animals, beverages and tobacco in foreign trade in 1996

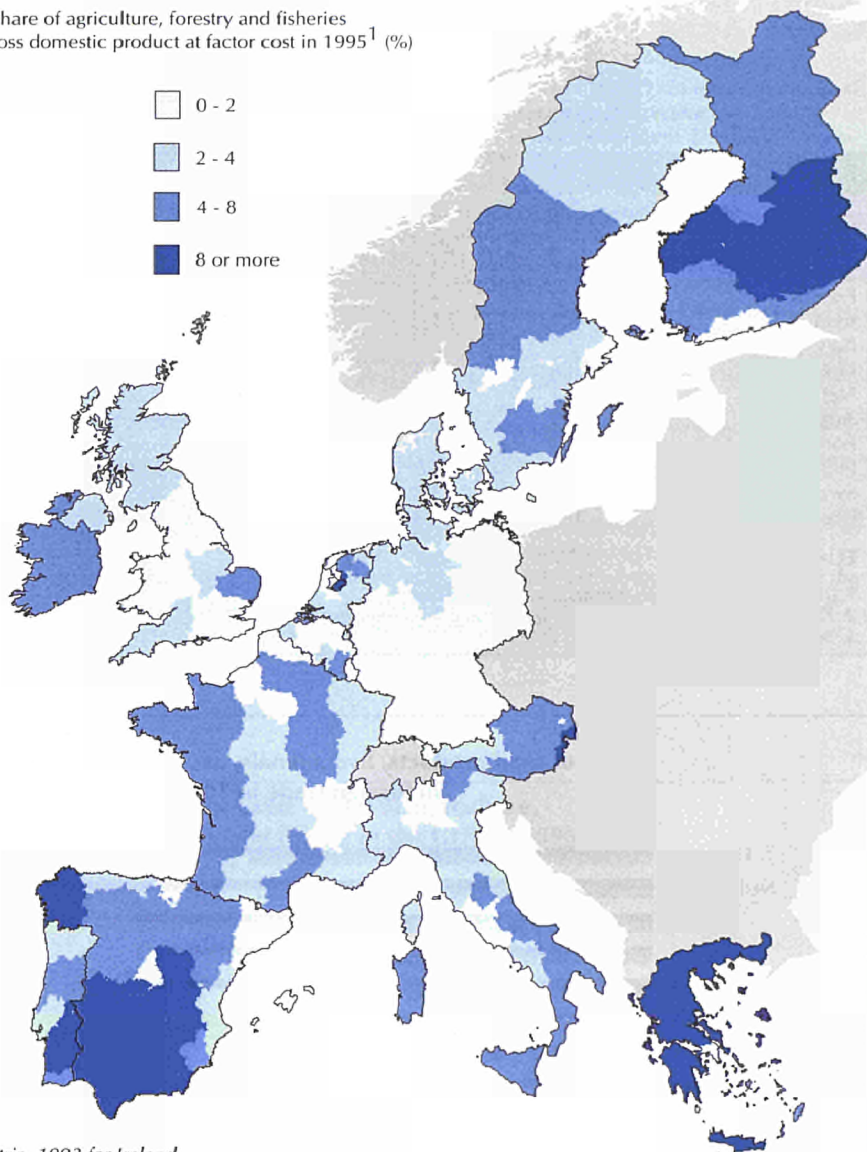




## AGRICULTURE IN THE ECONOMY

### Greece and the south of the Iberian peninsula...

share of agriculture, forestry and fisheries  
in the gross domestic product at factor cost in 1995<sup>1</sup> (%)



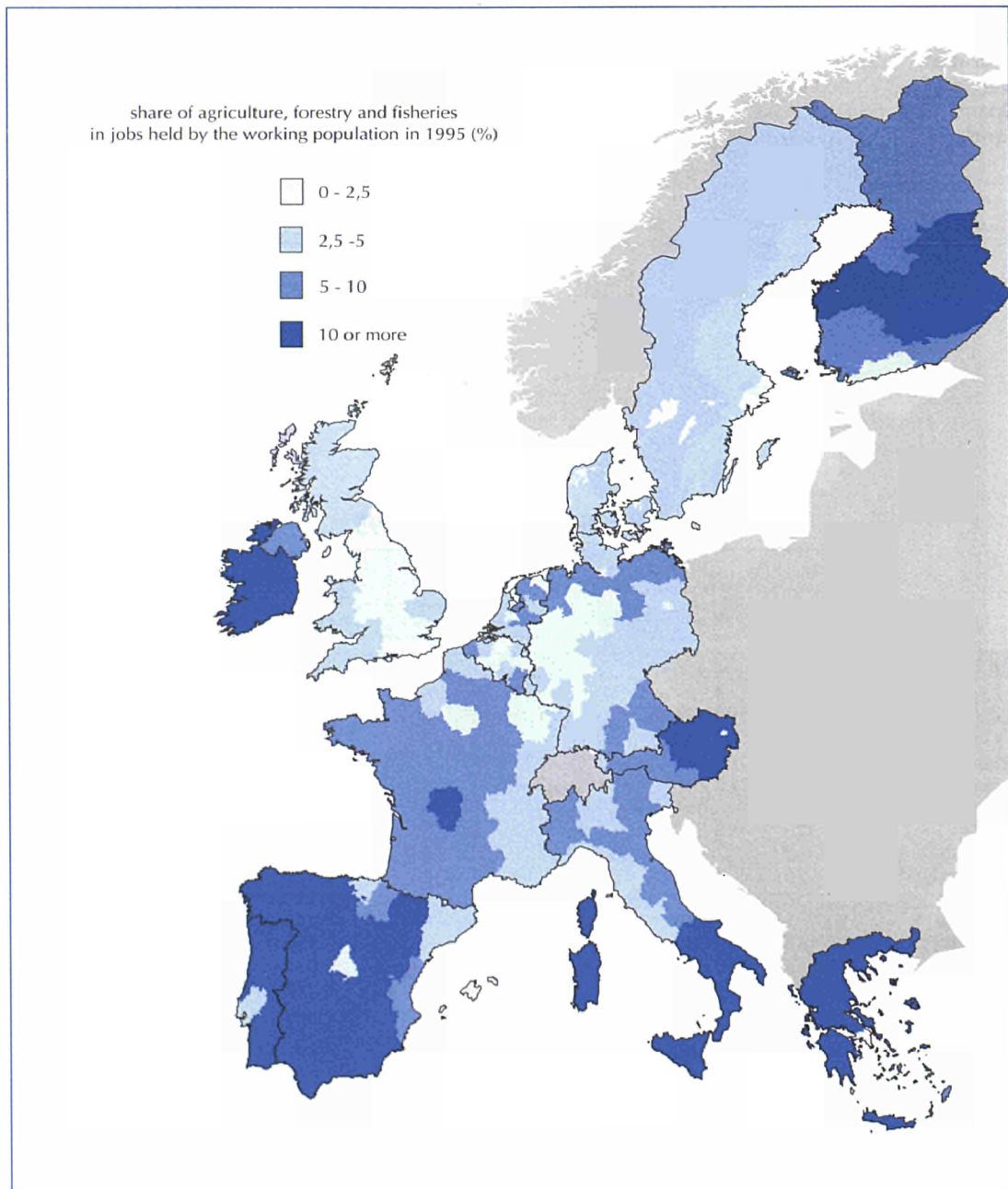
1. 1990 for Austria, 1993 for Ireland,  
1994 for Germany, Denmark, Greece, France and Luxembourg.  
Values added at market prices for Denmark, France, Luxembourg, Austria and Portugal.

Source : Eurostat - Newcronos



## AGRICULTURE IN THE ECONOMY

...are still the most agricultural regions



Source : Eurostat - Newcronos





## LAND DISTRIBUTION

The territory of the European Union, covering 3.2 million km<sup>2</sup>, includes 43 % farmland, 38 % forest and woodland, 16 % other forms of land, and 4 % inland waters. The shares of these four main categories vary from one country to the next. The United Kingdom, Denmark, Ireland, Spain, Italy and France have more than half their land area dedicated to farming. Forest covers

almost two-thirds of Finland and Sweden, and half of Greece and Austria. Inland waters cover a significant area in Finland, Sweden and the Netherlands. The next five countries to join the EU have between 32 % (Estonia) and 66 % (Hungary) of their land area given over to farmland. Of these five nations, Slovenia is the most forested.

**Land distribution in 1995**

	Total area		Forest and woodland		Farmland		Inland water		Other land	
	km <sup>2</sup>		km <sup>2</sup>	%	km <sup>2</sup>	%	km <sup>2</sup>	%	km <sup>2</sup>	%
Belgium	30 518		6 200	20	13 661	45	269	1	10 387	34
Denmark	43 094		4 171	10	27 209	63	700	2	11 015	26
Germany	356 970		107 410 <sup>1</sup>	30	173 443	49	7 798	2	68 320	19
Greece	131 957		65 130 <sup>1</sup>	49	51 629	39	3 119	2	12 079	9
Spain <sup>2</sup>	504 877		163 913	33	301 264	60	5 805	1	33 895	7
France	549 087		168 740	31	300 599	55	6 676	1	73 072	13
Ireland	70 285		6 061	9	44 071	63	1 391	2	18 762	27
Italy	301 323		98 570 <sup>1</sup>	33	167 432	56	7 200	2	28 121	9
Luxembourg	2 568		890	35	1 270	49	11	0	398	16
Netherlands	41 526		3 840	9	19 808	48	3 420	8	14 458	35
Austria	83 858		38 770	46	34 489	41	1 110	1	9 489	11
Portugal	91 905		32 380	35	39 729	43	441	1	19 355	21
Finland	338 150		230 030 <sup>1</sup>	68	21 606	6	33 550	10	52 964	16
Sweden	449 964		280 070	62	30 640	7	39 035	9	100 219	22
U. Kingdom	244 101		24 700 <sup>1</sup>	10	158 524	65	3 277	1	57 600	24
<b>EU-15</b>	<b>3 240 183</b>		<b>1 230 875</b>	<b>38</b>	<b>1 385 375</b>	<b>43</b>	<b>113 802</b>	<b>4</b>	<b>510 133</b>	<b>16</b>
Rep. Czech	78 866		26 300	33	42 800	54	...	...	...	...
Estonia	45 227		20 162	45	14 495	32	2 833	6	7 737	17
Hungary	93 030		17 629	19	61 793	66	...	...	...	...
Poland	312 685		88 218	28	186 222	60	...	...	...	...
Slovenia	20 251		10 980	54	7 870	39	...	...	...	...

1. Data estimated for the country concerned.

2. Spanish national data explaining certain double counts between used agricultural area (UAA) and woodland.





Sources : Eurostat - Working document on forestry statistics (july 1997) for EU - Cestat data base for Central Europe

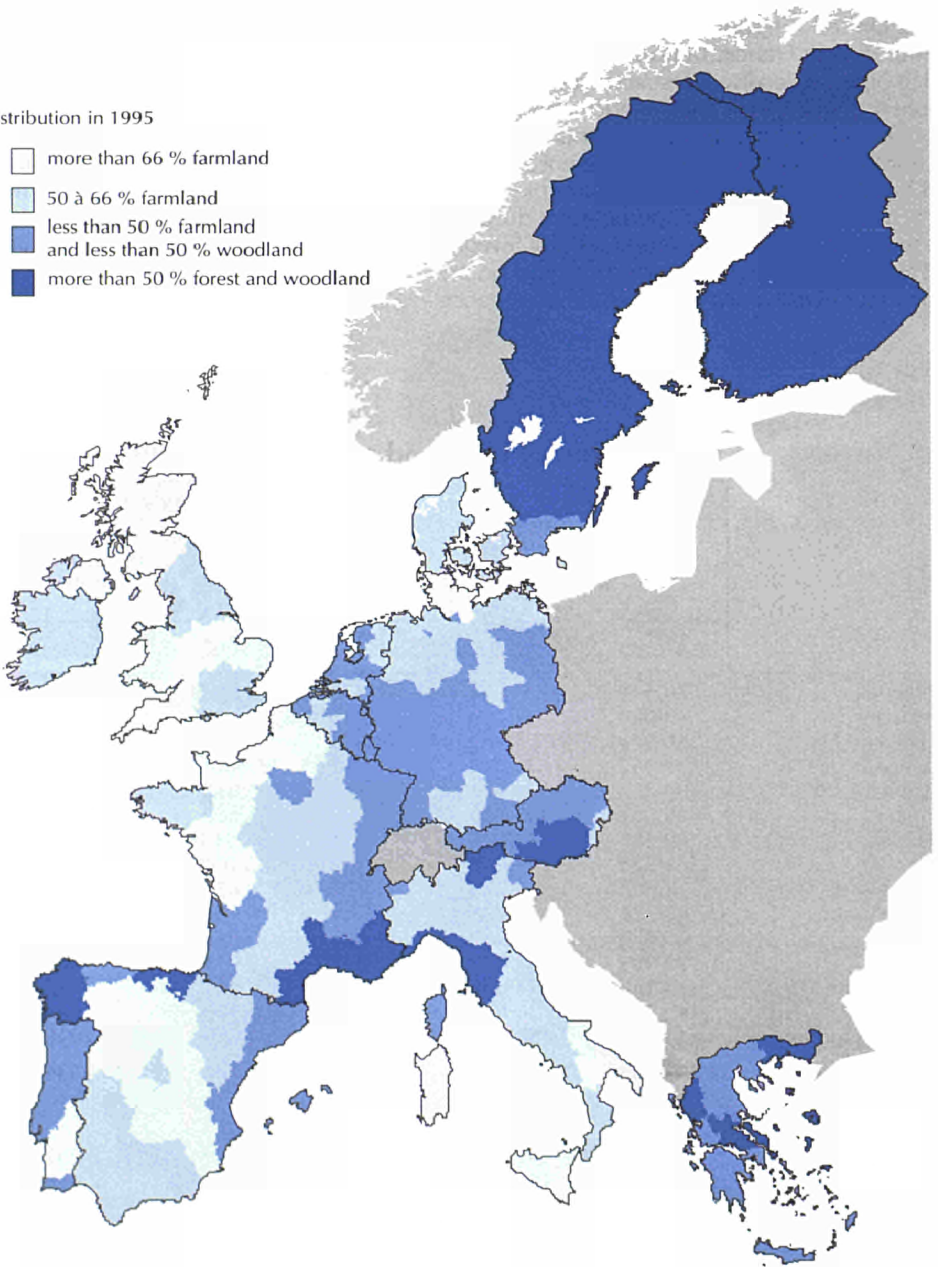


## LAND DISTRIBUTION

**Farmland in the West, forest and woodland in the North**

land distribution in 1995

-  more than 66 % farmland
-  50 à 66 % farmland
-  less than 50 % farmland  
and less than 50 % woodland
-  more than 50 % forest and woodland



Source : Eurostat





## FARMLAND

In 1995 farmland occupied 43 % of European Union territory , thus continuing the long term decline. Farmland areas vary from country to country. It covers almost 60 % of the territory of the United Kingdom, Denmark, Ireland and Spain, 55 % in France, but only 39 % in Greece which boasts extensive forest and woodland, and mountains. In Sweden and Finland, where forests are predominant, farmland represents just 7 % of the territory. In some regions as different as Apulia and Northern Ireland, farmland occupies up to 80 % of the territory. This percentage drops to less than 5 % in the northernmost parts of Sweden and Finland. The country hierarchy, based on the share of farmland, does not affect the importance

of different forms of European agriculture, for it takes into account neither the size of the country nor the intensity of farming. The make-up of farmland is very varied. These areas are not really anything other than arable land in Finland and Denmark, but are, conversely, mainly grasslands in Ireland, the United Kingdom and Austria. Permanent crops have an important position only in the southern states –Greece, Italy, Portugal and Spain– where they represent 15-20 % of farmland. Vines nevertheless occupy major areas in Languedoc-Roussillon, Rhineland-Palatinate, and Provence-Alpes-Côte d’Azur.

Distribution of farmland area in use in 1995

Total area	Area of farmland in use	including			
		Arable land	Areas always put to grass	Permanent crops	Family gardens
kilometre square					

Belgium	30 518	13 661	8 473	4 949	146	94
Denmark	43 094	27 209	25 016	2 120	73	–
Germany	356 970	173 443	118 345	52 820	2 088	189
Greece	131 957	51 629	22 833	17 800 <sup>1</sup>	10 829	167 <sup>1</sup>
Spain	504 877	301 264	144 525	109 662	47 077	–
France	549 087	300 599	180 935	105 658	11 830	2 176
Ireland	70 285	44 071	10 538	33 513 <sup>1</sup>	20	–
Italy	301 323	167 432	90 300 <sup>1</sup>	43 000 <sup>1</sup>	33 230	902 <sup>1</sup>
Luxembourg	2 568	1 270	580	675	14	1
Netherlands	41 526	19 808	9 146	10 107	385	170
Austria	83 858	34 489	14 026	19 513	757	193
Portugal	91 905	39 729	22 827	9 035	7 588	279
Finland	338 150	21 606	21 413	151	42	–
Sweden	449 964	30 640	26 466	4 130	44	–
United Kingdom	244 101	158 524	59 700	98 254	410	160
<b>EU-15</b>	<b>3 240 183</b>	<b>1 385 375</b>	<b>755 122</b>	<b>511 387</b>	<b>114 534</b>	<b>4 331</b>
Republic Czech	78 866	42 800	31 430	9 010	...	...
Estonia	45 227	14 495	11 278	3 069	...	...
Hungary	93 030	61 793	47 159	11 480	2 252	902
Poland	312 685	186 222	142 856	40 467	2 899	–
Slovenia	20 251	7 870	2 340	4 950	...	...

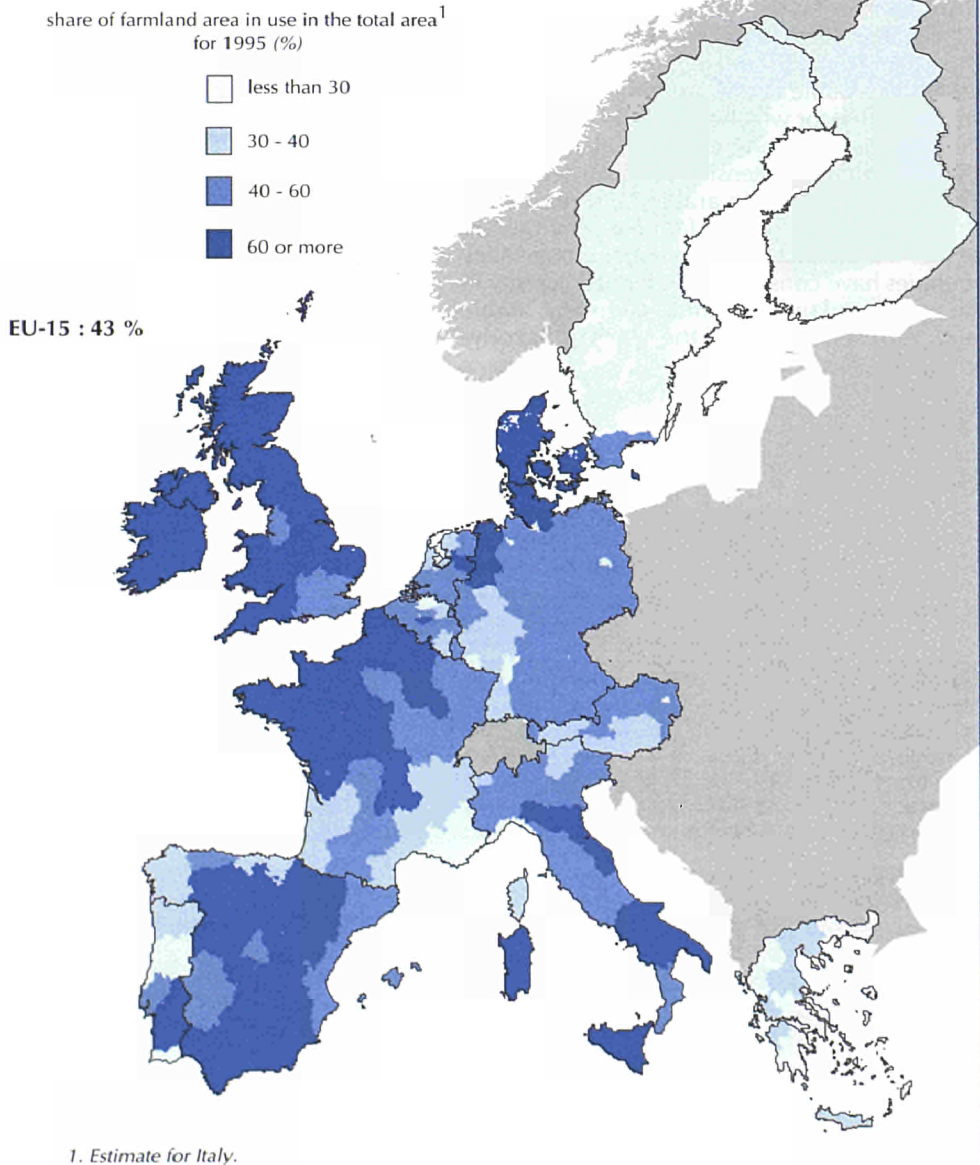
1. Data estimated.

Sources : Eurostat - Working document on forestry statistics (July 1997) for Greece, Ireland and Italy. National data for Spain (INE) clarifying certain double counting between UAA and woodland. Eurostat - Newcronos for the other countries of the Union. Eurostat (Cestat database) and national data for Central Europe.



## FARMLAND

## Two-thirds farmland in the United Kingdom







## ARABLE LAND

Arable land represented 38 % of the utilised agricultural area [UAA] in the Union in 1995. It occupies an important percentage in most of the northern European countries. It represents 99% of the UAA in Finland, 92 % in Denmark and 86 % in Sweden. In Germany, Belgium and France, it still represents nearly two-thirds of the UAA. Its share is no more than 44 % in Greece, 38 % in the United Kingdom and 24 % in Ireland. The extent of arable land embraces very different situations. Arable land is rare in Finland, being limited to that for which there is no other use. In Denmark as in Brittany, crops are planted above all to complement intensive livestock farming. In the Paris basin, where arable land represents almost 80 % of the UAA, farming activities are limited almost exclusively to major crops. Many countries have considerable regional diversity in the way their land is used. In Germany, arable land represents 93 % of the UAA in Saxony-

Anhalt and 38 % in Rhineland-Palatinate. In Ile-de-France, 96 % of farmland is arable, but only 25 % in Provence-Alpes-Côte d'Azur. In the United Kingdom, 86 % of East Anglian land is arable as opposed to just 16 % in Scotland. Among future EU members, Poland is the country with the most extensive arable regions, by surface area.

### Definitions

**Utilised agricultural area (UAA) :** the total area of arable land, permanent grassland and pasture and land given over to permanent crops and family gardens.

**Arable land :** this includes areas planted to cereals, oleaginous crops, industrial beet, textile, medicinal and perfumery plants, potatoes, fresh and field-dried and market-garden vegetables, cultivated flowers, fodder crops, as well as family gardens and fallow.

## Distribution of arable land in 1995

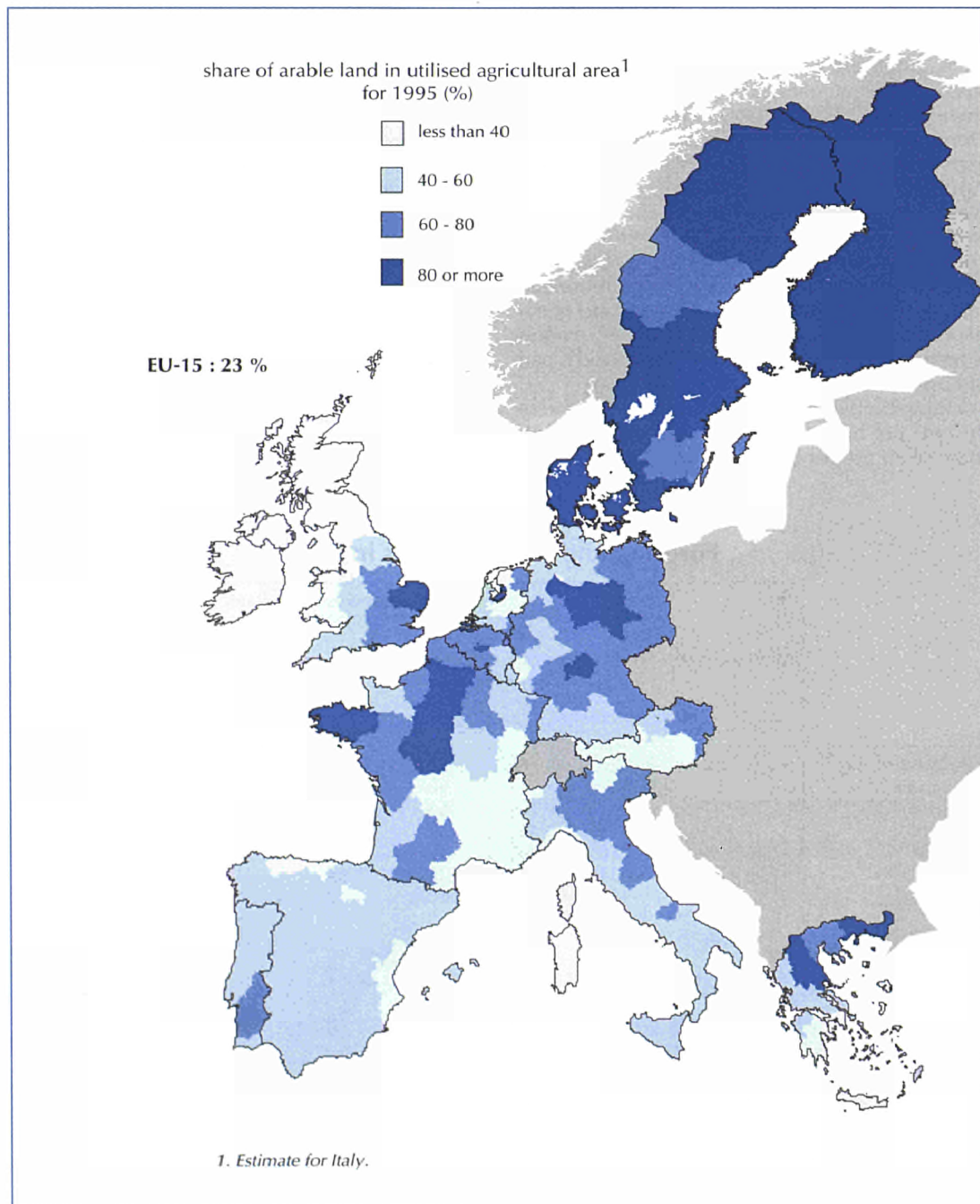
Arable land	dont					
	Cereals with rice	Arable land fodder	Gr. fertilizers, fallow	Industrial plants	Hoed crops	Fresh and dried veg.
thousand of hectare						
847	309	290	22	26	164	34
2 502	1 454	...	190	...	163	...
11 835	6 527	2 120	1 282	...	857	215
2 283	1 235	—	446	...	...	141
14 453	6 693	817	4 373	1 268	396	770
18 093	8 292	4 442	1 716	...	720	843
1 054	274	...	...	...	...	10
...	4 225	...	...	529	...	...
58	29	24	2	...	1	8
915	198	...	24	...	297	74
1 403	809	—	124	149	80	38
2 283	689	430	925	96	97	97
2 141	978	776	223	86	71	24
2 647	1 104	24	337	107	93	...
5 970	3 180	1 494	40	...	436	325
...	35 996	...	...	...	...	...
3 143	1 581	872	...	337	172	97
1 128	308	494	...	5	469	8
4 716	2 749	622	...	560	188	182
14 286	8 704	...	...	634	1 907	330
234	115	91	...	5	30	35

Sources : Eurostat - Newcronos for EU-15, ZMP and national data for Central Europe.



## ARABLE LAND

**Farmland areas are limited to arable land in the Nordic countries**



Sources : Eurostat - Newcronos and Spanish national data





## FOREST AND WOODLAND

In 1995, the expansion of the Union from twelve to fifteen member countries bolstered the importance of forest and woodland. The rate of afforestation in Europe thus rose from 33 % to 41 %. But there are sharp variations from zone to zone. The rate rarely reaches 15 % in the northwest arc extending from the Loire Valley to Denmark, nor does it in certain southernmost regions of Europe, such as the Algarve, Sicily and Apulia. The rate of afforestation, on the other hand, is in excess of 60 % in Sweden and Finland, in certain Alpine regions and in eastern Greece. Forests account on average for 80 % of wooded land, as opposed to 15 % for the Mediterranean maquis and 5 % for the Arctic tundra and oceanic heath- and moorland areas. However, maquis is predominant in non-Pyrenean Spain and a part of Greece.

Standing timber occupies an average volume of 100 m<sup>3</sup> per hectare in the Union, with a minimum of 25 m<sup>3</sup> per hectare in Spain and Greece,

and more than 160 m<sup>3</sup> in temperate Europe, well away from the sea.

More than 70 % of Greek forests are public, as they are in Ireland. They are mainly private in the other states.

The transition to 15 member states of the Union has further reinforced the importance of softwood. Softwood species now represent the main forest stands in nine Union countries. But broad-leaf forests are predominant in the regions of southern Europe, including in France.

### Definitions

**Afforestation rate** : share of the total forested/wooded area in the territory as a whole, in %.

**Forests** : land with a forest cover or an equivalent tree population of more than 10 % and an area greater than 0.5 hectares. Trees must be able to attain a minimum loggable height of 5 metres.

### Forested and wooded areas in 1995

Areas			Forest species		Rate of afforestation	Private share of wooded land <sup>4</sup>	Standing timber
All woodland	Forests	Other wooded land	Softwood <sup>3</sup>	Hardwood <sup>3</sup>			
thousand hectares			%		%	%	m <sup>3</sup> /ha

Belgium	620	620	—	50	50	20	57	155
Denmark	417	417	—	66	34	10	68	146
Germany	10 741 <sup>1</sup>	10 741 <sup>1</sup>	— <sup>1</sup>	68	32	30	46	271
Greece	6 513 <sup>1</sup>	3 359 <sup>1</sup>	3 154 <sup>1</sup>	47	53	49	15	23
Spain <sup>2</sup>	16 391	7 216	9 175	48	52	35	70	31
France	16 874	15 034	1 840	36	64	31	76	116
Ireland	606	570	36	88	12	9	27	74
Italy	9 857 <sup>1</sup>	6 821 <sup>1</sup>	3 036	20	80	33	66	109
Luxembourg	89	89	—	34	61	35	53	225
Netherlands	384	334	50	67	33	9	52	133
Austria	3 877	3 877	—	69	21	46	82	266
Portugal	3 238	2 875	363	40	60	35	86	62
Finland	23 003 <sup>1</sup>	20 032 <sup>1</sup>	2 971 <sup>1</sup>	92	8	68	68	85
Sweden	28 007	24 425	3 582	84	16	62	70	105
United Kingdom	2 470 <sup>1</sup>	2 470 <sup>1</sup>	—	70	29	10	62	97
<b>EU-15</b>	<b>123 087</b>	<b>98 880</b>	<b>24 207</b>	<b>...</b>	<b>...</b>	<b>41</b>	<b>...</b>	<b>100</b>

1. Data estimated by the countries in question.

2. Spanish national data explain certain double counts between utilised agricultural area and woodland.

3. The sum of softwoods and hardwoods is lower than 100 when countries do not include mixed forests.

4. Inventories carried out in different years, between 1982 and 1995.

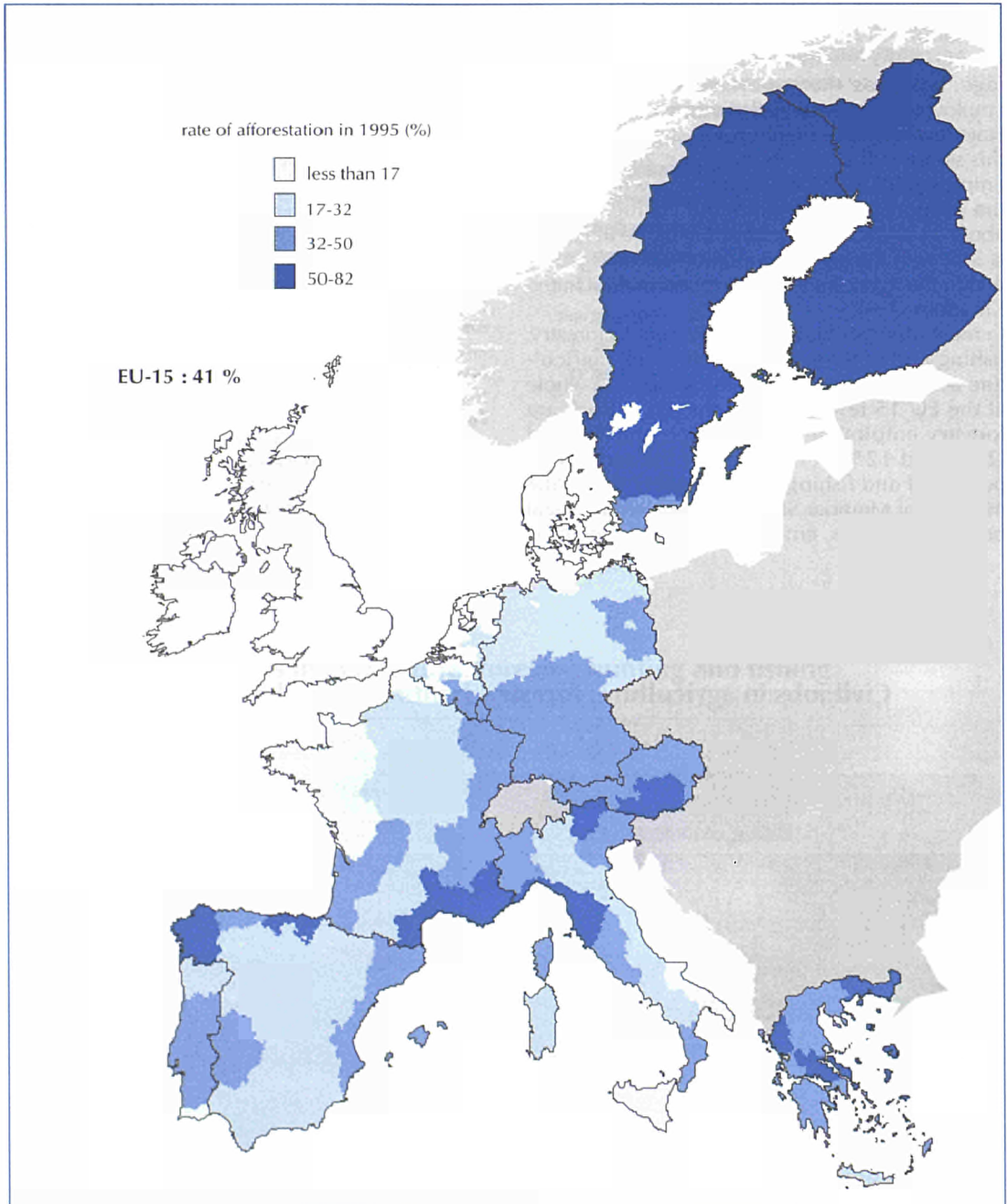
Sources : Eurostat - Working document on forestry statistics (July 1997)





## FOREST AND WOODLAND

## New Union members have more trees



Sources : Eurostat - Working document on forestry statistics (July 1997),  
and Boletín Mensual de Estadística (junio 97) for the Spanish wooded areas



## EMPLOYMENT IN AGRICULTURE, FORESTRY, HUNTING AND FISHING

In Europe, as in all industrialised countries, the proportion of total employment within the agricultural, forestry, hunting and fishing sector continues to decline, from 6 % in 1991 for the EU-15 to 5 % in 1996. Within this EU average, however, the importance of agricultural employment in the overall economy at a Member State level remains highly contrasting. In Greece, this sector still accounts for about 20 % of total employment in the economy as a whole, with the proportions in Ireland and Portugal being about 11 % each. In contrast, the figure in France is 5 %, with the lowest proportion of employment within the agricultural sector found in the United Kingdom (2 %).

In most Member States, employment in forestry, fishing and hunting is relatively small, agriculture accounting for 90 % of the sector as a whole at the EU-15 level. Among the exceptions are forestry employment in Sweden and Finland (23 % and 12 % of the total for the sector respectively) and fishing in Denmark (7 %). In the majority of Member States, Austria and Portugal being exceptions, employment in this sector is

male dominated particularly in Ireland (88 %), the Netherlands, Sweden, Luxembourg and Spain (all about 74 % respectively). Most workers declare themselves to be engaged full-time in their work and, more often than not, they are non-salaried workers. They are often non-wage-earning workers, particularly in Greece (96 % of total employment). But wage-earners are in a majority in Germany and Denmark, where they account for 51 % of jobs.

### Definitions

**Field of inquiry:** all persons aged 15 and over, living in private households, who have worked for at least one hour in the reference week. Numbers of employees in the fishing and forestry sectors are very low, so the reliability of the figures is uncertain, and they offer no more than a rough idea.

**Full time:** the reply given by working people themselves, except in Austria and the Netherlands, where reference is made to the number of hours ordinarily worked. The full-time parameter varies considerably from one Member State to the next.

### Civil jobs in agriculture, forestry, hunting and fishing in 1996

Total numbers	including			
	Men	Salaried employees	Family helpers	Full-time
thousands				

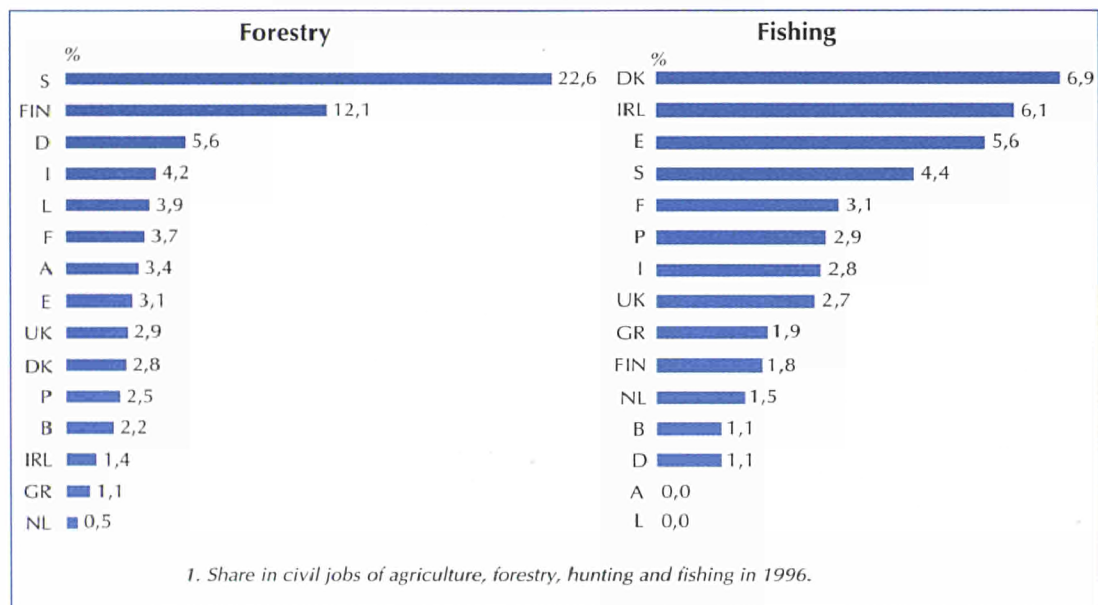
Belgium	104	71	14	23	97
Denmark	102	77	51	9	82
Germany	1 046	650	546	172	896
Greece	784	450	35	293	697
Spain	1 065	787	332	165	971
France	1 072	722	297	190	894
Ireland	146	128	28	10	138
Italy	1 332	873	497	164	1 179
Luxembourg	4	3	1	1	4
Netherlands	247	188	95	20	177
Austria	269	134	36	78	218
Portugal	541	274	89	35	399
Finland	161	105	31	22	133
Sweden	130	97	40	13	96
United Kingdom	511	375	231	28	416
<b>Europe of the 15</b>	<b>7 514</b>	<b>4 934</b>	<b>2 324</b>	<b>1 222</b>	<b>6 397</b>

Source : Eurostat - Labour Force Survey 1996



## EMPLOYMENT IN AGRICULTURE, FORESTRY, HUNTING AND FISHING

### Scale of forestry and fishing<sup>1</sup>



### Civil jobs in agriculture, forestry, hunting and fishing

	1983	1987	1991	1996
	thousands			
Belgium	115	109	101	104
Denmark	177	150	149	102
Germany <sup>1</sup>	1 490	1 242	1 554	1 046
Greece	1 060	971	807	784
Spain	///	1 723	1 376	1 065
France	1 790	1 591	1 333	1 072
Ireland	196	170	158	146
Italy	2 466	2 160	1 825	1 332
Luxembourg	7	5	6	4
Netherlands	273	297	279	247
Austria	///	///	///	269
Portugal	///	967	842	541
Finland	///	///	///	161
Sweden	///	179 <sup>2</sup>	143	130
United Kingdom	587	583	593	511
<b>EU-12</b>	<b>///</b>	<b>9 967</b>	<b>9 021</b>	<b>6 543</b>
<b>EU-15</b>	<b>///</b>	<b>///</b>	<b>///</b>	<b>7 514</b>

1. Ex-FRG in 1983 and 1987.  
2. 1986 data.

Source : Eurostat - Labour Force Survey 1996





## TYPES OF LABOUR IN AGRICULTURE

The drop in the number of farms went hand in glove, between 1990 and 1995, with an especially noticeable reduction in the numbers of regular agricultural workers in Germany, Portugal, France and Luxembourg. These numbers are holding up much better in the Netherlands and Greece, and are even on the rise in Denmark.

In the Union, farmers provide almost half the labour, measured in AWUs (annual work units) and family help accounts for a further 30%. Wage-earners are always in the minority, but they represent more than one-third of the total work force in Denmark and the United Kingdom. They are nevertheless marginal in Finland, accounting for just 3% of the total work done.

More than half the work done by wage-earners is provided by permanent labour. But seasonal work predominates in Spain, Italy and, above all, in Greece, where it accounts for 90% of wage-earning AWUs.

### Definitions

**Regular agricultural worker:** someone who has worked every week over the past twelve months prior to the survey. He either belongs to the family labour category (farmer, family help), or does not (permanent wage-earner). The seasonal wage-earner works on an irregular basis.

**Farmer:** a person, physically or legally defined, on whose account the farm is worked. In most cases, the farmer is the same as the farm owner, who sees to the day-to-day running of the farm.

**Family help:** spouse or other member of the farmer's family, working on the farm.

**Annual work unit (AWU):** amount of agricultural work done by a person employed full-time over the year.

**Full-time:** the time defined in national work contracts, but at least 1800 hours per annum. This amount varies from country to country. For example, 1800 hours in Ireland, 2200 in France and Greece.

### Agricultural workers in 1995

Farmers		Family helpers		P. salaried employees		Seasonal salaried workers	Total AWU	
Persons	AWU	Persons	AWU	Persons	AWU			
thousands								
	69.5	50.8	43.2	19.4	9.4	7.2	1.3	78.7
	68.4	47.5	34.9	19.1	37.8	33.9	4.5	105.0
	561.4	312.0	585.7	222.5	178.1	162.2	14.3	711.0
	773.7	316.1	730.1	220.9	8.9	7.5	71.6	616.1
1	241.4	499.4	1 143.4	301.3	158.3	124.2	163.3	1 088.2
	718.4	485.8	618.9	314.7	170.1	137.2	77.7	1 015.4
	152.9	128.5	124.9	73.1	15.5	10.4	9.9	221.9
2	470.6	893.0	2 225.0	666.7	77.6	54.4	203.9	1 818.0
	3.1	2.4	3.5	2.2	0.6	0.6	0.1	5.3
	109.8	88.3	103.0	63.8	63.4	49.9	8.0	210.0
	217.1	118.9	308.6	52.1	21.6	14.1	2.3	187.4
	445.2	238.0	665.8	250.8	61.8	47.9	46.9	583.6
	100.8	70.0	192.7	111.6	2.7	1.8	3.2	186.6
	83.4	46.7	51.6	18.4	29.3	18.4	4.2	87.7
	226.0	143.5	197.4	105.4	149.4	111.8	19.9	380.6
	7 241.7	3 441.0	7 028.6	2 441.7	984.4	784.0	628.6	7 295.3

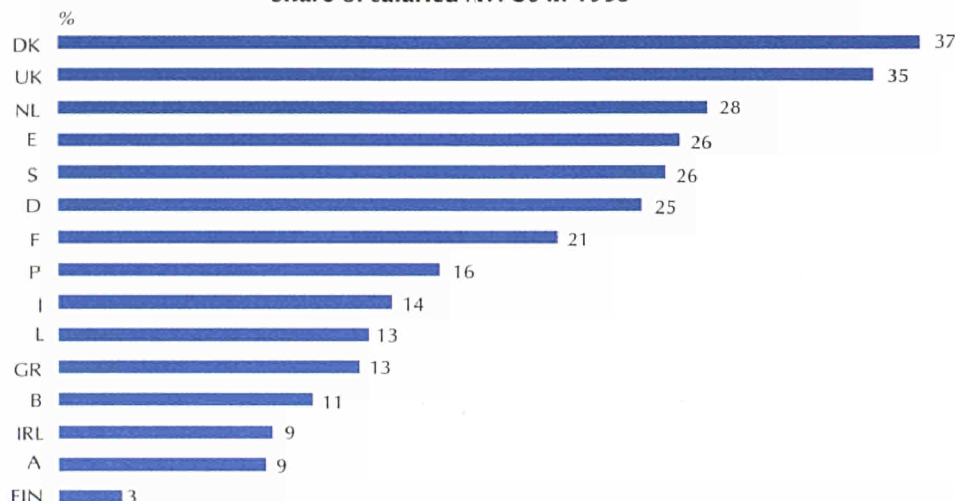
Source : Eurostat - Survey on the structure of agricultural Holdings 1995



## TYPES OF LABOUR IN AGRICULTURE

**Salaried employees provide more than 35 % of farm labour in Denmark**

**Share of salaried AWUs in 1995<sup>1</sup>**



1. AWU of permanent and seasonal salaried employees in all the AWUs.

Source : Eurostat - Survey on the structure of agricultural Holdings 1995

## Regular farm workers

1983	1989-1990	1995	Average annual rate of change	
			1983-1990	1990-1995
thousands			%	

Belgium	163.9	141.0	122.0	- 2.1	- 2.9
Denmark	185.7	139.1	141.1	- 4.7	0.2
Germany	1 783.6	1 775.9	1 325.2	- 0.1	- 4.8
Greece	2 079.3	1 543.5	1 512.7	- 4.8	- 0.3
Spain	3 179.8	2 838.7	2 540.2	- 1.9	- 1.8
France	2 405.7	1 859.0	1 507.4	- 3.6	- 4.1
Ireland	418.9	312.7	299.3	- 3.6	- 1.1
Italy	5 300.8	5 287.4	4 773.2	- ε	- 2.0
Luxembourg	10.7	9.3	7.3	- 2.3	- 4.0
Netherlands	304.6	289.2	276.2	- 0.7	- 0.9
Austria	///	///	547.3	///	///
Portugal	///	1 561.0	1 172.8	///	- 4.7
Finland	///	///	296.2	///	///
Sweden	///	///	164.2	///	///
United Kingdom	712.9	659.1	572.9	- 1.1	- 2.8
EU-12	///	16 415.9	14 250.1	///	- 2.3
EU-15	///	///	15 257.7	///	///

Source : Eurostat - Surveys on the structure of agricultural Holdings





## EMPLOYMENT AND AGE IN AGRICULTURE

Only 8 % of European farmers, are under 35 years old, and 28 % are over 65. This elderly structure is particularly marked in the South. One-third of farmers in Italy, Portugal, Greece and Spain are over 65 years old. Almost one-quarter are that same age group in the United Kingdom. Younger farmers tend to be found in the North : less than 10 % of farmers are over 65 in Finland, Germany and Austria. Farmers in Belgium, Luxembourg and France are also likely to be younger : more than 10 % of their farmers are under 35 years old and less than 20 % are over 65. In every country there are sharp regional variations: only 6 % of Spanish farmers are under 35, but more than 9 % in Aragon. Similarly, 18 % of German farmers are under 35, but this pro-

portion is only 7 % in the three city-States, as opposed to 20 % in the new Länder.

In all countries the average age of farmers has continued to increase over the past decade or so, to do both with the drop in the proportion of younger ones and the rise in the number of older ones. Despite relatively younger farmers in the three newest member states, the general EU trend towards older farmers continues.

### Definition

**Farmer** : a person, physically or legally defined, on whose account the farm is worked. In most cases, the farmer is the same as the farm owner, who sees to the day-to-day running of the farm.

Farmers' ages in 1995

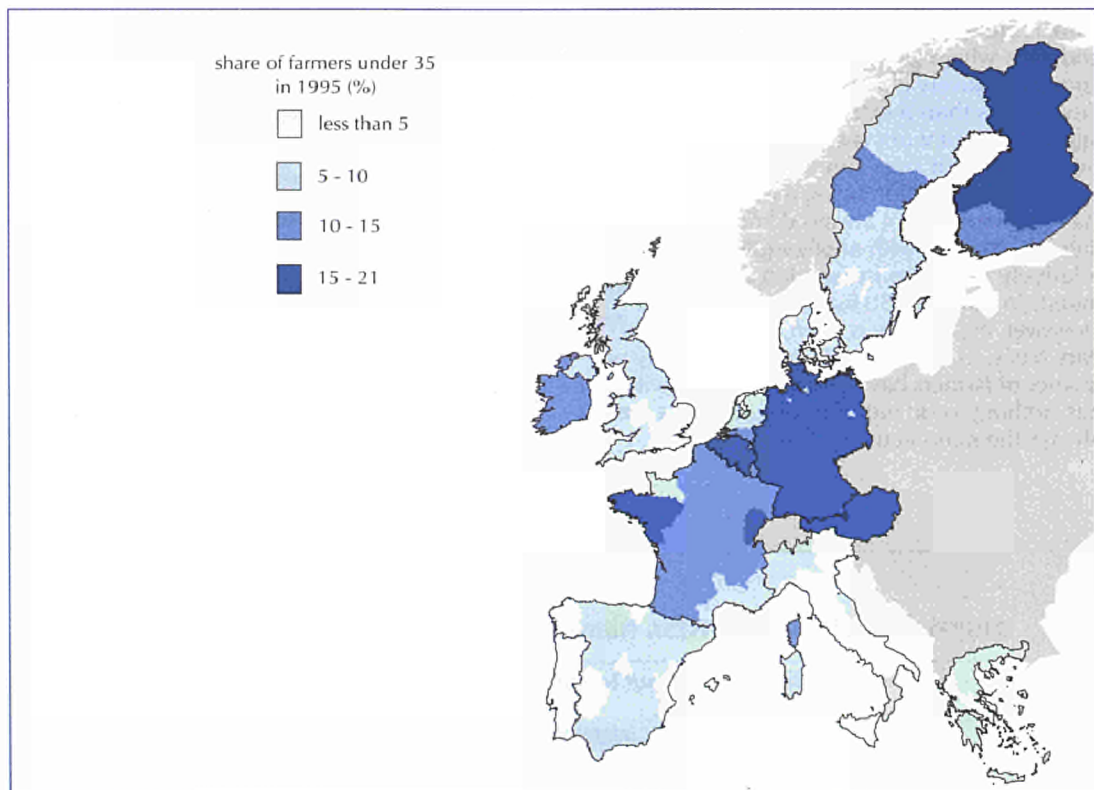
	Under 35	35-44	45-54	55-64	65 and over	Overall
thousands						
Belgium	10.9	14.2	14.8	17.8	11.8	69.5
Denmark	6.6	13.6	16.3	16.2	15.7	68.4
Germany	98.2	142.4	126.2	152.8	41.8	561.4
Greece	47.5	111.4	156.6	219.0	239.2	773.7
Spain	76.6	159.1	266.9	367.5	371.3	1 241.4
France	92.3	163.9	177.6	174.4	110.2	718.4
Ireland	20.9	30.0	34.5	35.0	32.5	152.9
Italy	110.2	256.4	490.7	701.0	912.3	2 470.6
Luxembourg	0.4	0.8	0.7	0.6	0.6	3.1
Netherlands	10.3	21.6	28.6	30.3	19.0	109.8
Austria	39.7	56.6	53.0	46.9	20.9	217.1
Portugal	18.5	51.9	88.3	129.5	157.0	445.2
Finland	16.1	27.0	32.6	18.0	7.1	100.8
Sweden	7.5	17.1	22.9	17.9	18.0	83.4
United Kingdom	13.7	37.4	59.6	59.2	56.1	226.0
<b>EU-15</b>	<b>569.4</b>	<b>1 103.0</b>	<b>1 569.5</b>	<b>1 986.3</b>	<b>2 013.5</b>	<b>7 241.7</b>

Source : Eurostat - Survey on the structure of agricultural Holdings 1995



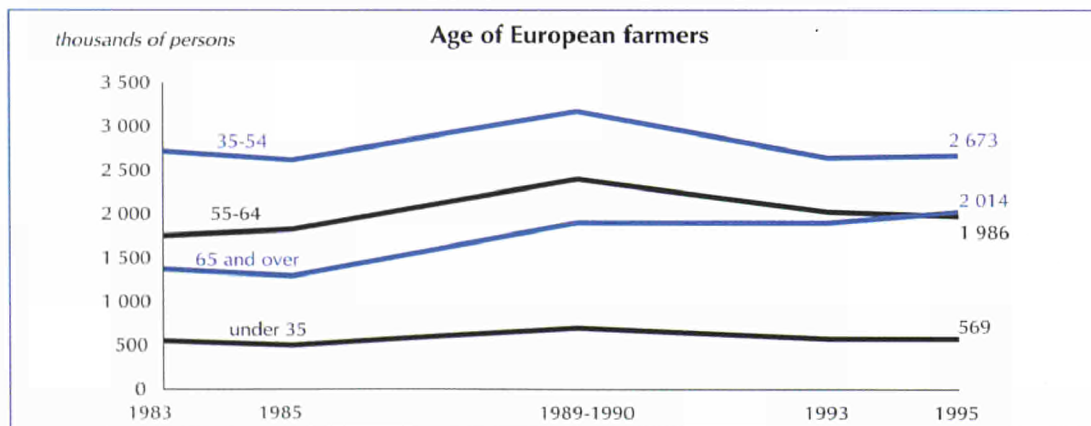
## EMPLOYMENT AND AGE IN AGRICULTURE

### Germany, Austria and Finland have the youngest farm owners



Source : Eurostat - Survey on the structure of agricultural Holdings 1995

### The farming population is growing older



Source : Eurostat - Surveys on the structure of agricultural Holdings



## WORK TIME AND MULTIPLE ACTIVITIES IN AGRICULTURE

One European farmer out of every four works on a full-time basis. Most farmers are full-time in Benelux and Ireland. In contrast, full-time farmers are in a marked minority in Greece, Spain and Italy, where land areas are usually small and farmers relatively elderly. More than half of them devote less than a quarter of their time to their farm. Part-time work is also the rule in Portugal, but carried out over longer periods of time, a significant proportion being more than half-time. Part-time work is not always combined with another job. Farmers with another gainful activity are relatively common in Sweden (53 % of all farmers), in Finland (50 %) and Germany (44 %). However, this activity is often carried on a secondary basis. In Italy, Greece and Spain, only one-quarter of farmers have an additional activity that has nothing to do with farming, but it is almost always the main activity.

### Definitions

**Farmer:** a person, physically or legally defined, on whose account the farm is worked. In most cases, the farmer is the same as the farm owner, who sees to the day-to-day running of the farm.

**Full-time:** the time defined in national work contracts, but at least 1800 hours per annum. This amount varies from country to country. For example, 1800 hours in Ireland, 2200 in France and Greece.

**Other gainful activity:** a non-agricultural activity carried on on a remunerative basis, or for a wage, fee or other income, including payment in kind. The farmer himself declares whether he regards this activity as principal or secondary, without reference to any concept of time or income. Normally speaking, the other gainful activity carried on as a main job takes up more time than the work involved by farm labour.

### Farmers' activities in 1995

Full time	Part time			with another gainful activity	Overall
	Total	including less than 1/4 time	including 1/4 to 1/2 time		
thousands					
41.7	27.8	14.0	7.6	10.4	69.5
33.8	34.6	11.3	10.5	21.5	68.4
216.7	344.7	182.5	115.6	247.0	561.4
95.5	678.2	345.2	167.2	196.0	773.7
259.2	982.2	574.4	148.4	294.2	1 241.4
354.2	364.2	171.2	87.5	176.8	718.4
103.8	49.1	10.3	14.0	50.0	152.9
345.8	2 124.8	1 444.4	381.2	608.4	2 470.6
1.7	1.4	0.2	0.4	0.5	3.1
69.1	40.7	10.7	10.3	25.1	109.8
60.3	156.8	67.3	35.1	80.7	217.1
80.0	365.2	129.0	96.2	143.1	445.2
50.0	50.8	22.0	11.4	50.4	100.8
26.8	56.6	27.0	14.3	44.1	83.4
105.9	120.1	57.9	23.8	56.0	226.0
1 844.5	5 397.2	3 067.4	1 123.6	2 004.2	7 241.7

Source : Eurostat - Survey on the structure of agricultural Holdings 1995

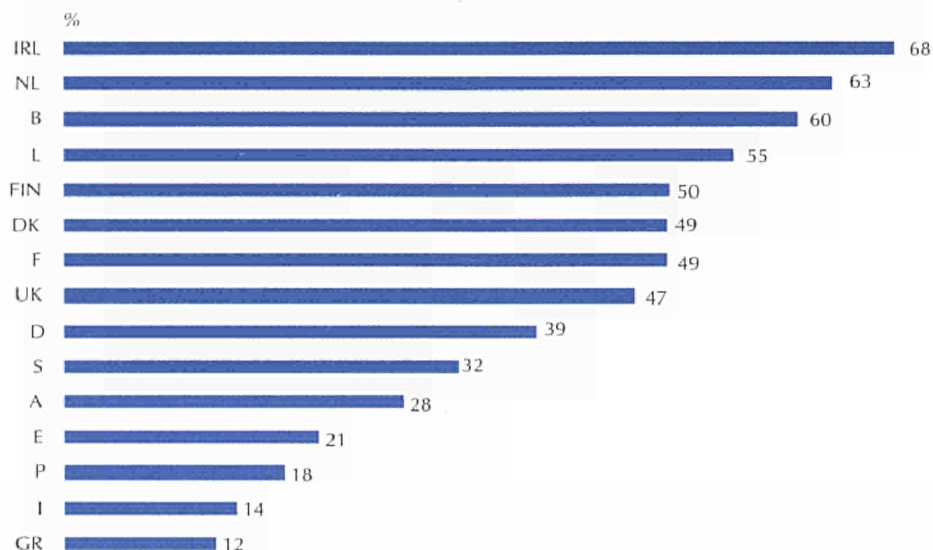




## WORK TIME AND MULTIPLE ACTIVITIES IN AGRICULTURE

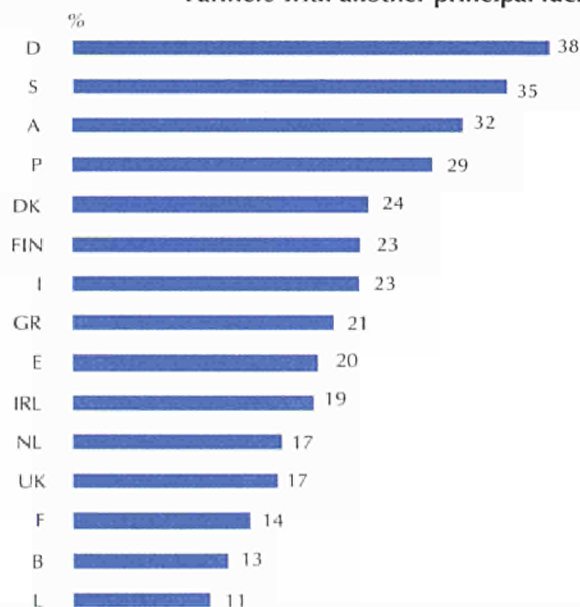
### Full-time farm work is the rule in Benelux and Ireland

Full-time farmers in 1995



### 38 % of German farmers have a main activity outside of farming

Farmers with another principal lucrative activity in 1995



Source : Eurostat - Survey on the structure of agricultural Holdings 1995





## EMPLOYMENT IN THE FARMING AND FOOD INDUSTRIES

In the Union, salaried workers in the food processing industry, including tobacco, represent on average 11.5% of manufacturing employment. This proportion varies amongst Member States from 10 % to 20 %. At one extreme are Ireland and Greece where 22 % and 21 % respectively of total employment in manufacturing are in the farming and food industries. At the other extreme are Sweden, Germany and Italy, where it only represents 8-10% of manufacturing jobs.

Taken as a whole, sectors as different as industrial baking, the sugar industry, chocolate, and confectionery, all grouped together under the

heading « other food processing industries » form the number one food industry employer in most of the EU countries. They are ahead of the meat sector and the beverages sector, made up, among other things, of alcoholic drinks, brewing, wine-making, mineral water and sodas. In Denmark and France, however, the meat industry is the number one food industry employer.

Nevertheless, food industry employment has been dropping in the Fifteen since 1990, but less rapidly than manufacturing employment. The FPIs are in fact always in need of plenty of labour, despite the development of certain production processes.

### Distribution of salaried jobs in the food processing industry by sector in 1995

	Total industry	Total FPI <sup>2</sup>	Meat	Fish	Fruit and vegetab.	Fatty substances	Milk and dairy products	Seeds and starch products	Animal feed	Other FPIs-	Beverages	Tobacco
	thousands											

Belgium	647	91.6	14.9	1.3	5.4	1.9	7.1	2.4	4.4	40.3	11.2	2.8
Denmark	354	67.0	22.3	6.7	1.5	...	10.2	...	1.4	16.1	...	...
Germany	6 816	559.4	103.7	11.9	25.3	10.8	50.7	10.2	11.8	235.2	85.0	14.7
Greece	219	48.2	3.9	0.9	8.0	1.6	6.7	1.8	1.0	13.4	7.9	2.9
Spain	2 074	344.6	55.4	17.6	30.3	10.9	25.8	7.7	11.6	129.4	46.6	9.3
France	3 190	361.5	110.0	10.9	20.6	4.0	59.0	10.9	16.1	90.9	39.2	...
Ireland	220	46.9	12.7	2.7	1.6	...	10.5	...	1.8	...	4.9	1.0
Italy	2 780	219.4	36.3	4.7	20.4	3.5	38.8	5.9	7.5	61.4	26.2	14.8
Luxembourg	34	3.8	0.4	...	...	...	...	...	...	1.9	1.0	...
Netherlands	...	...	...	...	...	...	...	...	...	...	...	...
Austria	534	60.0	11.8	...	2.9	...	6.4	1.3	...	23.1	10.4	...
Portugal	...	...	...	...	...	...	...	...	...	...	...	...
Finlande	386	45.3	10.9	0.5	1.9	0.8	6.6	1.0	1.5	17.2	4.1	0.9
Sweden	599	58.3	16.2	1.5	3.7	...	9.4	0.9	...	17.2	6.6	...
U. Kingdom	3 571	485.5	109.9	19.5	42.6	2.8	38.9	12.2	17.7	180.3	53.5	8.1

1. Companies with 20 employees or more.

2. Including the tobacco industry.

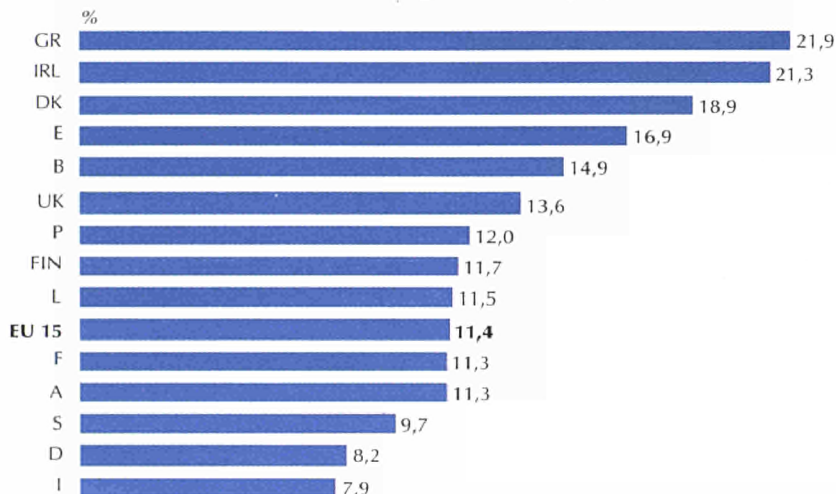
Source : Eurostat - Newcronos



## EMPLOYMENT IN THE FARMING AND FOOD INDUSTRIES

### Food processing jobs are a major item in Greece and Ireland

Share of FPIs in manufacturing salaried employment in 1995



1. Including the tobacco industry  
2. Companies with 20 employees or more

Source : Eurostat - Newcronos

### Development of employment<sup>1</sup> in the FPIs<sup>2</sup>

	1986	1990	1993	1994	1995 <sup>3</sup>	1996 <sup>3</sup>
	thousands					

Belgium	65.9	67.9	64.5	63.1	68.2	69.9
Denmark	72.3	65.7	66.4	65.7	68.5	...
Germany	544.2	593.3	588.5	574.4	561.1	554.6
Greece	48.9	49.8	48.9	49.3	48.7	...
Spain	362.7	384.4	379.5	378.3	374.4	388.0
France	374.0	364.1	360.8	362.8	359.6	357.3
Ireland	49.1	45.1	46.2	46.7	47.9	49.1
Italy	243.2	241.0	233.4	226.9	221.2	215.1
Luxembourg	...	...	2.8	...	...	...
Netherlands	109.6	122.5	124.2	121.6	116.5	113.2
Austria	66.2	64.4	62.4	61.0	57.9	57.0
Portugal	118.1	124.1	111.3	117.7	107.4	102.3
Finland	57.7	53.9	43.9	41.6	40.6	...
Sweden	...	66.2	60.1	58.1	57.9	57.4
United Kingdom	538.2	552.6	521.4	508.0	513.9	506.3
<b>Europe of the 15</b>	<b>2 722.1</b>	<b>2 802.6</b>	<b>2 718.3</b>	<b>2 678.3</b>	<b>2 647.4</b>	<b>2 632.0</b>

1. Salaried and non-salaried employees. For methodological reasons, the figures cannot be compared with those on the previous page.

2. Includes tobacco

3. Data estimated.

Source : Eurostat - Yearbook 1997



## FARMS

In 1995, the European Union had 7.3 million farms. Of these, 80 % were located in just five countries : 34 % in Italy, 17 % in Spain, 10 % in Greece and France, and 8 % in Germany. Although the other ten Member States accounted for a relatively low number of farms, this does not affect the importance of what they produce. The drop in the number of farms has been widespread in all EU countries. But it is less rapid in some countries than in others, and changed in pace over time. For most of the Member States, this pace gathered speed in the 1980s. Between 1980 and 1995, the number of farms decreased particularly fast in Denmark, France, and Portugal, with a loss of more than 40 %. Conversely, the decline was relatively slight in

the United Kingdom, and in Italy, even though their agricultural structures are very different : for the former, large farms, for the latter, lots of very small units.

### Definition

**Farm :** a technical and economic unit with single management, producing agricultural products. To be so defined, a farm must have a sufficiently large physical and economic dimension: one hectare of farming land in use, or, failing this, a minimum production for sale. However, discrepancies emerge between Member States, regarding the application of the area threshold and the interpretation of a physical and economic minimum. For example, ten ares for Greece, and five hectares for Denmark.

Number of farms

	1970-1971	1975	1979-1980	1985	1989-1990	1995
	thousands					
Belgium	184.0	138.1	115.1	97.8	85.0	71.0
Denmark	146.0	132.3	122.7	92.4	81.3	68.8
Germany	1 074.6	907.9	849.9	740.5	653.6	566.9
Greece	1 046.3	...	998.9	951.6	850.1	773.8
Spain	...	...	...	...	1 593.6	1 277.6
France	1 587.6	1 315.1	1 255.3	1 056.9	923.6	734.8
Ireland	...	228.0	223.5	220.2	170.6	153.4
Italy	2 849.9	2 664.2	2 832.4 <sup>1</sup>	2 801.1	2 664.6	2 482.1
Luxembourg	7.6	6.2	5.2	4.4	4.0	3.2
Netherlands	184.6	162.6	148.7	135.9	124.8	113.2
Austria	...	...	...	...	...	221.8
Portugal	...	...	769.4	...	598.7	450.6
Finland	...	...	...	...	...	101.0
Sweden	...	...	...	...	...	88.8
United Kingdom	326.7	280.6	268.6	258.5	243.1	234.6
<b>EU-12</b>	...	...	...	...	<b>7 992.9</b>	<b>6 930.0</b>
<b>EU-15</b>	...	...	...	...	...	<b>7 341.5</b>

1. 1982 data.

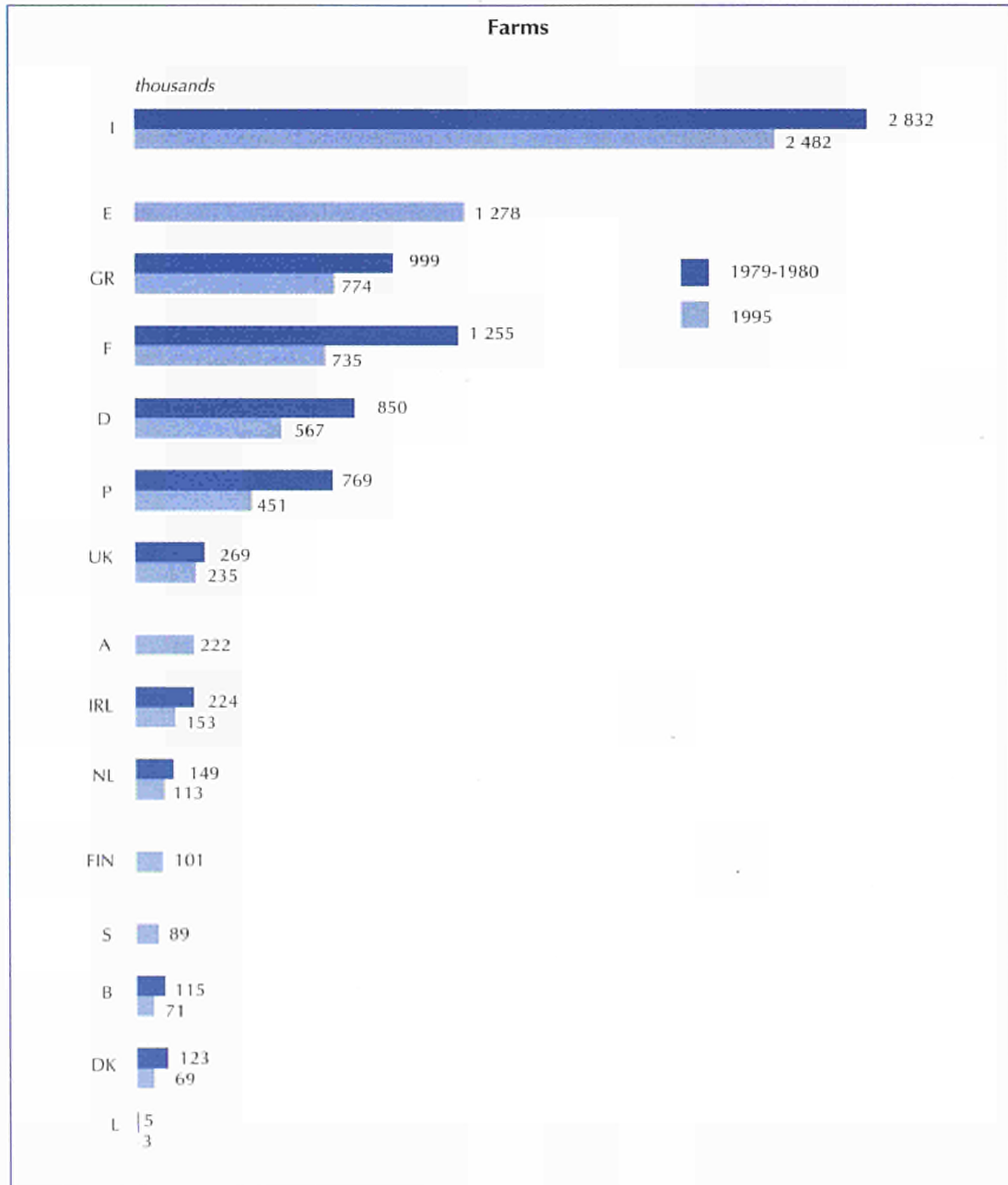
Source : Eurostat - Surveys on the structure of agricultural Holdings





## FARMS

## The number of farms is declining throughout the European Union



Source : Eurostat - Surveys on the structure of agricultural Holdings



## AVERAGE SIZE OF FARMS

In 1995, the average size of farm ranged from 70 hectares in the United Kingdom to less than five hectares in Greece. Average sizes also tended to be larger (above 40 ha) in Denmark, France and Luxembourg. The smallest, of less than 10 hectares, are in Portugal, Italy and Greece.

In some countries, regional contrasts are very marked. For examples in Portugal the average area varies from 0.4 hectares in Madeira, to 50 hectares in the Alentejo, in southern Portugal. In Germany, the difference ranges from 16 hectares in Baden-Württemberg to 270 hectares in Mecklenburg.

In all countries, average farm areas have increased to differing degrees and at different rates of change. In eight years, the average area of Spanish farms has risen by more than 40%, with the rapid disappearance of many small units. Growth has been just as marked in France and

Portugal, even if three-quarters of Portuguese units have less than five hectares. Conversely, the average rate of increase in area is still low in Greece, Italy and the United Kingdom, although the small structures in the first two countries contrast with the very large structures of the third. These different rates of development mean that discrepancies exist between Member States, even if they are becoming less pronounced. At the extremes the size of farms in Epirus, Liguria and Campania is still under 3 hectares, whereas it exceeds 100 hectares in Scotland and in the new German Länder.

### Definition

**Utilised agricultural area (UAA):** all the area of arable land, permanent meadow and pasture, and land devoted to permanent crops and kitchen gardens.

**Average farmland area on farms**

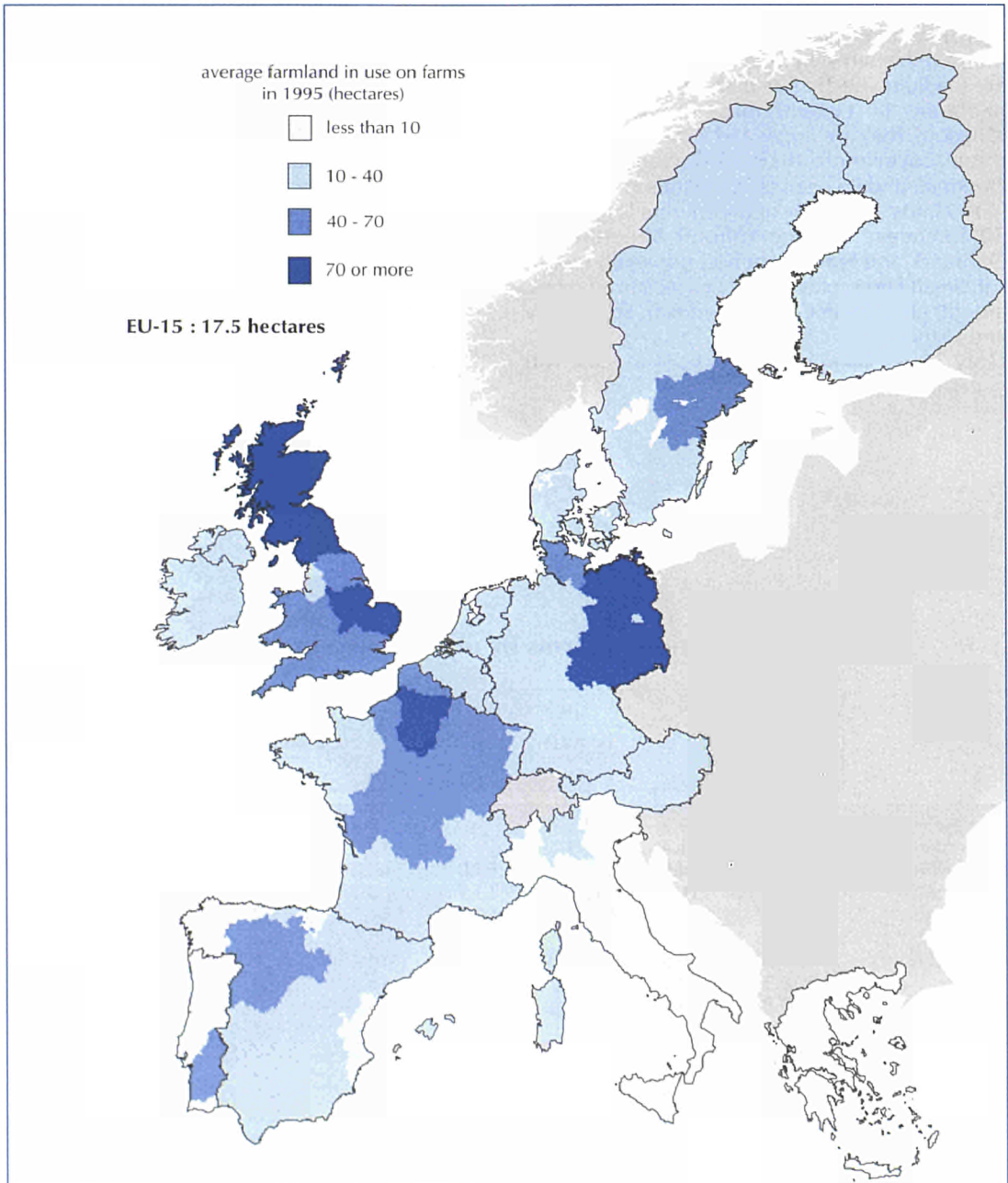
	1970-1971	1975	1979-1980	1985	1989-1990	1995
	hectares					
Belgium	8.4	10.6	12.3	14.1	15.8	18.8
Denmark	20.3	22.4	23.8	30.7	34.2	39.6
Ex-FRG	11.8	13.7	14.4	16.0	18.6	21.7
Germany	///	///	///	///	26.1	30.3
Greece	3.4	...	3.6	4.3	4.3	4.5
Spain	...	...	...	13.8 <sup>1</sup>	15.4	19.7
France	18.9	22.4	23.3	27.0	30.5	38.5
Ireland	...	22.3	22.6	22.7	26.0	28.2
Italy	6.0	6.2	5.6	5.6	5.6	5.9
Luxembourg	17.8	21.9	25.2	28.6	32.1	39.7
Netherlands	11.6	12.8	13.7	14.9	16.1	17.7
Austria	...	...	...	...	...	15.4
Portugal	...	...	4.3	5.2 <sup>1</sup>	6.7	8.7
Finland	...	...	...	...	...	21.7
Sweden	...	...	...	...	...	34.4
United Kingdom	54.2	58.7	63.7	65.1	67.9	70.1
<b>EU-12</b>	...	...	...	<b>13.3<sup>1</sup></b>	<b>15.0</b>	<b>17.2</b>
<b>EU-15</b>	...	...	...	...	...	<b>17.5</b>

1. 1987 data.

Source : Eurostat - Surveys on the structure of agricultural Holdings

## AVERAGE SIZE OF FARMS

**More than 100 hectares on average in Scotland and the new German Länder**



Source : Eurostat - Survey on the structure of agricultural Holdings 1995





## DISTRIBUTION OF FARMS BY SIZE

Most farms in the EU are small, less than five hectares, but huge differences exist among the Member States. In Greece, Italy and Portugal, more than three farms out of every four have less than five hectares. In Ireland and Finland, farms are medium-sized: more than a third have 20-50 hectares. In Luxembourg and the United Kingdom, they are larger and in two cases out of three, cover more than 50 hectares. France, Denmark and Sweden tend towards larger sizes, with almost a quarter of their farms larger than 50 hectares. The agricultural structures of Denmark and France are not, however, identical. Small farms, often growing specialized crops, are still plentiful in Greece, Portugal, Spain, Italy and France.

Only 3 % of European farms have at least 100

hectares, but 10 % of these are in France and 17 % in the United Kingdom. There are also noticeable regional differences within the same country. Thus, in France, 2 % of farms in Brittany have more than 100 hectares, as opposed to 38 % in the Ile-de-France. In Spain, such farms represent 0.2 % in the Canaries and 9 % in Castile-Leon. In Germany, 1 % of farmers in Baden-Württemberg farm at least 100 hectares, as opposed to 39 % in Mecklenburg.

### Definition

**Utilised agricultural area (UAA):** all the area of arable land, permanent meadow and pasture, and land devoted to permanent crops and kitchen gardens.

## Distribution of farms by utilised area in 1995

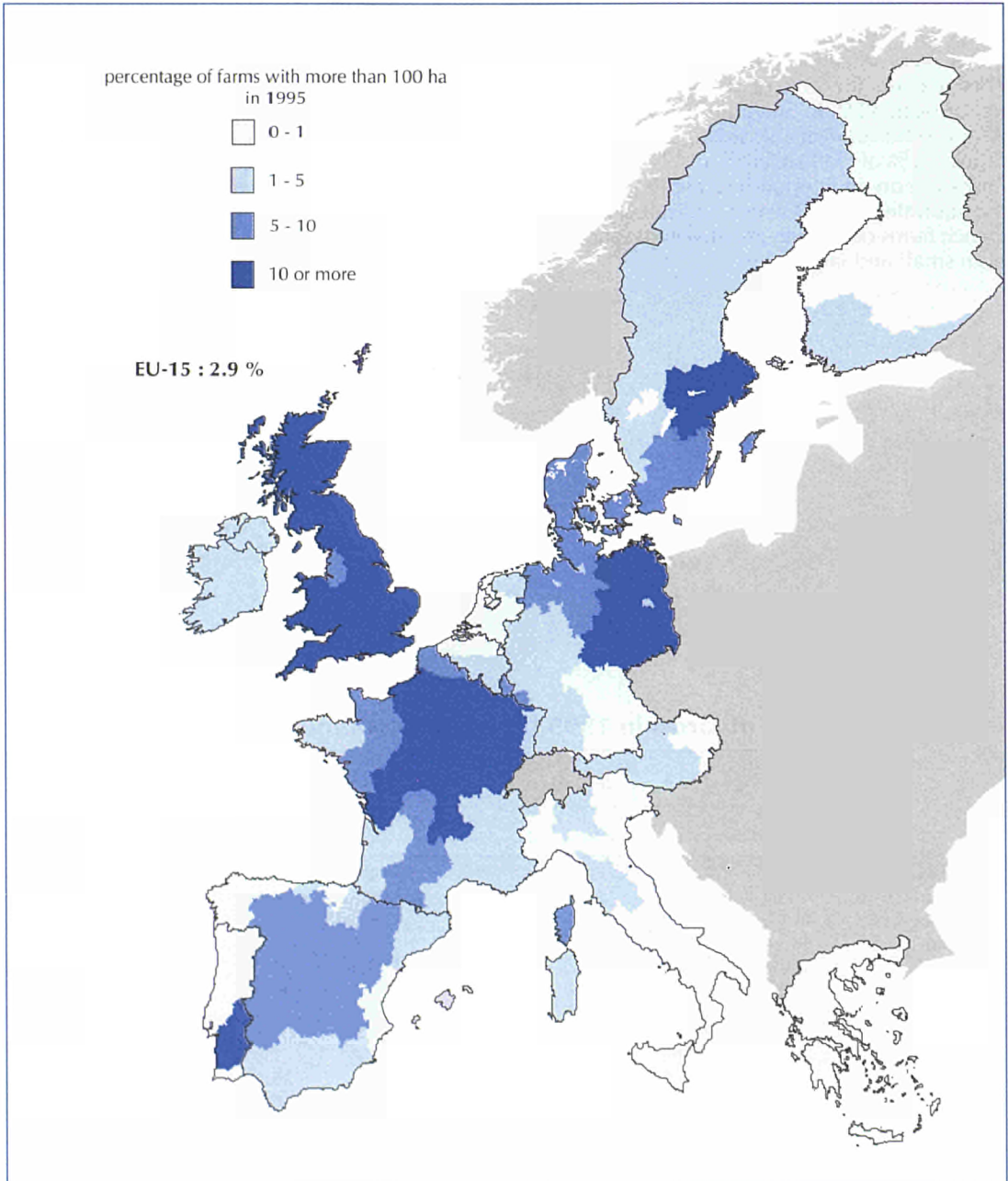
	Utilised agricultural area in hectares							Total
	Under 5	5 à 10	10 à 20	20 à 30	30 à 50	50 à 100	100 or more	
	thousand farms							
Belgium	23.7	10.2	12.7	9.0	9.4	5.0	0.8	71.0
Denmark	2.1	11.4	14.9	10.4	12.9	12.1	5.0	68.8
Germany	179.2	84.0	100.0	64.0	68.3	51.6	19.9	566.9
Greece	580.9	116.2	52.4	13.1	8.1	2.6	0.7	773.8
Spain	706.4	211.6	147.2	60.5	54.7	51.7	45.4	1 277.6
France	200.9	69.6	88.6	68.3	109.0	128.2	70.3	734.8
Ireland	14.8	20.5	40.6	29.1	28.1	16.1	4.1	153.4
Italy	1 938.3	258.1	140.2	58.8	46.5	26.9	13.4	2 482.1
Luxembourg	0.8	0.3	0.3	0.2	0.5	1.0	0.2	3.2
Netherlands	37.4	18.1	20.8	15.0	14.8	6.2	0.9	113.2
Austria	87.3	41.7	49.0	21.5	14.2	5.2	2.8	221.8
Portugal	345.6	51.9	28.3	8.6	6.5	4.4	5.4	450.6
Finland	10.6	17.9	30.3	19.1	16.2	6.0	0.8	101.0
Sweden	11.0	15.5	19.0	11.4	13.3	13.0	5.6	88.8
United Kingdom	32.3	29.5	36.1	23.8	32.7	40.9	39.3	234.6
<b>EU-15</b>	<b>4 171.3</b>	<b>956.5</b>	<b>780.3</b>	<b>412.7</b>	<b>435.1</b>	<b>370.8</b>	<b>214.7</b>	<b>7 341.5</b>

Source : Eurostat - Survey on the structure of agricultural Holdings 1995



## DISTRIBUTION OF FARMS BY SIZE

**Farms with more than 100 hectares are rare in the south and the far north**



Source : Eurostat - Survey on the structure of agricultural Holdings 1995



## ECONOMIC SCALE OF FARMS

More than one third of EU farms are very small, in economic terms, with less than three wheat-equivalent hectares. This mean figure comprises very marked differences between Member States. Very small farms tend to be in the South. They account for 53 % of all farms in Italy, 48 % in Portugal, 41 % in Spain and 34 % in Greece. At the other end of the scale, 27 % of Dutch farms, 15 % of Danish farms and 11 % of British farms are on an economic scale that is at least the equivalent of 150 wheat-equivalent hectares. French farms occupy an in-between position with both small and large farms.

### Definitions

**European size unit (ESU):** the economic scale of farms is expressed in european size unit (ESU), and defined on the basis of the farm's total standard gross profit.

**Standard gross margin (SGM):** appreciation and development of the different productions of the farm based on standard coefficients. This may be expressed in wheat-equivalent hectares, i.e. in the number of hectares yielding the same gross margin. One ESU roughly tallies with 1.5 wheat-equivalent hectares.

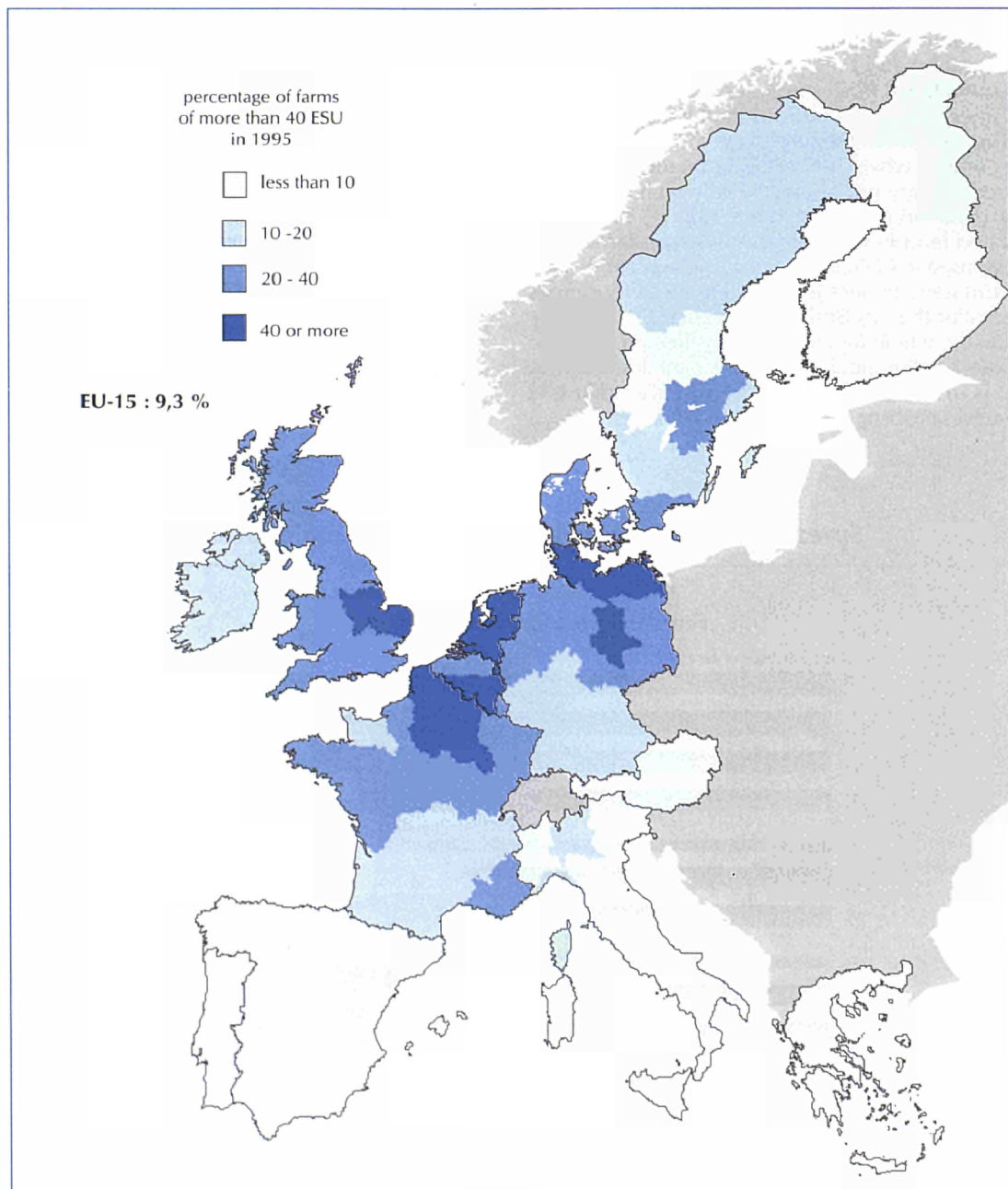
### Number of farms in 1995 based on economic size in ESU

	Less than 2	2 to 4	4 to 8	8 to 16	16 to 40	40 to 100	100 or more	Total
thousand farms								
Belgium	7.5	5.6	7.1	7.8	14.9	21.1	7.0	71.0
Denmark	0.3	4.2	11.0	12.0	14.6	16.6	10.1	68.8
Germany	117.6	68.2	68.3	74.6	124.8	92.2	21.2	566.9
Greece	262.8	157.2	171.3	124.2	51.8	5.9	0.6	773.8
Spain	520.0	234.1	204.7	161.1	114.3	34.0	9.4	1 277.6
France	137.1	63.6	66.4	89.7	188.1	149.0	40.7	734.8
Ireland	23.7	23.6	30.5	28.4	31.1	14.2	1.9	153.4
Italy	1 302.4	398.7	321.5	222.9	153.6	62.3	20.7	2 482.1
Luxembourg	0.4	0.3	0.3	0.3	0.7	1.0	0.1	3.2
Netherlands	0.2	1.9	11.0	13.7	19.7	36.1	30.6	113.2
Austria	61.9	31.9	37.1	41.1	41.1	8.3	0.4	221.8
Portugal	215.1	111.1	64.9	32.6	19.0	6.1	1.9	450.6
Finland	15.1	14.1	16.5	22.1	26.6	5.5	1.0	101.0
Sweden	16.6	14.0	13.9	12.1	15.8	13.4	3.1	88.8
United Kingdom	44.0	21.9	28.0	28.6	40.9	44.2	26.8	234.6
<b>EU-15</b>	<b>2 724.6</b>	<b>1 150.5</b>	<b>1 052.5</b>	<b>871.3</b>	<b>857.1</b>	<b>510.1</b>	<b>175.3</b>	<b>7 341.5</b>

Source : Eurostat - Survey on the structure of agricultural Holdings 1995



## ECONOMIC SCALE OF FARMS

**Farms with more than 40 ESU are most common in the Benelux**

Source : Eurostat - Survey on the structure of agricultural Holdings 1995



## FARMING TENURE

The farmland used by EU farms exceeded 128 million hectares in 1995. Of this total, 80 % lies in just five countries: 22 % in France, 20 % in Spain, 13 % in Germany and the United Kingdom, and 11 % in Italy. The average size of Union farms ranges from less than 5 hectares in Greece to 70 hectares in the United Kingdom. The type of farm tenure in the EU also varies but countries where the rent of farmland is the most frequent are not always those which have large average areas. For example, only 35 % of cultivated land in Great Britain is tenant-farmed, as opposed to 67 % in Belgium. The average Belgian farm nevertheless has an area about four times smaller than its British counterpart. On the whole tenant farming is less prevalent in southern Europe, hallmarked by small structures. It is in Austria and Ireland, however, that it is rarest, affecting less than 20 % of farms.

Since 1985, the proportion of land used for tenant farming has risen in most countries, in correlation to the growth of average farm size (ha). It has risen by a factor of three in Ireland and in Germany rose substantially upon reunification. On the other hand, in Belgium, the United Kingdom and above all in the Netherlands, the proportion of land being tenant farmed declined between 1985 and 1995.

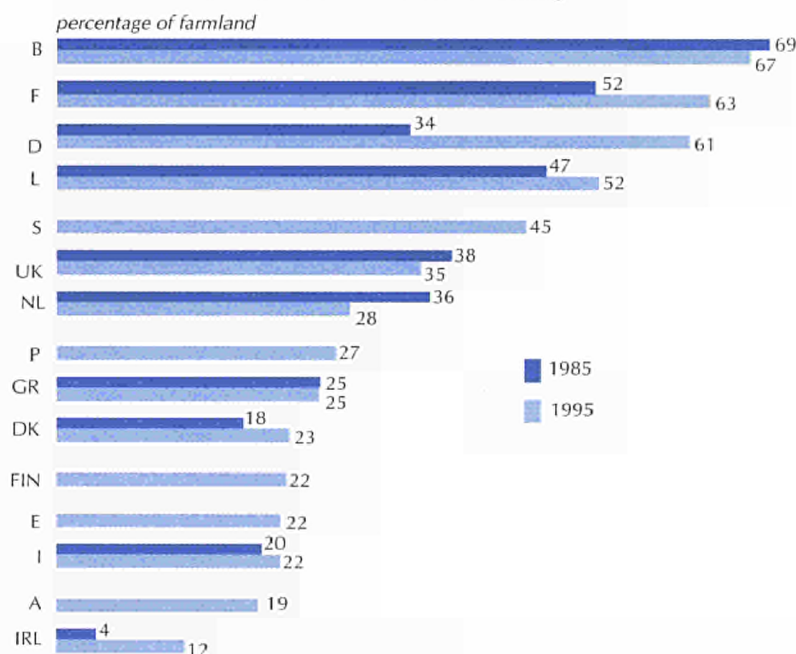
### Definitions

**Utilised agricultural area (UAA):** all the area of arable land, permanent meadow and pasture, land devoted to permanent crops and kitchen gardens.

**Area used for tenant farming:** land rented out by the farmer, for at least twelve months, for a fixed rent agreed in advance by way of a written or verbal contract.

## Spread of tenant farming with the enlargement of farms

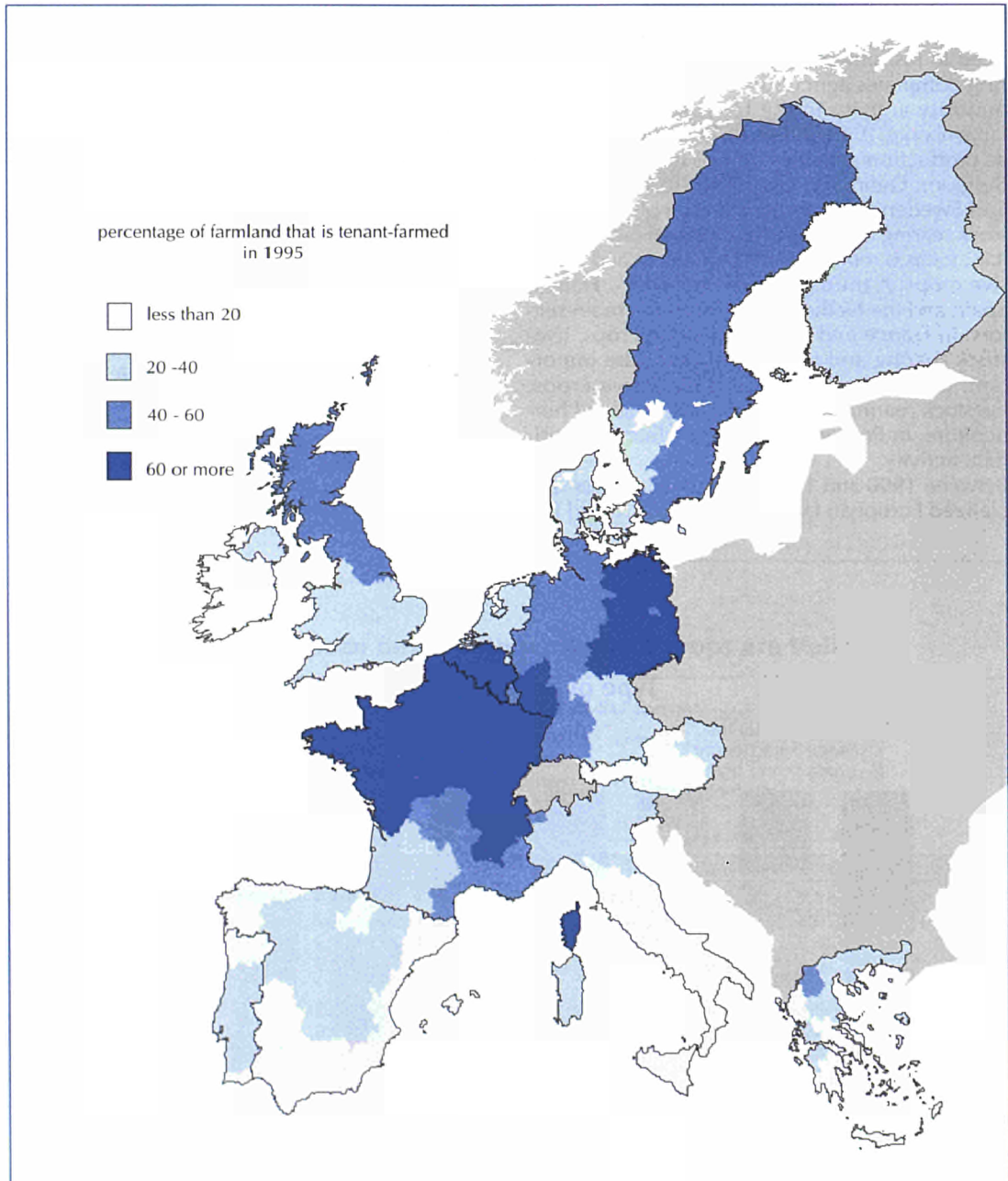
Farmland used for tenant farming



Sources : Eurostat - Surveys on the structure of agricultural Holdings

## FARMING TENURE

**Tenant farming is commonplace in Belgium, France and Germany**



Source : Eurostat - Survey on the structure of agricultural Holdings 1995





## TYPE OF FARMING

In 1995, three-quarters of EU farms were involved in the production of either : permanent crops, herbivorous livestock rearing, or extensive crops. Certain countries have specialized in just one of these sectors. Livestock rearing dominates agriculture in Ireland. It is also a majority activity in the United Kingdom and Luxembourg. A second group of countries focuses its production activities on two main sectors. In Belgium, Denmark, Germany, Austria, Finland and Sweden, most farmers are involved in livestock rearing and extensive crops. In Greece and Italy, focus is more towards permanent and extensive crops. A third group of countries – France, Spain and the Netherlands – has three main sectors. In France and Spain, extensive crops, livestock rearing and permanent crops are important. In the Netherlands, it is extensive crops, livestock rearing and market-gardening and horticulture. In Portugal, there is no clear predominant activity.

Between 1990 and 1995, the number of less specialized European farmers, practising mixed far-

ming, mixed livestock rearing, or a mixture of crops and livestock, fell sharply. The only grown in activity was the rearing of grain-eating animals. Six farms out of every ten are situated in either Spain, Italy, Germany, the United Kingdom, and France. The geographical concentration is even more marked for farms with extensive crops, permanent crops, mixed livestock rearing and mixed farming ; 45 % of European farms specializing in permanent crops and 42 % of those with extensive crops and mixed farming are found in Italy.

### Definitions

**Type of farming :** determined by the relative contribution of different animal and crop activities to the total standard gross margin of the farm. A small number of farms cannot be categorized.

**Standard gross margin (SGM) :** appreciation and development of the different productions of the farm based on standard coefficients. This may be expressed in wheat-equivalent hectares.

### Type of farming in 1995

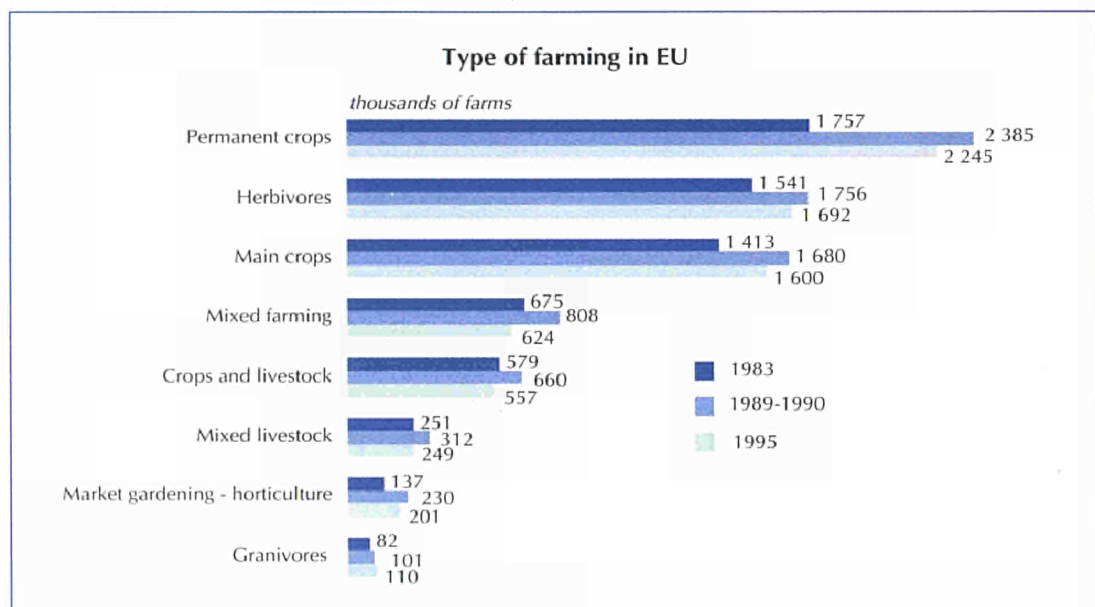
	Major crops	Market-gardening and horticulture	Permanent crops	Herbivore rearing	Grain-vore rearing	Mixed farming	Mixed livestock rearing	Crops and livestock rearing	Total
% of all holdings in each member state									thousands
Belgium	11.6	8.0	3.7	48.5	7.0	2.7	6.0	12.1	71.0
Denmark	43.7	2.3	1.1	21.8	6.8	3.4	3.3	17.6	68.8
Germany	20.5	2.0	8.0	40.7	2.3	4.2	6.0	16.3	566.9
Greece	26.2	2.1	47.6	6.7	0.4	9.3	1.8	6.0	773.8
Spain	16.8	4.6	42.2	17.4	1.4	7.9	3.6	5.1	1 277.6
France	19.1	2.8	15.6	39.0	1.5	5.7	5.5	10.7	734.8
Ireland	2.8	0.4	0.1	92.9	0.4	0.1	0.3	2.7	153.4
Italy	26.8	1.8	41.0	11.6	0.6	10.6	1.5	4.9	2 482.1
Luxembourg	5.7	0.9	18.2	55.7	1.3	0.9	4.7	11.3	3.2
Netherlands	13.1	14.0	5.1	48.3	9.0	2.2	4.0	4.2	113.2
Austria	15.5	0.6	11.2	44.2	3.0	3.7	4.9	8.7	221.8
Portugal	10.5	2.7	26.5	11.6	1.8	22.1	10.9	13.9	450.6
Finland	39.1	4.4	0.5	36.5	4.3	2.5	1.1	11.6	101.0
Sweden	46.1	1.3	0.8	29.2	1.4	1.8	1.7	17.6	88.8
U. Kingdom	18.3	2.4	1.2	64.4	4.8	1.4	1.1	6.0	234.6
<b>EU-15</b>	<b>21.8</b>	<b>2.7</b>	<b>30.6</b>	<b>23.0</b>	<b>1.5</b>	<b>8.5</b>	<b>3.4</b>	<b>7.6</b>	<b>7 341.5</b>

Source : Eurostat - Survey on the structure of agricultural Holdings 1995



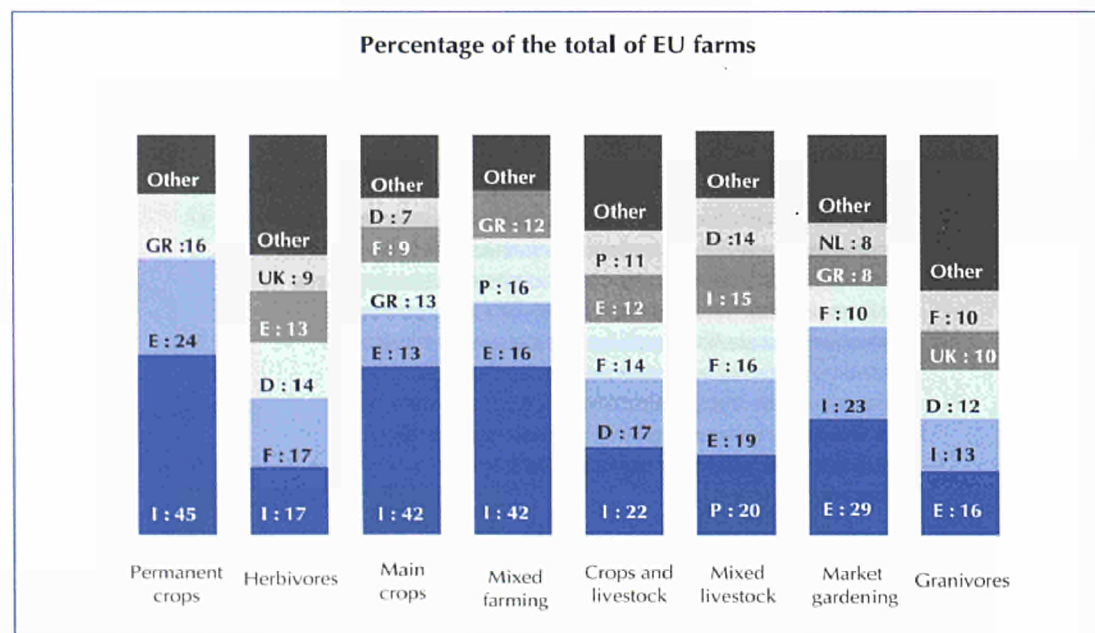
## TYPE OF FARMING

## Less specialized farms are on the wane



Source : Eurostat - Surveys on the structure of agricultural Holdings

## 45 % of European farms with permanent crops are Italian



Source : Eurostat - Survey on the structure of agricultural Holdings 1995



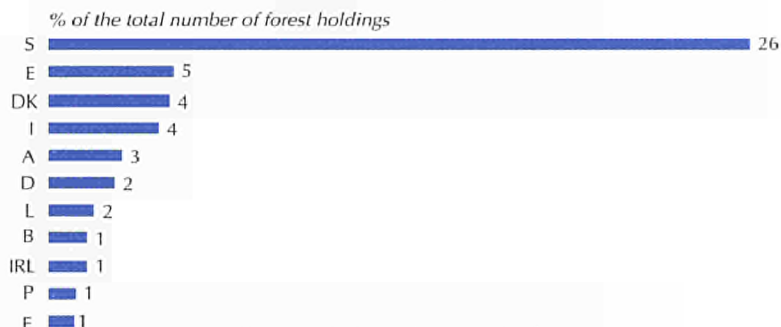
## FOREST OWNERSHIP

Swedish forest holdings are the largest in the Union with an average of more than 90 hectares. Those of France, Belgium, Luxembourg, Italy and Portugal are the smallest, with an average area of less than 10 hectares. Forest parceling in lots is particularly common in Belgium and France, where more than 90% of properties cover less than five hectares.

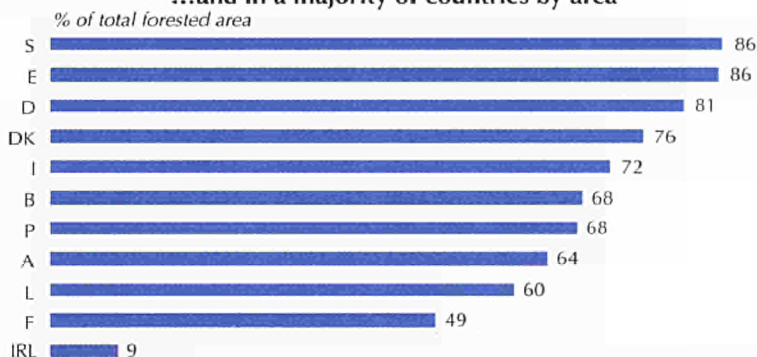
The average area of forest holdings in the other countries is between 14 and 22 hectares. Forest holdings of more than 50 hectares are not any less important in the EU as a whole. In all the countries of the Union, apart from Ireland, they represent at least one-half of all the forested areas, even being in excess of 75 % in Sweden, Spain, Germany and Denmark.

### Forest holdings of more than 50 hectares<sup>1</sup> predominate...

#### ...In Sweden, by number



#### ...and in a majority of countries by area



1. Share of forest holdings of more than 50 hectares in all properties.

Source : Eurostat - Working party paper on forestry statistics (July 1997)





## FOREST OWNERSHIP

## Distribution of forest holdings by size

Less than 5 ha	5-10 ha	10-20 ha	20-50 ha	50-100 ha	More than 100 ha	All holdings
-------------------	---------	----------	----------	-----------	---------------------	-----------------

## Number of holdings

Belgium	102 244	4 011	2 341	1 576	718	874	111 764
Denmark	13 354	3 273	1 948	1 078	373	537	20 563
Germany	← 431 672 →					← 10 652 →	442 324
Greece <sup>1</sup>	← 1 024 →	253	376	303	3 302	4 234	
Spain	531 544	56 364	31 732	20 570	9 910	20 590	670 710
France	3 461 660	182 808	78 431	58 001	18 779	16 626	3 816 305
Ireland	← 27 500 →	6 513	383	97	15 572	817 827	34 493
Italy	486 260	150 348	91 996	56 042	17 609	15 572	817 827
Luxembourg	11 604	1 020	517	269	76	155	13 641
Netherlands <sup>2</sup>	768	1 269	1 166	1 052	414	522	5 191
Austria	139 566	35 815	21 427	11 946	← 5 710 →	214 464	
Portugal	← 360 493 →	← 9 565 →	1 410	2 361	373 829		
Finland <sup>3</sup>	153 686	← 124 939 →	100 010	43 346	17 177	439 158	
Sweden	49 558	← 72 197 →	60 563	35 113	27 789	245 220	
United Kingdom <sup>4</sup>	—	—	—	—	53	53	

Less than 5 ha	5-10 ha	10-20 ha	20-50 ha	50-100 ha	More than 100 ha	All holdings
-------------------	---------	----------	----------	-----------	---------------------	-----------------

## Forested area

thousand ha

Belgium	87	30	35	53	53	385	642
Denmark	26	22	26	32	26	313	445
Germany	← 1 781 →					← 7 779 →	9 560
Greece <sup>1</sup>	← 4.2 →	4	14	24	7 574	7 615	
Spain	637	379	422	620	687	11 838	14 583
France	3 302	1 305	1 171	1 655	1 306	5 961	14 700
Ireland	← 281 →	181	37	7	507		
Italy	367	326	385	508	370	3 666	5 623
Luxembourg	13	7	7	8	5	48	89
Netherlands <sup>2</sup>	53	9	17	33	29	191	331
Austria	270	251	296	356	← 2 063 →	3 237	
Portugal	← 700 →	← 306 →	114	1 982	3 102		
Finland <sup>3</sup>	384	← 1 562 →	3 500	3 251	5 252	13 949	
Sweden	142	← 871 →	2 032	2 496	16 783	22 323	
United Kingdom <sup>4</sup>	—	—	—	—	932	932	

1. Greece: forest holdings whose wooded area invariably includes a grassy zone of more than one hectare.

2. Netherlands: forest holdings whose wooded area exceeds half a hectare.

3. Finland: exclusively private forest holdings of a hectare or more.

4. United Kingdom: the data only relate to state-owned forests.

Source: Eurostat - Working party paper on forestry statistics (July 1997)



## FISHING FLEET

The European Union had a fishing fleet of almost 98,000 vessels in 1996, more than half of which belonged to Greece, Spain and Italy combined. Without a coastline, Luxembourg and Austria have no fishing vessels.

Almost 78,000 vessels, i.e. 80% of the fleet, are less than 12 metres long. This proportion exceeds 90% in Greece, Finland and Portugal. Less than 2% of the community fishing fleet exceeds 36 metres, despite their relative importance in the Netherlands and Belgium, (23% and 13% of their ships respectively). One-third of the Italian fleet is between 12 and 36 metres.

The length, tonnage and power of vessels are all interconnected. The vessels of the Netherlands and Belgium are, on average, the largest and the most powerful in the Community fleet. Conversely, Greek, Finnish and Portuguese vessels have the smallest tonnage and power.

Since 1983, the European Union has been imple-

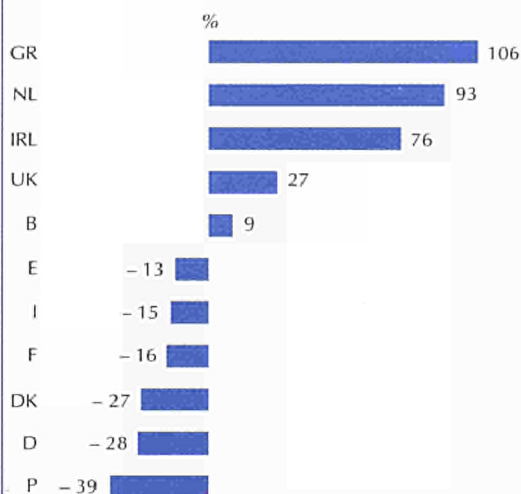
menting guideline programmes spanning several years to reduce the fleet's capacity and renew fish resources. Between 1991 and 1996, in EU-12, the number of vessels dropped by 2% per annum, the total tonnage by 0.5% and the total power by 2.5%. These trends nevertheless mask contrasting developments: the Danish and German fleets are growing in numbers, while losing both power and volume. The Irish fleet is quite the opposite. The Dutch and British fleets are becoming smaller in number and power, but larger in volume. And the French fleet is also becoming numerically smaller, as well as in power and volume.

### Definition

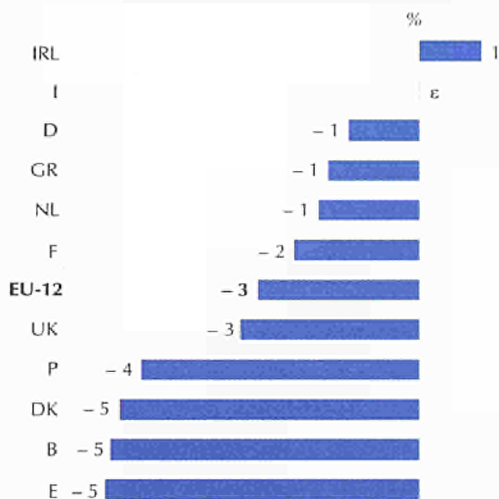
**Tonnage** : volume of vessels and ships. It is expressed in gross tons.

## Overall drop in the power of European ships

Development from 1980 to 1996  
of the total tonnage of the fishing fleet



Average annual development 1991-1996  
of the power of the fishing fleet



Source : Eurostat - Unit F2, fish





## FISHING FLEET

## Number of boats by tonnage in 1996

Total	Less than 25	25-50	50-100	100-500	500 or more	Unknown
<i>gross registered tonnage in 1996</i>						

Belgium	146	4	19	46	77	—	—
Denmark	4 845	4 253	246	88	188	17	53
Germany	2 370	1 988	221	56	90	15	—
Greece	20 349	19 189	347	303	96	13	401
Spain	18 244	14 795	806	1 032	1 447	164	—
France	6 473	5 074	797	310	217	68	7
Ireland	1 248	840	126	159	111	12	—
Italy	16 352	13 701	1 363	837	437	14	—
Luxembourg	—	—	—	—	—	—	—
Netherlands	1 059	383	154	156	318	48	—
Austria	—	—	—	—	—	—	—
Portugal	11 934	11 277	238	152	222	30	15
Finland	4 024	3 850	94	53	26	—	1
Sweden	2 481	1 383	107	108	119	6	758
United Kingdom	8 351	6 727	495	440	648	40	1
<b>EU-15</b>	<b>97 876</b>	<b>83 464</b>	<b>5 013</b>	<b>3 740</b>	<b>3 996</b>	<b>427</b>	<b>1 236</b>

## Number of boats by power in 1996

Total	Less than 25	25-150	150-500	500-1 000	1 000 or more	Unknown
<i>kilowatt</i>						

Belgium	146	—	9	82	54	1	—
Denmark	4 845	2 223	1 650	553	121	21	277
Germany	2 370	1 200	543	336	18	18	255
Greece	20 349	13 553	5 476	709	42	2	567
Spain	18 244	7 442	4 576	2 140	500	120	3 466
France	6 473	792	3 610	1 780	127	77	87
Ireland	1 248	316	601	263	49	17	2
Italy	16 352	5 858	7 116	3 161	187	26	4
Luxembourg	—	—	—	—	—	—	—
Netherlands	1 059	163	306	336	61	193	—
Austria	—	—	—	—	—	—	—
Portugal	11 934	6 642	2 021	428	89	26	2 728
Finland	4 024	1 990	1 666	355	12	1	—
Sweden	2 481	794	1 238	355	71	18	5
United Kingdom	8 351	2 301	4 166	1 505	250	96	33
<b>EU-15</b>	<b>97 876</b>	<b>43 274</b>	<b>32 978</b>	<b>12 003</b>	<b>1 581</b>	<b>616</b>	<b>7 424</b>

Source : Eurostat - Unit F2, fish





## FINAL AGRICULTURAL OUTPUT BY COUNTRY

In 1996, the value of final agricultural output in the Union slightly exceeded 220 billion ecus, a figure considerably higher than that in 1990, and a third as much again as the 1980 figure. The value of final agricultural output incurred prices has not, however, advanced evenly over the years. It rose from 1980 to 1984, the year when dairy quotas were introduced, and then stagnated until 1989. The impact of the reform of the Common Agricultural Policy resulted in a 7% reduction after 1992. [It then did not move in the Union and in almost all the Member States]. This development can be explained by the dual impact of the imposition of obligatory land set-aside and cuts in support prices particularly for some crop products and beef.

France is the leading main agricultural producer country in value terms in the European Union, followed by Italy and Germany, the shares of these three varying little between 1980 and 1996. Only the shares of Spain (+2.5%) and the Netherlands (+1.4%) have seen noticeable increases. The United Kingdom, still akin to Spain in 1980, has seen its share drop considerably in 16 years, and now has a share similar to the Netherlands.

The value of final output in the European Union was comprised of similar values for both animal and crop final outputs. In 1980, the value of final animal output represented more than 55% of final agricultural output. Production in the Member States is heterogeneous, influenced in part by climate, geology and topography. In general though, those areas concentrating in animal production tend to be in northern countries (areas like Wales and Northern Ireland with 90% of their agricultural production in animal output) and those concentrating in crop production in the south (accounting for 85% of output value in regions like Apulia and the Ile-de-France (for example).

### Definition

**Final agricultural output:** this concept of national agricultural accounting corresponds to the value of agricultural goods produced for marketing or self-consumption. It represents the sum of agricultural product deliveries, variations in farm produce stocks on farms and the gross fixed capital formation (GFCF) in agricultural products (herds and flocks, plantations).

### Final agricultural output

Final output			Final crop output			Final animal output		
1980	1990	1996	1980	1990	1996	1980	1990	1996
millions of ecus and current exchange rates								

Belgium	4 190	6 197	6 817	1 394	2 402	2 534	2 794	3 784	4 268
Denmark	4 458	6 933	6 915	1 208	2 438	2 065	3 250	4 495	4 851
ex-FRG	21 775	27 556	///	6 724	9 788	///	15 032	17 744	///
Germany	///	33 157	33 348	///	12 248	13 224	///	20 885	20 089
Greece	5 465	7 622	8 889	3 698	5 156	6 195	1 748	2 463	2 693
Spain	14 941	26 987	27 523	8 355	16 150	16 374	6 485	10 489	10 956
France	32 161	48 248	46 897	15 794	26 246	24 129	16 470	22 019	22 830
Ireland	2 531	4 193	4 404	392	551	536	2 139	3 642	3 868
Italy	25 147	36 774	35 694	15 126	22 036	21 580	9 917	14 379	13 705
Luxembourg	120	196	185	18	35	34	101	160	150
Netherlands	9 354	15 748	17 156	3 168	6 728	7 919	6 185	9 020	9 237
Austria	2 846	4 556	3 637	938	1 557	1 210	1 908	2 999	2 427
Portugal	2 225	4 532	4 937	1 146	2 395	2 314	1 053	2 087	2 539
Finland	2 665	5 051	2 274	689	1 789	660	1 976	3 262	1 614
Sweden	3 390	4 530	3 484	1 069	1 586	1 124	2 321	2 944	2 360
U. Kingdom	14 421	18 713	18 185	5 131	7 542	7 033	9 290	11 171	11 152
<b>EU-15</b>	<b>145 689<sup>1</sup></b>	<b>223 436</b>	<b>220 346</b>	<b>64 851<sup>1</sup></b>	<b>108 860</b>	<b>106 929</b>	<b>80 669<sup>1</sup></b>	<b>113 800</b>	<b>112 739</b>

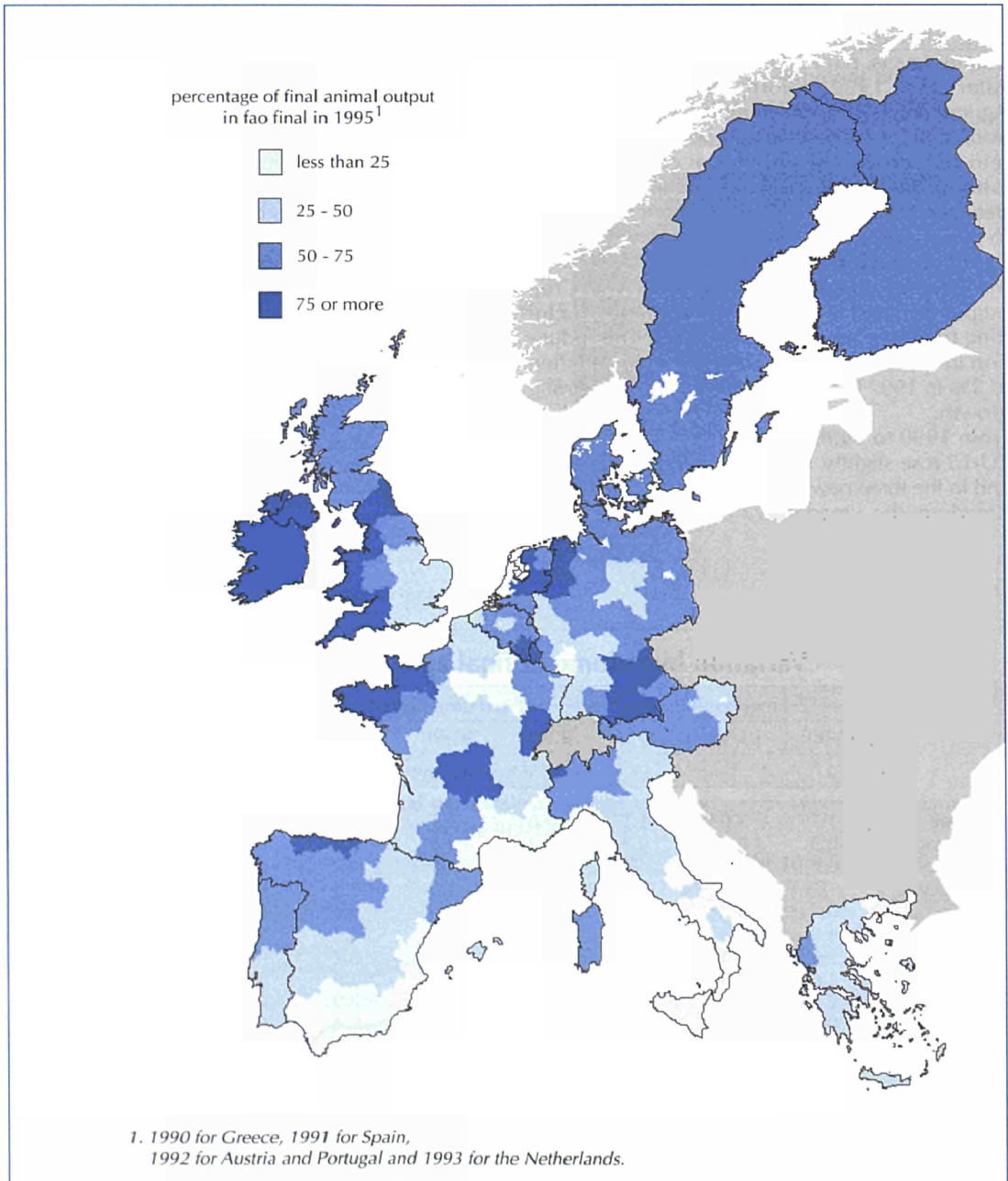
1. EU-15 without the new Länder.

Source : Eurostat - EAA Economic Accounts for Agriculture



## FINAL AGRICULTURAL OUTPUT BY COUNTRY

**Wales and Northern Ireland concentrate on animal production  
(90 % of each's final output)**



Source : Eurostat - Economic Accounts for Agriculture





## DEVELOPMENT OF FINAL AGRICULTURAL OUTPUT

The volume of final agricultural output fluctuates for two reasons. On the one hand, producers react to market developments. On the other, changes in the climate have an effect on output, levels, particularly for crops.

After the 1992 reform of the Common Agricultural Policy, which introduced a 15% set-aside rate for cereals, oleaginous crops and protein-rich crops, the volume of crop output in Europe was brought under control until 1995. Between 1990 and 1995, average annual growth in this sector only exceeded 3% in non-cereal-based producing countries like Greece and in the Benelux. In Italy, the figure was 1.4%. Crop output declined in all the other countries, including the three new Member States. The reduction in set-aside rates to 10% in 1996, and then to 5% in 1997 however marked a return to strong growth.

From 1990 to 1996, animal/livestock output for EU-15 rose slightly. It only declined in Germany, and in the three new Member States. In the United Kingdom, the «mad cow» crisis of 1996 led to

a considerable decline in cattle output.

Between 1980 and 1996, the volume of final agricultural output per full-time labour equivalent (AWU) doubled for EU-15, mostly due to both rising output and sharp decline in labour. From 1980 to 1996, the Europe of the Fifteen doubled its production in terms of annual work units (AWU). Even if this indicator increased more sharply in Portugal than in the other countries, Belgium, Denmark and the Netherlands are still the states with the highest production levels by AWU, as opposed to Ireland, Greece and Portugal, at the other end of the scale.

### Definitions

**Final agricultural output:** this concept of national agricultural accounting corresponds to the value of agricultural goods produced for marketing or self-consumption. It represents the sum of agricultural product deliveries, variations in farm produce stocks on farms and the gross formation of personal fixed capital in agricultural products (herds and flocks, plantations).

### Variation by volume of final agricultural output

	Final output			Final crop output			Final animal output		
	90/80	95/90	96/95	90/80	95/90	96/95	90/80	95/90	96/95
	% annual average								
Belgium	1.7	3.0	-1.1	2.6	4.1	-5.0	1.2	2.3	1.7
Denmark	2.3	0.3	0.3	6.3	-2.9	-0.2	0.7	1.9	0.4
ex-FRG	0.4	///	///	1.6	///	///	-0.1	///	///
Germany	///	-2.1	4.1	///	-1.0	9.3	///	-2.8	0.7
Greece	-0.3	3.2	-3.9	-0.3	4.4	-5.1	-0.1	0.5	-0.9
Spain	1.8	-1.3	10.7	1.9	-3.6	24.2	1.4	2.0	-1.6
France	1.8	0.3	4.2	2.8	-0.2	6.7	0.6	1.1	1.6
Ireland	2.6	0.9	1.8	1.5	-1.1	4.9	2.8	1.2	1.4
Italy	-0.1	1.2	1.5	-0.4	1.4	0.9	0.4	0.7	2.6
Luxembourg	0.9	0.2	4.0	3.7	-0.1	0.4	0.5	0.3	4.8
Netherlands	2.5	1.2	-0.3	5.0	2.3	1.2	1.0	0.4	-1.5
Austria	0.8	-1.0	-0.4	1.1	-1.6	-5.1	0.6	-0.7	1.9
Portugal	4.1	-1.1	6.1	3.8	-3.1	10.8	4.6	0.9	2.1
Finland	0.7	-2.8	-1.8	3.6	-4.5	-5.1	-0.6	-1.9	-0.1
Sweden	0.5	-1.9	1.4	1.7	-4.4	3.3	0.0	-0.6	0.6
U. Kingdom	1.0	0.2	0.3	2.1	-0.1	9.1	0.3	0.4	-5.5
<b>EU-15</b>	<b>1.2<sup>1</sup></b>	<b>0.0</b>	<b>2.9</b>	<b>1.7<sup>1</sup></b>	<b>-0.2</b>	<b>6.2</b>	<b>0.6<sup>1</sup></b>	<b>0.2</b>	<b>0.2</b>

1. EU-15 without the new Länder.

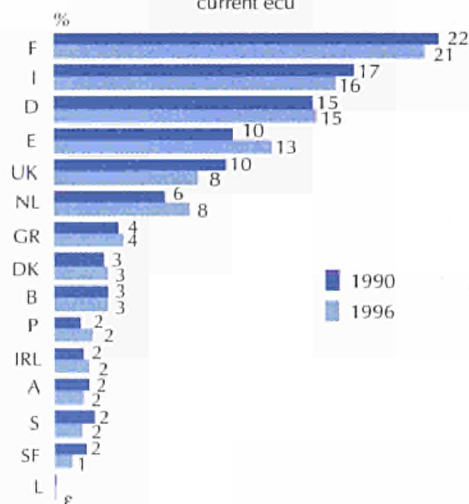
Source : Eurostat - Economic Accounts for Agriculture





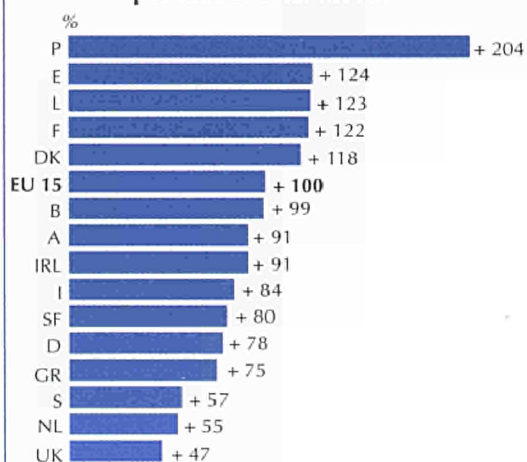
## DEVELOPMENT OF FINAL AGRICULTURAL OUTPUT

**Share of countries  
in EU final agricultural output<sup>1</sup>**  
current ecu

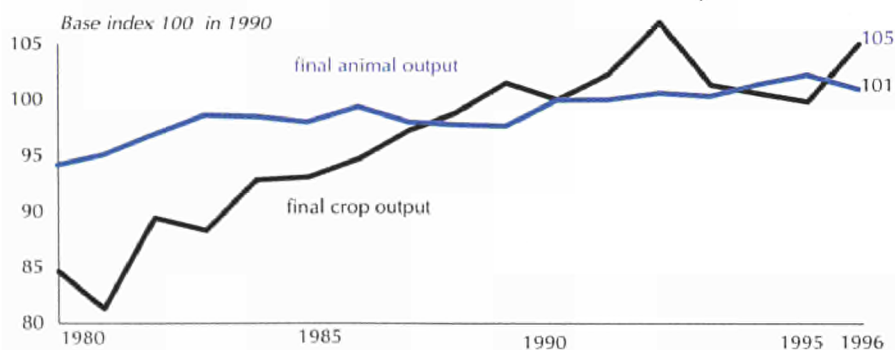


1. Germany and Europe of the 15 did not include the new Länder in 1990.

**1980-1996 development of  
the volume of final agricultural output  
per unit of total labour**



**Index of final agricultural output volume  
in the EU-15<sup>1</sup>**



1. Change of field in 1990 due to the enlargement of Germany.



## FINAL AGRICULTURAL OUTPUT BY SECTOR

The main nine agricultural sectors accounted for four-fifths of the value of final agricultural output in 1996, as they did in 1980. Milk is the most valuable agricultural product although its share of final output value has declined a little since the introduction of milk quotas in 1984. The relative shares of cattle and cereal output also dropped. For the latter, the boom in maize production has not made up for the relative decline of wheat and other cereal crops, the declining share therefore mainly being due to lower prices. Pigs, which have increased by almost 14 % since 1990, have moved for the first time into the number two slot, by sector, ahead of cereals.

Between 1980 and 1996, the five other items also enjoyed fairly sustained growth in nominal value, on average between 3 % and 4.5 %. The greatest expansion as been in the production of poultry, and flowers and ornamental plants. In the other sectors, and with wine especially, the rise in

prices has been the major cause of growth in the nominal value of output.

In terms of output values, France was the EU's number one producer of cereals, cattle, wine and poultry in 1996, whilst Germany was for milk and pigs, Italy for vegetables and fresh fruit, and the Netherlands for flowers and ornamental plants. This situation was the same as in 1980, with the exception of milk, for which France had been the leading producer until 1988.

### Definition

**Final agricultural output:** this concept of national agricultural accounting corresponds to the value of agricultural goods produced for marketing or self-consumption. It represents the sum of agricultural product deliveries, variations in farm produce stocks on farms and the gross formation of personal fixed capital in agricultural products (herds and flocks, plantations).

### Final agriculture output in the nine major sectors in 1996

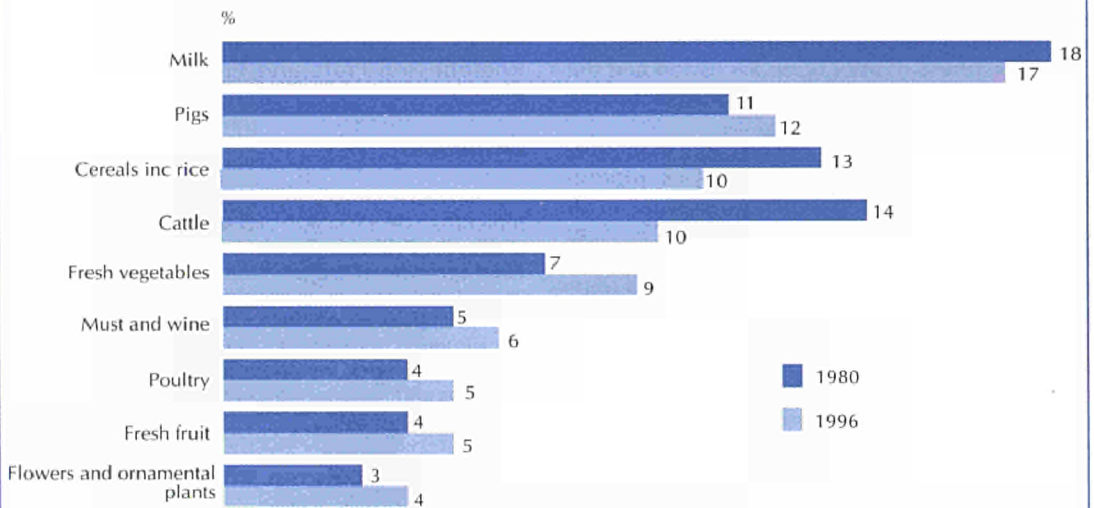
	Milk	Pigs	Cereals incl. rice	Cattle	Fresh vegetables	Must and wine	Poultry	Fresh fruit	Flow. and ornam. plants
<i>millions of ecus, at current prices and exchange rates</i>									
Belgium	964	1 778	262	874	969	—	330	344	270
Denmark	1 497	2 416	941	408	118	—	162	30	352
Germany	8 479	5 509	3 417	3 626	1 147	1 281	820	2 095	1 403
Greece	971	273	568	256	1 400	151	249	728	160
Spain	2 088	3 617	3 018	1 609	3 872	1 483	1 335	1 801	554
France	7 731	3 497	6 884	5 891	3 225	6 700	3 361	1 737	983
Ireland	1 506	367	183	1 489	139	—	150	21	—
Italy	4 085	2 300	3 354	3 129	4 768	3 499	1 951	2 425	1 971
Luxembourg	82	18	9	47	2	14	—	4	—
Netherlands	3 466	3 009	207	1 362	1 969	—	716	363	2 995
Austria	782	764	163	605	124	220	99	222	95
Portugal	588	1 126	232	226	383	811	214	337	—
Finland	790	236	274	222	104	—	54	35	96
Sweden	1 159	467	507	346	130	—	92	34	153
U. Kingdom	4 338	1 606	2 810	1 512	1 374	—	1 820	317	431
<b>EU-15</b>	<b>38 526</b>	<b>26 981</b>	<b>22 831</b>	<b>21 601</b>	<b>19 723</b>	<b>14 158</b>	<b>11 352</b>	<b>10 493</b>	<b>9 462</b>

Source : Eurostat - Economic Accounts for Agriculture



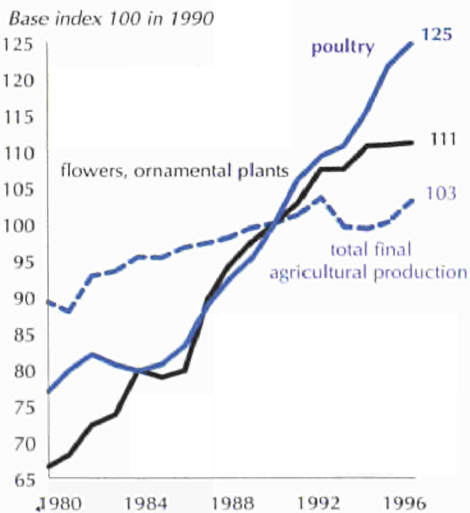
## FINAL AGRICULTURAL OUTPUT BY SECTOR

**Development of the share of the nine major sectors in community final agricultural output in current ecus<sup>1</sup>**



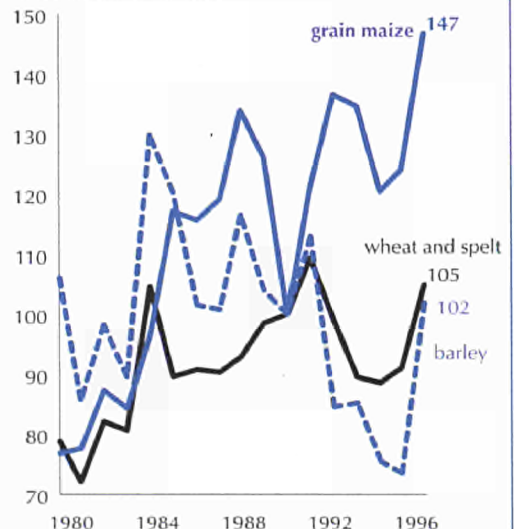
1. Germany and EU-15 without the new Länder in 1980.

**On-going growth for poultry and flowers in volume terms**



**Differing cereal developments in volume terms**

Base index 100 in 1990



Source : Eurostat - Economic Accounts for Agriculture





## INTERMEDIATE AGRICULTURAL CONSUMPTION

The share of the value of intermediate consumption in the value of final agricultural output for the European Union has been rising for six years. It rose from 43 % in 1990 to 47 % in 1996. But it stood at 45 % in 1980. The enlargement of the EU led to a greater share, with the value of final output in the three new Member States declining sharply upon accession and the value of intermediate consumption either rising or falling less steeply.

In 1996, animal feed represented more than 36 % of the total value of intermediate consumption and considerably exceeded the other items in all countries, apart from Austria and Greece. Services have become the number two expenditure item, representing 13.6 % of intermediate consumption.

The share of the value of intermediate consumption in final agricultural output is very diversified within the European Union, ranging from less than 15 % to more than 70 %, depending on the Member State. A high share often means a high

degree of agricultural intensification and in particular the presence of considerable battery farming, as in Catalonia, western Flanders and Brittany. Conversely, a low proportion may mean a predominance of non-cereal plant production, like flowers in the North and South Holland provinces of the Netherlands, and vines in Rheinhessen-Pfalz and Provence-Alpes-Côte d'Azur.

### Definitions

**Intermediate consumption** : the value of goods (other than fixed capital) and services consumed during the period in the current production process.

**Final agricultural output** : this concept of national agricultural accounting corresponds to the value of agricultural goods produced for marketing or self-consumption. It represents the sum of agricultural product deliveries, variations in farm produce stocks on farms and the final agricultural output (herds and flocks, plantations).

### The value of intermediate consumption

	Final agricultural output (Fao)			Intermediate consumption			including animal feed			Share of int. cons. in the Aep in 1996
	1980	1990	1996	1980	1990	1996	1980	1990	1996	
millions of ecus at current prices and exchange rates										%
Belgium	4 190	6 197	6 817	2 413	3 472	4 456	1 313	1 530	1 992	65.4
Denmark	4 458	6 933	6 915	2 485	3 315	3 586	1 363	1 458	1 599	51.9
ex-FRG	21 775	27 556	///	12 320	14 374	///	4 792	4 343	///	///
Germany	///	33 157	33 348	///	17 121	18 532	///	5 301	5 228	55.6
Greece	5 465	7 622	8 889	1 234	1 943	2 422	390	572	563	27.2
Spain	14 941	26 987	27 523	5 680	11 300	11 441	2 675	4 994	4 644	41.6
France	32 161	48 248	46 897	14 152	21 051	23 270	4 494	6 455	7 691	49.6
Ireland	2 531	4 193	4 404	1 124	1 755	2 147	467	677	798	48.8
Italy	25 147	36 774	35 694	7 129	10 585	9 823	4 228	5 520	4 738	27.5
Luxembourg	120	196	185	50	77	86	21	22	24	46.2
Netherlands	9 354	15 748	17 156	5 254	7 330	8 515	3 248	3 551	3 701	49.6
Austria	2 846	4 556	3 637	1 116	1 604	1 835	315	378	384	50.5
Portugal	2 225	4 532	4 937	914	2 157	2 241	457	1 171	1 164	45.4
Finland	2 665	5 051	2 274	1 245	2 326	1 513	473	778	475	66.5
Sweden	3 390	4 530	3 484	1 842	2 599	2 434	714	860	734	69.9
U. Kingdom	14 421	18 713	18 185	7 944	9 701	10 563	3 578	3 518	3 787	58.1
<b>EU-15</b>	<b>145 689<sup>1</sup></b>	<b>223 436</b>	<b>220 346</b>	<b>64 902<sup>1</sup></b>	<b>96 337</b>	<b>102 861</b>	<b>28 526<sup>1</sup></b>	<b>36 786</b>	<b>37 523</b>	<b>46.7</b>

1. EU-15 without the new Länder.

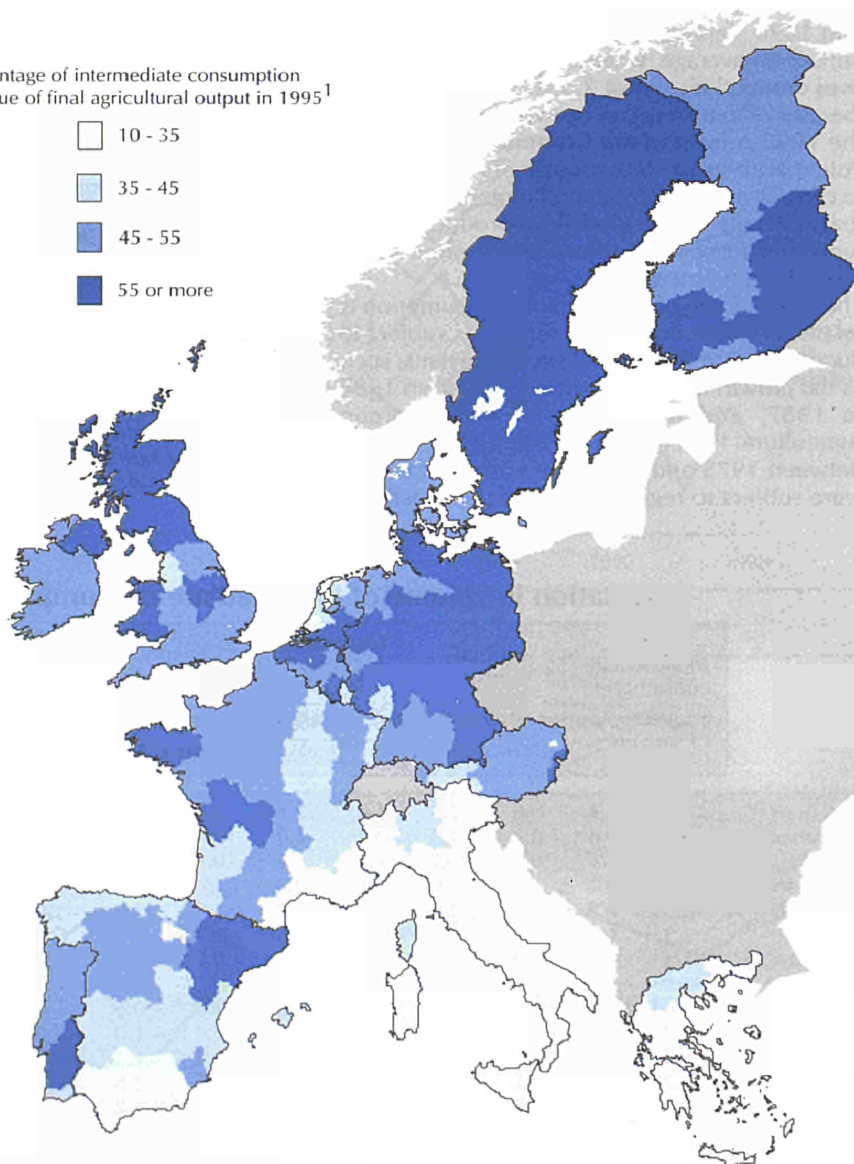
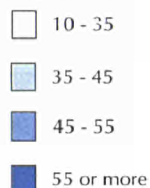
Source : Eurostat - Economic Accounts for Agriculture



## INTERMEDIATE AGRICULTURAL CONSUMPTION

**Intermediate consumption represents up to 70 % of the value of output**

percentage of intermediate consumption  
in the value of final agricultural output in 1995<sup>1</sup>



1. 1990 for Greece, 1991 for Spain, 1992 for Portugal,  
1993 for the Netherlands, and 1994 for Finland.





## DEVELOPMENT OF INTERMEDIATE AGRICULTURAL CONSUMPTION

Since 1980, intermediate consumption has risen less quickly in volume terms than final agricultural output in the European Union.

The main intermediate consumption items are not developing in the same way. Between 1990 and 1996, services rose by more than 2 % per annum on average, whereas fertilizers and additives dropped by almost 2.5 %. This reduction in the uses of fertilizers can be explained mainly by the 1992 reform of the Common Agricultural Policy, with its partial set-aside of areas planted to cereals, and oleaginous and protein-rich crops. It also results from a change in production systems and from the reinforcement of environmental requirements.

The productivity of intermediate consumption is relatively stable in the long term. It is subject to fluctuations on the basis of specific events, such as the growth in costs of animal feed from 1984 to 1987, and the reform of the Common Agricultural Policy from 1992 to 1995.

Between 1975 and 1984, the « terms of trade » were subject to regular and tendential deteriora-

tion, in particular in the wake of the rise in the price of oil, and subsequently stabilized until 1991. From 1992 on, because of short-term factors, or structural changes like the reform of the Common Agricultural Policy, the prices of farm products have deteriorated. This has resulted in a deterioration of the « terms of trade » in recent years.

### Definitions

**Intermediate consumption:** the value of goods (other than fixed capital) and services consumed during the period in the current production process.

**Final agricultural output:** this concept of national agricultural accounting corresponds to the value of agricultural goods produced for marketing or self-consumption. It represents the sum of agricultural product deliveries, variations in farm produce stocks on farms and the final agricultural output (herds and flocks, plantations).

**Terms of trade:** the ratio between the nominal price index of final agricultural output and of the intermediate consumption.

### Variation in volume of intermediate consumption

Total intermediate consumption		Animal feed		Equipment and small tools <sup>4</sup>		Energy, lubricants		Fertilizer and additives		Services	
90/80	96/90	90/80	96/90	90/80	96/90	90/80	96/90	90/80	96/90	90/80	96/90
% annual average, at constant prices and exchange rates											

Belgium	2.0	2.4	0.8	3.5	3.0	2.8	2.8	2.3	-0.4	1.1	2.2	0.4
Denmark	0.5	0.4	-0.7	3.0	0.2	-2.8	0.4	-0.4	-0.7	-5.1	1.4	-1.4
ex-FRG	-0.4	///	-0.9	///	-1.2	///	0.1	///	-2.1	///	0.0	///
Germany	///	-0.7	///	-2.6	///	-2.3	///	0.5	///	-4.2	///	5.2
Greece	1.5	1.8	0.7	0.8	0.3	0.8	4.8	3.9	1.0	-3.9	-1.2	1.5
Spain	2.3	1.6	2.7	2.2	1.7	-0.6	1.7	0.4	0.0	-0.5	4.9	4.4
France	1.3	0.5	1.9	2.1	-1.2	-0.3	-0.2	-0.3	0.6	-2.7	1.2	0.8
Ireland	2.0	3.1	2.6	3.4	0.8	2.1	0.5	4.4	2.1	1.3	1.5	2.3
Italy	0.6	-1.0	0.1	-1.8	0.0	0.0	3.9	0.6	-1.0	-1.2	-0.1	-2.2
Luxembourg	2.4	0.9	-0.2	3.1	2.0	-0.1	2.4	-1.0	3.0	-1.1	0.0	0.0
Netherlands	1.2	0.4	0.5	-0.3	1.3	0.9	1.3	1.7	-5.5	-4.1	4.7	4.1
Austria	-0.2	0.0	0.1	-0.5	...	...	1.3	-2.6	-4.0	-4.4	...	...
Portugal	-0.7	1.2	-0.6	-0.5	0.0	2.5	2.8	3.2	0.0	0.0	-5.4	0.0
Finland	0.1	-1.7	-2.2	-0.6	1.4	-2.6	1.4	-2.7	1.4	-5.2	1.4	0.6
Sweden	-1.1	-1.4	-1.7	0.6	-0.2	-2.2	0.7	-3.8	-5.6	-0.6	0.4	-4.0
U. Kingdom	0.6	0.9	-0.1	2.0	-0.1	0.7	-1.8	0.5	1.2	-1.7	1.3	2.1
EU-15	0.8 <sup>1</sup>	0.4	0.6 <sup>1</sup>	0.6	-0.2 <sup>3</sup>	-0.7 <sup>2</sup>	0.9 <sup>1</sup>	0.5	-0.5 <sup>1</sup>	-2.4	1.2 <sup>3</sup>	2.1 <sup>2</sup>

1. EU-15 without the new Länder. 2. Data without Austria. 3. Data without either the new Länder or Austria.

4. Including « maintenance and repairs ».

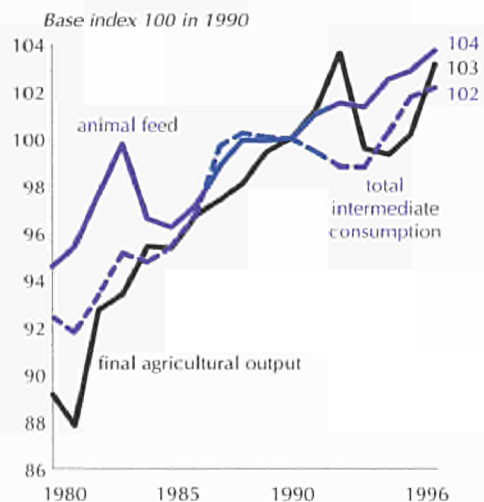
Source : Eurostat - Economic Accounts for Agriculture



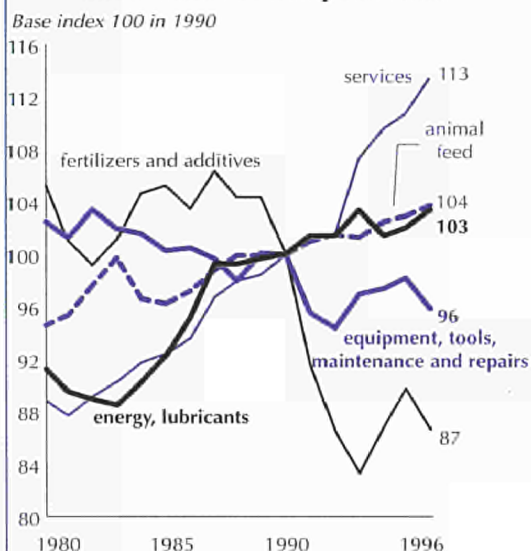


## DEVELOPMENT OF INTERMEDIATE AGRICULTURAL CONSUMPTION

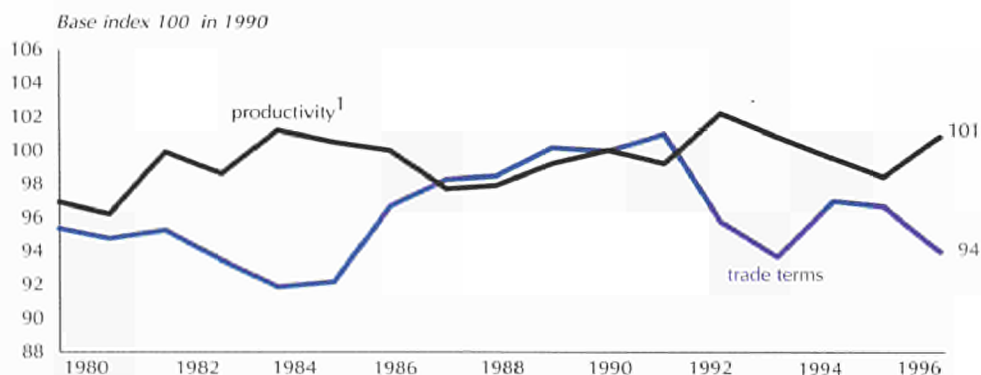
**Comparative development of final agricultural output and intermediate consumption (by volume)**



**Developments in the volume of the main intermediate consumption terms**



**Developments in the productivity of intermediate consumption and trade terms for the European Union**



1. Ratio between the volume indices of final agricultural output and of intermediate consumption.

Source : Eurostat - Economic Accounts for Agriculture



## INCOMES IN AGRICULTURE

Between 1990 and 1996, agricultural net value added to the factor cost per annual work unit (AWU) rose by average by 3.3 % per annum in the European Union. It rose by 1.9 % in the 1980s. The sharpest increases occurred between 1993 and 1996 with an annual growth in excess of 6 %. The development of this indicator of agricultural income has not been the same in all countries. From 1990 to 1996 it stagnated or dropped in the Benelux and in the new Member States. Conversely, it rose by more than 4 % per year in Spain, Germany and the United Kingdom.

Income disparities between Member States are still marked, ranging from 3800 ecus per AWU

in Portugal for 1996 to more than eight times this level in Denmark, itself lying well ahead of the Netherlands and the United Kingdom.

### Definitions

**Annual work unit (AWU):** amount of agricultural work done by a person employed full-time over the year.

**Net value added to factor cost (NVAFC):** value of output - expenditures in intermediate consumption - production-linked taxes - depreciation + farm subsidies.

As related to the number of AWUs, the NVAFC is an indicator of income from agricultural activity.

### Agricultural value added

	Net value added to factor cost (NVAFC)			Net value added to factor cost by AWU			Average ann. develop. NVAFC/AWU	
	1980	1990	1996	1980	1990	1996	1990/1980	1996/1990
	thousand of ecus 1990						%	
Belgium	2 399	2 494	1 619	20.8	26.5	20.5	2.5	- 4.2
Denmark	2 441	2 631	2 582	17.0	26.6	30.8	4.6	2.5
Ex-FRG	10 397	10 147	...	10.1	13.4		2.8	...
Germany	...	13 515	10 029		11.0	14.7		4.9
Greece	6 520	5 969	5 649	6.8	8.1	9.4	1.7	2.6
Spain	15 956	14 377	16 477	8.6	11.4	16.0	3.0	5.7
France	23 217	22 855	21 379	12.8	17.7	20.7	3.3	2.6
Ireland	1 969	2 451	2 691	6.3	9.5	12.0	4.1	4.0
Italy	34 153	20 708	20 158	11.8	9.6	11.9	- 2.0	3.7
Luxembourg	106	103	81	11.6	17.2	17.0	4.0	- 0.2
Netherlands	4 916	6 335	4 983	19.3	27.5	22.3	3.6	- 3.4
Austria	2 008	2 013	1 426	7.6	10.2	10.1	3.0	- 0.1
Portugal	2 354	2 535	2 178	2.0	3.2	3.8	5.0	2.8
Finland	2 652	2 788	2 216	7.6	12.5	12.4	5.2	- 0.2
Sweden	1 789	1 709	869	12.7	17.4	9.9	3.2	- 8.9
United Kingdom	7 796	7 316	8 610	15.0	16.8	21.9	1.1	4.6
<b>EU-15</b>	<b>118 674<sup>1</sup></b>	<b>107 797</b>	<b>100 947</b>	<b>10.0<sup>1</sup></b>	<b>11.9</b>	<b>14.4</b>	<b>1.9<sup>1</sup></b>	<b>3.3</b>

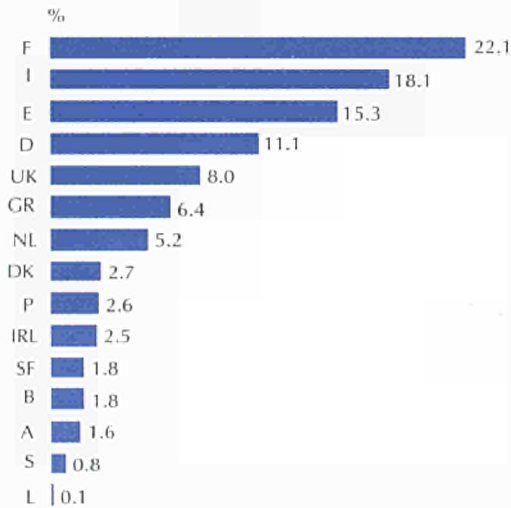
1. Without the new Länder.

Source : Eurostat - Economic Accounts for Agriculture

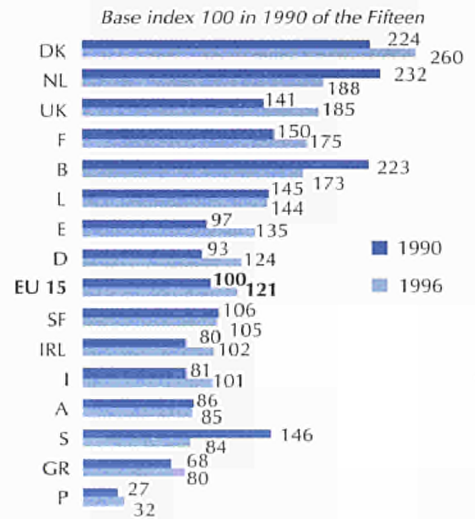


## INCOMES IN AGRICULTURE

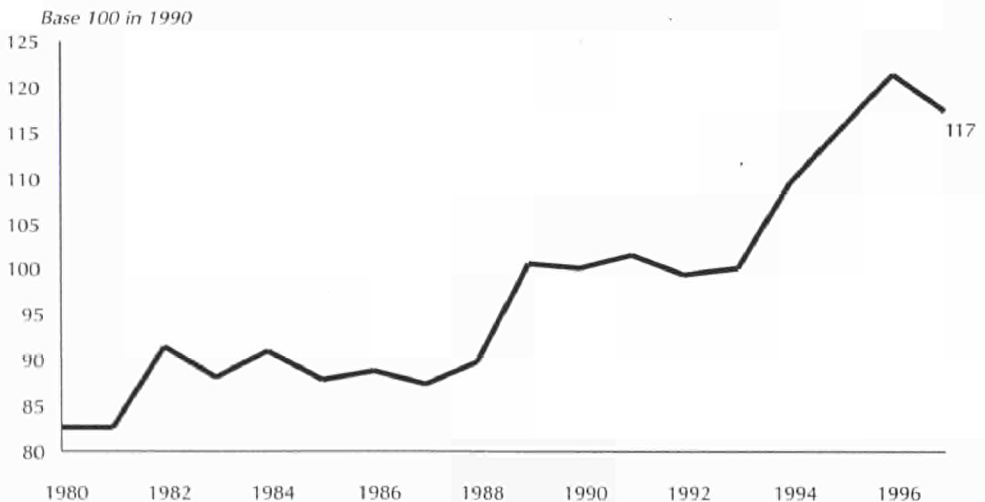
**Share in the EU-15's agricultural net value added at factor cost in 1996**



**Net agricultural value added at factor cost per AWU**



**Development of net agricultural value added at factor cost per AWU in the EU-15**



Source : Eurostat - Economic Accounts for Agriculture





## INCOMES PER FAMILY WORK UNIT

In the European Union as a whole, farm income by family work unit was slightly higher than 13,000 ecus in 1995. The United Kingdom was way out in front with a farm income per family work unit of 32,000 ecus, followed by the Netherlands with 24,500 ecus and Belgium with 23,500 ecus. At the opposite end of the scale came Greece and Finland with revenues of some 6,000 ecus, and, more conspicuously still, Portugal, which had an income of less than 3,000 ecus.

The income per family work unit was high in the markedly intensive sector of granivore rearing. At a regional level, the net added value per family work unit was highest of all in Champagne-Ardenne, Saxony-Anhalt and former Mecklenburg-Pomerania. Greek and Portuguese regions had the lowest value added. Finnish and Swedish regions had similar levels.

### Definitions

**Net farm value added (NFVA)**: value of output - expenditures in intermediate consumption - depreciation. It remunerates family and wage-earning labour, farm management, personal funds and borrowed capital, and directly farmed and tenant-farmed land. As related to the number of annual work units (AWUs), the NFVA is an indicator of agricultural labour performance.

**Family farm revenue (FFR)**: NFVA - wages - costs and financial expenses. This indicator estimates what is available to the farmer and non-wage-earning labour for investments, household requirements and savings.

**Annual work unit (AWU)**: this corresponds to the work of one full-time person for a whole year. The family annual work unit (FAWU) is related to the labour of non-wage-earning persons on the farm (owner included).

### Farm revenue disparities by family work unit in 1995

	Average income	Highest regional disparities	All farms	Main crops	Market-gardening, horticulture	Permanent crops	Herbivore farms	Granivore farms	Mixed farming	Mixed crops and livestock
ecu	base index 100 in 1995 for all the holdings in EU-15									
Belgium	23 552	///	177	238	148	279	135	265	...	180
Denmark	15 528	///	117	63	171	102	119	262	40	99
Germany	14 586	52-353	109	152	68	117	95	137	111	102
Greece <sup>1</sup>	6 070	43-50	46	38	...	49	61	...	47	58
Spain	14 083	59-201	106	120	125	100	91	150	96	115
France	19 626	38-299	147	179	142	193	119	147	127	144
Ireland	12 053	///	90	173	...	...	85	...	...	157
Italy	11 082	40-152	83	76	107	68	135	318	56	80
Luxembourg	21 815	///	164	...	...	...	171	...	...	201
Netherlands	24 421	///	183	254	216	307	138	170	...	196
Austria	15 002	///	113	176	...	107	98	126	123	114
Portugal	2 417	11-43	18	24	30	24	31	35	13	12
Finland	6 178	45-51	46	95	...	...	48	...	...	...
Sweden	12 001	82-101	90	110	...	...	89	75	...	85
U. Kingdom	32 022	118-405	240	460	189	194	162	337	352	271
EU-15 <sup>1</sup>	13 328	11-405	100	117	127	83	108	169	54	89

1. Without Thessaly, the Aegean islands and Crete.

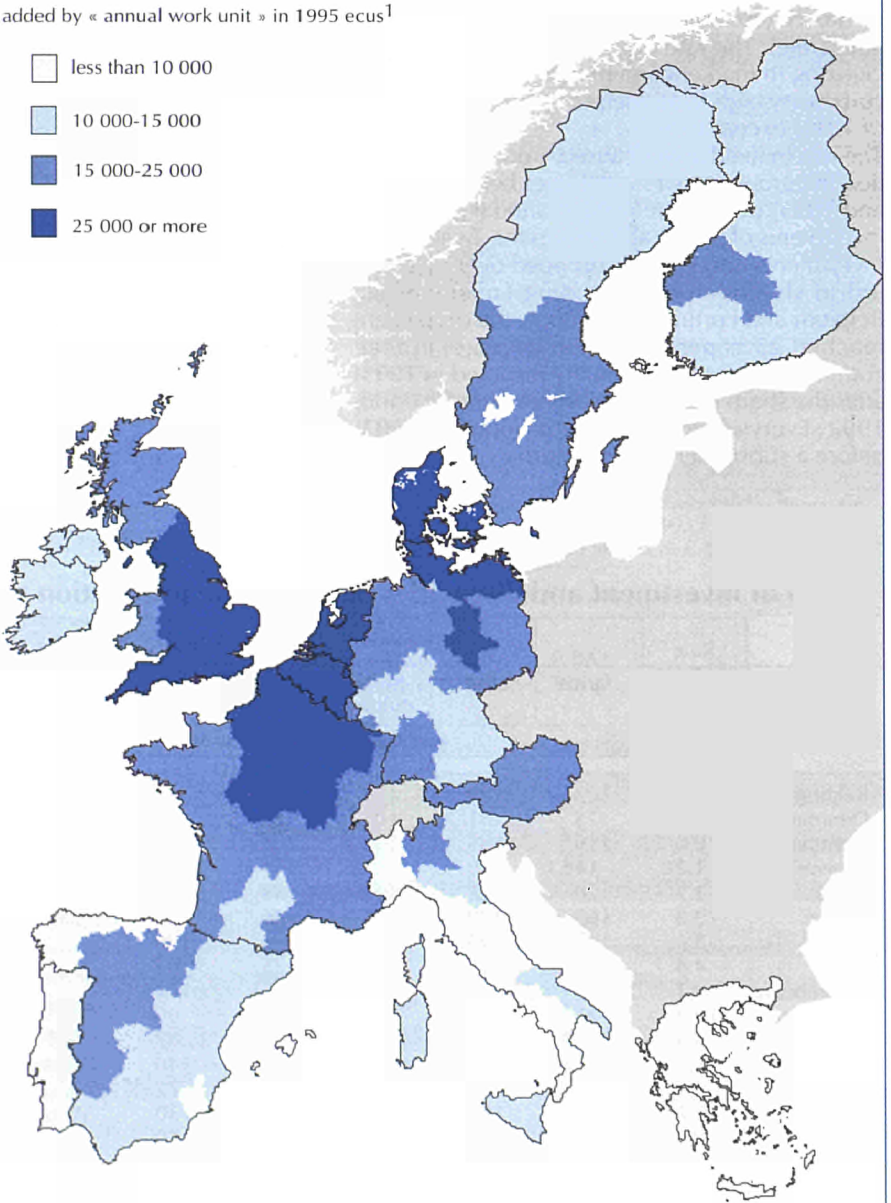
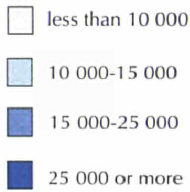
Source : European Commission - Farm Accountancy Data Network



## INCOMES PER FAMILY WORK UNIT

The most productive regions are in France, Germany and the United Kingdom

net value added by « annual work unit » in 1995 ecus<sup>1</sup>



1. Average for the years 1993-1995 and 1995 for Austria, Sweden and Finland.





## INVESTMENT IN AGRICULTURE

Investments made in 1995 by all farms in the Fifteen represented slightly more than 8% of their fixed assets. This rate of investment stood at 14% in France, but was hardly more than 1% in Greece (excluding Thessaly, the Aegean islands and Crete). The rate of investment in farms specializing in market-gardening and horticulture is particularly high in all Member States (an average of 12%) except Italy.

The rise in fixed assets caused around 7% variation in European investment rates between 1990 and 1995, despite an average annual growth in investments of 5% in all farms in the Twelve. But investments nevertheless dropped over this period in six countries, including Luxembourg, Belgium and Portugal. In Greece, the drop even reached 23% per annum on average. In that country, investments gradually resumed in 1993 after the sharp downturn observed in 1991 and 1992. Everywhere else, they dropped in 1993 before a subsequent rapid upturn.

From 1993 to 1995, equipment was the top investment item in most Union countries. But they come second to buildings in the Netherlands, Ireland and Belgium. In Greece, plantations represent more than a quarter of investments.

### Definitions

**Investment:** this is calculated as the difference between acquisitions and transfers in relation to all forms of immobilization carried out during the financial year (land improvement, plantations, buildings and specialized installations, equipment and tools, intangible assets), increased by the difference between stocks at the start and end of the financial year for breeding animals. Land values being too uneven from one country to the next, because of their assessment and the accounting systems used, all the statistics given are calculated without land.

**Rate of investment:** this is equal to investment related to illiquid assets.

## Rates of investment and disparities based on the production system in 1995

Rate of investment	All farms	Main crops	Market-gardening, horticulture	Permanent crops	Herbivore farms	Grainivore farms	Mixed farming	Mixed crops and livestock
%	base index 100 in 1995 for all the holdings in EU-15							

Belgium	8.6	103	109	175	148	83	112	...	102
Denmark	6.3	75	51	105	52	85	99	68	67
Germany	10.0	119	185	133	125	93	125	148	119
Greece <sup>1</sup>	1.2	14	19	...	11	22	...	10	6
Spain	1.7	20	27	192	3	4	96	18	53
France	13.9	165	229	146	146	140	135	158	187
Ireland	8.6	102	93	...	...	106	...	...	46
Italy	4.4	53	35	30	35	108	57	19	51
Luxembourg	9.7	116	...	...	...	111	...	...	104
Netherlands	10.2	121	162	170	113	99	115	...	105
Austria	6.5	77	71	...	90	82	71	63	72
Portugal	11.2	133	330	148	82	140	78	131	104
Finland	6.1	73	95	...	...	72	...	...	50
Sweden	12.7	151	192	...	...	130	186	...	199
U. Kingdom	9.4	112	208	172	121	70	183	207	124
EU-15 <sup>1</sup>	8.4	100	131	145	55	95	113	80	108

Reading: on average, in 1995, farms invested a sum equivalent to 8.4% of the value of their fixed assets. Farms specializing in market-gardening and horticulture invested one and a half times more, those specializing in permanent crops half as much.

1. Excluding Thessaly, the Aegean islands and Crete.

Source: European Commission - Farm Accountancy Data Network





## INVESTMENT IN AGRICULTURE

### Structure of the figures for all farms in 1995

#### Assets

#### Liabilities

Fixed assets <sup>1</sup> 67.5 %	Equity capital <sup>3</sup> 70 %
Floating assets <sup>2</sup> 32.5 %	Debts <sup>4</sup> 30 %
Total assets = 224,900 ecus	Total liabilities = 224,900 ecus

1. Intangible assets (expenses of establishments, dues and bonds etc) and tangible assets (land, buildings etc).
2. Supplies, product stocks, non-breeding animals, advances on crops etc.
3. Net situation and investment subsidies
4. Amount of short-, medium and long-term loans, not repaid at the end of the financial year.

### Average investment per farm

« 1991 »	« 1994 »	Average annual developm. <sup>2</sup>
ecu of 1995		%

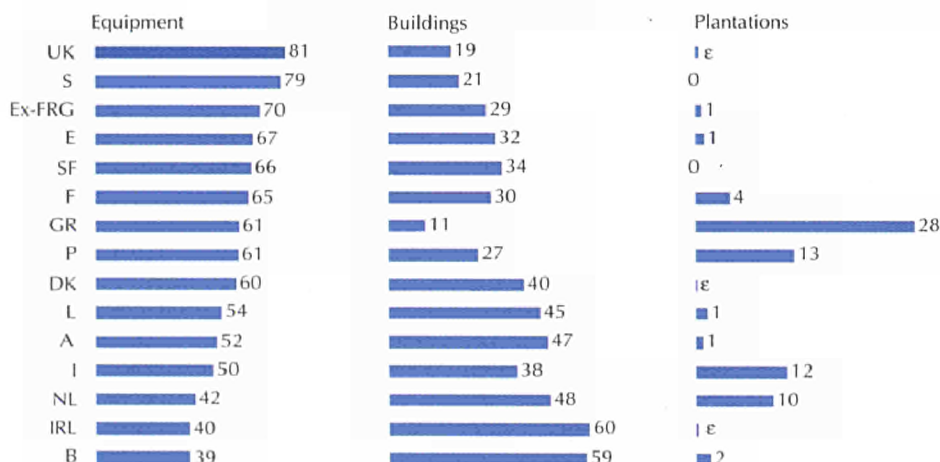
Belgium	14 298	13 424	- 5.28
Denmark	10 014	12 253	3.97
Ex-FRG	12 051	12 650	3.47
Greece <sup>3</sup>	714	292	- 23.16
Spain	517	709	2.03
France	10 655	11 697	3.29
Ireland	3 520	3 254	- 1.01
Italy	1 626	1 623	3.30
Luxembourg	30 439	24 378	- 8.24
Netherlands	29 372	28 172	- 0.39
Austria	...	11 387	...
Portugal	3 010	1 711	- 5.13
Finland	...	10 405	...
Sweden	...	7 810	...
United Kingdom	13 884	15 817	1.09
EU-12	4 605	5 265	5.12
EU-15 <sup>3</sup>	...	6 586	...

1. « 91 » = average for 1990, 1991 and 1992; « 94 » = average for 1993, 1994 and 1995; 1995 for A, SF and S.

2. Calculation made on annual data between 1990 and 1995.

3. Excluding Thessaly, the Aegean islands and Crete.

### Investment structure in « 1994 »<sup>1</sup>



1. Average for 1993 to 1995 for all countries, except Austria, Finland and Sweden where the data are for 1995.



## DEBTS IN AGRICULTURE

The average debts of farms in 1995 amounted to 36,000 ecus per farm in the European Union of the Fifteen. This represented 16 % of the total liabilities of farms. The amount of debt for Dutch farms was six times higher than the community average. But because the liabilities in these farms are themselves very high, their rate of indebtedness is barely twice the European average. Danish farms are the most indebted of all with an average debt level of 60 %, and rates in excess of 36 % for two farms out of every three. Farms specializing in market-gardening and horticulture usually have the highest level of indebtedness. Differences between countries lie largely in their differing fiscal systems. Countries in southern Europe thus often resort to family loans that are difficult to enter in the accounts. The degree of financial costs has become more burdensome in recent years for Finnish farms:

their costs linked with loans have severely affected their added value, which just about equals the European average. For all the farms of the Twelve, the improved profits chalked up in the past few years have helped to absorb the increased level of indebtedness.

### Definitions

**Debts:** this is assessed by the amount of short-, medium and long-term loans, not repaid by the end of the financial year. Because land values are too uneven between countries, as a result of their assessment and the accounting systems used, all the statistics given are calculated without land.

**Rate of debts:** this is equal to the amount of debts related to the total liabilities.

**Degree of financial costs:** this is equal to the financial costs, without land, related to the net value added.

### Total debts and disparities based on production systems

Average debt by farm		Average rate of debt. in 1995	All farms	Main crops	Market-garden. horti-culture	Perma-nent crops	Herbi-vore farms	Grani-vore farms	Mixed farming	Mixed crops and livestock
« 91 » <sup>1</sup>	« 94 » <sup>1</sup>									
thousand of ecus		%	Base index 100 in 1995 in the EU-15							

Belgium	80,4	99,1	35,5	223	188	318	193	197	286	...	207
Denmark	160,8	215,0	60,1	378	353	465	470	395	386	357	368
Germany <sup>2</sup>	58,9	65,8	13,1	82	71	359	116	73	90	115	82
Greece <sup>3</sup>	2,2	1,3	1,6	10	18	...	5	13	...	12	12
Spain	1,1	2,0	1,7	11	9	78	1	11	57	9	14
France	69,4	75,8	34,0	214	232	346	201	180	372	197	223
Ireland	13,1	10,6	4,3	27	30	...	...	27	...	...	19
Italy	2,5	2,3	1,6	10	6	14	10	14	11	9	11
Luxembourg	70,8	74,4	12,4	78	...	...	...	77	...	...	71
Netherlands	191,4	236,1	36,1	227	144	354	196	192	318	...	193
Austria	...	34,7	9,8	62	90	...	95	51	59	85	66
Portugal	1,9	1,3	2,4	15	32	22	8	36	11	8	14
Finland	...	97,4	31,0	195	182	...	...	215	...	...	182
Sweden	...	49,1	31,4	198	155	...	...	214	228	...	197
U. Kingdom	77,2	69,4	13,1	82	77	171	127	80	134	109	69
EU-12	25,4	31,1	...	...	...	...	...	...	...	...	...
EU-15 <sup>2</sup>	...	35,8	15,9	100	88	254	57	99	199	61	105

1. « 91 » = average for 1990, 1991, 1992; « 94 » = average for 1993, 1994, 1995; 1995 for A, SF and S.

2. Excluding the new Länder before 1995.

3. Excluding Thessaly, the Aegean islands and Crete in 1995.

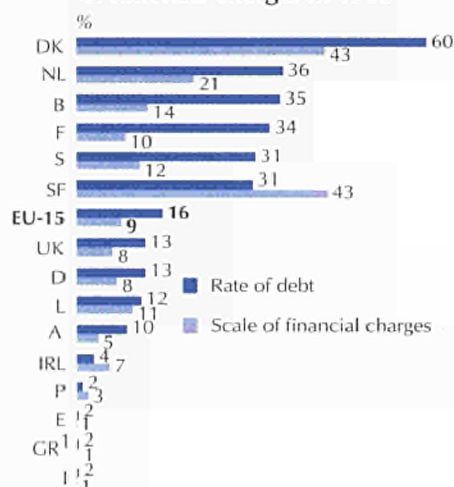
Reading: the average rate of debt for the Fifteen's farms was 15.9 % in 1995. It was double for granivore farms and half as much for permanent crops.

Source : European Commission - Farm Accountancy Data Network



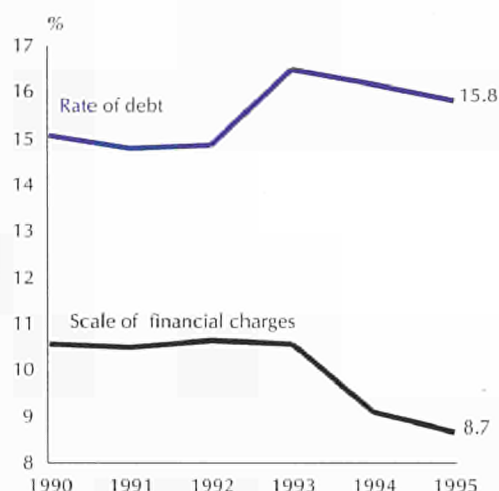
## DEBTS IN AGRICULTURE

**Rate of debt and scale of financial charges in 1995**



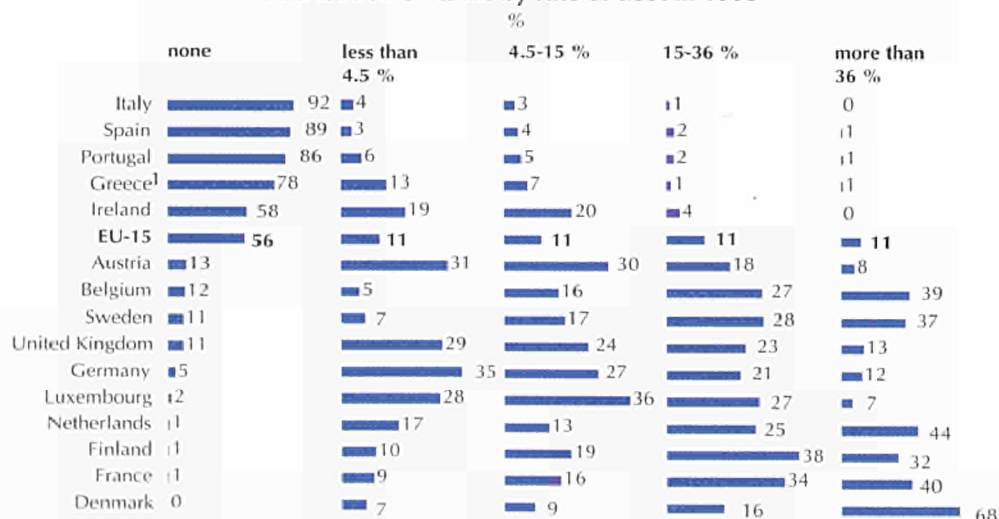
1. Excluding Thessaly, the Aegean islands and Crete.

**Rate of debt and scale of financial charges in the Twelve<sup>1</sup>**



1. The Fifteen in 1995.

**Distribution of farms by rate of debt in 1995**



Reading : 3 % of Italian farms in 1995 had a rate of debt of between 4.5 and 15 %.

1. Excluding Thessaly, the Aegean islands and Crete.





## FARMING AND FOOD INDUSTRIES

In 1995, the turnover of the farming and food industries of the Fifteen was some 578 billion ecus, i.e. almost 16% of the turnover of the entire manufacturing industry. The Community's food processing industry turnover rose by almost 1.5% as compared with 1994. With a turnover of 133 billion ecus, Germany easily headed the Fifteen, followed by France (99 billion ecus), the United Kingdom, Italy and Spain. Of these five countries, only France had a positive foreign trade balance in foodstuffs and tobacco. Spain's was more or less even. France is the largest exporter of foodstuffs and tobacco in the Union. The Netherlands, number two exporter, have the highest foreign trade surplus. Denmark and Ireland, with much lower figures, have trade surpluses close to one-third of their turnover. The value added in the farming and food industries sector came to 119 billion ecus in 1995, i.e. considerably more than the 93 billion figure for

the automobile industry. Germany, the United Kingdom and France alone represent half of the Community value added.

More than a third of the turnover of all the FFIs comes from the processing of products of animal origin. The meat industry comes first with 103 billion ecus, ahead of the 93 billion for the automobile industry, followed by the beverages industry.

### Definitions

**Turnover:** the sum of sales of goods, the production of goods sold and the production of services sold. These amounts are calculated before tax.

**Value added:** in terms of national accounting, this term describes the value created by each production unit. For the FFIs, it involves the gross value added to the factor cost (GVAFC). It is obtained as follows:  $GVAFC = \text{value added to the market price before tax} + \text{farm subsidies} - \text{dues, taxes and assimilated payments}$ .

### Turnover, value added and food industry trade in the Fifteen

Turnover		Value added		Foreign trade balance <sup>1</sup>	
1993	1995	1993	1995	1993	1995
billion ecus					

Belgium	17.6 <sup>2</sup>	27.8	...	5.4	2.2 <sup>3</sup>	2.3 <sup>3</sup>
Denmark	14.3	16.3	3.5	3.6	4.7	5.2
Germany	113.7	133.2	26.1	27.0	-3.5	-4.7
Greece	5.4	5.9	0.9	1.1	-0.9	-0.9
Spain	52.9	56.4	12.1	11.8	-1.1	-0.5
France	93.0	99.0	17.9	18.4	5.3	6.9
Ireland	12.9	14.3	3.9	3.2	3.8	4.7
Italy	62.6	60.5	16.7	10.6	-4.9	-4.6
Luxembourg	0.5	0.6	0.2	0.2	///	///
Netherlands	43.0	42.1	8.1	7.8	10.2	11.4
Austria	13.1	11.3	4.4	2.9	...	-0.7
Portugal <sup>2</sup>	9.2	9.8	...	...	-1.0	-1.1
Finland	7.4	8.3	2.0	2.0	...	-0.3
Sweden	12.3	11.8	2.4	2.4	...	-1.1
United Kingdom	...	80.8	...	19.9	-3.6	-4.3
<b>EU-15</b>	<b>555.1<sup>2</sup></b>	<b>577.8</b>	<b>122.5<sup>2</sup></b>	<b>118.7<sup>2</sup></b>	<b>...</b>	<b>...</b>

1. Farm products and FFIs including tobacco.

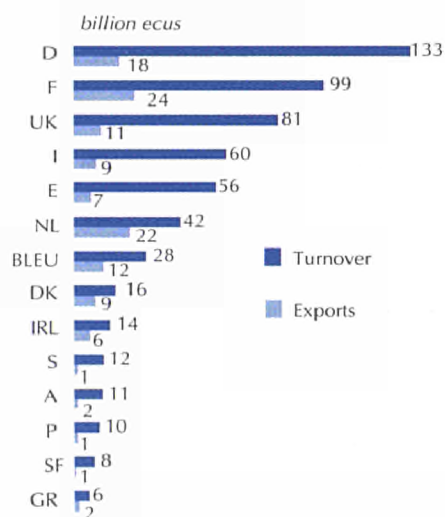
2. Estimated data.

3. Data for the BLEU.

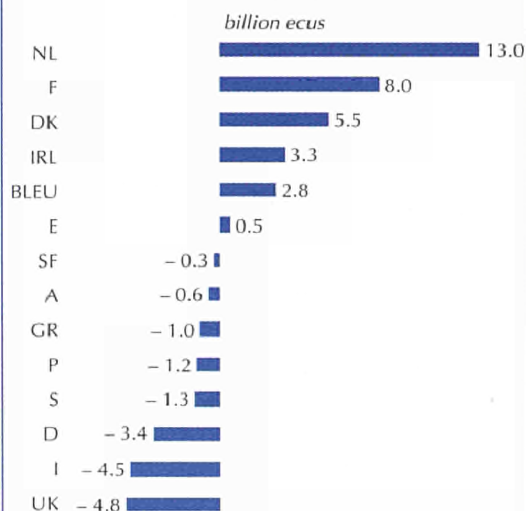
Sources : Eurostat - Newcronos and Comext



## FARMING AND FOOD INDUSTRIES

Food industry turnover and exports<sup>1</sup> in 1995

1. Farm products and FFIs including tobacco.

Food industry figures<sup>1</sup> in 1997

1. Farm products and FFIs including tobacco.

## Turnover for major food industry sectors in 1995

	Total industry	Total FFIs <sup>1</sup>	Meat	Fish	Fruit and veg.	Fatty items	Milk and dairy products	Seeds and starch products	Animal feed	Other FFIs	Beverages	Tobacco
billion ecus												
Belgium	150	27.8	4.6	0.3	1.5	2.2	3.1	1.3	2.6	6.9	3.8	1.5
Denmark	52	16.2	5.1	1.5	0.3	...	4.0	...	0.3	2.7	...	...
Germany	1112	133.1	18.8	2.0	5.5	4.9	20.6	3.2	4.6	33.9	23.8	15.8
Greece	21	5.9	0.4	0.0	0.7	0.4	1.0	0.4	0.2	1.1	1.2	0.4
Spain	260	56.4	9.7	2.2	3.4	5.8	5.6	2.3	4.8	10.4	9.4	2.8
France	601	99.0	24.5	2.0	4.3	1.7	20.2	3.9	7.2	21.8	13.4	...
Ireland	44	14.2	3.0	0.3	0.2	...	3.8	...	0.6	...	2.1	0.8
Italy	478	60.4	9.7	1.3	3.4	1.7	10.9	2.5	3.6	12.4	8.3	6.6
Luxembourg	7	0.6	0.1	...	...	...	...	...	...	0.1	0.22	...
Netherlands	154	42.1	6.9	0.5	2.3	4.1	...	1.5	5.3	7.9	3.6	3.6
Austria	82	11.3	1.9	...	0.7	...	2.5	0.3	...	2.7	2.1	...
Portugal <sup>2</sup>	48	9.8	1.4	0.4	0.4	0.6	1.2	...	1.1	...	1.8	0.7
Finland	68	8.3	1.7	0.1	0.4	0.2	2.0	0.3	0.5	2.1	0.8	0.2
Sweden	106	11.8	3.3	0.2	0.6	...	2.4	0.3	...	2.6	1.3	...
U. Kingdom	438	80.8	12.4	1.9	5.0	1.8	9.3	3.5	5.2	17.6	14.2	9.9
EU-15 <sup>2</sup>	3621	577.8	103.4	...	28.7	...	93.3	...	36.5	122.2	...	...

1. Including the tobacco industry.

2. Estimated data.





## FARMING AND FOOD INDUSTRIES

In the Fifteen, the rate of value added of all the farming and food industries in 1995 was close to 20%. It is almost 10 percentage points lower than that of the manufacturing industry. The « miscellaneous » food industries sector, which encompasses industrial bakeries, the sugar industry, confectionery, chocolate, miscellaneous food products and beverages, has the highest value added rate. Next come the fruit and vegetable industry and the grain processing industry. In the European Union in 1995, one wage-earning job produced as much value added in the food processing sector as in the manufacturing industry: on average, almost 50,000 ecus per wage-earner per annum. The meat sector nevertheless has a markedly lower value added level per wage-earner: just 34,000 ecus. There are sharp differences between Union members. The value added per wage-earner is less than 35,000 ecus in Spain and, above all, in Greece, whereas it is close to or higher than 60,000 ecus in Belgium and Ireland.

Despite the general trend to step up the technology of production processes, labour still represents a major factor in food production. The United Kingdom has a labour cost (wages and

social security contributions) that is lower than the other major producing countries in the EU. The gross farm surplus in the turnover is one of the highest, despite a lower work productivity level as measured by the value added per wage-earner. The economic context also comes into the picture, in particular the type of relations between manufacturers and distributors.

### Definitions

**Value added rate:** this is the ratio of value added to turnover.

**Gross farm surplus:** the gross value added to the factor cost - wages and salaries + social security contributions.

**Investments:** this involves, here, acquisitions of tangible assets, corresponding to the tangible assets included in the balance sheet and used in a permanent way.

**Value added:** in terms of national accounting, this term describes the value created by each production unit. For the FFIs, it is the gross value added to the factor cost (GVAFC). It is obtained as follows:  
 $GVAFC = \text{value added to the market price before tax} + \text{farm subsidies} - \text{dues, taxes and assimilated payments}.$

### Rate of value added in 1995

Total industry	Total FFIs <sup>1</sup>	Meat	Fish	Fruit and veg.	Fatty items	Milk and dairy products	Seeds and starch products	Animal feed	Other FFIs	Beverages	Tobacco
%											

Belgium	27.1	19.5	17.0	16.5	20.7	7.5	12.5	20.0	10.7	28.8	26.1	14.0
Denmark	33.1	22.4	22.0	18.8	22.9	...	14.1	...	12.8	31.7	...	...
Germany	31.0	20.3	18.7	20.9	21.9	13.0	13.4	20.8	16.8	27.9	25.9	9.0
Greece	19.1	18.9	16.7	18.9	15.3	16.6	17.4	11.7	7.4	23.7	22.7	20.2
Spain	27.5	20.9	15.5	18.8	21.7	8.7	19.0	15.5	10.6	32.4	30.2	18.5
France	26.3	18.6	14.4	18.1	19.7	13.0	14.3	20.6	12.9	25.2	25.1	...
Ireland	30.0	22.2	13.8	27.3	31.9	...	15.5	...	15.4	...	34.6	16.0
Italy	26.3	17.6	14.2	16.8	22.4	11.2	17.5	15.3	11.3	25.3	19.6	9.5
Luxembourg	30.0	29.2	18.0	...	...	...	...	...	...	50.1	28.6	...
Netherlands	27.2	18.6	12.5	19.4	20.6	8.1	14.0	23.3	11.1	26.7	30.1	28.4
Austria	34.6	25.6	23.3	...	24.9	...	9.0	20.7	...	36.9	33.5	...
Portugal	...	...	...	...	...	...	...	...	...	...	...	...
Finland	31.0	24.2	25.4	19.0	25.5	21.9	13.5	23.1	17.6	33.2	30.2	23.7
Sweden	29.6	20.7	16.7	20.6	24.2	...	14.4	22.5	...	25.0	26.4	...
U. Kingdom	31.8	24.6	21.7	20.6	34.5	8.0	17.4	26.8	16.1	34.5	26.3	17.3

1. Including the tobacco industry.

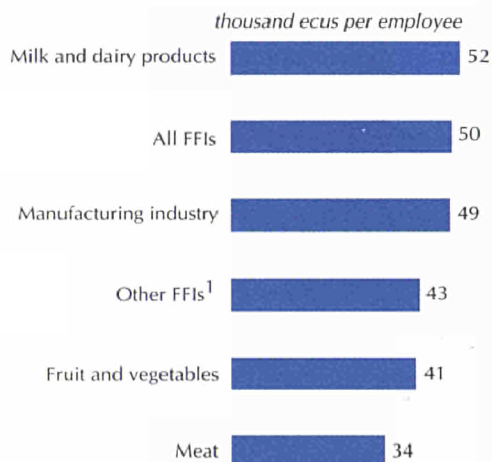
Source : Eurostat - Newcronos





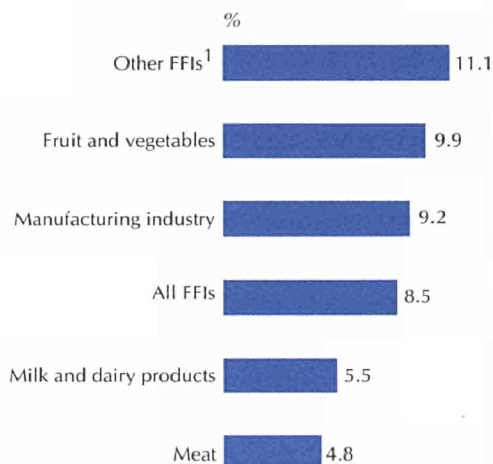
## FARMING AND FOOD INDUSTRIES

## Value added per salaried employee in 1995



1. Industrial bakeries, sugar, chocolate and confectionery industry and miscellaneous food products.

## Share of gross farm surplus in 1995 turnover



1. Industrial bakeries, sugar, chocolate and confectionery industry and miscellaneous food products.

## Economic indicators by country in 1995

	Investment /GAVTO	Value added per employee	Employee costs /GAVTO	Cost of labour per employee	Gross farm surplus /turnover
	%	thousand ecus	%	thousand ecus	%
Belgium	...	59.2	59.8	35.4	7.8
Denmark	17.5	54.2	62.2	33.7	8.5
Germany	19.8	48.3	67.2	32.4	6.7
Greece	31.8	23.1	73.2	16.9	5.1
Spain	8.7	34.3	55.0	18.8	8.8
France	15.6	51.0	61.8	31.5	7.1
Ireland	...	67.2	35.4	23.7	14.3
Italy	19.0	48.4	58.3	28.2	7.3
Luxembourg	...	43.3	56.1	24.3	12.8
Netherlands	...	...	53.6	...	8.6
Austria	21.4	48.3	72.4	35.0	7.1
Portugal	...	...	...	...	...
Finland	27.4	44.3	66.2	29.4	9.5
Sweden	18.9	41.8	68.6	28.7	6.5
United Kingdom	14.7	40.9	46.9	19.2	13.0
EU-15	...	49.7	...	29.0	8.5

Source : Eurostat - Newcronos



## FINAL FORESTRY OUTPUT

The Union's forestry production is concentrated in a small number of countries. In 1996, France, Sweden, Finland and Germany accounted for three-quarters of the output concentration of the Fifteen. This distribution has remained more or less unchanged for the past 15 years.

The value of the output of each country does not reflect the area of forest and woodland, but rather the intensive nature of the way they log timber. Since the 1990s, the forestry output of France's 15 million hectares of forest has exceeded the forests of Sweden and Finland, which cover 24 and 20 million hectares respectively. Conversely, Greek forests, which cover more than 3 million hectares, produce only 1 % of Community output. The values of forestry output vary from year to year depending on prices, which impacts on volumes. Among the Union's major producers,

France is the country that has most developed its production since the early 1980s.

Forestry production is limited in most countries to rough timber. In France, Sweden and Germany, the timber harvest represents between 96 % and 100 % of forestry output. The by-products of wood are more important in Finland, the United Kingdom and Spain. In Portugal, they even represent half of forestry output, because of the scale of the cork harvest (Portugal being the world's number one producer).

### Definition

**Final forestry output:** this essentially involves rough timber. But it also includes certain wood by-products like cork and resin.

### Final Forestry Output

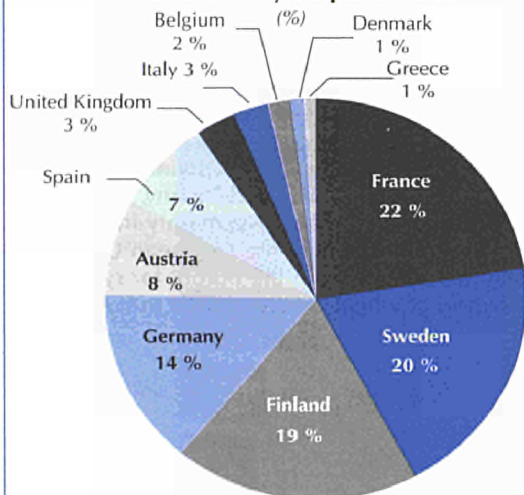
	1980	1985	1990	1993	1994	1995	1996
<i>thousands of ecus</i>							
Belgium	89	157	182	195	199	205	200
Denmark	83	129	167	145	163	172	180
Ex-FRG	1 401	1 384	3 130	1 088	1 389		
Germany				1 200	1 541	1 884	1 686
Greece	79	106	95	89	82	92	106
Spain	356	562	908	673	766	895	842
France	1 630	1 917	2 759	2 164	2 793	2 965	2 751
Ireland							
Italy	408	416	417	435	466	385	430
Luxembourg	11	16	15	10	16		
Netherlands							
Austria	865	759	1 169	748	961	996	954
Portugal	410	457	675				
Finland	1 678	2 484	2 928	1 546	2 053	2 478	2 292
Sweden			2 507	1 770	2 100	2 606	2 396
United Kingdom	186	313	393	375	431	407	420
<b>EU-15</b>	<b>7 196</b>	<b>8 699</b>	<b>15 345</b>	<b>10 437</b>	<b>12 960</b>	<b>13 085</b>	<b>12 258</b>

Source : Eurostat - Economic Accounts for Agriculture

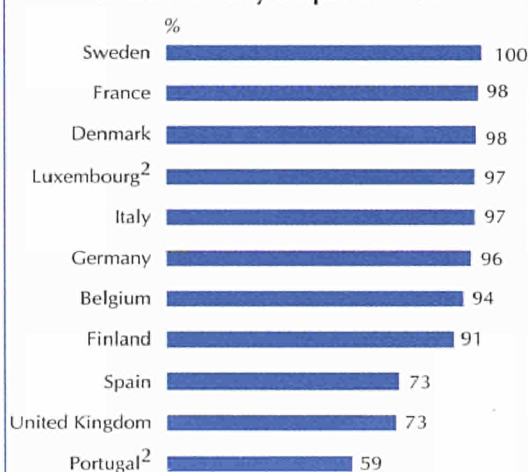


## FINAL FORESTRY OUTPUT

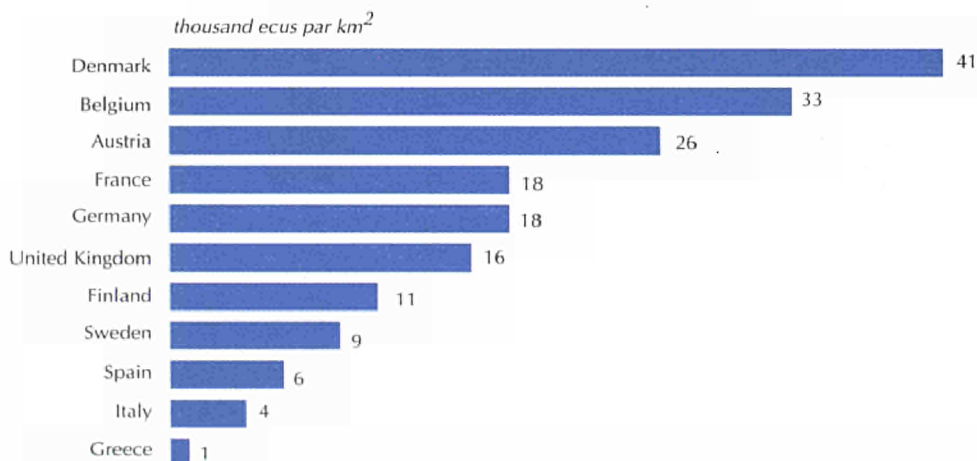
## Three-quarters of production in just four countries

Distribution of the value of final forestry output in 1995<sup>1</sup>

1. No data for Luxembourg, Portugal, Ireland and the Netherlands

Share of rough timber in the value of final forestry output in 1995<sup>1</sup>

1. No data for Ireland, Greece, the Netherlands and Austria  
2. In 1991 for Portugal and 1994 for Luxembourg.

Forestry output per km<sup>2</sup> of forested land in 1995

Source : Eurostat - Economic Accounts for Agriculture





## CEREAL PRODUCTION

The fifteen members of the European Union produced almost 210 million tonnes of cereals in 1996, almost as much as India, representing more than 10 % of the world total. Only China and the NAFTA countries produce more, with each bloc producing more than 20 % of the world's cereal resources. From 1980 to 1996 the Community harvest rose by 25 %, as opposed to the 33 % increase in the world harvest. Over the same period, cereal production in Asia advanced by 50 %. In the CIS it has dropped by 50 % since 1990.

With almost 60 quintals per hectare, the average cereal yield of the Fifteen in 1996 was the highest of the major production zones. It is only exceeded by those of certain countries such as Egypt, Japan and Korea.

France, Germany and the United Kingdom account for more than 60 % of the Community's cereal production, and more than half the land planted to cereal crops. Poland's admission to the Union will add a cultivatable area equivalent to that of France and an output equivalent to that of the United Kingdom. Wheat, rice and maize represent 84 % of world cereal production. But among the Fifteen, it is wheat, barley and maize which account for 90 % of the output. The remainder is divided mainly among oats, produced in particular in Germany, Finland and Sweden, and rye harvested mainly in Germany. Poland's admission to the European Union will lead to a doubling of the output for rye and for a hybrid of wheat and rye called triticale.

### Area of cereal crops in 1996

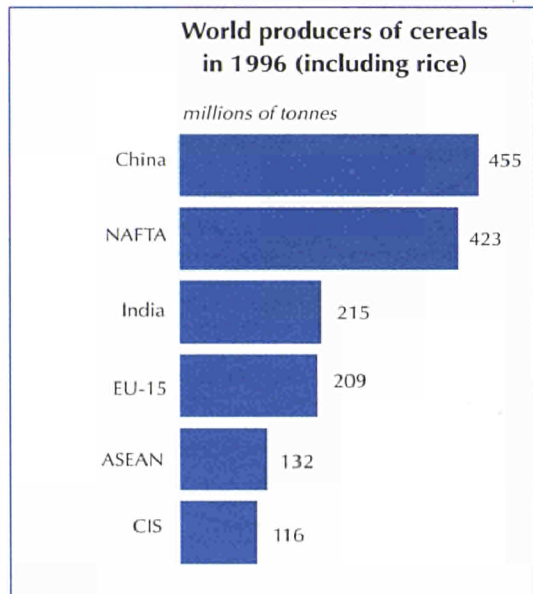
	Wheat	Barley	Maize	Oats	Rye	Rice	Others	Total
<i>thousands of hectares</i>								
Belgium	205	49	23	6	3	—	11	296
Denmark	681	739	—	26	72	—	12	1 530
Germany	2 594	2 208	372	302	809	—	421	6 707
Greece	855	148	222	40	18	20	1	1 305
Spain	2 022	3 530	435	411	171	107	73	6 748
France	5 039	1 530	1 729	140	48	22	322	8 830
Ireland	86	181	—	21	—	—	6	294
Italy	2 443	351	1 023	142	8	245	50	4 262
Luxembourg	10	13	—	3	—	—	4	30
Netherlands	142	35	11	2	7	—	9	206
Austria	248	260	202	42	51	—	54	856
Portugal	229	41	183	68	62	28	39	649
Finland	113	543	—	374	35	—	11	1 075
Sweden	328	459	—	278	33	—	94	1 192
United Kingdom	1 976	1 267	—	96	8	—	10	3 357
<b>EU-15</b>	<b>16 970</b>	<b>11 354</b>	<b>4 200</b>	<b>1 950</b>	<b>1 325</b>	<b>422</b>	<b>1 115</b>	<b>37 336</b>
Czech Republic	801	604	30	66	64	—	22	1 587
Estonia	46	148	—	49	32	—	20	295
Hungary	1 193	325	1 053	48	59	3	126	2 807
Poland	2 480	1 130	69	625	2 415	—	2 001	8 720
Slovenia	41	13	49	...	2	...	...	107

Sources : Eurostat - New Cronos for the European Union and national statistics for the other countries

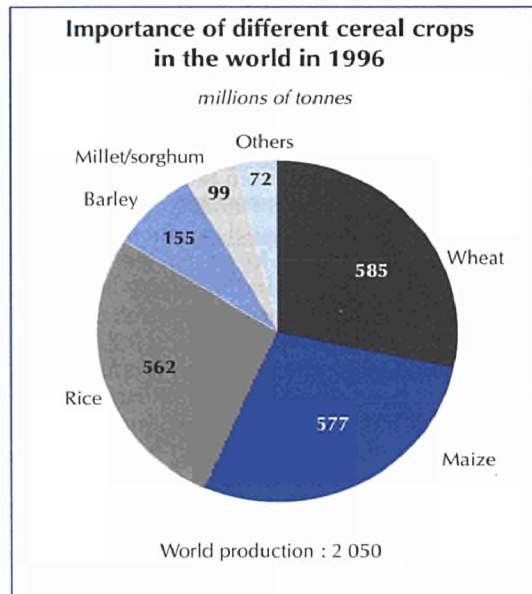


## CEREAL PRODUCTION

The European Union produces more than 10 % of the world's cereals



Source : FAO



Sources : ZMP, FAO, CIB, USDA

## Cereal production in 1996

	Wheat	Barley	Maize	Oats	Rye	Rice	Others	Total
thousands of tonnes								
Belgium	1 846	363	215	28	14	—	75	2 541
Denmark	4 758	3 853	—	134	343	—	30	9 118
Germany	18 922	12 074	2 913	1 606	4 214	—	2 407	42 136
Greece	1 841	359	1 814	96	39	223	2	4 374
Spain	6 169	10 636	3 896	654	295	761	159	22 570
France	35 945	9 463	14 449	623	219	115	1 650	62 464
Ireland	771	1 225	—	146	—	—	ε	2 142
Italy	8 253	1 313	9 547	353	31	1 424	194	21 114
Luxembourg	64	72	ε	13	2	—	23	176
Netherlands	1 269	235	87	11	38	—	71	1 711
Austria	1 240	1 083	1 544	153	156	—	323	4 498
Portugal	432	58	805	66	51	154	58	1 624
Finland	459	1 860	—	1 261	87	—	34	3 700
Sweden	2 030	2 113	—	1 200	166	—	445	5 954
United kingdom	16 031	7 780	—	590	51	—	55	24 507
<b>EU-15</b>	<b>100 030</b>	<b>52 487</b>	<b>35 269</b>	<b>6 934</b>	<b>5 707</b>	<b>2 677</b>	<b>5 525</b>	<b>208 630</b>
Czech Republic	3 727	2 262	169	214	204	—	68	6 644
Estonia	101	317	—	115	62	—	48	643
Hungary	3 910	921	5 989	112	98	7	271	11 308
Poland	8 576	3 437	350	1 581	5 652	—	5 702	25 298
Slovenia	161	41	333	...	6	...	...	542

Source : Eurostat - New Cronos for the European Union and national statistics for the other countries





## CEREAL BALANCE SHEETS

In the 1995-1996 marketing year, the European Union produced 177 million tonnes of cereals. Europe, overall, meets its own cereal requirements, though this is not the case with every Member State. The Belgium-Luxembourg economic union provides less than half its needs, Portugal one-third, and the Netherlands one-quarter. These countries import almost all their cereals from the other Member States, in particular from France.

The bulk of European cereal production is used locally, first and foremost for animal feed. Human consumption is the second main use industrial uses – beer-making for barley and starch products for wheat and maize – representing 9 % of utilization. Since 1980, the European production of cereals has been rising faster than their utilization, which has helped to lower imports. The 1993 reform of the CAP nevertheless boosted domestic uses and put a brake on production, thus reducing exports.

In 1996, Europe only exported beyond its borders around 15 million tonnes of cereals, some 20 % of which went to Saudi Arabia, and a further 10 % to Poland. Imports were halved, with more than half of them coming from the United States.

### Definitions

**1995-1996 marketing year :** products harvested in 1995 and marketed in 1995 and 1996.

**Self-sufficiency level :** relation between usable production and domestic use. A figure of 90 means that 90 % of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of imports and exports in 1996 was based on customs declarations for non-processed cereals. So the result is slightly different from that of the balance sheets, which apply to a marketing year.

### Cereal balance sheets for the 1995-1996 commercial year

Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use				Self-sufficiency level
			Total	animal feed	including human consump.	industrial uses	
thousands of tonnes							%

BLEU	2 128	6 246	3 650	4 698	2 409	1 017	1 199	45.3
Denmark	9 150	558	2 842	7 230	5 849	477	335	126.6
Germany	39 220	6 331	12 207	35 645	21 901	7 793	3 900	110.0
Greece	4 213	1 399	502	4 863	2 762	1 799	60	86.6
Spain	11 073	8 751	1 342	18 666	12 313	3 666	1 544	59.3
France	53 432	2 103	26 807	29 625	20 407	5 740	1 776	180.4
Ireland	1 806	695	229	2 255	1 556	389	145	80.1
Italy	18 290	9 155	3 954	23 360	12 540	9 379	691	78.3
Netherlands	1 504	7 476	2 857	6 106	3 367	1 200	1 465	24.6
Austria	4 455	703	834	4 255	2 782	702	502	104.7
Portugal	1 321	2 536	107	3 750	2 206	1 129	241	35.2
Finlande	3 333	377	521	3 063	1 955	444	405	108.8
Sweden	4 792	123	652	4 288	3 180	782	66	111.8
United Kingdom	21 862	4 162	6 126	19 719	9 157	7 330	2 277	110.9
<b>EU-15</b>	<b>176 579</b>	<b>7 830</b>	<b>19 846</b>	<b>167 523</b>	<b>102 384</b>	<b>41 847</b>	<b>14 606</b>	<b>105.4</b>

1. For EU-15, trade with non-member countries.

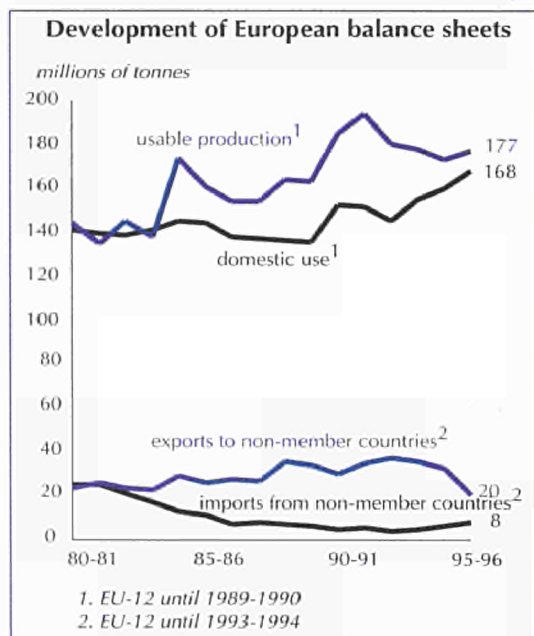
Source : Eurostat - Balance sheets



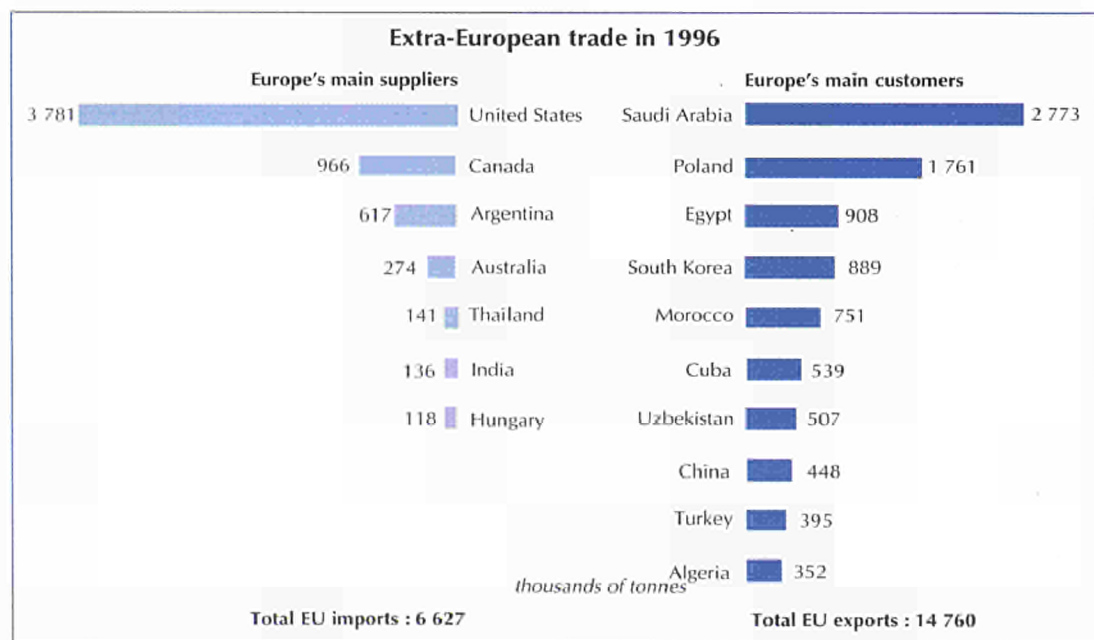
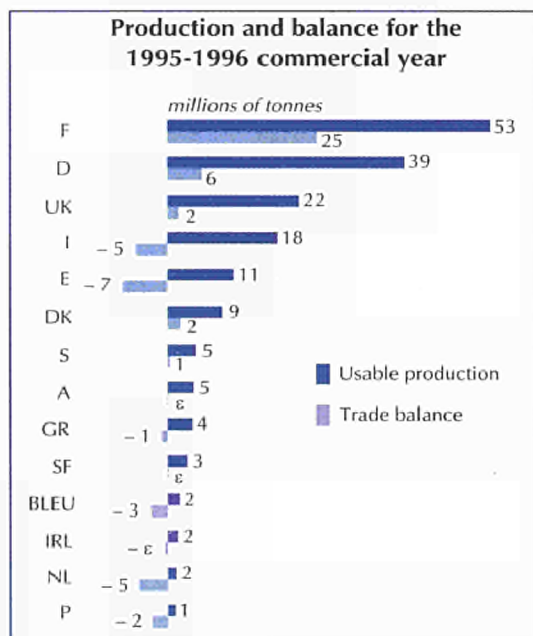


## CEREAL BALANCE SHEETS

### Cereal surpluses on the decline



Source : Eurostat - Balance sheets



Source : Eurostat - External trade



## WHEAT PRODUCTION

Community wheat production rose from 67 to 100 million tonnes between 1980 and 1996. With 17% of world production in 1996, as opposed to 15% in 1980, the European Union is now the world's number two producer behind China. From 1980 to 1995, the harvests of the leading world producers developed in differing ways: higher growth than in the Union for China and Australia, stagnation for North America, and a collapse in production output for the CIS at the start of the 1990's. With an average of 59 quintals per hectare in 1996, the Union has the highest average yields in the world. Only one or two countries like Egypt also exceed 50 quintals per hectare, in very different production conditions.

France, Germany and the United Kingdom account for more than two-thirds of the

Community's wheat production. The 1993 CAP reform put a brake on the expansion of areas put to wheat. But with the exception of Greece and the new Member States, the Union countries all increased their production between 1990 and 1996, mainly because of extremely favourable climatic conditions and especially high yields. Wheat is grown throughout the territory of the Fifteen, apart from certain regions situated in northernmost Finland and Sweden, and the Azores. The Centre Region of France, Denmark and Picardy account for 13% of Union production. The highest yields, those from the Holland area of in the Netherlands, are ten times higher than the lowest yields obtained in the south of the Iberian peninsula.

### European wheat producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	<i>thousands of hectares</i>				<i>thousands of tonnes</i>				<i>q/ha</i>
Belgium	188	213	209	205	879	1 303	1 525	1 844	90.2
Denmark	139	535	608	674	652	3 953	4 599	4 757	70.6
Ex-FRG	1 668	1 671	///	///	8 156	11 053	///	///	///
Germany	///	2 430	2 579	2 594	///	15 242	17 763	18 922	72.9
Greece	1 012	1 002	857	855	2 970	1 939	2 139	1 841	21.5
Spain	2 699	2 007	2 127	2 022	6 040	4 774	3 139	6 169	30.5
France	4 590	5 147	4 746	5 040	23 781	33 346	30 888	35 949	71.3
Ireland	53	70	71	86	273	596	583	771	90.0
Italy	3 408	2 763	2 482	2 443	9 156	8 082	7 946	8 258	33.8
Luxembourg	9	9	9	10	28	44	53	64	66.4
Netherlands	142	141	135	142	882	1 076	1 167	1 269	89.6
Austria	277	290	256	248	1 230	1 405	1 301	1 240	50.1
Portugal	355	208	260	237	433	297	360	406	17.1
Finland	124	191	101	113	357	627	380	459	40.8
Sweden	288	348	261	335	1 193	2 243	1 554	2 030	60.7
U. Kingdom	1 441	2 013	1 858	1 976	8 470	14 033	14 316	16 102	81.5
<b>EU-15</b>	<b>14 398<sup>1</sup></b>	<b>17 366</b>	<b>16 558</b>	<b>16 979</b>	<b>64 499<sup>1</sup></b>	<b>88 958</b>	<b>87 712</b>	<b>100 081</b>	<b>58.9</b>
Czech Rep.	...	823	832	801	3 466	4 624	3 823	3 727	46.5
Estonia	56	26	39	46	126	65	77	101	22.1
Hungary	1 276	1 221	1 108	1 193	6 077	6 198	4 614	3 910	32.8
Poland	1 609	2 281	2 407	2 480	4 175	9 026	8 668	8 576	34.6
Slovenia	...	43	42	41	...	200	178	161	39.4

1. EU-15 without the new Länder.

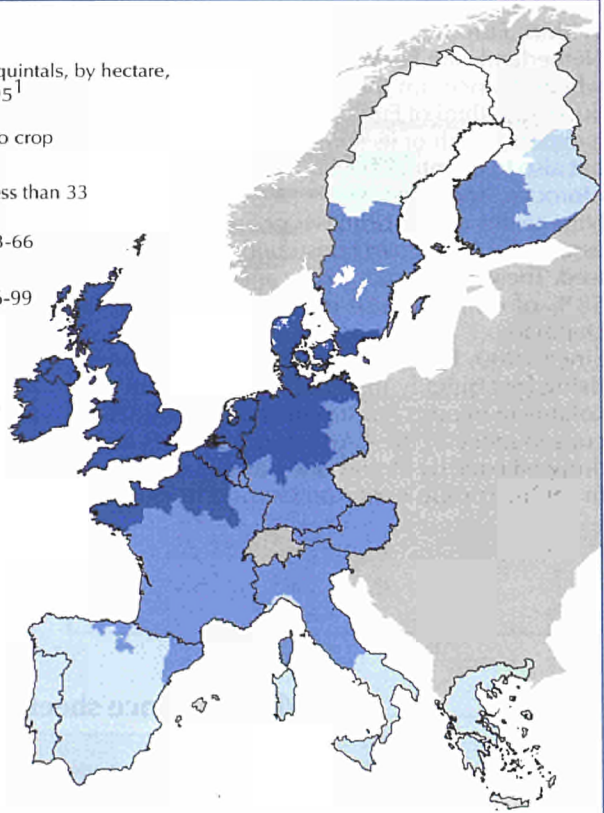
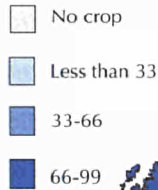
Sources : Eurostat - New Cronos for the EU and national statistics, ZMP, FAO for the other countries



## WHEAT PRODUCTION

## The highest wheat yields are in the Netherlands

Yields of soft wheat, in quintals, by hectare,  
for 1995



1. 1994 data for Italy.

Source : Eurostat-New Cronos

## World wheat producers

	1980	1990	1996
	thousands of tonnes		
China	55 213	98 232	110 570
EU-15	64 338	89 021	99 992
NAFTA	86 696	111 115	95 369
India	31 830	49 850	62 620 <sup>1</sup>
CIS	96 870	107 989	25 112 <sup>1</sup>
Australia	10 856	15 402	23 653
<b>World</b>	<b>446 107</b>	<b>601 723</b>	<b>586 120</b>

1. Estimate. For methodological reasons, the data differ from those on page 88.

Source : FAO





## WHEAT BALANCE SHEETS

During the 1995-1996 marketing year, the European Union produced 87 million tons of wheat, enough to be more than self-sufficient. Within Europe, however, Portugal and the Netherlands are far from being self-sufficient in wheat. France, on the other hand, which produces one-third of Europe's wheat, has a surplus. It exports much of its surplus to Member States, but also to countries beyond Europe, like China, Morocco, and Algeria.

Nine-tenths of European wheat are used locally, essentially for human consumption and animal feed. The wheat consumed by animals represents 58 % of domestic use in France and 81% in Denmark.

Since 1980, European wheat output has been rising less quickly than domestic use, but the volume of imports has dropped noticeably. As a consequence of the CAP reform, exports have dropped back by almost one half since 1992.

In 1996, Europe exported beyond its borders

almost 8 million tonnes of wheat, i.e. one-half of world cereal exports. It imported four times less, mainly from Canada and the United States: this was the so-called « strong » spring wheat, which is needed for the manufacture of certain types of bread, i.e. hamburger rolls.

### Definitions

**1995-1996 marketing year:** products harvested in 1995 and marketed in 1995 and 1996.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed wheat and mixed wheat and rye crops. So the result is slightly different from that of the balance sheets, which apply to a marketing year.

### Wheat balance sheets for 1995-1996

Usable production	Imports <sup>1</sup>	Export <sup>1</sup>	Domestic use				Self- sufficiency level
			Total	animal feed	including human consumpt.	industrial uses	
thousands of tonnes							%

BLEU	1 531	3 000	2 087	2 413	997	966	396	63,4
Denmark	4 599	259	1 540	3 398	2 763	353	15	135,3
Germany	17 398	2 735	5 344	15 276	7 909	5 796	665	113,9
Greece	2 139	840	483	2 309	360	1 759	—	92,6
Spain	3 094	3 173	883	5 543	1 522	3 590	58	55,8
France	30 888	1 183	15 927	17 157	9 881	5 298	931	180,0
Ireland	583	431	101	875	497	307	4	66,6
Italy	7 857	6 487	3 140	11 164	1 657	8 712	190	70,4
Netherlands	1 167	3 392	1 270	3 260	1 441	1 071	708	35,8
Austria	1 304	188	452	1 016	446	495	8	128,3
Portugal	360	1 198	59	1 499	467	965	8	24,0
Finland	379	242	110	493	64	312	86	76,9
Sweden	1 554	72	216	1 455	757	560	66	106,8
United Kingdom	14 310	1 633	3 570	11 924	5 106	5 647	567	120,0
EU-15	87 163	2 785	13 134	77 782	33 867	35 831	3 702	112,1

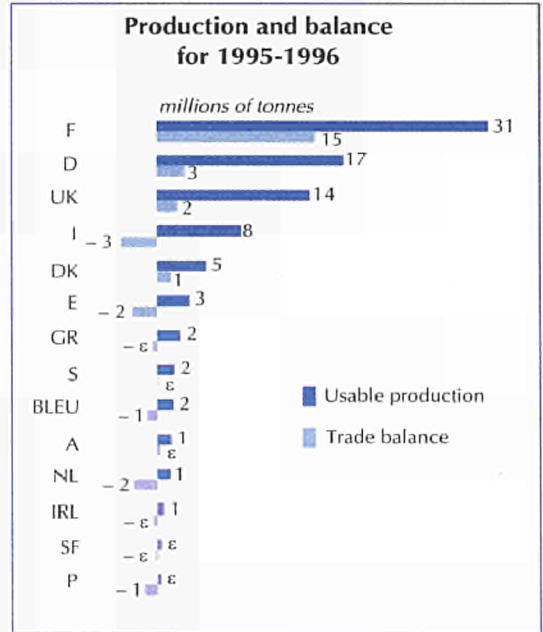
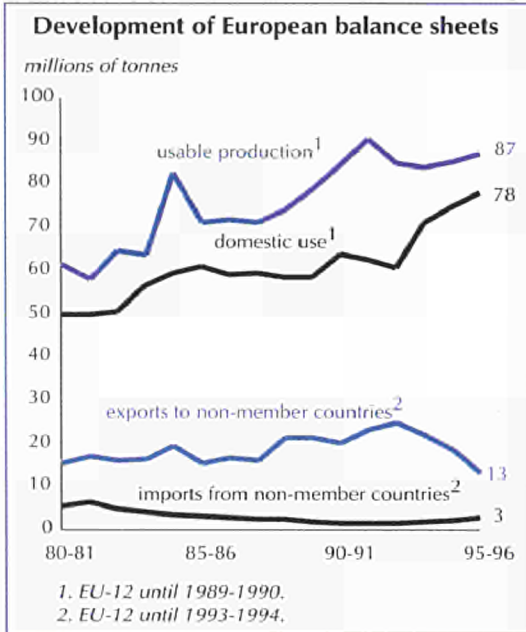
1. For EU-15, trade with non-member countries.

Source : Eurostat - Balance sheets



## WHEAT BALANCE SHEETS

### Wheat production on a par with its uses



Source : Eurostat - Balance Sheets

### Extra-European trade in 1996



Source : Eurostat - External trade



## WHEAT FLOUR AND BISCUITS

With a wheat flour production figure in excess of 25 million tonnes in 1996, the European Union more than meets its own requirements. Community production as a whole has been stable since the early 1990s. France, which is the EU-15's leading wheat producer, is also the largest producer of flour and the number one exporter to non-member countries. It comes in ahead of Italy, Germany and the United Kingdom, with the last two of these states consuming almost all their own production. The consumption of bread has dropped over the past ten years in most countries with the exception of Germany, Denmark and Austria. Consumption is at quite different levels from country to country, ranging from 40 kg per inhabitant in the United Kingdom to more than 80 kg in Germany and Denmark. The United Kingdom is the main producer of biscuits among the Fifteen, way ahead of Germany,

Italy and France. This activity has grown sharply over the last ten years in most countries and consumption per inhabitant has risen appreciably, especially in Spain and Germany, where it had previously been in decline. The Greeks and Portuguese still consume very little biscuits. The trade balance in terms of volume for biscuit products shows a surplus for the Fifteen as a whole. It is very favourable in the Netherlands and Denmark, but is negative in France, in particular.

### Definitions

**Bread consumption:** taking all types of flour together, including rye flour.

**Biscuit production:** this includes sweet biscuits, salt biscuits and pre-packaged non-frozen pastries. Continental-style toast is not included.

### Balance sheets for milling flour and biscuit-making in 1996

Wheat flour			Biscuits			
Production	Imports	Exports	Production	Imports	Exports	Consumption
thousands of tonnes						

Belgium	1 319	102	723	291	79	164	206
Denmark	262	20	37	151	34	107	79
Germany	4 585	58	440	868	206	221	853
Greece	...	...	...	45	13	12	45
Spain	2 411	-	266	405	60	75	390
France	5 272	109	1 674	717	228	175	769
Ireland	...	...	...	30	45	22	53
Italy	4 820	7	825	780	56	133	704
Netherlands	1 371	318	399	382	55	163	274
Austria	346	15	-	73	52	40	85
Portugal	655	-	-	27	24	9	42
Finland	...	...	63	45	20	12	54
Sweden	535	2	17	82	14	8	88
United Kingdom	4 245	32	102	2 065	173	282	1 956
<b>EU-15</b>	<b>...</b>	<b>...</b>	<b>...</b>	<b>5 961</b>	<b>...</b>	<b>...</b>	<b>5 598</b>

Source : Gam-Caobisco



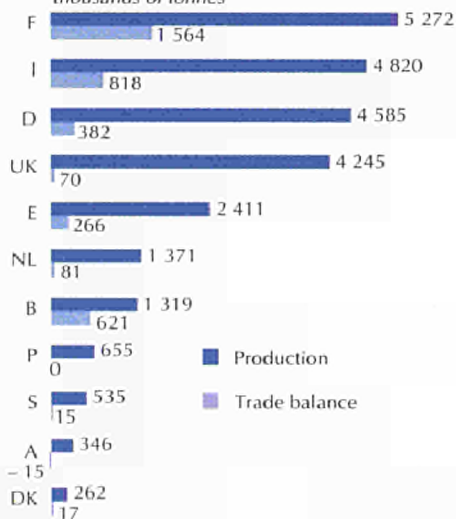


## WHEAT FLOUR AND BISCUITS

### Germans are eating more and more bread

**Production and balance of wheat flour trade in 1996**

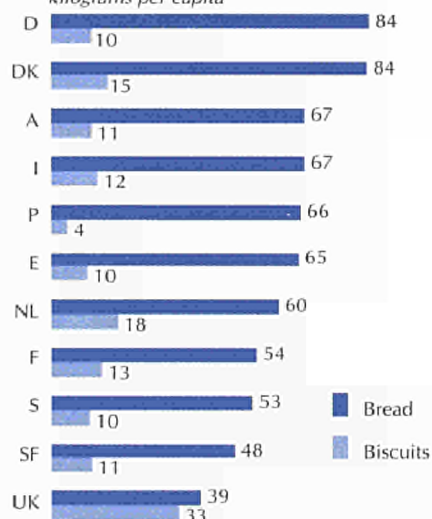
thousands of tonnes



Source : Gam

**Per capita consumption of bread and biscuits in 1996**

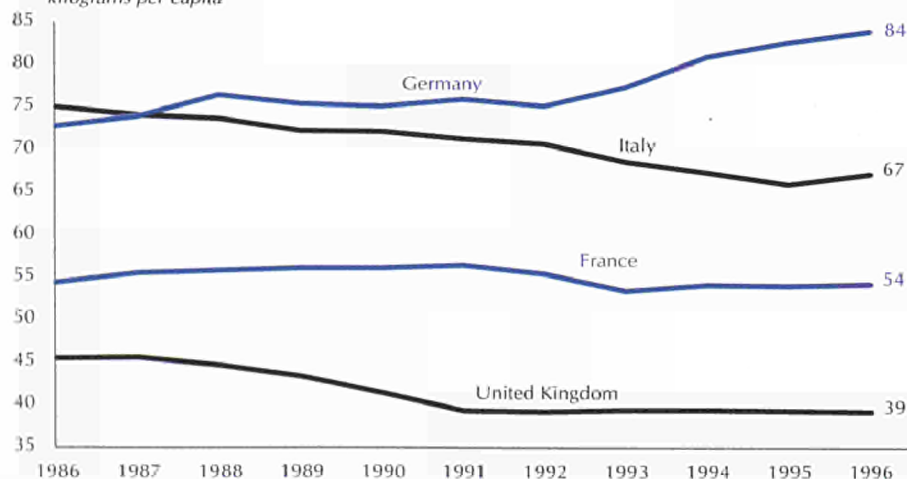
kilograms per capita



Source : Gam-Caobisco

**Development of per capita bread consumption between 1986 and 1996**

kilograms per capita



Source : Gam



## BARLEY PRODUCTION

With a harvest of 53 million tonnes in 1996, i.e. more than one- third of the world harvest, the European Union is the world's main producer of barley. Community production has nevertheless dropped since 1980. The CIS countries, where harvests have declined greatly in recent years, and the NAFTA states, where an opposite trend has been noted. The two other main blocs are barley producers.

In 1996, the average barley yield of the EU was twice the world level and exceeded only in Switzerland and New Zealand.

In 1996, Germany, Spain and France accounted for 60 % of the Union's harvest. Since its reunification, Germany has been the leading European producer. Spain and France take second and third places, depending on the year.

The area sown to barley among the original nine members of the EU was highest in 1979, although production peaked in 1984. The 1993 CAP reform speeded up the slackening in production until 1995, the year when the reduction in fallow levels from 10 % to 5 % helped to reverse this trend. Barley is grown throughout almost all of the Europe of the Fifteen, exceptions being regions like Asturias in northern Spain, Val d'Aosta, and the Atlantic islands. Denmark, Castile-Leon and Bavaria produce more than 2 million tonnes apiece, i.e. 20 % of the Union's production. In 1995, yields varied from 70 quintals per hectare, in the more fertile areas in Belgium, to less than 5 quintals per hectare in the south of the Iberian peninsula.

### European barley producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	<i>thousands of hectares</i>				<i>thousands of tonnes</i>				<i>q/ha</i>
Belgium	153	93	54	50	807	534	357	382	75.7
Denmark	1 577	910	719	738	6 044	4 987	3 898	3 953	53.6
Ex-FRG	2 002	1 693	///	///	8 826	9 195	///	///	///
Germany	///	2 613	2 109	2 208	///	13 992	11 891	12 074	54.7
Greece	345	180	133	148	911	312	384	359	24.2
Spain	3 575	4 358	3 556	3 572	8 705	9 382	5 047	10 697	29.9
France	2 647	1 758	1 387	1 534	11 692	9 996	7 686	9 497	61.9
Ireland	366	207	179	181	1 659	1 219	1 094	1 225	67.5
Italy	329	469	381	351	947	1 709	1 387	1 313	37.4
Luxembourg	19	16	13	13	59	70	63	72	56.4
Netherlands	53	40	36	35	258	219	203	235	66.2
Austria	374	292	229	260	1 514	1 521	1 065	1 083	41.7
Portugal	79	67	51	46	54	79	53	70	15.2
Finland	533	486	516	543	1 534	1 720	1 764	1 860	34.3
Sweden	648	468	453	469	2 172	2 123	1 793	2 113	45.1
U. Kingdom	2 330	1 517	1 192	1 267	10 320	7 911	6 830	7 784	61.4
<b>EU-15</b>	<b>15 029<sup>1</sup></b>	<b>13 472</b>	<b>11 007</b>	<b>11 416</b>	<b>55 502<sup>1</sup></b>	<b>55 773</b>	<b>43 513</b>	<b>52 717</b>	<b>46.2</b>
Czech Rep.	...	555	560	604	2 590	3 157	2 141	2 262	37.5
Estonia	269	264	187	148	574	600	279	317	21.4
Hungary	246	297	393	325	929	1 369	1 408	921	28.3
Poland	1 322	1 174	1 048	1 130	3 420	4 217	3 279	3 437	30.4
Slovenia	...	7	13	13	...	25	44	41	32.4

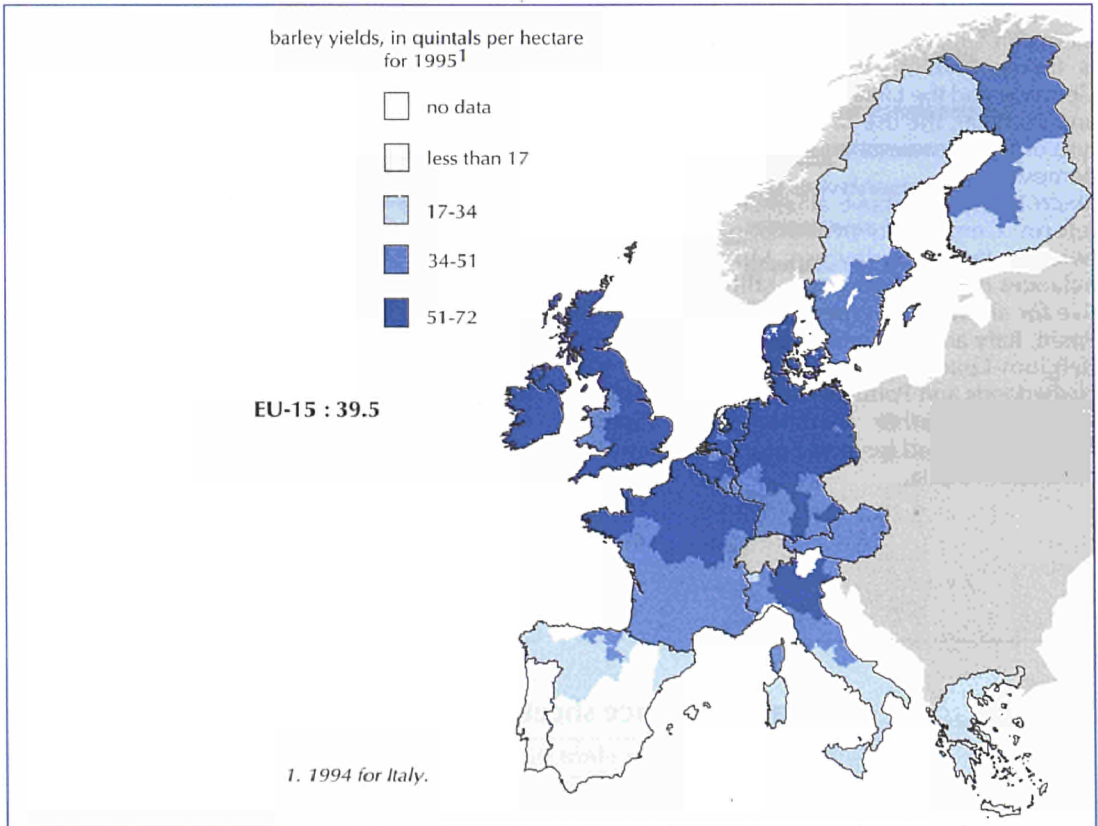
1. EU-15 without the new Länder.

Sources : Eurostat - New Cronos for the EU and national statistics, ZMP, FAO for the other countries



## BARLEY PRODUCTION

### Belgium has the highest barley yields



Source : Eurostat - New Cronos

### World barley producers

	1980	1990	1996
	thousands of tonnes		
EU-15	59 522	55 746	52 755
CIS	37 997	50 016	27 541
NAFTA	19 787	23 125	24 764
Turkey	5 300	7 300	8 000
CEFTA	7 924 <sup>1</sup>	9 682	7 379
Australia	2 682	4 108	6 809
<b>World</b>	<b>156 730</b>	<b>177 574</b>	<b>156 139</b>

*1. without Slovenia.*

Sources : FAO, ZMP, national statistics. For methodological reasons, the data differ from those on page 94.





## BARLEY BALANCE SHEETS

With 43 million tonnes produced during the 1995-1996 marketing year, barley represents one-quarter of the total cereal production of the European Union. In every country, domestic use is focused mainly on animal feed. But in Germany and the United Kingdom, as in Benelux and Portugal, the use of barley in the manufacture of beer accounts for at least one-quarter of domestic use.

Since 1980, and above all since the 1993 CAP reform, Community production has dropped twice as fast as barley use. Most of the trade balances of Union states are still soundly positive for all this, with the exception of those of Spain, Italy and low producer countries like the Belgium-Luxembourg union, Greece, the Netherlands and Portugal. Germany exports barley both to other Member States (Spain, Netherlands) and beyond Europe, to countries like Saudi Arabia.

In 1996, Europe exported beyond its borders more than 4 million tons of barley, including 2.8 million tons to Saudi Arabia. Imports, which remain low, came mainly from Australia, the number one supplier, well ahead of the United States and Hungary.

### Definitions

**1995-1996 marketing year:** products harvested in 1995 and marketed in 1995 and 1996.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed barley. So the result is slightly different from that of the balance sheets, which apply to a marketing year.

Barley balance sheets for 1995-1996

Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use				Self-sufficiency level	
			Total	animal feed	including			
					human consump.	industrial uses	%	
thousands of tonnes								
BLEU	420	1 402	994	833	451	6	364	50.4
Denmark	3 898	199	857	3 260	2 677	—	320	119.6
Germany	11 758	1 376	3 500	10 532	7 292	19	2 610	111.6
Greece	384	173	—	557	491	—	40	68.9
Spain	4 971	1 729	128	6 501	5 261	—	625	76.5
France	7 686	160	3 649	3 969	3 421	20	242	193.7
Ireland	1 094	49	105	1 056	839	—	128	103.6
Italy	1 422	990	11	2 402	2 062	10	250	59.2
Netherlands	203	1 443	279	1 353	873	15	451	15.0
Austria	1 065	77	199	942	682	3	173	113.1
Portugal	53	280	18	315	166	2	136	16.8
Finland	1 764	13	242	1 481	1 050	10	291	119.1
Sweden	1 793	40	286	1 452	1 271	96	—	123.5
United Kingdom	6 834	214	1 852	5 466	3 597	12	1 556	125.0
EU-15	43 345	313	4 288	40 119	30 133	193	7 186	108.0

1. For EU-15, trade with non-member countries.

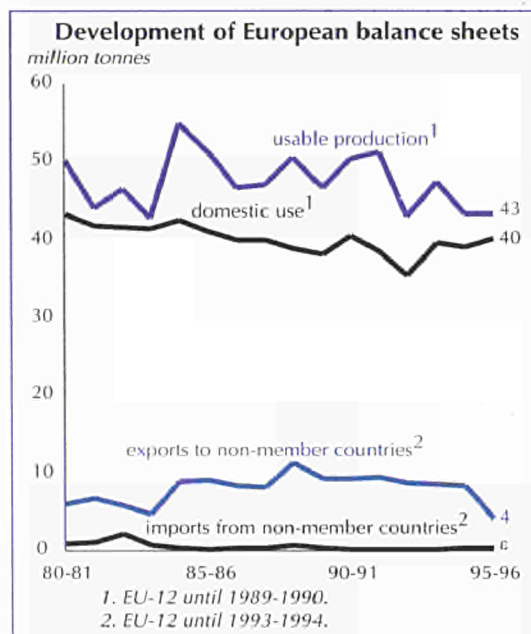
1. For EU-15, trade with non-member countries.

Source : Eurostat - Balance sheets

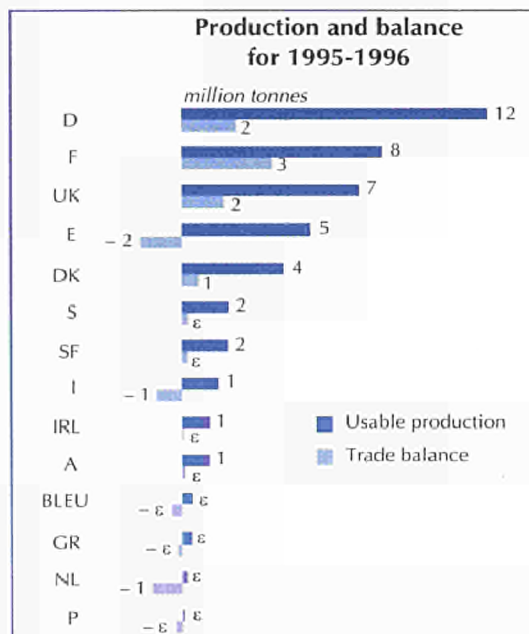


## BARLEY BALANCE SHEETS

### Low barley purchases from non-member countries



Source : Eurostat - Bilans



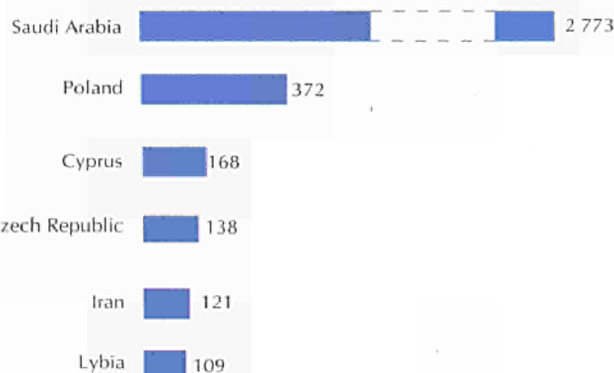
### Extra-European trade in 1996

#### Europe's main suppliers



Total EU imports : 184

#### Europe's main customers



Total EU exports : 4 311

thousand tonnes

Source : Eurostat - Foreign trade



## BEER

The EU produced 316 million hectolitres of beer in 1996, i.e. almost one-quarter of the world total. Over the past decade, Community production, which rose slightly until 1992, has levelled out. Consumption, which rose until 1992, is now showing a tendency to drop. Trade is low as compared with production, except for the Netherlands, but it is growing at a regular pace. Exports, which have doubled in the last decade, are rising faster than imports.

Germany is still the main producer among the Fifteen with more than one-third of production in 1997, followed by the United Kingdom, Spain and the Netherlands. National production levels have been developing differently over the past

ten years: they are rising in particular in Germany, the Netherlands, Ireland and Portugal, but dropping in the United Kingdom and Spain.

Consumption of beer still predominates in certain countries in the centre and north of the Union. In Germany, Denmark, Belgium, Austria and the United Kingdom, it amounts on average to more than 100 litres per inhabitant per annum. Conversely, it is low in wine-producing countries: 25-40 litres for France, Italy and Greece. But for some years now the drop in per capita consumption is more or less widespread. It is particularly marked in Belgium, Germany and Austria.

### Brewing in the European Union in 1997

	Number of breweries	Salaried employees	Production	Imports	Exports	Consump- tion	Per capita consump- tion
			<i>thousand hl</i>				<i>litres</i>
Belgium	112	6 500	14 168	651	4 576	10 243	102.0
Denmark	14	3 550	9 181	94	2 800	6 165	116.7
Germany	1 269	44 000	114 800	3 166	9 227	107 533	131.1
Greece	5	1 800	3 945	215	220	3 940	39.0
Spain	22	9 000	24 879	2 001	495	26 385	67.1
France	20	5 950	19 483	4 319	2 147	21 655	37.0
Ireland	7	2 100	8 152	530	3 276	5 406	123.7
Italy	17	3 050	11 455	3 341	261	14 535	25.4
Luxembourg	5	300	481	149	133	485	80.0
Netherlands	17	8 350	24 701	940	12 166	13 475	86.4
Austria	54	5 600	9 366	352	631	9 132	113.1
Portugal	7	1 900	6 623	200	596	6 218	62.6
Finland	6	2 300	4 797	74	321	4 170	81.1
Sweden	40	3 900	4 858	592	41	5 459	61.7
United Kingdom	87	26 500	59 139	5 483	3 092	61 114	103.6
<b>EU-15</b>	<b>1 682</b>	<b>124 800</b>	<b>316 028</b>	<b>...</b>	<b>...</b>	<b>295 915</b>	<b>...</b>

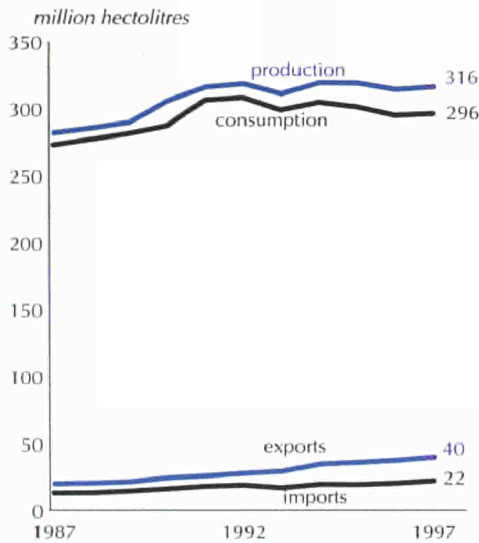
Source : CBMC





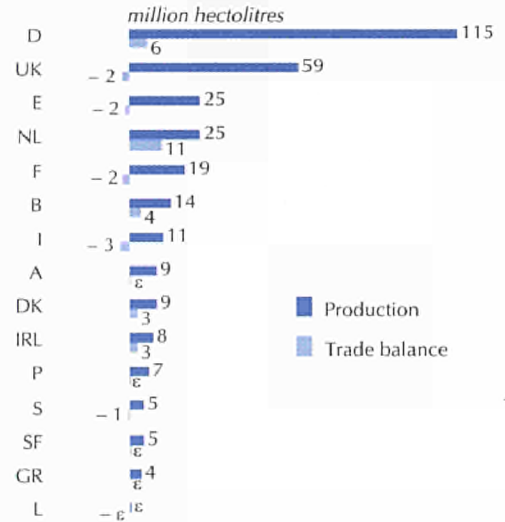
## BEER

**Beer production, consumption and trade in the European Union**



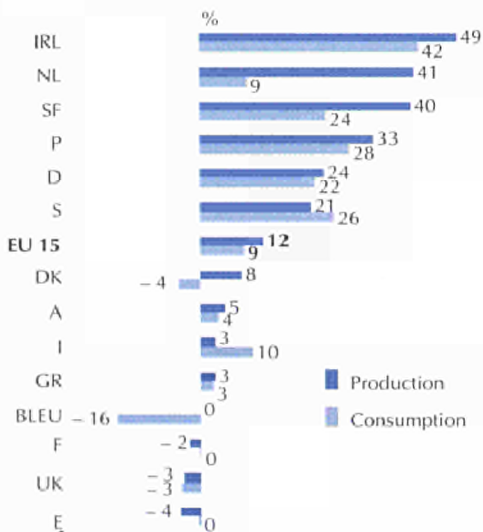
Source : CBMC

**Beer production and trade balance in 1997**



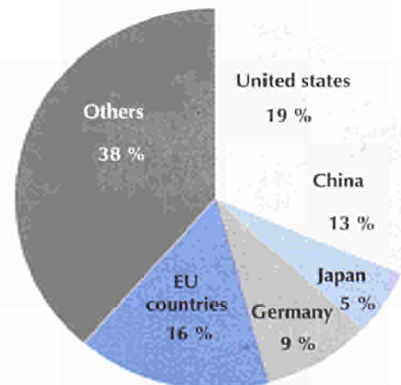
Source : CBMC

**Development of beer production and consumption from 1987 to 1997**



Source : CBMC

**Distribution of world beer production in 1996**



Source : Brasseurs de France



## MAIZE PRODUCTION

In 1996, the European Union produced slightly more than 35 million tons of grain maize. With 6 % of the world harvest, it is the number four production zone after the NAFTA, China and the Mercosur. Like world production, EU production has increased by one-half since 1980.

The Community maize yield reached 85 quintals per hectare in 1996. As with wheat, it is twice as high as world yields. New Zealand and Chile nevertheless boast higher yields than the Fifteen. United States and Canadian yields, which are respectively around 80 and 70 quintals per hectare, are lower than in Europe.

Maize needs sun, so it is not grown in the Nordic countries or in the British Isles. France, Italy and

Spain are the Union's leading producers, with more than 80 % of the total harvest. Between 1990 and 1996, all the countries in the Union apart from Greece and Austria increased their production. With above average growth, Germany has become Europe's fourth producer. The admission of Hungary to the Union will increase Community maize production by 17 %. Maize yields have been rising steadily since the 1950s. The Community average was 70 quintals per hectare in 1985. Yields range from less than 10 quintals in the Canary Islands and Attica to more than 100 quintals per hectare in Thessaly. These differences can be explained specifically by whether crops are irrigated or not.

### European maize producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	<i>thousand hectares</i>				<i>thousand tonnes</i>				<i>q/ha</i>
Belgium	6	7	26	22	39	56	236	199	89.8
Denmark	—	—	—	—	—	—	—	—	—
Ex-FRG	119	227	///	///	672	1 545	///	///	///
Germany	///	228	325	372	///	1 552	2 395	2 913	78.3
Greece	173	208	160	208	1 279	2 131	1 566	1 850	88.9
Spain	454	473	357	440	2 314	3 042	2 590	3 751	85.3
France	1 754	1 562	1 650	1 734	9 323	9 401	12 736	14 544	83.9
Ireland	—	—	—	—	—	—	—	—	///
Italy	942	768	943	1 023	6 377	5 864	8 454	9 548	93.4
Luxembourg	—	—	—	8	—	—	—	8	...
Netherlands	—	—	9	11	2	8	63	87	80.2
Austria	193	198	120	179	1 293	1 620	1 024	1 736	96.9
Portugal	314	218	177	185	532	666	766	854	46.2
Finland	—	—	—	—	—	—	—	—	—
Sweden	—	—	—	—	—	—	—	—	—
U. Kingdom	—	—	—	—	—	—	—	—	—
<b>EU-15</b>	<b>3 955<sup>1</sup></b>	<b>3 662</b>	<b>3 769</b>	<b>4 174</b>	<b>21 831<sup>1</sup></b>	<b>24 331</b>	<b>29 830</b>	<b>35 481</b>	<b>85.0</b>
Czech Rep.	...	31	27	30	...	98	113	169	56.3
Estonia	—	—	—	—	—	—	—	—	—
Hungary	1 229	1 082	1 033	1 053	6 673	4 500	4 679	5 989	56.1
Poland	...	59	48	69	...	290	239	350	50.5
Slovenia	...	66	48	49	...	338	306	333	68.0

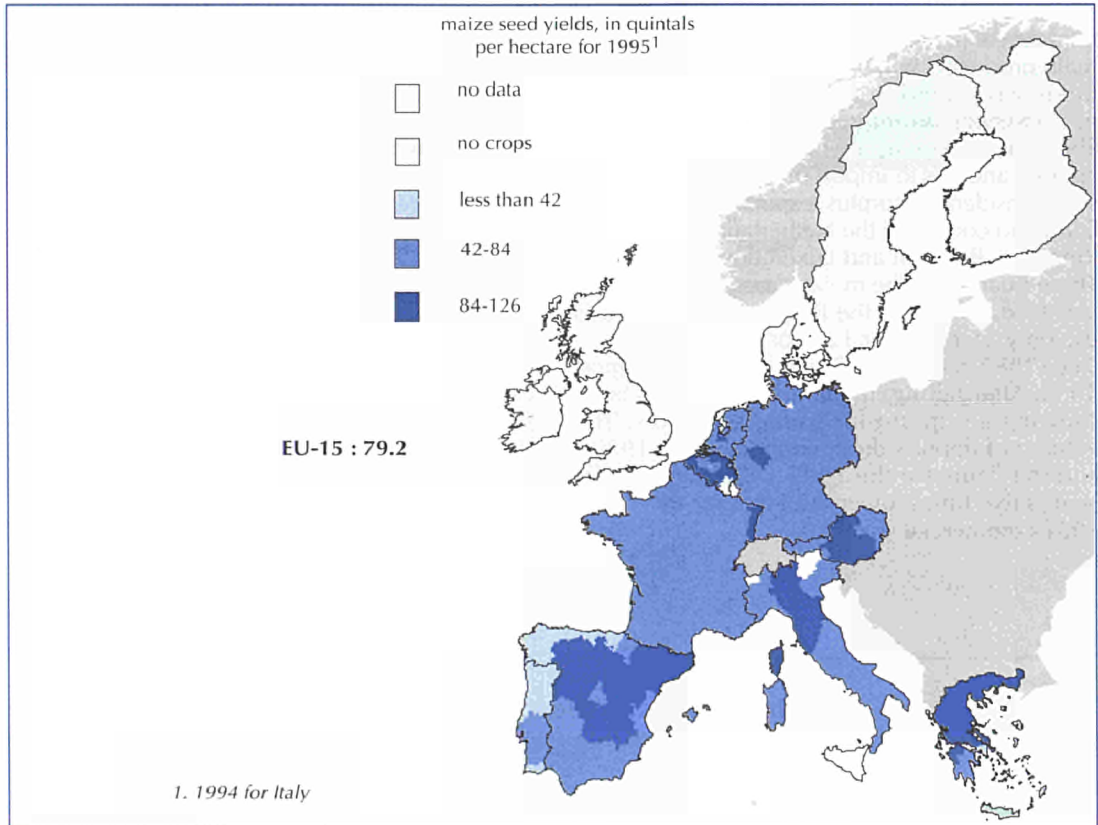
1. EU-15 without the new Länder.

Sources : Eurostat-Newcronos for the EU and national statistics, ZMP, FAO for the other countries



## MAIZE PRODUCTION

### Higher maize yields in the South because of irrigation



Source : Eurostat-Newcronos

### World maize producers

	1980	1990	1996
	thousand tonnes		
NAFTA	186 923	223 300	261 423
China	62 715	97 158	127 810
Mercosur	27 476	27 639	43 247
EU-15	21 824	24 134	35 605
<b>World</b>	<b>395 949</b>	<b>479 340</b>	<b>588 203</b>

Source : FAO - For methodological reasons, the data differ from those on page 100.





## MAIZE BALANCE SHEETS

During the 1995-1996 commercial year, the European Union produced 30 million tons of grain maize, representing less than 20 % of total cereal production. France and Italy are the main producers with 21 million tons. Except for these two countries, national production does not cover the requirements of Member States. The Union taken as a whole does not produce enough and has to import maize. France, with a very considerable surplus, exports maize to other European countries: the Netherlands, the United Kingdom, Belgium and Luxembourg. Three-quarters of the maize crop is used for animal feed, except in the British Isles where this use only accounts for 12 % of outlets. Since 1980, maize production has risen by almost 50 %. After falling, the amount used has been showing an upturn for some years now. The volume of imports dropped in the early 1980s, and the figure for the 1995-1996 commercial year is five times lower than that for the 1980-1981 commercial year.

In 1996, Europe exported little maize beyond its borders. Angola was the number one purchaser. With 2.6 million tons, the volume of imports is six times that of exports, and represents more than one-third of total cereal imports. The United States provided three-quarters of maize deliveries.

### Definitions

**1995-1996 commercial year:** products harvested in 1995 and marketed in 1995 and 1996.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed maize. So the result is different from that of the balance sheets, which in addition apply to a commercial year.

### Maize balance sheets for 1995-1996

Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use				Self- sufficiency level
			Total	animal feed	including human consump	industrial uses	
thousand tonnes							%

BLEU	47	1 542	408	1 181	717	23	439	4.0
Denmark	—	23	—	20	20	—	—	—
Germany	2 395	1 972	787	3 577	2 108	778	556	67.0
Greece	1 566	369	15	1 860	1 800	25	20	84.2
Spain	2 551	2 464	292	4 830	3 912	45	850	52.8
France	12 736	468	6 640	6 642	5 358	382	603	191.7
Ireland	—	133	1	132	50	69	13	—
Italy	8 461	1 168	799	8 738	7 799	655	251	96.8
Netherlands	63	2 107	1 100	1 083	721	42	305	5.8
Austria	1 474	377	95	1 719	1 242	80	321	85.7
Portugal	766	982	19	1 729	1 443	107	96	44.3
Finland	—	63	30	33	1	6	27	—
Sweden	—	3	—	3	3	—	—	—
United Kingdom	—	2 170	369	1 801	217	1 426	154	—
<b>EU-15</b>	<b>30 059</b>	<b>3 474</b>	<b>189</b>	<b>33 348</b>	<b>25 391</b>	<b>3 638</b>	<b>3 635</b>	<b>90.1</b>

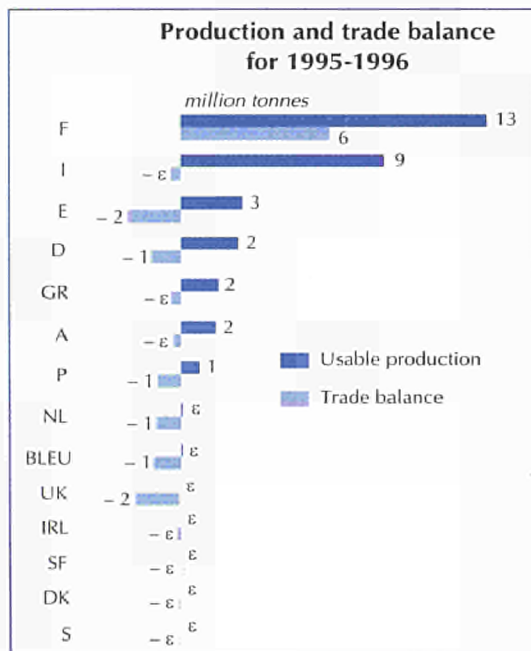
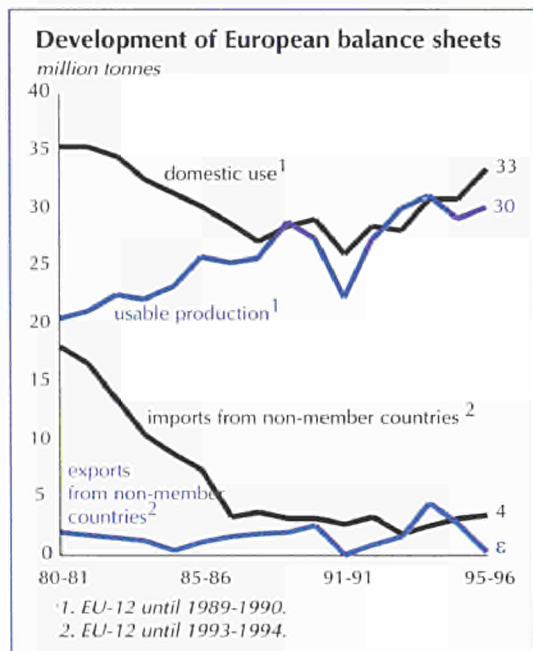
1. For EU-15, trade with non-member countries.

Source : Eurostat - Balance sheets

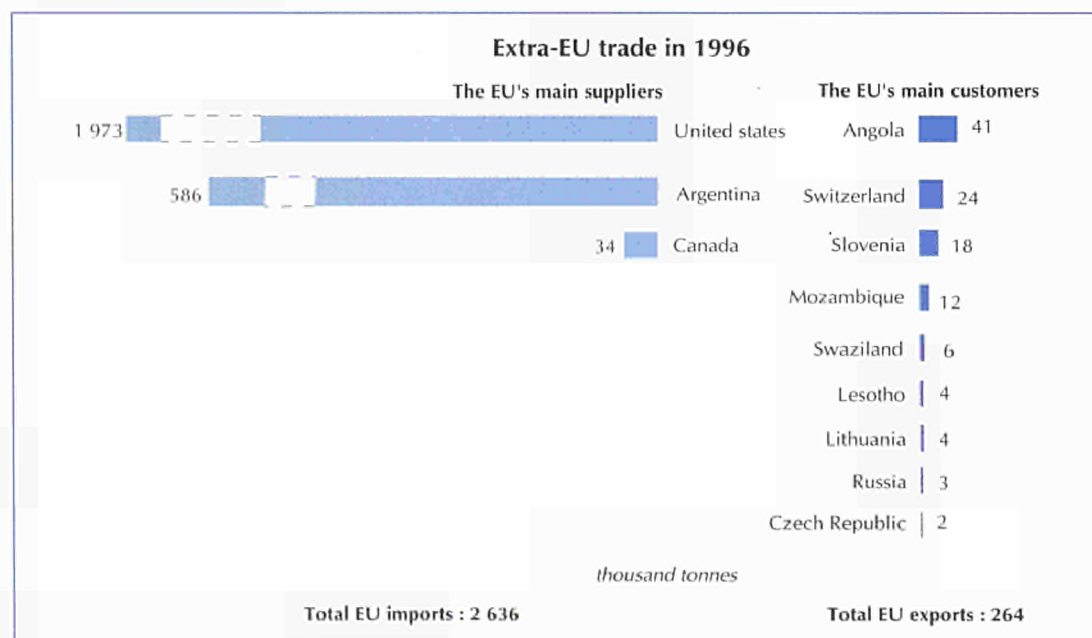


## MAIZE BALANCE SHEETS

### Maize production and use converge



Source : Eurostat - Balance sheets



Source : Eurostat - Foreign trade



## POTATO PRODUCTION

World production of potatoes rose from 230 to 310 million tonnes between 1980 and 1996. Among the major production areas, North America increased its harvest by 60%, India's was doubled, and China's tripled. The CIS and the European Union only saw slight harvest increases. The CIS is still the world's number one producer, ahead of China which outstripped the EU in 1996. With 33 tonnes per hectare, the average yield of Europe of the Fifteen in 1996 was double world output, and is more or less only bettered in the United States, where levels of 39 tons per hectare are reached.

In 1990 as in 1996, Germany, the Netherlands and the United Kingdom together produced close on 28 million tonnes of potatoes, i.e. 56% of the Fifteen's production. Poland's admission to the Union, as the number two European producer

after the Russian Federation, will increase Community production by one-half.

The potato crop is a feature throughout the European Union, but it is less important than it was 30 years ago. Since 1955, areas planted to potatoes have been losing on average 3.2% per annum, with production dropping by 1.3% every year.

Lower Saxony and the three northern provinces of the Netherlands, with more than 7 million tonnes in 1995, alone contribute one-sixth of the Union's total potato production. In the Union, yields vary from less than 10 tonnes per hectare in regions with the lowest potential like the Canary Islands and the Alentejo, in southern Portugal, to 45 tonnes and more in the most productive Dutch regions, such as Utrecht province.

### European potato producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	thousand hectares				thousand tonnes				tonnes/ha
Belgium	46	53	56	61	1 416	1 837	2 117	2 536	41.3
Denmark	34	40	42	43	842	1 483	1 441	1 617	37.4
Ex-FRG	258	211	///	///	6 694	7 233	///	///	///
Germany	///	548	315	336	///	14 039	9 898	13 100	39.0
Greece	65	51	52	50	1 030	996	1 006	920	18.3
Spain	355	271	206	180	5 737	5 331	3 914	3 856	21.4
France	224	164	172	175	6 609	4 754	5 840	6 263	35.7
Ireland	42	24	22	24	884	605	618	733	30.2
Italy	161	120	90	100	2 923	2 309	2 095	2 145	21.5
Luxembourg	1	1	1	1	34	25	23	20	25.4
Netherlands	172	175	179	185	6 267	7 036	7 340	8 081	43.6
Austria	53	32	27	26	1 264	794	724	769	29.2
Portugal	123	120	96	89	1 200	1 343	1 436	1 326	14.9
Finland	41	41	36	35	736	881	798	766	22.0
Sweden	41	36	35	37	1 084	1 366	1 074	1 201	32.7
U. Kingdom	206	177	171	177	7 032	6 533	6 399	7 219	40.7
<b>EU-15</b>	<b>1 822<sup>1</sup></b>	<b>1 854</b>	<b>1 500</b>	<b>1 520</b>	<b>43 753<sup>1</sup></b>	<b>49 331</b>	<b>44 723</b>	<b>50 551</b>	<b>33.3</b>
Czech Rep.	130	110	78	86	1 922	1 755	1 330	1 800	20.9
Estonia	72	46	37	35	1 146	618	537	500	14.2
Hungary	63	44	57	62	941	744	1 099	1 308	21.2
Poland	2 344	1 835	1 522	1 342	...	36 313	24 891	27 217	20.3
Slovenia	...	30	24	22	...	412	449	443	20.2

1. EU-15 without the new Länder.

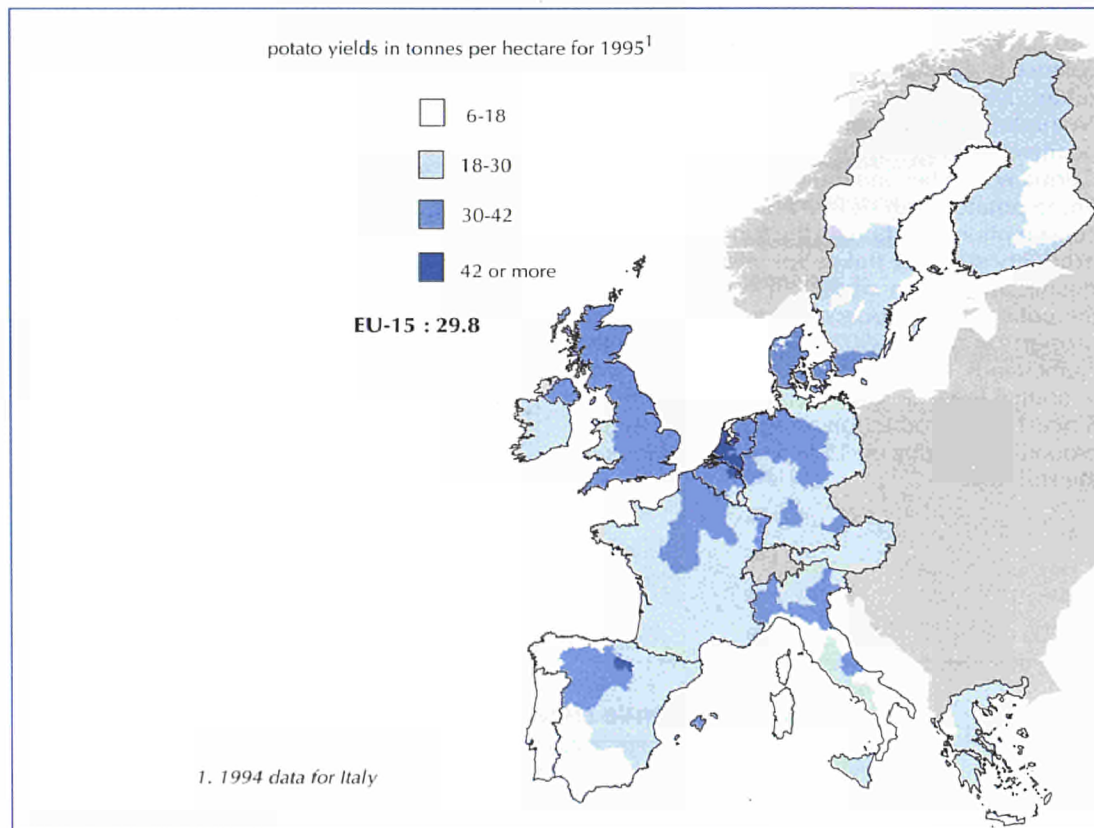
Sources : Eurostat - Newcronos for the EU and national statistics, ZMP and FAO for the other countries





## POTATO PRODUCTION

### Potato yields three times higher in the Netherlands than in Portugal



Source : Eurostat - Newcronos

### World potato producers

	1980	1990	1996
	thousands of tons		
CIS	63 500	60 425	72 222
EU-15	45 126	49 885	52 017
China	15 536	32031	52 034
CEFTA	30 478	40 073	31 564
NAFTA	17 148	22 434	27 814
India	8 327	14 770	19 240
<b>World</b>	<b>230 263</b>	<b>268 107</b>	<b>311 183</b>

Source : FAO



## POTATO BALANCE SHEETS

European potato production reached 45 million tons during the 1995-1996 commercial year. Germany accounts for more than 20 % and also counts as the number one consumer. Its trade balance is slightly in the red, and it imports from other Member States. Against this, the Netherlands, the number two producer, shows positive balance sheets. It exports mainly to Germany and beyond the Union.

Three potatoes out of five are used for human consumption, the bulk in the form of processed products such as flakes for making mashed potato, and frozen chips. On average, 15 % of the potatoes are processed into starch, but this proportion rises to 50 % in Denmark and the Netherlands. 8 % of potatoes used find their way to animal feed.

Since 1980, production and use have risen in proportions verging on 15 %. Exports and imports are still low.

In 1996, Europe exported as many potatoes for storage as it imported early or new potatoes. The Czech Republic was its principal buyer, and Egypt its principal supplier.

### Definitions

**1995-1996 commercial year:** products harvested in 1995 and marketed in 1995 and 1996.

**Processing:** transition into a sector of activity for which there are separate balance sheets, i.e. starch products.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed potatoes. So the result is different from that of the balance sheets, which apply to a commercial year.

### Potato balance sheets for 1995-1996

	Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use				Self- sufficiency level
				Total	animal feed	including		
						human consump.	processing into starch	%
thousand tonnes								
BLEU	2 367	978	1 666	1 679	506	993	–	141.0
Denmark	1 297	150	110	1 337	186	299	746	97.0
Germany	10 017	1 613	1 170	10 463	607	5 956	2 361	95.7
Greece	891	188	48	1 031	–	911	–	86.4
Spain	3 872	441	181	4 132	420	3 253	–	93.7
France	5 839	1 263	1 104	5 846	200	3 403	1 170	99.9
Ireland	618	204	44	778	76	627	–	79.4
Italy	2 081	830	415	2 496	60	2 196	–	83.4
Netherlands	7 440	1 662	3 796	5 306	777	1 355	2 504	140.2
Austria	724	59	9	774	30	456	143	93.5
Portugal	1 436	224	27	1 633	5	1 376	–	87.9
Finland	798	14	8	793	21	291	100	100.6
Sweden	1 074	181	32	1 223	120	510	226	87.8
United Kingdom	6 396	1 169	295	7 161	351	5 951	–	89.3
EU-15	44 850	...	...	44 652	3 359	27 577	7 250	100.4
1. For EU-15, trade with non-member countries.								

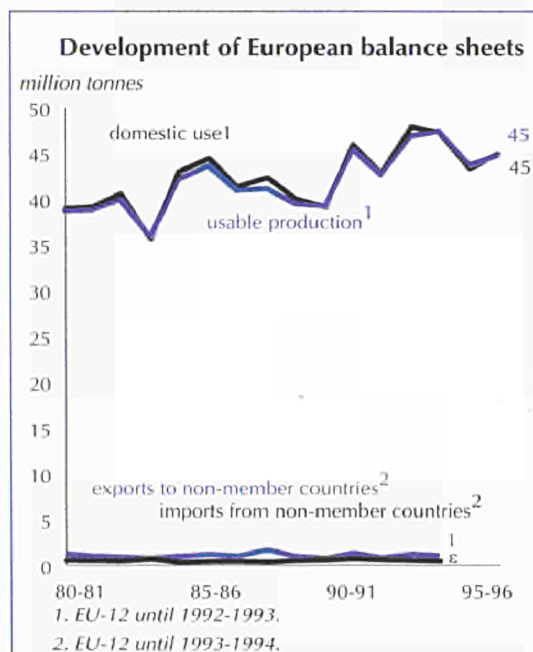
1. For EU-15, trade with non-member countries.

Source : Eurostat - Balance sheets and national data for Austria

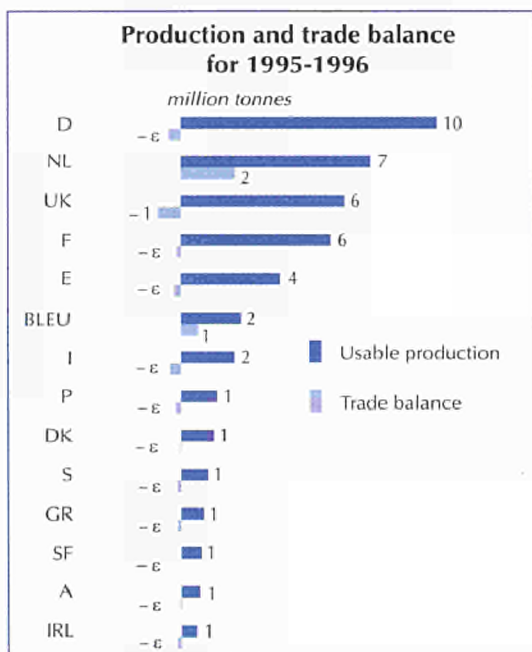


## POTATO BALANCE SHEETS

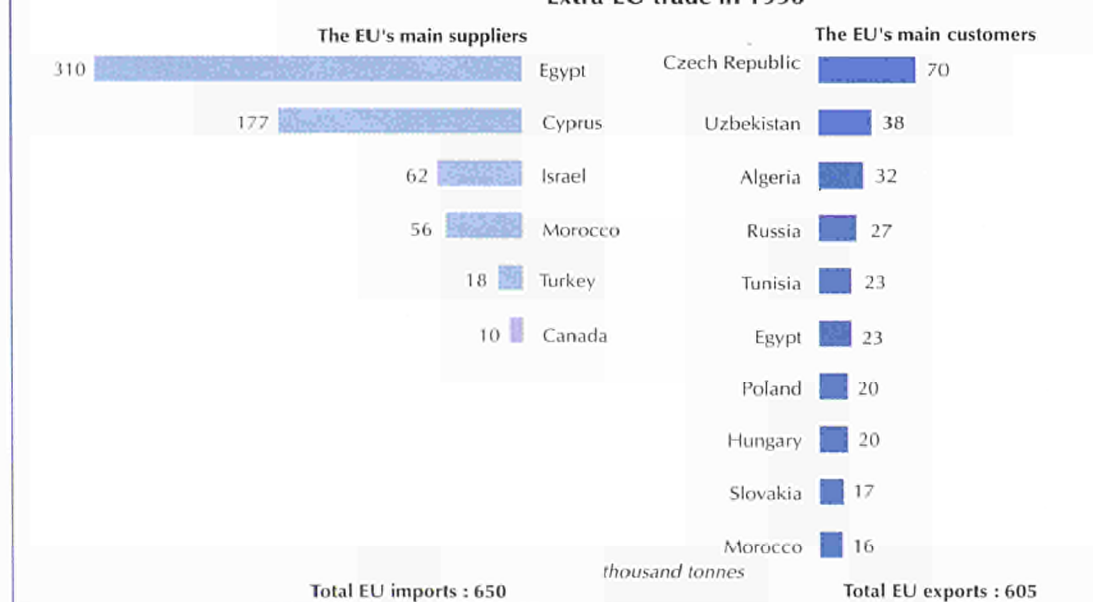
### Little trade in potatoes



Source : Eurostat - Bilans



### Extra-EU trade in 1996



Source : Eurostat - Foreign trade





## SUGAR BEET PRODUCTION

In 1996, world sugar beet production regained its 1980 level, i.e. almost 265 million tonnes. It had gone beyond the 300 million mark in 1990. European Union production has followed the same development, and amounted to 113 million tonnes in 1996, i.e. 40 % of world production. The CIS harvest, the world's second producer, fell by one-half between 1990 and 1996. It now represents just 16 % of the world harvest. Among the other major producers, only China increased its production between 1980 and 1996, including during the period 1990-1996. By progressing from 6 million tonnes in 1980 to 17 million tonnes in 1996, China is now the world's fifth producer, behind the NAFTA. Average yields in the European Union in 1996 were more than half again as much as world yields, outmatched only by Switzerland, Chile and Japan.

Sugar beet production has been relatively stable for some years in the European Union. In 1996, as in 1990, France, Germany and Italy accounted for more than 60 % of production. With an output of some 18 million tonnes of sugar beet in 1996, Poland will become the Community's number three sugar beet producer, once it has joined the EU.

In 1995, Picardy, Champagne-Ardenne and Lower Saxony harvested more than 20 % of the Community's sugar beet crop. Sugar beet cultivation is non-existent in northern Scandinavia, as well as in certain Mediterranean and Atlantic regions. Elsewhere it attains yields ranging from 20 tonnes per hectare in Campania to 78 tonnes in Thessaly.

### European sugar beet producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	thousand hectares				thousand tonnes				tonnes/ha
Belgium	117	108	99	98	5 876	6 418	6 081	6 075	62.0
Denmark	77	66	68	70	3 010	3 533	3 130	3 064	43.9
Ex-FRG	395	406	///	///	19 122	23 310	///	///	///
Germany	///	608	513	515	///	30 600	26 049	26 064	50.6
Greece	29	44	42	40	1 610	2 760	2 562	2 352	58.4
Spain	183	169	172	157	6 908	7 361	7 438	8 236	52.4
France	549	475	458	461	28 442	31 746	30 571	31 211	67.8
Ireland	33	32	35	32	1 156	1 480	1 547	1 476	45.7
Italy	291	274	284	273	13 478	11 768	13 188	12 114	47.0
Luxembourg	£	£	£	£	1	£	1	£	40.0
Netherlands	121	125	116	117	5 931	8 623	6 449	6 416	55.0
Austria	51	50	52	53	2 587	2 494	2 886	3 131	59.0
Portugal	1	£	1	1	38	13	56	32	43.5
Finland	32	32	35	35	851	1 125	1 110	897	25.8
Sweden	50	50	58	59	2 257	2 776	2 479	2 430	41.0
U. Kingdom	212	194	196	199	7 380	8 000	8 431	8 804	48.0
<b>EU-15</b>	<b>2 141<sup>1</sup></b>	<b>2 227</b>	<b>2 129</b>	<b>2 095</b>	<b>98 647<sup>1</sup></b>	<b>118 698</b>	<b>111 978</b>	<b>112 302</b>	<b>53.6</b>
Czech Rep.	157	119	94	104	5 105	4 026	3 712	4 316	41.5
Estonia	-	-	£	£	-	-	13	2	26.1
Hungary	104	131	124	118	3 941	4 743	4 199	4 677	39.6
Poland	467	440	385	453	...	16 721	13 309	17 846	39.4
Slovenia	...	4	6	6	...	167	265	308	48.6

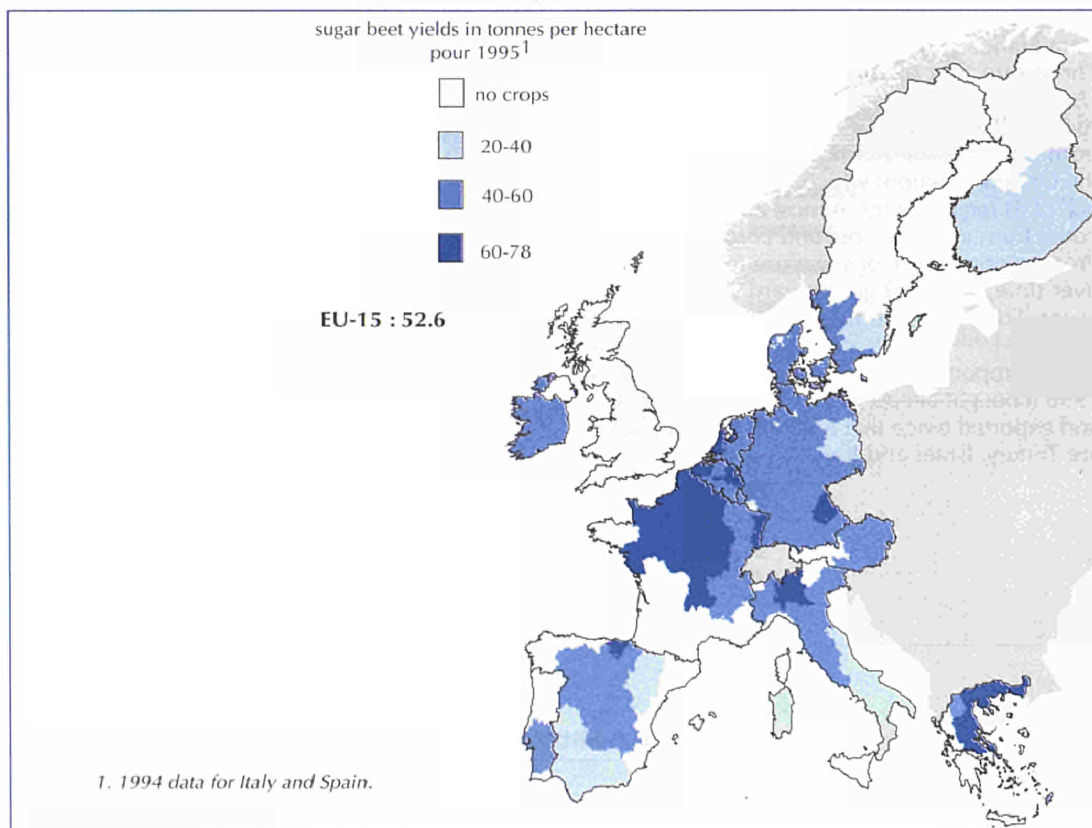
1. EU-15 without the new Länder.

Sources : Eurostat - Newcronos for the EU and national statistics, ZMP and FAO for the other countries



## SUGAR BEET PRODUCTION

### French yields are among the highest



Source : Eurostat-Newcronos

### World sugar beet producers

	1980	1990	1996
	thousand tonnes		
EU-15	96 640	118 695	113 525
CIS	80 246	80 329	42 490
CEFTA	21 338	27 073	28 858
NAFTA	22 272	25 901	25 234
China	6 305	14 525	16 726
<b>World</b>	<b>264 033</b>	<b>307 378</b>	<b>265 451</b>

Source : FAO - For methodological reasons, the data differ from those on page 108.



## SUGAR BALANCE SHEETS

During the 1995-1996 commercial year, the European Union produced 16 million tonnes of white sugar equivalent, half of which came from France and Germany.

Three-quarters of the sugar produced in the Union is consumed by the domestic market. Almost all Member States are self-sufficient, apart from Portugal, with next to no production, and the United Kingdom which only meets just over half of its requirements. Almost all of their imports come from countries beyond Europe.

Production and use of sugar are relatively stable over time, with a slight upward trend in recent years. Foreign trade has been dropping since 1993.

Europe imports sugar cane almost exclusively. In 1996 it bought almost two million tonnes of sugar and exported twice that amount. Its main buyers are Turkey, Israel and Iran.

### Definitions

**1995-1996 commercial year** : products harvested in 1995 and marketed in 1995 and 1996.

**Domestic use** : 98 % is destined for human consumption.

**Self-sufficiency level** : relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance** : the difference between the volume of exports and the volume of imports.

**Extra-European trade** : the volume of imports and exports in 1996 was based on customs declarations for chemically pure sugar and sucrose in the solid state. So the result is slightly different from that of the balance sheets, which apply to the 1995-1996 commercial year.

Sugar balance sheets for 1995-1996

	Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use		Self- sufficiency level
				Total	including human consumption	
thousand tonnes						%
BLEU	919	1 003	1 455	457	447	201.1
Denmark	432	71	263	228	212	189.5
Germany	3 826	728	1 933	2 650	2 614	144.4
Greece	287	78	78	270	268	106.3
Spain	1 098	385	173	1 261	1 194	87.1
France	4 445	820	3 072	2 018	1 995	220.3
Ireland	222	93	163	155	155	143.2
Italy	1 492	504	459	1 467	1 467	101.7
Netherlands	988	300	746	528	506	187.1
Austria	442	83	174	331	320	133.5
Portugal	7	285	24	293	290	2.4
Finland	162	35	40	188	170	86.2
Sweden	357	81	66	387	369	92.2
United Kingdom	1 216	1 533	677	2 175	2 158	55.9
EU-15	15 893	2 050	5 374	12 408	12 165	128.1

1. For EU-15, trade with non-member countries.

1. For EU-15, trade with non-member countries.

Source : Eurostat - Balance sheets



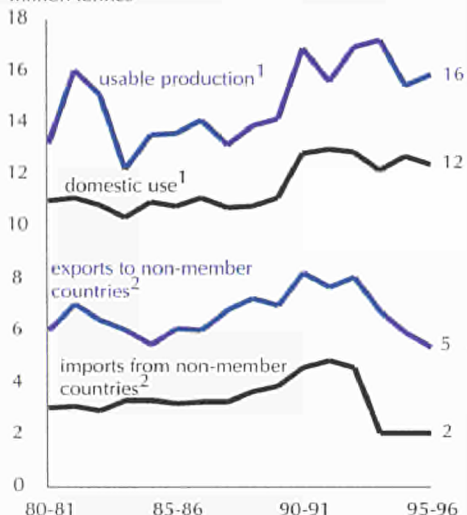


## SUGAR BALANCE SHEETS

### The Union is self-sufficient in sugar

#### Development of European balance sheets

million tonnes

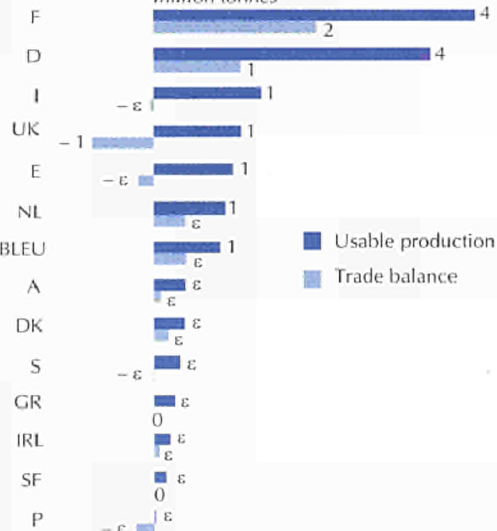


1. EU-12 until 1989-1990.

2. EU-12 until 1993-1994.

#### Production and trade balance for 1995-1996

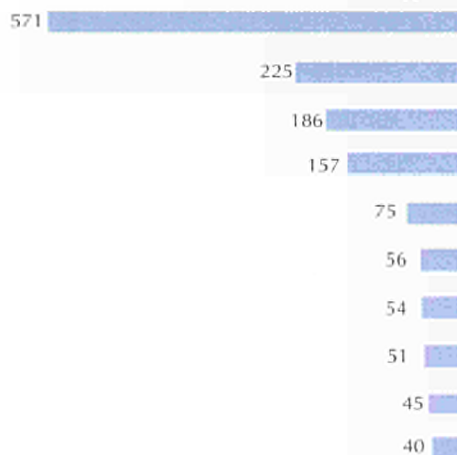
million tonnes



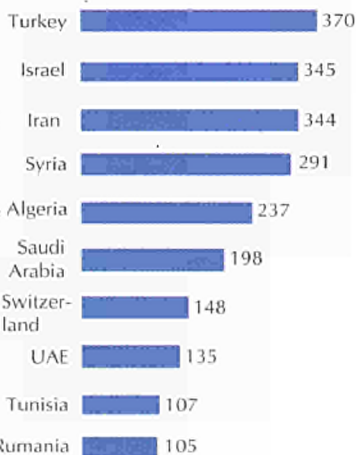
Source : Eurostat - Bilans

#### Extra-EU trade in 1996

##### The EU's main suppliers



##### The EU's main customers



thousand tonnes

Total EU imports : 2 065

Total EU exports : 4 112

Source : Eurostat - Foreign trade



## OLEAGINOUS SEED AND FRUIT PRODUCTION

In 1996, the Fifteen produced almost 13 million tonnes of oleaginous plants, i.e. 4.8 % of the world total. Four countries or groups of countries, NAFTA, Mercosur, China and India, have a greater production.

The Community harvest, which rose by an average of 14 % in the 1980s, levelled out in the 1990s. This stagnation coincided with a slight drop in world production, except for that of North America. From 1980 to 1996, EU-15 nevertheless chalked up the highest world growth: more than 8 % per annum as opposed to 3.3 % for the planet as a whole. Their production thus outstripped that of the ASEAN group and the CIS, which was the only group to show a decline, of 1.7 % per annum from 1980, and 6.7 % from 1990.

Half of world production of oleaginous plants is accounted for by soya beans. Next come, in descending order of importance, cotton, groundnuts, rape and sunflowers. From 1980 to 1996,

world outputs of rape and oil palm increased by more than 6 % per annum, those of flax, copra and safflower remaining level. Production of sunflowers and castor-oil plants has been growing weakly since the early 1990s.

In the EU, rape represents more than one-half of the harvest and sunflowers 30 %. The cultivation of cotton is essentially carried out in Greece, and that of flax in the United Kingdom. The production of soya beans, which was non-existent in 1980, has been briskly developed in Italy, reaching the 1 million ton level in 1996.

The average yield in oleaginous plants of the EU, almost 22 quintals per hectare in 1996, is, together with that of the NAFTA, the highest of the major production zones. Half the Union's areas are cultivated in France and Spain. French and German production represents slightly over half the Community's production of oleaginous plants.

### Area of oleaginous crops in 1996

Rape	Sunflower	Flax	Soya	Other oleaginous plants	Cotton seed	Total
<i>thousand hectares</i>						

Belgium	4.9	—	11.3	—	—	—	16.2
Denmark	106.0	—	...	—	3.5 <sup>2</sup>	—	109.5
Germany	853.6	43.8	81.6	—	10.7	—	989.7
Greece	—	23.9	—	0.1	1.0	427.4	452.4
Spain	99.7	1 118.2	19.9	5.1	0.3	77.2	1 320.3
France	875.0	891.0	8.4	86.0	0.5	—	1 860.9
Ireland	3.5	—	—	—	—	—	3.5
Italy	65.2	247.7	3.5 <sup>1</sup>	223.4	ε <sup>1</sup>	ε <sup>1</sup>	...
Luxembourg	2.4	—	—	—	—	—	2.4
Netherlands	0.9	—	3.9	—	0.3	—	5.1
Austria	64.9	19.0	...	13.4	16.0 <sup>2</sup>	—	113.3
Portugal	—	101.0	—	—	—	—	101.0
Finland	61.7	—	0.4	—	—	—	62.1
Sweden	66.0	—	7.4	—	—	—	73.4
United Kingdom	414.0	0.1	54.0	—	—	—	468.1
<b>EU-15</b>	<b>2 617.8</b>	<b>2 444.6</b>	<b>...</b>	<b>327.8</b>	<b>...</b>	<b>...</b>	<b>...</b>
Czech Republic	229.0	20.0	10.0	—	...	—	280.0
Estonia	8.6	—	0.1	—	...	—	...
Hungary	93.9	473.0	1.0	13.0	3.0	—	584.0
Poland	282.6	—	5.9	—	18.3	—	306.7
Slovenia	0.2	—	—	—	...	—	...

1. 1995 data.

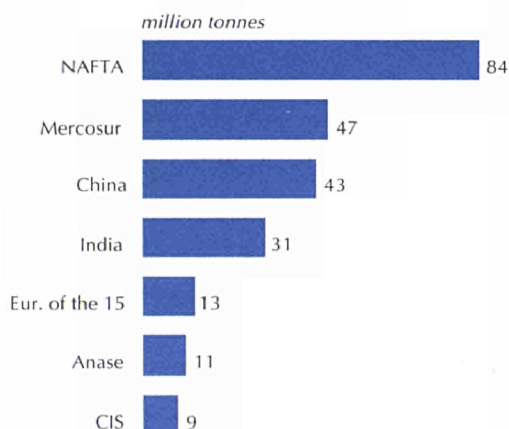
2. Includes flax.

Sources : Eurostat – Newcronos for the EU and ZMP, national statistics for the other countries



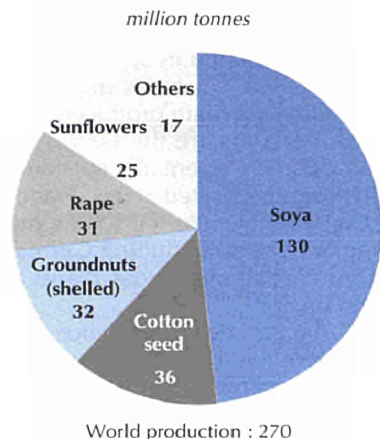
## OLEAGINOUS SEED AND FRUIT PRODUCTION

**Main world producers of oleaginous crops in 1996**



Source : FAO

**Size of different oleaginous crops in the world in 1996**



Sources : FAO, USDA

### Oleaginous production in 1996

Rape	Sunflower	Flax	Soya	Other oleaginous plants	Cotton seed	Total
thousand tonnes						

Belgium	18	—	1	—	—	—	18
Denmark	251	—	2	—	£	—	253
Germany	1 970	103	...	—	...	—	...
Greece	—	26	—	£	...	518	...
Spain	108	1 178	44	10	...	150	...
France	2 902	1 995	15	230	1	—	5 141
Ireland	10	—	—	—	—	—	10
Italy	80	515	5 <sup>1</sup>	742	28 <sup>1</sup>	£ <sup>1</sup>	...
Luxembourg	8	—	—	—	—	—	8
Netherlands	3	—	6	—	1	—	9
Austria	151	44	...	27	11 <sup>2</sup>	—	233
Portugal	—	38	—	—	—	—	38
Finland	89	—	2	—	—	—	91
Sweden	172	—	10	—	—	—	182
United Kingdom	1 410	£	86	—	—	—	1 496
<b>EU-15</b>	<b>7 171</b>	<b>3 898</b>	<b>...</b>	<b>1 009</b>	<b>...</b>	<b>...</b>	<b>...</b>
Czech Rep.	521	38	3	1	...	—	586
Estonia	10	—	£	—	...	—	...
Hungary	138	868	1	28	...	—	...
Poland	449	—	17	—	18	—	484
Slovenia	£	—	—	—	...	—	...

1. 1995 data.

2. Includes flax.

Sources : Eurostat - Newcronos for the EU and ZMP, national statistics for the other countries





## OLEAGINOUS SEED AND FRUIT BALANCE SHEETS

During the 1993-1994 commercial year, Europe produced 20 million tonnes of oleaginous plants: rape, turnip rape, sunflower, flax, soya bean, poppy seed, mustard, cotton, sesame seed, groundnuts etc. Three-quarters of the production is concentrated in Spain, Italy, France and Germany. Few countries meet their own needs, including the main producers. Germany and the Netherlands are the Union's leading importers. They buy essentially outside Europe, especially from the United States. France is the leading Community exporter, selling mainly to other Member States, including Germany and Belgium. Almost all oleaginous plants are processed into oil.

Since 1981, the volume of oleaginous plants produced has risen, but it is still a good way below Community requirements. So imports have remained at a high level. In 1996, Europe bought more than 20 million tonnes of oleaginous plants from outside its territory, of which, almost half from

the United States. Exports, on the other hand, are still very low. Europe sold 969 000 tonnes in 1996, including almost one-half this amount to Poland and Switzerland.

### Definitions

**1993-1994 marketing year:** products harvested in 1993 and marketed in 1993 and 1994.

**Processing:** transition into a sector of activity for which there are separate balance sheets, in this case, oil.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for oleaginous seeds and fruit. So the result is different from that of the balance sheets, which apply to a marketing year.

### Oleaginous balance sheets for 1993-1994

Usable production	Imports	Exports	Domestic use		Self-sufficiency level
			Total	including processing into oil	
thousand tonnes					%

BLEU	241	2 078 <sup>2</sup>	100 <sup>2</sup>	2 008 <sup>2</sup>	2 001 <sup>2</sup>	1.2 <sup>2</sup>
Denmark	417	106	96	193	193	216.1
Germany	3 105	4 449	793	6 562	6 255	47.3
Greece	2 091	346	135	2 076	1 981	100.7
Spain	4 150	2 073	135	6 073	5 434	68.3
France	3 448	960	1 398	2 964	2 302	116.3
Ireland	171	152	102	302	-2	56.7 <sup>2</sup>
Italy	3 960	1 559	6	5 403	5 010	73.3
Netherlands	10	4 871	256	4 572	4 234	0.2
Austria	366	41	80	334	189	109.6
Portugal	324 <sup>3</sup>	844 <sup>3</sup>	93	1 156 <sup>3</sup>	1 030 <sup>3</sup>	28.0 <sup>3</sup>
Finland	130 <sup>2</sup>	136 <sup>2</sup>	- 2	266 <sup>2</sup>	64 <sup>2</sup>	48.9 <sup>2</sup>
Sweden	313	20	13	314	258	99.7
United Kingdom	1 338	1 195	122	2 410	2 010	55.5
EU-15	19 693	...	...	34 361	30 961	57.3

1. Production harvested.

2. SCEES estimate.

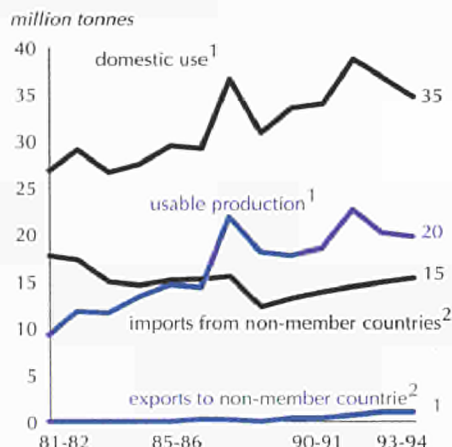
3. Harmonized national data.

Source : Eurostat - Balance sheets



## OLEAGINOUS SEED AND FRUIT BALANCE SHEETS

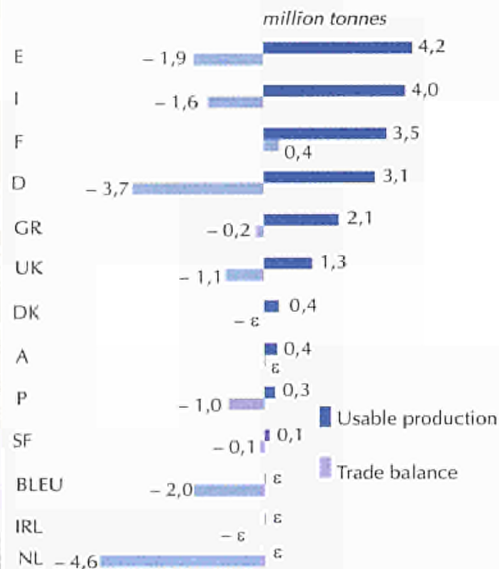
### Development of European balance sheets



1. EU-12 until 1988-1989. SCEES estimate based on 1990 for the BLEU, Ireland, Portugal and Finland.

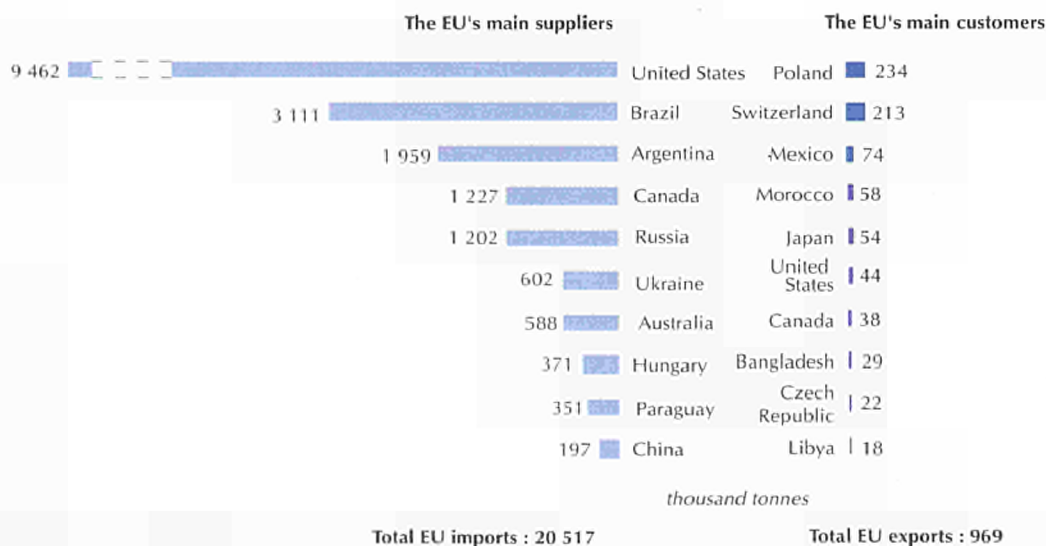
2. EU-12 SCEES estimates based on 1990.

### Trade in 1993-1994



Source : Eurostat - Balance sheets

### Extra-EU trade in 1996



Source : Eurostat - Foreign trade



## RAPE PRODUCTION

In 1996, as in 1980, the European Union was the world's number two producer of rape, after China, with almost one-quarter of the world harvest. In 16 years, production of this oleaginous plant doubled within the NAFTA, tripled in the European community, and quadrupled in India and China. The average yield in the European Union in 1996, which was twice world yields, was bettered only in Switzerland. Between 1980 and 1990, rape cultivation spread throughout the European Union. Areas planted thus quadrupled in former East Germany and the United Kingdom. This expansion, combined with increased yields, resulted in a very sharp rise in harvests. The CAP reforms shifted this trend in 1993, but the readjustment of world rape prices and the possibility offered to farmers to grow this crop for uses other than food led to new

increases, especially in France. The enlargement of the Union in 1990, with the incorporation of five new Länder representing one-fifth of the community area planted to rape, further emphasized this phenomenon. Thereafter, France, Germany and the United Kingdom have represented, on their own, 80 % of Community rape production. Rape is not grown throughout EU territory. It is conspicuously absent in Greece, Portugal, and parts of Italy and Spain. Three regions produce one-fifth of the Community rape crop : former Mecklenburg-Pomerania, the centre region of France, and Bavaria. Rape yields range from less than five quintals per hectare in central-northern Sweden and southwest Spain, to more than 35 quintals per hectare in England, in the province of Liège, and in Champagne-Ardennes.

### European rape producers

	Area				Production				Yield
	1980	1990	1995	1996	1980	1990	1995	1996	1996
	thousand hectares				thousand tonnes				q/ha
Belgium	£	5	6	5	1	16	19	18	36.1
Denmark	102	270	152	106	197	793	312	251	23.7
Ex-FRG	138	570	///	///	377	1 720	///	///	///
Germany	///	720	974	854	///	2 088	3 103	1 970	23.1
Greece	—	—	—	—	—	—	—	—	—
Spain	—	24	88	100	—	30	51	108	10.8
France	390	680	864	875	1 093	1 976	2 789	2 902	33.2
Ireland	£	5	4	4	1	15	13	10	28.6
Italy	£	17	46	65	1	44	96	80	12.3
Luxembourg	£	2	3	2	1	5	7	8	31.2
Netherlands	8	8	2	1	29	26	5	3	35.6
Austria	4	39	89	65	8	97	268	151	23.3
Portugal	—	—	—	—	—	—	—	—	—
Finland	55	66	85	62	88	117	128	89	14.5
Sweden	174	168	103	66	323	422	194	172	26.0
U. Kingdom	92	390	439	414	300	1 258	1 235	1 410	34.1
<b>EU-15</b>	<b>964<sup>1</sup></b>	<b>2 395</b>	<b>2 854</b>	<b>2 618</b>	<b>2 417<sup>1</sup></b>	<b>6 886</b>	<b>8 219</b>	<b>7 171</b>	<b>27.4</b>
Czech Rep.	64	105	252	229	154	304	662	521	22.8
Estonia	—	—	5	9	—	—	7	10	11.7
Hungary	51	60	45	94	98	106	89	138	14.7
Poland	320	500	606	283	572	1 206	1 377	449	15.9
Slovenia	...	2	£	£	...	5	1	£	21.9

<sup>1</sup>. Europe of the 15 without the new Länder.

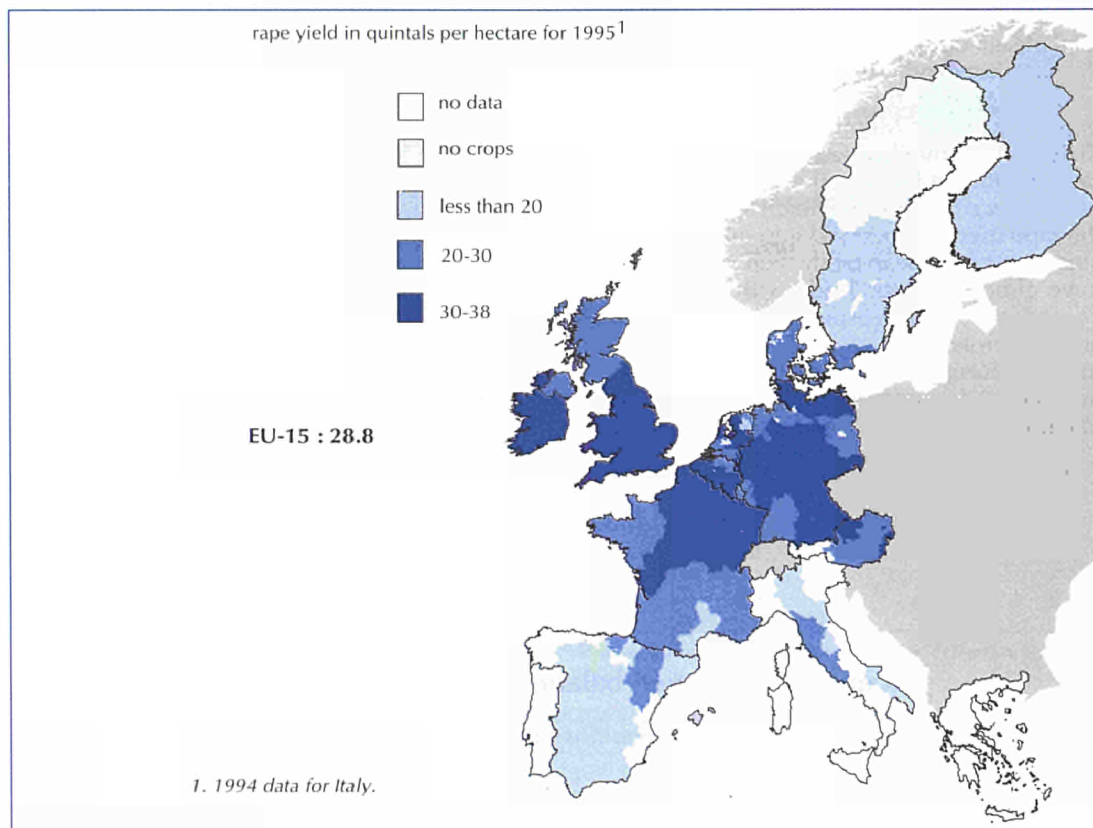
Sources : Eurostat - Newcronos for the EU and national statistics, ZMP, FAO for the other countries





## RAPE PRODUCTION

### Highest yields are in England and Champagne-Ardennes



Source : Eurostat - Newcronos

### World rape producers

	1980	1990	1995	1996
	thousand tonnes			
China	2 386	6 958	9 777	9 201
EU-15	2 425	6 833	8 217	7 128
India	1 428	4 125	5 758	6 071
NAFTA	2 486	3 314	6 696	5 294
<b>World</b>	<b>10 751</b>	<b>24 439</b>	<b>34 338</b>	<b>30 636</b>

Source : FAO - For methodological reasons, the data differ from those on page 116.



## RAPE BALANCE SHEETS

In the 1993-1994 commercial year, the European Union produced almost 7 million tonnes of rape, which represented one-third of total oleaginous production. Germany as the leading producer and user, meets its rape-seed requirements. France, the second largest producer, exports to other Member States. The United Kingdom, the number three producer, purchases rape, mainly in France. The other countries do not produce or consume much at all. Almost all the rape used is processed into oil.

Since 1981, European production and use of rape have almost tripled. Trade with non-member countries is still low, especially as far as exports are concerned.

In 1996, Europe bought 584.000 tonnes of rape from beyond its borders. Half the imports originated from Central Europe. Canada accounted

for 39%. Export volume reached 463.000 tonnes in 1996, almost half of which went to Poland.

### Definitions

**1993-1994 marketing year:** products harvested in 1993 and marketed in 1993 and 1994.

**Processing:** transition into a sector of activity for which there are separate balance sheets, here, oil.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for rape and rape seed. So the result is different from that of the balance sheets, which apply to a marketing year.

**Rape and rape seed balance sheets for 1993-1994**

Usable production	Imports	Exports	Domestic use		Self- sufficiency level
			Total	including processing into oil	
thousand tonnes					%

BLEU	18 <sup>1</sup>	374 <sup>2</sup>	15 <sup>2</sup>	377 <sup>2</sup>	377 <sup>2</sup>	4.8 <sup>2</sup>
Denmark	417	106	96	193	193	216.1
Germany	2 848	760	736	2 793	2 665	102.0
Greece	—	—	—	—	—	///
Spain	17	16	1	32	30	53.1
France	1 562	255	769	1 073	721	145.6
Ireland	9 <sup>1</sup>	6 <sup>2</sup>	10 <sup>2</sup>	5 <sup>2</sup>	— <sup>2</sup>	180.0 <sup>2</sup>
Italy	13	9	0	22	22	59.1
Netherlands	7	315	19	306	278	2.3
Austria	131	10	2	143	126	91.6
Portugal	—	—	—	—	—	///
Finland	130	...	...	...	...	...
Sweden	313	...	...	...	...	...
United Kingdom	1 136	281	34	1 394	1 221	81.5
<b>EU-15</b>	<b>6 601</b>	<b>...</b>	<b>...</b>	<b>...</b>	<b>...</b>	<b>...</b>

1. Production harvested.

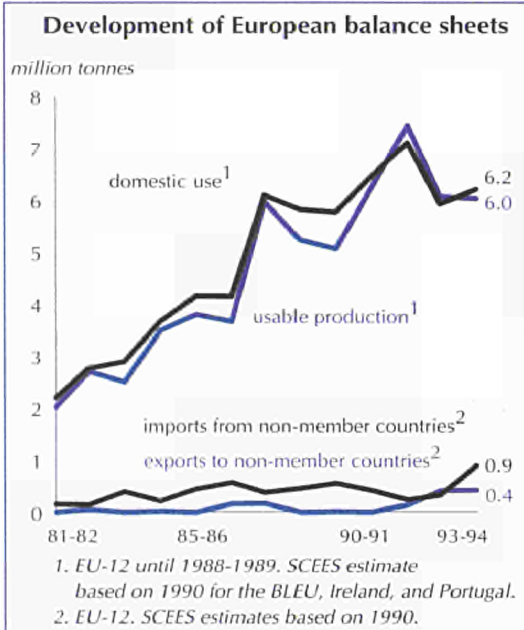
2. SCEES estimate.

Source : Eurostat - Balance sheets

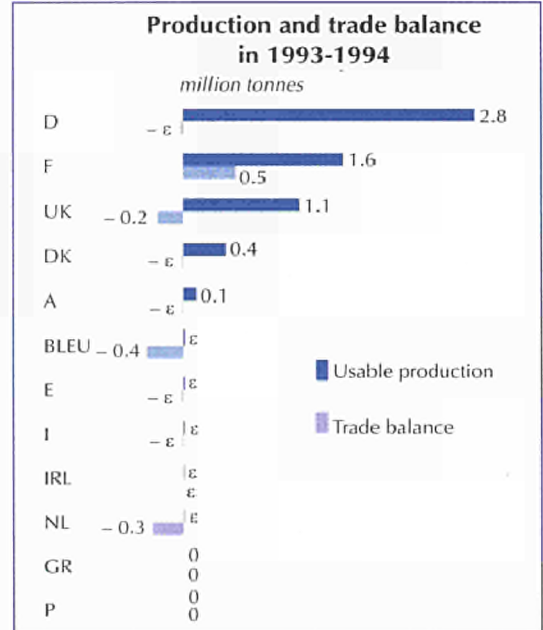


## RAPE BALANCE SHEETS

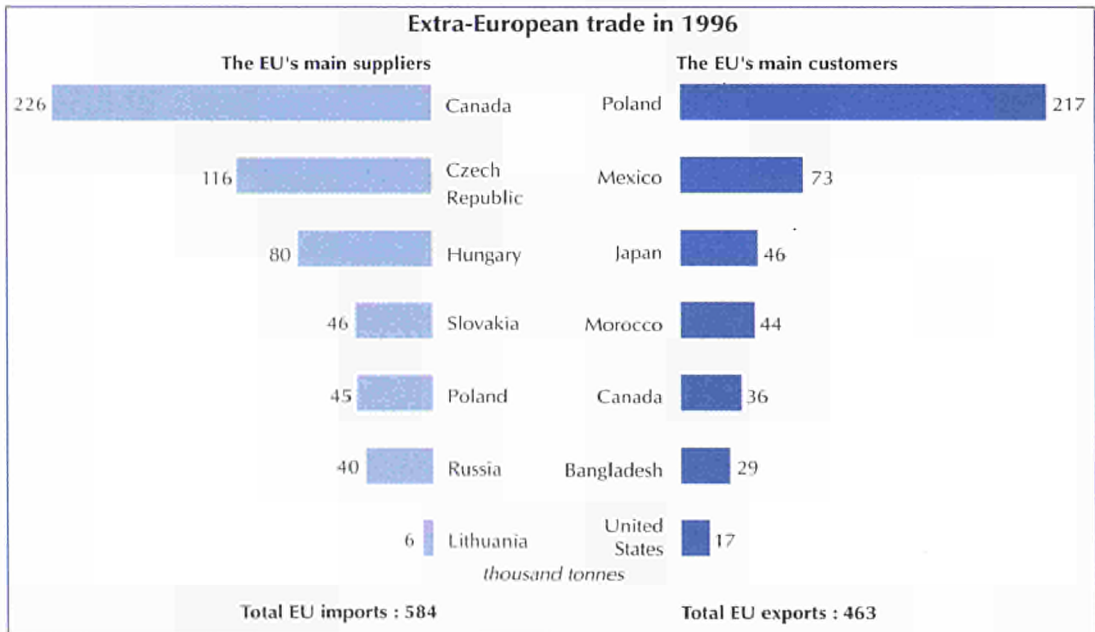
### Trebling of rape and rape seed production since 1980



Source : Eurostat - Balance sheets and SCEES estimates



Source : Eurostat - Balance sheets and SCEES estimates for UEBL, IRL and P



Source : Eurostat - Foreign trade





## SUNFLOWER PRODUCTION

With a harvest of 3.9 million tonnes in 1996, the European Union produced one-sixth of the world's 1996 sunflower harvest. It is the world's third producer behind the Mercosur and the CIS. The average 1996 yield in the European Union was one-third higher than the world yield. It still comes behind the yields of the three major producer countries, Argentina, the United States and China. It is also surpassed in several Central European countries, including the Czech Republic and Hungary, both candidates for admission to the Union.

Sunflowers, which need sun and moisture, are not cultivated throughout the European Union. In particular, they are not grown in the Scandinavian countries, Benelux, the British Isles, and most mountainous regions. Areas planted to sunflowers increased greatly during the 1980s

in all the Union's producer countries. With yields rising sharply, the production of the Fifteen has been increased by a factor of five. This trend has altered over the past few years because of the CAP reform.

France, the Union's number one producer, and Spain which boasts the largest areas, account for between 75 % and 90 % of the Community sunflower harvest, depending on the year. Hungary's admission to the Union will increase Community production by about 20 %. Poitou-Charentes, the Centre region of France and the Midi-Pyrénées represented 37 % of the Community's sunflower production in 1995. There are conspicuous differences in yield among the Fifteen. The lowest, one quintal per hectare, are those of Central Portugal, the highest, 32 quintals per hectare, occur in Rhineland-Palatinate.

### European sunflower producers

Area				Production				Yield
1980	1990	1995	1996	1980	1990	1995	1996	1996
thousand hectares				thousand tonnes				q/ha

Belgium	—	—	—	—	—	—	—	—
Denmark	—	—	—	—	—	—	—	—
Ex-FRG	—	25	///	///	—	72	///	///
Germany	///	///	52	44	///	///	111	103
Greece	3	26	22	24	5	41	31	26
Spain	668	1 201	1 112	1 098	492	1 312	588	1 178
France	103	1 145	963	891	245	2 430	1 987	1 995
Ireland	—	—	—	—	—	—	—	—
Italy	32	173	230	257	57	404	534	542
Luxembourg	—	—	—	—	—	—	—	—
Netherlands	—	—	—	—	—	—	—	—
Austria	—	23	29	19	—	58	61	44
Portugal	25	105	94	101	22	61	26	38
Finland	—	—	—	—	—	—	—	—
Sweden	—	—	—	—	—	—	—	—
U. Kingdom	—	—	£	£	—	—	£	£
<b>EU-15</b>	<b>831<sup>1</sup></b>	<b>2 698<sup>1</sup></b>	<b>2 503</b>	<b>2 434</b>	<b>822<sup>1</sup></b>	<b>4 377<sup>1</sup></b>	<b>3 338</b>	<b>3 926</b>
Czech Rep.	...	...	19	20	...	...	32	38
Estonia	—	—	—	—	—	—	—	—
Hungary	273	347	491	473	456	684	789	868
Poland	—	—	—	—	—	—	—	—
Slovenia	—	—	—	—	—	—	—	—

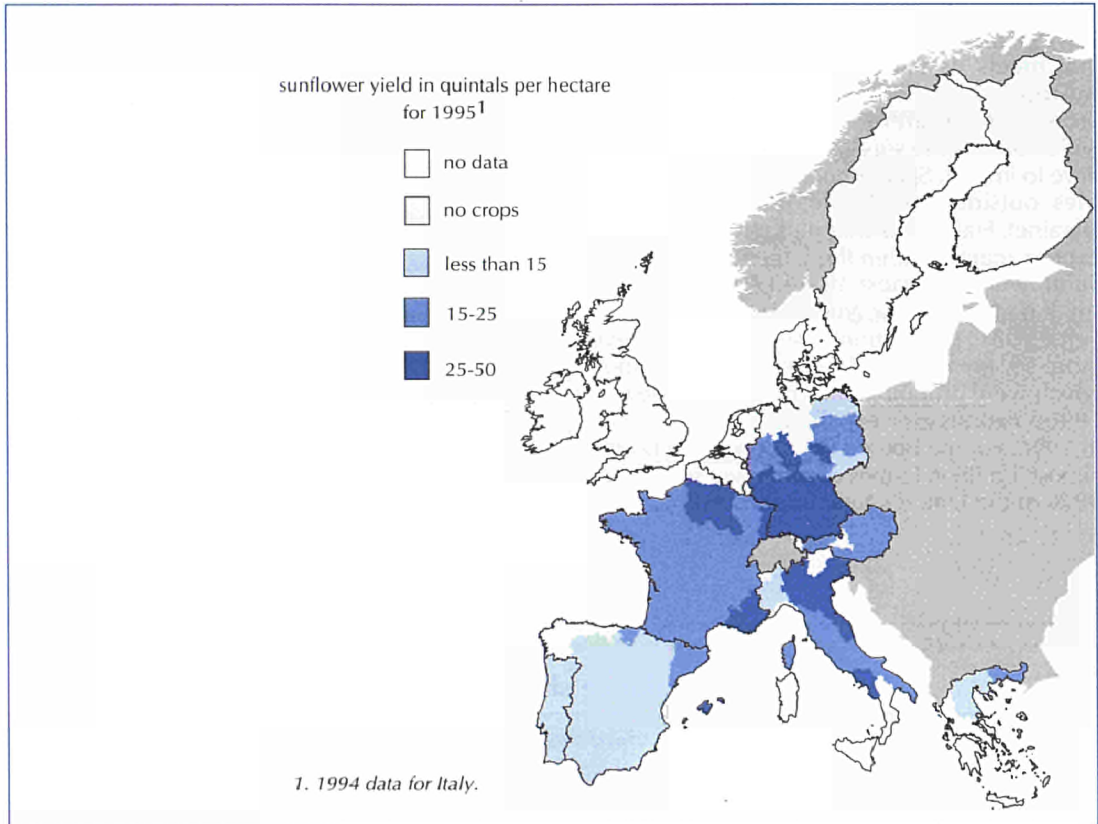
1. EU-15 without the new Länder.

Sources : Eurostat - Newcronos, for the EU and national statistics, ZMP and FAO for the other countries



## SUNFLOWER PRODUCTION

**Highest yields are in Rhineland-Palatinate and the Balearic islands**



Source : Eurostat - Newcronos

### World producers

	1980	1990	1995	1996
	thousand tonnes			
Mercosur	1 733	4 010	5 982	5 767
CIS	4 652	6 518	7 403	5 280
EU-15	822	4 355	3 340	3 878
NAFTA	1 922	1 153	1 885	1 683
India	66	889	1 324	1 337
China	910	1 339	1 269	1 290
<b>World</b>	<b>13 586</b>	<b>22 682</b>	<b>26 366</b>	<b>24 786</b>

Source : FAO - For methodological reasons, the data differ from those on page 120.



## SUNFLOWER BALANCE SHEETS

During the 1994-1995 commercial year, the European Union produced 4 million tonnes of sunflower. France, with a production of 2 million tonnes, is one of the two European countries that meets its sunflower seed requirements. Austria is the other one, but with a very small production. Apart from Denmark and Ireland, which do not use sunflower, the other countries have to import. Spain imports mainly from countries outside the Union (Russia, Argentina, Ukraine). France has a surplus trade balance and exports mainly within the Union. Sunflower are almost all processed into oil. A small part is used for animal feed. Since 1981, production of sunflower and, even more so, their use, have risen sharply. Imports which were dropping have risen since the early 1990s. Exports are very slight. In 1996, Europe bought from beyond its borders almost 3 million tonnes of sunflower seeds. With 42 % of the Union's total imports from outside,

Russia is its main supplier ahead of Ukraine (22 %) and Argentina (18 %). The volume of exports was slightly more than 20.000 tonnes, including one-third to Morocco and one-quarter to Switzerland.

### Definitions

**1994-1995 marketing year:** products harvested in 1994 and marketed in 1994 and 1995.

**Processing:** transition into a sector of activity for which there are separate balance sheets, here, oil.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for sunflower seeds. So the result is different from that of the balance sheets, which also apply to a marketing year.

Sunflower balance sheets for 1994-1995

Usable production	Imports	Exports	Domestic use			Self-sufficiency level
			Total	including animal feed	processing into oil	
thousand tonnes						%

BLEU	—	150 <sup>1</sup>	3 <sup>1</sup>	150 <sup>1</sup>	— <sup>1</sup>	150 <sup>1</sup>	— <sup>1</sup>
Denmark	—	—	—	—	—	—	—
Germany	311	298	59	557	75	455	55.8
Greece	25	54	—	79	—	76	31.6
Spain	979	493	13	1 459	80	1 334	67.1
France	2 053	92	670	1 456	111	1 273	141.0
Ireland	—	—	—	—	—	—	—
Italy	545	160	—	655	20	522	83.2
Netherlands	—	502	9	534	27	508	—
Austria	92	22 <sup>1</sup>	44 <sup>1</sup>	70 <sup>1</sup>	6 <sup>1</sup>	60 <sup>1</sup>	131.4 <sup>1</sup>
Portugal	26 <sup>2</sup>	254 <sup>2</sup>	— <sup>2</sup>	278 <sup>2</sup>	— <sup>2</sup>	276 <sup>2</sup>	9.4 <sup>2</sup>
Finland	...	...	...	...	...	...	...
Sweden	...	...	...	...	...	...	...
United Kingdom	—	220	15	214	—	164	—
EU-15	...	...	...	...	...	...	...

1. SCEES estimate

2. Harmonized national data.

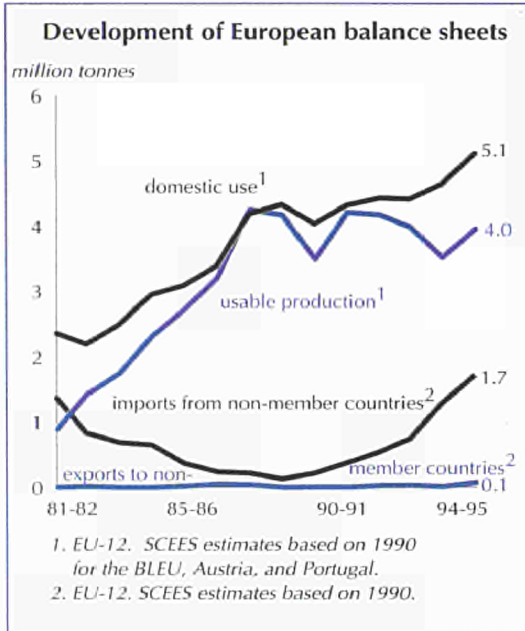
Source : Eurostat - Balance sheets



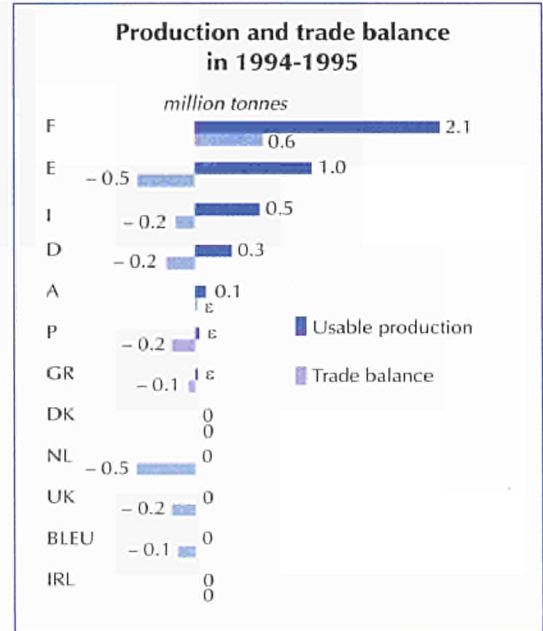


## SUNFLOWER BALANCE SHEETS

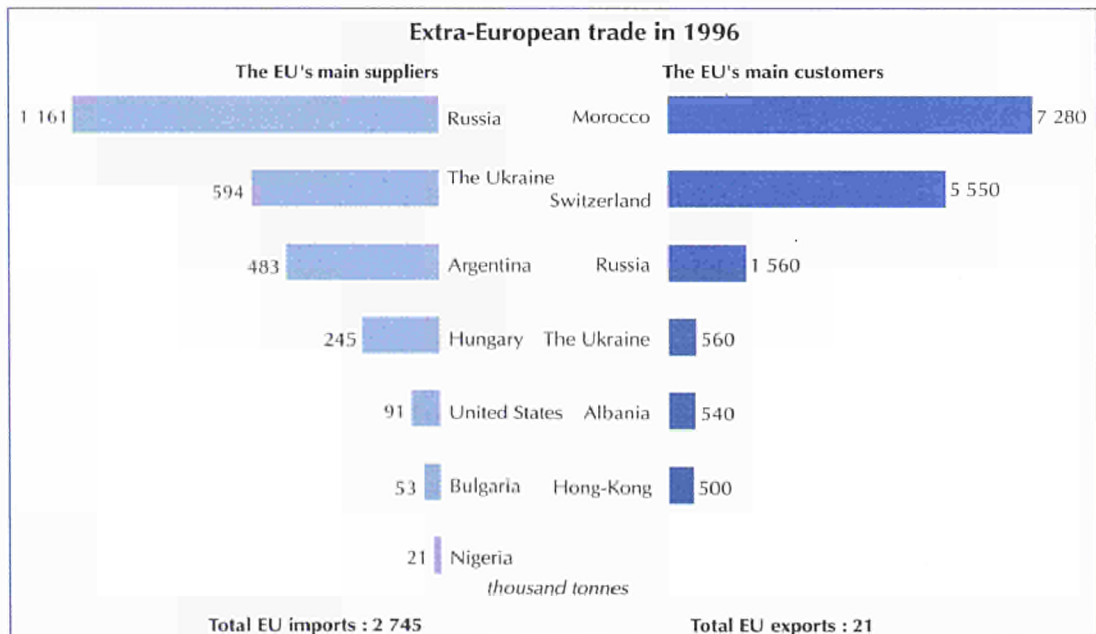
### A production which has stabilized since 1987



Source : Eurostat - Balance sheets and SCEES estimates



Source : Eurostat - Balance sheets and SCEES estimates for UEBl, A and P.



Source : Eurostat - Foreign trade



BALANCE SHEETS FOR VEGETABLE FATS AND OILS

During the 1993-1994 commercial year, Europe produced more than 8 million tonnes of oil, including 4.5 million in Germany, Spain and Italy. The Union is not self-sufficient, nor are half the Member States. Germany exports rape-oil to other Union Countries such as the Netherlands and Italy. Spain exports olive oil, half to Europe (Italy, Portugal, France) and half beyond. Italy imports more than it exports, buying olive oil in Greece, rape-oil in Germany, and palm oil in Indonesia. Direct human consumption accounts for 80 % of the various uses, as opposed to 10% for industrial uses. The remaining 10% is processed into margarine and other prepared food fats. In 1996, Europe bought from beyond its borders more than 3 tonnes of oils, including almost 2 million tonnes of palm oil and 1 million tonnes of coconut oil.

Three Southeast Asian countries supply 72 % of purchases. European oil exports accounted for less than 2 million tonnes, including two-thirds rape-oil and soya bean. The main purchasers are China, Russia and Tunisia.

Definitions

- 1993-1994 marketing year:** products harvested in 1993 and marketed in 1993 and 1994.
- Self-sufficiency level:** relation between usable production and domestic use.
- Trade balance:** the difference between the volume of exports and the volume of imports.
- Extra-European trade:** the volume of imports and exports may differ from that on the balance sheets, for which refined oils are converted into raw oil, and which also apply to a marketing year.

Balance sheets for vegetable fats and oils in 1993-1994

	Usable production	Imports	Exports	Domestic use			Self- sufficiency level
				Total	including		
						human consump- tion	industrial uses
thousand tonnes							%
BLEU	500 <sup>1</sup>	580 <sup>1</sup>	640 <sup>1</sup>	440 <sup>1</sup>	240 <sup>1</sup>	110 <sup>1</sup>	113.6 <sup>1</sup>
Denmark	186	25	120	91	91 <sup>1</sup>	— <sup>1</sup>	204.4
Germany	1 955	1 252	1 390	1 794	1 449	309	109.0
Greece	390	80	137	342	340	2	114.0
Spain	1 436	305	434	1 251	1 177	74	114.8
France	876	768	534	1 075	727	225	81.5
Ireland	— <sup>1</sup>	80 <sup>1</sup>	— <sup>1</sup>	80 <sup>1</sup>	80 <sup>1</sup>	— <sup>1</sup>	— <sup>1</sup>
Italy	1 083	820	268	1 567	1 400	152	69.1
Netherlands	947	1 139	1 268	802	527	57	118.1
Austria	77	107	8	176	6	162	43.8
Portugal	236 <sup>2</sup>	105 <sup>2</sup>	57 <sup>2</sup>	291 <sup>2</sup>	199 <sup>2</sup>	70 <sup>2</sup>	81.5 <sup>2</sup>
Finland	...	...	...	...	...	...	...
Sweden	...	...	...	...	...	...	...
United Kingdom	680 <sup>1</sup>	1 050 <sup>1</sup>	150 <sup>1</sup>	1 580 <sup>1</sup>	1 230 <sup>1</sup>	— <sup>1</sup>	43.0 <sup>1</sup>
EU-15	...	...	...	...	...	...	...
EU-12	8 289	...	...	9 313	7 460	999	89.0

1. SCEES estimate.  
2. Harmonized national data.

Source : Eurostat - Balance sheets

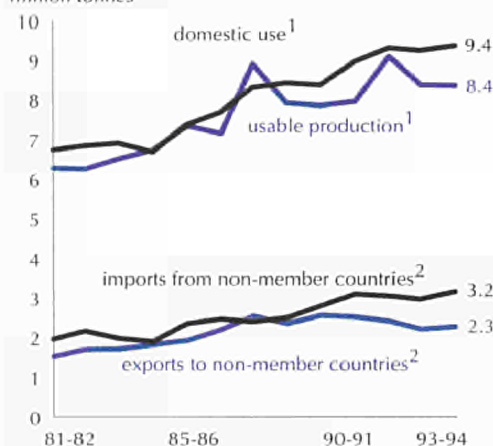


## BALANCE SHEETS FOR VEGETABLE FATS AND OILS

### The Union is not self-sufficient

#### Development of European balance sheets

million tonnes



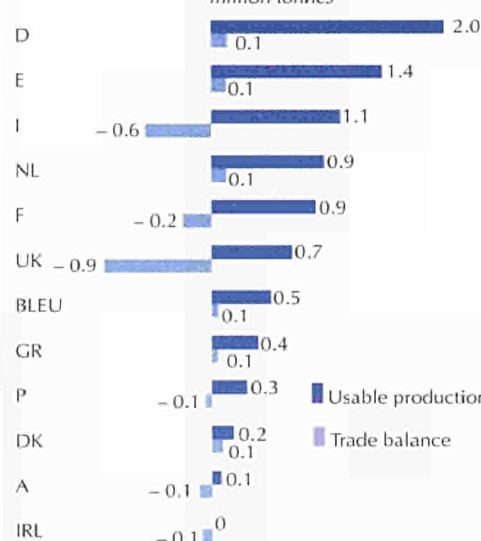
1. EU-12. SCEES estimates based on 1990 for the BLEU, Ireland, and Portugal.

2. EU-12. SCEES estimates based on 1990, according to Eurostat-Foreign trade data.

Source : Eurostat - Balance sheets and SCEES estimates

#### Production and trade balance in 1993-1994

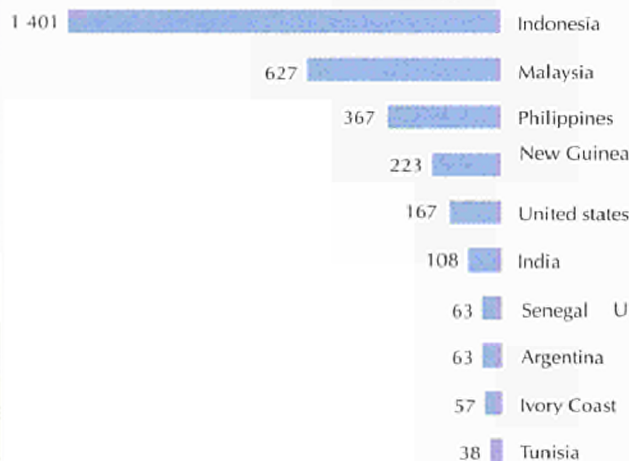
million tonnes



Source : Eurostat - Balance sheets and SCEES estimates for UK, UEBL, P, IRL

#### Extra-European trade in 1996

##### The EU's main suppliers



Total EU imports : 3 297

##### The EU's main customers



Total EU export : 1 732

thousand of tons

Source : Eurostat - Foreign trade





## OILCAKE AND CATTLE-CAKE BALANCE SHEETS

During the 1994-1995 commercial year, Europe produced more than 20 million tonnes of oilcake and cattle-cakes, with more than half coming from soya beans. The remainder of the production consisted essentially of rape and sunflower cakes. There is virtually no production of maize cakes. Germany, Spain and the Netherlands accounted for 60 % of production. Denmark produces little and buys mainly outside the Union (Argentina and Brazil). Ireland produces nothing and uses little.

No country meets its requirements. France, the second largest user, meets less than 30 % of its needs, and imports mainly from Brazil. Although Germany is Europe's second exporter, behind the Netherlands, it is not self-sufficient. It imports mainly from Brazil and Argentina, and re-exports within the Union.

Since 1981, the use and production of oilcake and cattle-cakes have increased in similar proportions. Almost 90 % of European exports occur

within its borders. In 1996, Europe exported 485.000 tonnes of soya cakes to non-member countries, with more than half going to Poland and the Czech Republic. It imported about 20 times more, mainly from Brazil and Argentina.

### Definitions

**1994-1995 marketing year :** products harvested in 1995 and marketed in 1994 and 1995.

**Self-sufficiency level :** relation between usable production and animal feed, only domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of imports and exports in 1996 was based on customs declarations for soya cakes. So the result is slightly different from that of the balance sheets, which includes trade in rape, sunflower and maize cakes, and also apply to a marketing year.

### Balance sheets for oilcake and cattle-cake in 1994-1995

	Usable production	Imports	Exports	Animal feed	Self- sufficiency level
	thousand tonnes				%
BLEU	1 500 <sup>1</sup>	1 500 <sup>1</sup>	1 300 <sup>1</sup>	1 700 <sup>1</sup>	88.2 <sup>1</sup>
Denmark	176	2 863	34	3 005	5.9
Germany	5 125	3 386	2 036	6 513	78.7
Greece	608	244	45	807	75.3
Spain	3 892	2 046	58	4 650	83.7
France	1 764	4 686	96	6 263	28.2
Ireland	—	825	9	816	—
Italy	1 797	2 350	45	4 102	43.8
Netherlands	3 534	3 910	2 921	4 527	78.1
Austria	...	...	...	...	...
Portugal	700 <sup>1</sup>	200 <sup>1</sup>	100 <sup>1</sup>	800 <sup>1</sup>	87.5 <sup>1</sup>
Finland	...	...	...	...	...
Sweden	...	...	...	...	...
United Kingdom	1 242	3 220	220	4 238	29.3
EU-15	...	...	...	...	...
EU-12	20 338	...	...	37 421	54.3

1. SCEES estimates.

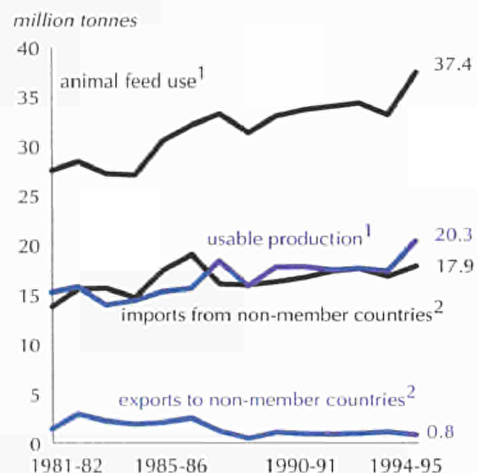
Source : Eurostat - Balance sheets



## OILCAKE AND CATTLE-CAKE BALANCE SHEETS

### No country meets its needs

#### Development of European balance sheets

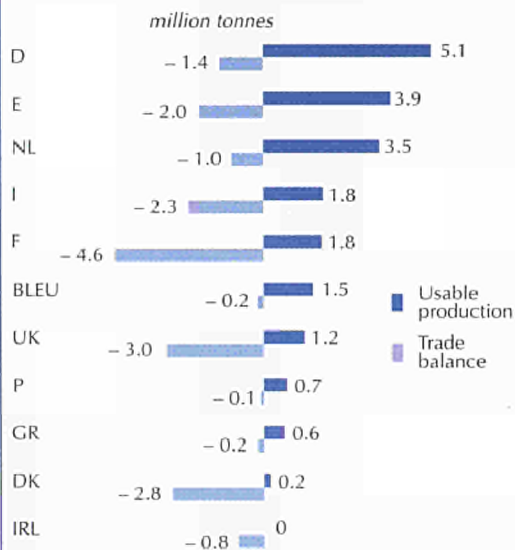


1. EU-12. SCEES estimates based on 1990 for Portugal.

2. EU-12. SCEES estimates based on 1990, according to Eurostat-Foreign trade data.

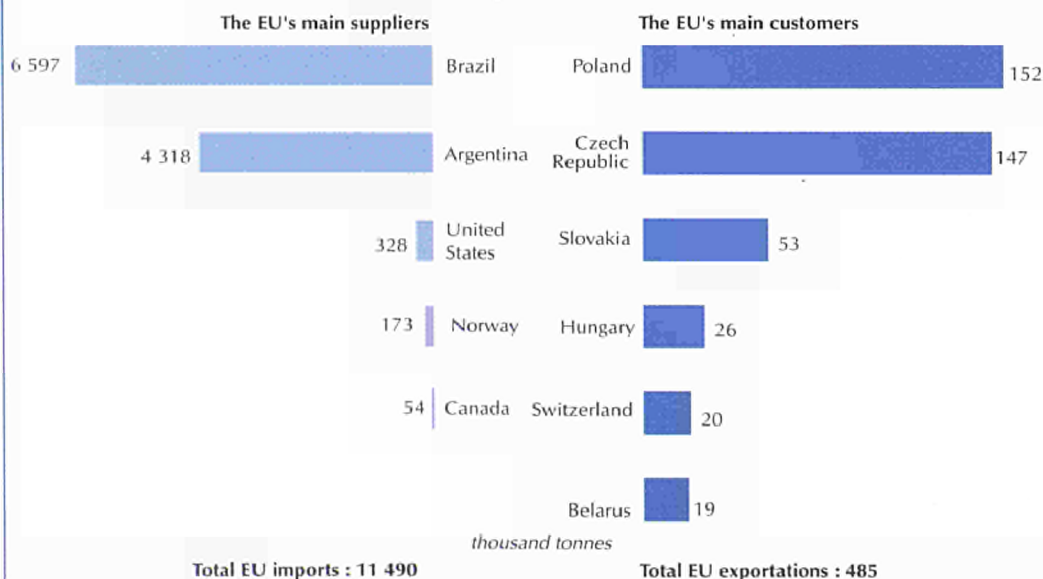
Source : Eurostat - Balance sheets and SCEES estimates

#### Production and trade balance in 1994-1995



Source : Eurostat - Balance sheets and SCEES estimates for UEBL and P

#### Extra-European trade in 1996



Source : Eurostat - Foreign trade



## OLIVE OIL BALANCE SHEETS

The Community production of olive oil, 1.5 million tonnes during the 1994-1995 commercial year, almost all comes from Spain, Italy and Greece. Portuguese and French production is very low, and there is no production anywhere else. The producer countries are also the main consumer countries, but Italy does not meet its needs. It imports olive oil mainly from Greece and Spain, Europe's leading exporters. One-quarter of Spain's olive oil sales is also made beyond Europe's borders.

Since 1981, European consumption of olive oil has risen regularly, whereas production has been more variable.

Olives themselves are used essentially by the producer countries. So trade has to do primarily with olive oil and is conducted mainly within the Union.

In 1996, Europe exported beyond its borders a mere 166.000 tonnes of oil, half of which went

to the United States. It imported 73 000 tonnes, with Tunisia as its leading supplier.

### Definitions

**1994-1995 marketing year:** products harvested in 1994 and marketed in 1994 and 1995.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for olive oil. So the result is slightly different from the that of the balance sheets, which includes trade in non-processed olives, and also apply to a marketing year.

### Olive oil balance sheets in 1994-1995

Usable production	Imports	Exports	Human consumption	Self-sufficiency level
thousands tonnes				%

BLEU	—	3 <sup>1</sup>	— <sup>1</sup>	3 <sup>1</sup>	— <sup>1</sup>
Denmark	—	—	—	—	///
Germany	—	17	1	16	—
Greece	387	3	163	190	203.7
Spain	585	125	207	465	125.8
France	3	55	13	45	6.7
Ireland	—	1 <sup>1</sup>	— <sup>1</sup>	1 <sup>1</sup>	— <sup>1</sup>
Italy	525	311	181	695	75.5
Netherlands	—	1 <sup>1</sup>	—	1 <sup>1</sup>	— <sup>1</sup>
Austria	—	2 <sup>1</sup>	—	2	—
Portugal	35	47 <sup>2</sup>	23 <sup>2</sup>	51 <sup>2</sup>	68.6 <sup>2</sup>
Finland	—	...	...	...	...
Sweden	—	...	...	...	...
United Kingdom	—	17	1	16 <sup>1</sup>	— <sup>1</sup>
<b>EU-15</b>	<b>1 535</b>	<b>...</b>	<b>...</b>	<b>...</b>	<b>...</b>

1. SCEES estimates.

2. Harmonized national data.

Source : Eurostat - Balance sheets

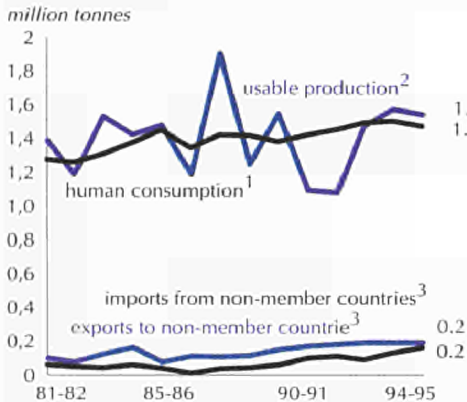




## OLIVE OIL BALANCE SHEETS

### Spain, Italy and Greece supply the Union

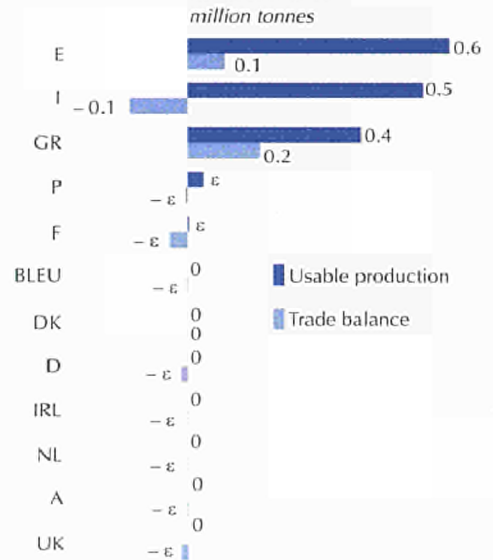
#### Development of European balance sheets



1. EU-12. SCEES estimates based on 1990 for Ireland and Portugal.
2. EU-15. SCEES estimates based on 1990 for Ireland and Portugal.
3. EU-12. SCEES estimates based on 1990.

Sources : Eurostat - Balance sheets and SCEES estimates

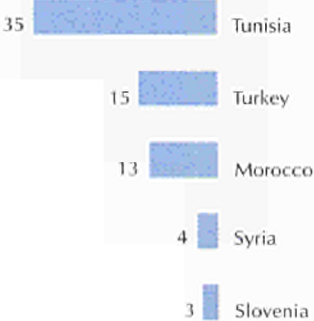
#### Production and trade balance in 1994-1995



Sources : Eurostat - Balance sheets and SCEES estimates for UEBL, IRL, P

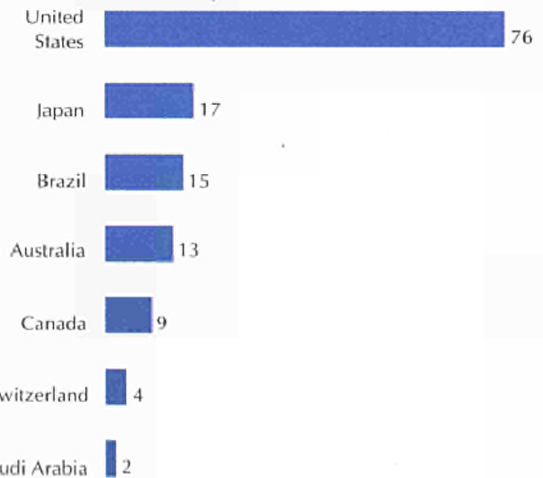
#### Extra-European trade in 1996

##### The EU's main suppliers



Total EU imports : 73

##### The EU's main customers



Total EU exports : 166

Source : Eurostat - Foreign trade



## FRESH VEGETABLE PRODUCTION

After levelling out at around 46 million tonnes since 1990, Community vegetable production rose to 47 million in 1996. This growth came largely from tomatoes, the leading vegetable grown in the Union, with Italian and Spanish harvests rising noticeably in 1996, as a specific result of good climatic conditions. Peas and green beans, which alone occupy 270,000 hectares, with an output of 1.7 million tonnes are the main vegetables earmarked for processing, along with tomatoes. Vegetables are traded with countries that are geographically close because of their limited shelf-life. So, 83 % of Community imports and 89 % of Community exports occur within the Union. Almost one-third of imports from beyond the Community come from the Canary Islands and 12 % from Morocco. These are principally tomato imports. Kenya is the EU's third supplier, largely due to green beans. Switzerland,

which is the Union's number one client, takes one-quarter of Community exports, the United States 15 %, Russia 12 %, and Poland and the Czech Republic 8 % each.

Italy is the EU's leading producer but only its third exporter, because its production goes mainly to its domestic market. The Netherlands, on the contrary are a hub of vegetable trade : it exports the equivalent of 75 % of its production, with a considerable part made up of re-exports. Spain, which sells 30 % of its production beyond its borders, is also a major exporter, its imports are negligible. France is the Community's fourth exporter and third importer. In 1996 its foreign trade balance was 360 million ecus in the red. Germany and the United Kingdom are the two leading importers of vegetables, and Germany even buys more vegetables than it produces.

### Area of main fresh vegetables in 1996

Total	including								
	Tomato	Onion	Carrot	Lettuce	Cauli-flower	Melon	White cabbage	Water-melon	Cap-sicum
thousand hectares									
56.4 <sup>e</sup>	0.9	0.4	2.8	2.5	5.2	£	0.3	–	0.1
15.7	0.1	1.5	1.8	0.5	0.7	–	0.4	–	£
90.2	0.4	6.9	8.0	5.9	6.0	–	8.4	–	–
134.0	37.3	9.7	1.2	3.6	3.7	7.8	8.3	17.5	4.1
388.3	56.8	25.5	6.6	33.5	16.8	43.4	5.0	20.1	23.6
321.1	9.3	8.5	17.0	13.5	43.0	17.6	1.2	0.3	1.0
7.1 <sup>e</sup>	0.1 <sup>e</sup>	0.2 <sup>e</sup>	1.0 <sup>e</sup>	0.3 <sup>e</sup>	1.2 <sup>e</sup>	–	–	–	£
486.8	123.6	15.8	9.7	21.3	35.6	21.8	4.8	6.4	13.7
0.1	£	£	£	£	–	–	£	–	–
74.5	1.1	16.7	8.3	2.3	2.9	–	2.1	–	1
12.4	0.2	1.7	1.0	1.5	0.8	–	1.0	–	0.2
80.0 <sup>e</sup>	18.6	2.0 <sup>e</sup>	3.0 <sup>e</sup>	1.4 <sup>e</sup>	0.5	4.3	–	1.3	0.2 <sup>e</sup>
10.5	0.1	1.0	1.8	0.3	0.5	–	1.0	–	£
6.6	0.1	0.8	1.8	0.7	0.4	£	0.5	–	–
147.4	0.3	11.8	13.6	7.6	22.6	–	12.9	–	0.1
1 831.1 <sup>e</sup>	248.9 <sup>e</sup>	102.5 <sup>e</sup>	77.6 <sup>e</sup>	94.9 <sup>e</sup>	139.9 <sup>e</sup>	94.9 <sup>e</sup>	45.9	45.6	44.0 <sup>e</sup>

Source : Eurostat - Newcronos



## FRESH VEGETABLE PRODUCTION

Germany imports vegetables, while the Netherlands and Spain export them

### Foreign trade in 1996



million ecus

### Production of main fresh vegetables in 1996

Total	including								
	Tomato	Onion	Carrot	Lettuce	Cauli-flower	Melon	White cabbage	Water-melon	Cap-sicum
thousand hectares									

Belgium	1 292	286	10	133	85	90	8	17	—	13
Denmark	179 <sup>e</sup>	19	46	77	7	7	—	16	—	1
Germany	2 773	38	279	340	144	162	—	576	—	0
Greece	4 167	1 933	204	37	69	71	164	192	720	106
Spain	10 585 <sup>e</sup>	3 326	967	302	924	358	968	142	651	871
France	6 132	774	338	657	365	526	315	83	10	29
Ireland	224 <sup>e</sup>	7	6	34	10	10	—	—	—	8
Italy	12 485 <sup>e</sup>	6 528	445	346	419	626	491	116	235	346
Luxembourg	2	8	8	8	8	—	—	8	—	—
Netherlands	3 579	480	510	350	110	57	—	130	—	253
Austria	395	19	70	34	48	8	—	49	—	6
Portugal	1 975 <sup>e</sup>	987	60 <sup>e</sup>	83 <sup>e</sup>	32 <sup>e</sup>	9	64	—	20	1 <sup>e</sup>
Finland	230	33	19	54	4	4	—	23	—	8
Sweden	227	18	23	87	14	6	8	22	—	—
United Kingdom	3 048	117	343	672	207	283	—	350	—	6
<b>EU-15</b>	<b>47 294<sup>e</sup></b>	<b>14 565</b>	<b>3 260<sup>e</sup></b>	<b>3 123<sup>e</sup></b>	<b>2 406<sup>e</sup></b>	<b>2 217</b>	<b>2 002</b>	<b>1 716</b>	<b>1 636</b>	<b>1 632<sup>e</sup></b>

Source : Eurostat - Newcronos





## TOMATO BALANCE SHEETS

During the 1995-1996 commercial year, Europe produced 12 million tonnes of tomatoes. Benelux and the three southern countries are the only ones to meet their needs. The leading producer countries like Italy, Spain and Greece, sell little beyond their borders. The Netherlands, the Union's sixth producer, is actually the number one exporter. 80 % of its sales go to the Union, in particular to Germany and the United Kingdom.

The tomatoes used in the producer countries are for the most part processed : 70 % in Italy but only 25 % in France, which, incidentally, does not meet all its requirements. Since 1980, the EU's production and use of tomatoes have remained pretty much at the same level. Trading occurs mainly within the Union, with just minimal trade with non-member countries.

In 1996, the EU bought from beyond its borders 538.000 tonnes of tomatoes, with one-quarter

coming from Morocco. It exported half this amount. Its leading buyers were Poland and Russia.

### Definitions

**Sales by professional producers** : excludes production from family gardens.

**Processing** : transfer to a sector for which separate balance sheets exist.

**Self-sufficiency level** : relation between sales by professional producers and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance** : the difference between the volume of exports and the volume of imports.

**Extra-EU trade** : the volume of imports and exports in 1996 was based on customs declarations for non-processed tomatoes. So the result is different from that of the balance sheets, and also apply to a marketing year.

### Tomato balance sheets in 1995-1996

	Sales by profes- sional producers	Imports	Exports	Domestic use			Self- sufficiency level
				Total	including		
					Human consump- tion	Processing	
thousand tonnes							%
BLEU	343	28	201	170	109	39	201.8
Denmark <sup>1</sup>	16	14	—	30	30	—	53.3
Germany	26	614	7	633	570	—	4.1
Greece <sup>1</sup>	1 600	—	—	1 600	640	900	100.0
Spain <sup>1</sup>	2 500	—	300	200	950	750	113.6
France	808	353	68	1 093	718	280	73.9
Ireland	8	15	—	23	21	—	34.8
Italy	5 088	32	117	5 003	1 308	3 535	101.7
Netherlands <sup>1</sup>	600	245	762	100	100	—	600.0
Austria <sup>1</sup>	25	125	—	150	128	—	16.7
Portugal	930	9	4	935	92	831	99.5
Finland	31	20	2	50	50	—	62.0
Sweden	25	53	—	78	22	51	32.1
Unit. Kingdom <sup>1</sup>	110	240	—	350	350	—	31.4
<b>EU-15</b>	<b>12 110</b>	<b>...</b>	<b>...</b>	<b>10 435</b>	<b>5 088</b>	<b>6 386</b>	<b>116.1</b>
1. SCEES estimates.							

1. SCEES estimates.

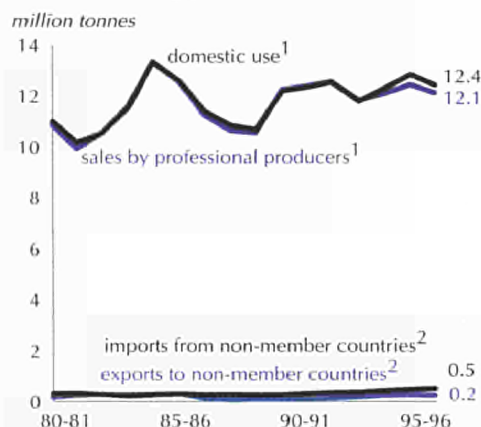
Source : Eurostat - Balance sheets



## TOMATO BALANCE SHEETS

### Low tomato trade with the rest of the world

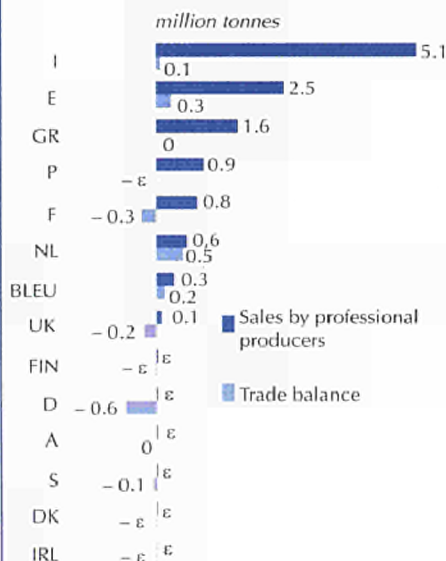
#### Development of EU balance sheets (including processed tomatoes)



1. EU-12 until 1992-1993. SCEES estimates from 1989 for Denmark, Greece, Spain and the United Kingdom.  
2. EU-12. SCEES estimates from 1989, from Eurostat-Foreign Trade data.

Source : Eurostat - Balance sheets and SCEES estimates

#### Production and balance for 1995-1996



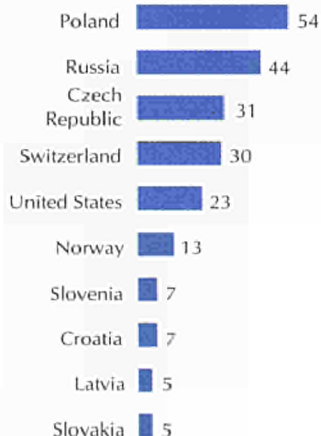
Source : Eurostat - Balance sheets and SCEES estimates for E, GR, NL, UK and DK

### Extra-European trade in 1996

#### The EU's main suppliers of fresh tomatoes



#### The EU's main customers for fresh tomatoes



thousand tonnes

Total EU imports : 538

Total EU exports : 239

Source : Eurostat - Foreign trade



## TABLE FRUIT PRODUCTION

In 1996, the European Union's production of table fruit totalled 29.9 million tonnes. It is harvested over an orchard area of 3.5 million hectares, 1.3 million of which are devoted to nuts. The southern countries provided the bulk: Italy was the leading producer country, with 10.6 million tonnes, ahead of Spain with its 8.7 million tonnes. Next came France and Greece, with 3.8 and 3.2 million tonnes respectively. Citrus accounted for 30% of fruit production, being harvested mainly in Italy and Spain. Table apples, which accounted for 25% of production, are grown in all Union Member States.

The European Union's fruit trade with non-member countries is considerably in the red: 2.3 million tonnes of fruit exported as opposed to 9.3 imported. Exports concern mainly citrus, apples and grapes. However, even for these leading products from the Union's orchards, imports greatly

exceed exports. A large proportion of these imports comes from countries in the southern hemisphere where the seasons do not tally with Europe's, which enables EU distributors to have fresh fruit virtually all year round. The EU is also a massive importer of bananas, with 3.8 million tonnes and tropical fruit, with 0.5 million tonnes, all very popular with European consumers. In terms of market value, the trade balance for the Union's fruit is 6 billion ecus in the red. Its rate of self-sufficiency for fruit was 81% in 1996. This figure has been more or less stable for several years.

The Union's Member States trade 10.1 million tonnes of fruit between them, which is slightly more than one third of their production. Spain is the country which exports most to other Member States, and Germany is the largest importer.

### Area of main table fruit in 1996

Total table fruit	including								
	Table apples	Oranges	Peaches and nectarines	Table pears	Table grapes	Clemen- tines	Lemons	Plums	Straw- berries
thousand hectares									
16.2	9.4	—	8	4.5	8	—	—	0.2	1.2
5.4	1.5	—	—	0.4	—	—	—	0.1	0.5
73.8 <sup>e</sup>	31.2	—	0.2	2	—	—	—	4.9	8.3
344.1	13.6	39.1	52.9	4.2	15.2	3.0	12.2	0.7	0.5
1 400.4	41.2	133.8	71.3	39.4	34.7	63.3	42.6	20.3	8.1
229.3	63.1	0.1	31.0	14.7	14.7	2.5	—	25.1	5.3
1.6 <sup>e</sup>	0.6 <sup>e</sup>	—	—	8	—	—	—	8	0.5 <sup>e</sup>
1 137.8 <sup>e</sup>	71.1	110.4	106.6	51.8	74.1	22.2	37.5	13.9	7.5
0.2	0.1	—	—	8	—	—	—	8	8
24.7	15.2	—	—	5.9	8	—	—	0.5	1.7
14.5 <sup>e</sup>	6.0	—	0.4	0.4	—	—	—	n.d.	1.0
174.2	24.5	20.6	11.5	12.5	6.9	—	1.3	2.3	—
7.9	0.4	—	—	n.d.	—	—	—	n.d.	5.3
6.1	1.7	—	—	0.2	—	—	—	0.2	3.0
29.1	13.5	—	—	2.7	—	—	—	1.5	4.5
3 465.3 <sup>e</sup>	293.1 <sup>e</sup>	304.0	273.9	138.7	145.6	91.0	93.6	69.7	47.4 <sup>e</sup>

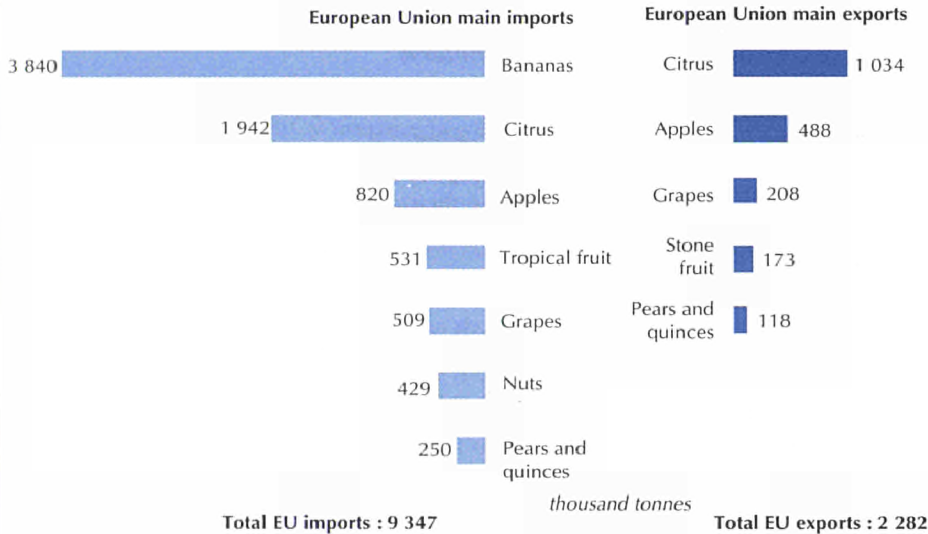
Sources : Eurostat and SCEES estimates





## TABLE FRUIT PRODUCTION

### Extra-European trade in 1996<sup>1</sup>



1. Until 1996, the French overseas départements are not included in the European Union territory.

Source : Eurostat

### Production of main table fruit in 1996

Total table fruit	including								
	Table apples	Oranges	Peaches and nectarines	Table pears	Table grapes	Clemen-tines	Lemons	Plums	Straw-berries
thousand tonnes									

Belgium	499	295	—	—	137	1	—	—	2	43
Denmark	41	18	—	—	3	—	—	—	1	4
Germany	1 478	878	—	1	37	—	—	—	39	77
Greece	3 154	335	979	897	72	238	48	161	4	9
Spain	8 695	865	2 201	870	665	369	952	484	147	231
France	3 759	2 004	1	459	347	95	21	—	355	81
Ireland	15	11	—	—	—	—	—	—	—	6
Italy	10 880	2 071	1 771	1 754	966	1 585	302	608	181	171
Luxembourg	11	8	—	—	1	—	—	—	1	—
Netherlands	610	437	—	—	130	1	—	—	8	30
Austria	201	163	—	6	6	—	—	—	n.d.	9
Portugal	819	257	179	76	102	56	—	9	18	—
Finland	17	2	—	—	n.d.	—	—	—	n.d.	12
Sweden	32	17	—	—	1	—	—	—	—	12
Uni. Kingdom	370	223	—	—	40	—	—	—	20	40
<b>EU-15</b>	<b>30 579</b>	<b>7 584</b>	<b>5 131</b>	<b>4 063</b>	<b>2 507</b>	<b>2 345</b>	<b>1 323</b>	<b>1 262</b>	<b>776</b>	<b>725</b>

Sources : Eurostat and SCEES estimates



## APPLE BALANCE SHEETS

During the 1995-1996 marketing year, Europe produced 7.5 million tonnes of apples, in other words, one-seventh of the world's apple production. France and Italy provide one-half of the Community's harvest. Even though these two countries are themselves big consumers of apples, they export to other Member States : Italy to Germany, France to the United Kingdom and the Netherlands.

The majority of the other countries are not self-sufficient. Germany, the leading European consumer, only meets one-third of its requirements and imports from Italy, the Netherlands and Belgium. Nearly 90% of apples used in Europe are destined for human consumption in the form of fresh apples and apple juice. Since 1980, the use and the production of European apples have developed in roughly the same proportions. Therefore, European production remains lower than use. Trade with non-member countries involves only small amounts.

In 1996, Europe purchased from beyond its borders, 808 000 tonnes of fresh apples, mainly out

of season. New Zealand supplied one-quarter and South Africa one-fifth. Exports totalled half this figure, with Russia the principal purchaser.

### Definitions

**1995-1996 marketing year :** products harvested in 1995 and marketed in 1995 and 1996.

**Sales by professional producers :** excludes production from family gardens.

**Self-sufficiency level :** relation between sales by professional producers and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of imports and exports in 1996 was based on customs declarations for non-processed apples. So the result is slightly different from that of the balance sheets. Furthermore these apply to a marketing year.

### Apple balance sheets in 1995-1996

Sales by professional producers	Imports	Exports	Domestic use		Self-sufficiency level
			Total	Human consumption	
thousand tonnes					%

BLEU	513	303	451	365	297	142.5
Denmark	40 <sup>1</sup>	75 <sup>1</sup>	5 <sup>1</sup>	110 <sup>1</sup>	110 <sup>1</sup>	36.4 <sup>1</sup>
Germany	497	918	54	1 393	1 309	35.7
Greece	300 <sup>1</sup>	30 <sup>1</sup>	50 <sup>1</sup>	280 <sup>1</sup>	180 <sup>1</sup>	107.1 <sup>1</sup>
Spain	900 <sup>1</sup>	50 <sup>1</sup>	50 <sup>1</sup>	900 <sup>1</sup>	850 <sup>1</sup>	100.0 <sup>1</sup>
France	2 089	218	936	1 353	1 139	154.4
Ireland	11	46	4	52	49	21.2
Italy	1 885	85	607	1 363	1 263	138.3
Netherlands	535	582	578	548	400 <sup>1</sup>	97.6
Austria	324	207 <sup>1</sup>	48 <sup>2</sup>	483 <sup>2</sup>	270 <sup>1</sup>	67.1
Portugal	211	70	9	277	262	76.2
Finland	2	68	23	48	48 <sup>1</sup>	4.2
Sweden	16	99	9	106	98	15.1
United Kingdom	250 <sup>1</sup>	640 <sup>1</sup>	50 <sup>1</sup>	840 <sup>1</sup>	840 <sup>1</sup>	29.8 <sup>1</sup>
EU-15	7 573	...	...	8 118	7 115	93.3

1. SCEE estimate.

2. National data.

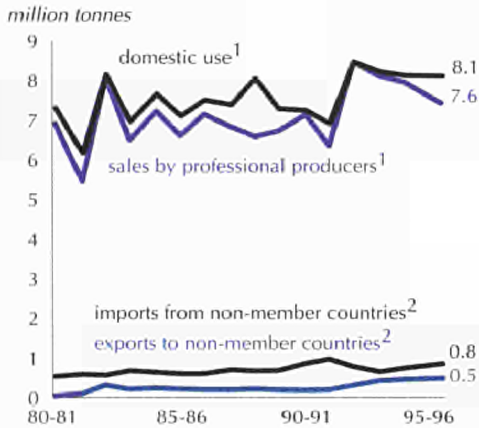
Source : Eurostat - Balance sheets



## APPLE BALANCE SHEETS

### Low apple trade with the rest of the world

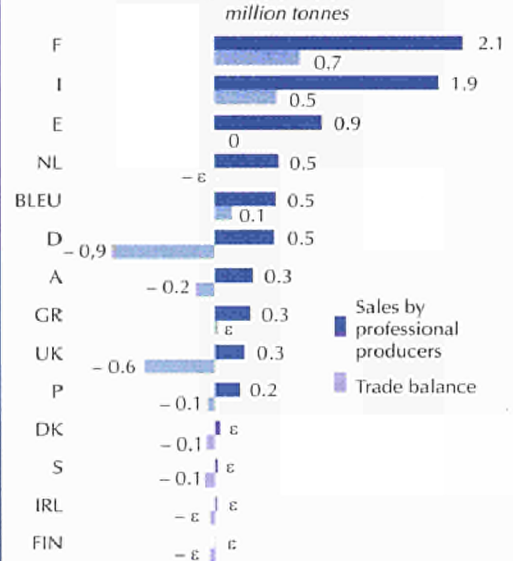
#### Development of European balance sheets



1. EU-12 until 1992-1993. SCEES estimates from 1989 for Denmark, Greece, Spain and the United Kingdom.  
2. EU-12. SCEES estimates from 1989.

Source : Eurostat - Balance sheets and SCEES estimates

#### Production and trade balance for 1995-1996

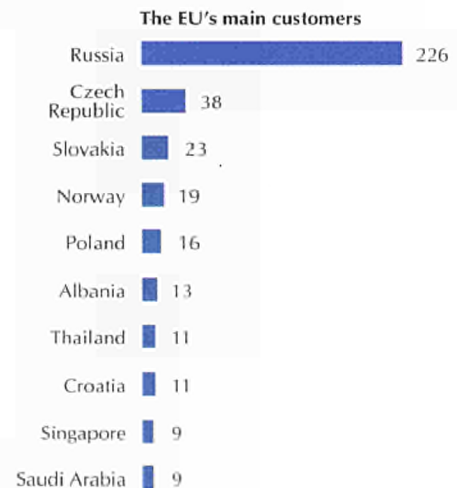


Source : Eurostat - Balance sheets and SCEES estimates for E, GR, UK and DK

### Extra-European trade in 1996



Total EU imports : 808



Total EU exports : 486

thousand tonnes

Source : Eurostat - Foreign trade





## CITRUS BALANCE SHEETS

During the 1994-1995 commercial year, Europe produced a little more than 9 million tonnes of citrus fruits. More than half of that was supplied by Spain, 30 % by Italy and 12 % by Greece. The other Member States either produced little or none and did not meet their needs. Germany, a major user, buys citrus fruits from Spain. France, whose marginal production is limited to Corsican clementines, buys its citrus fruits from Spain as well, but also from outside Europe, Morocco, in particular. Since 1980, the use and production of European citrus fruits, either fresh or whole, or processed, have increased in similar proportions, use still remains greater than production. In 1996, the EU bought close to 2 million tonnes of fresh citrus fruits, from abroad. Morocco supplied almost one-quarter of the imports, South Africa nearly one-sixth. EU exports account for

1 million tonnes. Poland and Russia are the main buyers.

### Definitions

**1994-1995 marketing year:** products harvested in 1994 and marketed in 1994 and 1995.

**Sales by professional producers:** excludes production from family gardens.

**Self-sufficiency level:** relation between sales by professional producers and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed citrus fruit. So the result is different from that of the balance sheets. Furthermore these apply to a marketing year.

Citrus balance sheets in 1994-1995

	Usable production	Imports	Exports	Domestic use		Self- sufficiency level
				Total	Human consumption	
thousand tonnes						%
BLEU	—	597	267	330	319	—
Denmark	—	80 <sup>1</sup>	—	80 <sup>1</sup>	80 <sup>1</sup>	— <sup>1</sup>
Germany	—	4 270	1 939	2 331	2 285	—
Greece	1 176	25	589	612	7	192.2
Spain	5 045	71	3 444	1 672	1 514	301.7
France	25	1 500 <sup>1</sup>	50 <sup>1</sup>	1 425 <sup>1</sup>	1 311 <sup>1</sup>	1.8 <sup>1</sup>
Ireland	—	62	30	32	29	—
Italy	2 833	217	230	2 820	2 510	100.5
Netherlands	—	2 144	1 228	916	898	—
Austria	—	155 <sup>1</sup>	10 <sup>1</sup>	145 <sup>1</sup>	138 <sup>1</sup>	— <sup>1</sup>
Portugal	243	56	11	288	253	84.4
Finland	—	120 <sup>1</sup>	20 <sup>1</sup>	100 <sup>1</sup>	100 <sup>1</sup>	— <sup>1</sup>
Sweden	—	10 <sup>1</sup>	—	10 <sup>1</sup>	10 <sup>1</sup>	— <sup>1</sup>
United Kingdom	—	1 090	77	1 013	1 013	—
EU-15	9 392	...	...	11 774	10 449	79.8

1. SCEES estimates.

1. SCEES estimates.

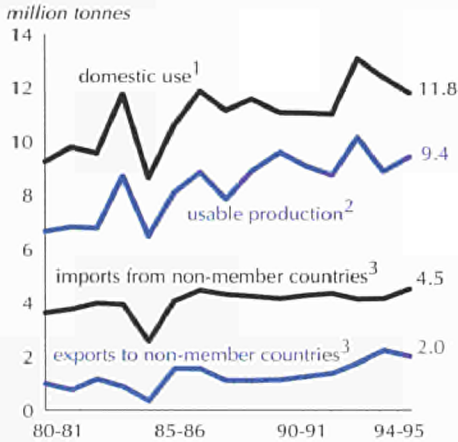
Source : Eurostat - Balance sheets



## CITRUS BALANCE SHEETS

### Citrus imports to meet demand

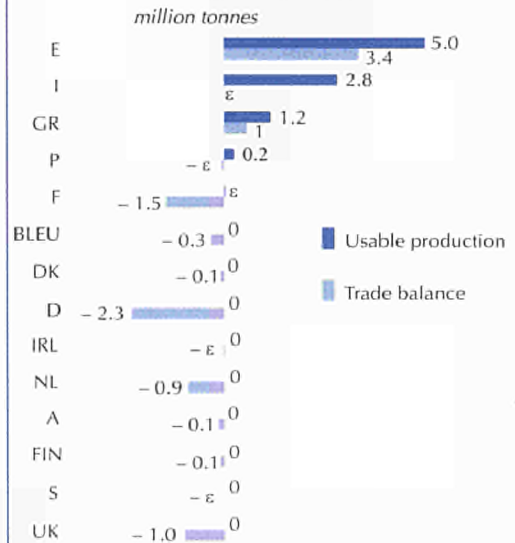
#### Development of European balance sheets



1. EU-12 until 1992-1993. SCEES estimates from 1989 for DK and F.
2. Harvested production from 1988-1989.
3. EU-12. SCEES estimates from 1989.

Sources : Eurostat - Balance sheets and SCEES estimates

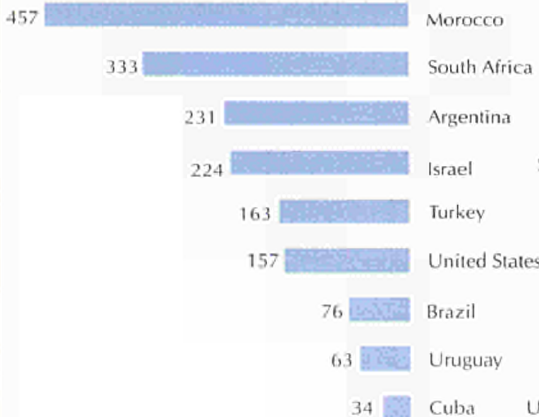
#### Production and trade balance in 1994-1995



Sources : Eurostat - Balance sheets and SCEES estimates for F, A, FIN and S

### Extra-European trade in 1996

#### The EU's main fresh citrus fruits suppliers



Total EU imports : 1 937

#### The EU's main fresh citrus fruits customers



Total EU exports : 1 027

thousand tonnes

Source : Eurostat - Foreign trade



## WINE BALANCE SHEETS

During the 1995-1996 marketing year, the Union produced 153 million hectolitres of wine. Almost three-quarters came from Italy and France. Forty percent of EU wines are quality wines produced in specified regions (VQPRD). They represent one half of the French harvest but only 20% of the Italian harvest.

During the 1995-1996 marketing year, one-fifth of French wines were distilled as alcohol for industrial use. This outlet for current wines also accounted for 9% of domestic use in Spain.

Most of the Member States are not self-sufficient and import wine, mainly from the European Union. But Italy's trade balance is well into the black, as are those of France and Spain, though to a lesser degree.

Since 1980, European wine production has fallen off slightly. Extra-European trade involves small quantities compared to production. Since 1994, the volume of imports has regained its 1980 level, after a considerable drop up until 1990.

Argentina is the Union's leading supplier, ahead of Australia and Bulgaria. Exports vary quite a lot. They exceeded 10 million tonnes in 1996, i.e., one and a half times the import volume. One-quarter of European sales go to the United States.

### Definitions

**1995-1996 marketing year:** products harvested in 1995 and marketed in 1995 and 1996.

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of imports and exports in 1996 was based on customs declarations for non-processed wines. So the result is slightly different from that of the balance sheets, which apply to a marketing year.

### Wine balance sheets in 1995-1996

Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use			Self- sufficiency level
			Total	including Human consumption	Industrial uses	
thousand hectolitres						%

Belgium	2	2 287	204	2 093	2 077	6	0.1
Denmark	—	1 454	41	1 413	1 413	—	—
Germany	8 361	11 164	2 517	18 582	18 580	2	45.0
Greece	3 875	50	650	3 368	3 043	215	115.1
Spain	20 876	2 197	6 190	16 762	14 458	1 505	124.5
France	54 354	6 425	13 067	44 926	35 091	9 358	121.0
Ireland	—	263	8	250	250	—	—
Italy	55 702	292	14 607	38 934	35 623	1 751	143.1
Luxembourg	150	170	115	220	220	—	68.2
Netherlands	—	1 923	101	1 813	1 795	—	—
Austria	2 229	283	174	2 741	2 544	195	81.3
Portugal	7 255	653	1 800	6 115	5 695	320	118.6
Finland	—	263	2	261	261	—	—
Sweden	—	1 066	1	1 080	1 080	—	—
United Kingdom	13	7 316	228	7 099	7 099	—	0.2
<b>EU-15</b>	<b>152 817</b>	<b>7 119</b>	<b>10 722</b>	<b>145 887</b>	<b>129 484</b>	<b>13 342</b>	<b>104.8</b>

1. For EU-15, trade with non-member countries.

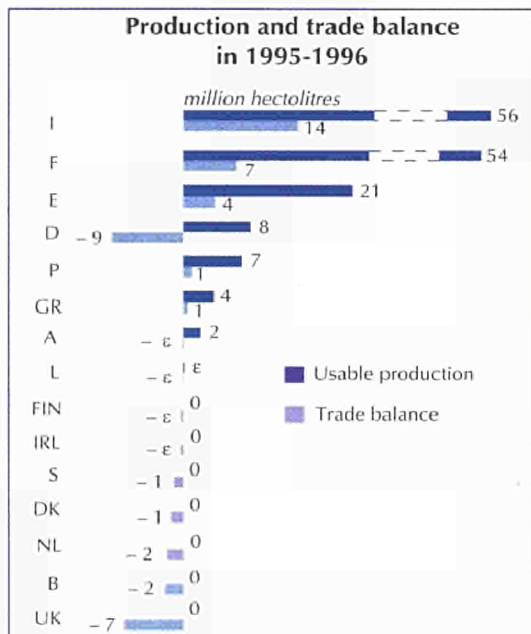
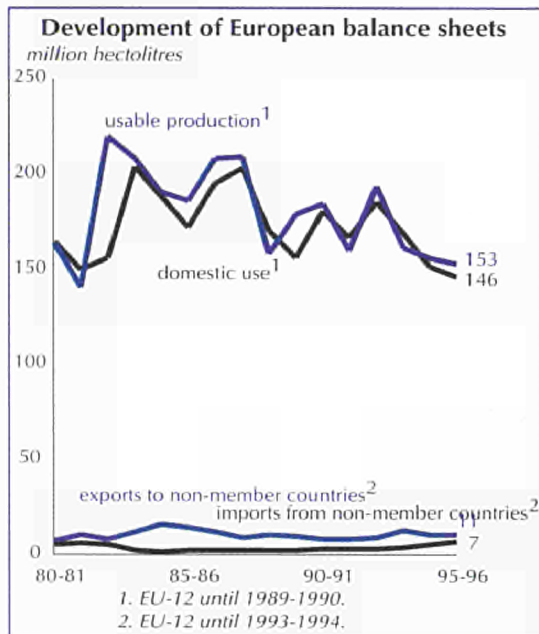
Source : Eurostat - Balance sheets



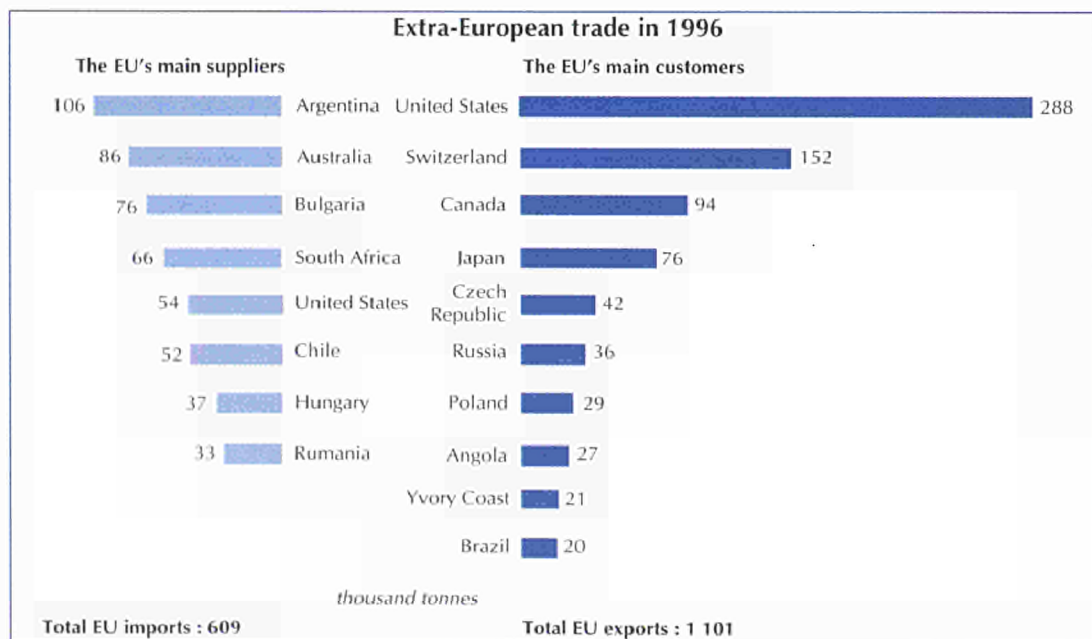


## WINE BALANCE SHEETS

### Wine production and consumption on the decline



Source : Eurostat - Balance sheets



Source : Eurostat - Foreign trade



## CATTLE REARING

**A**lmost 2 million farms in the EU i.e., one in four carry between them 6 % of the world's cattle. In 1996, the Union was the world's fifth cattle rearer, behind the Mercosur, which has 18 %, India 15 %, the NAFTA 11%, and China, which has 8 %.

In 1996, France reared 24 % of the European herd, Germany 19 %, and the United Kingdom 14 %. Sweden, Finland, Portugal and Greece all have small herds. There are 22 million dairy cows in the Union, almost one-quarter of them in Germany. Their numbers have dwindled down the years, while the number of breeding cows increased. This development was the outcome of the introduction of milk quotas in the 1980s. It also stems from the Common Agricultural Policy which aims to develop the breeding herd and control budgetary costs.

The number of cattle farms is dropping far faster than the head of cattle, and thus the average size of herds is on the rise. In 1995, 12 % of European cattle farmers reared at least 100 head of cattle. This proportion reached 30% in the Netherlands and the United Kingdom, and 44 % in Luxembourg. In the southern countries, as well as in Austria and Finland, large cattle farms are rare.

With more than 2.5 cattle per hectare of fodder area, the most intensive cattle farms are to be found in the center-north of the European Union, in other words from Picardy to Denmark, as well as in Bavaria, in the Po valley and in Northeastern Greece. The least intensive farms are to be found in the south of the Iberian peninsula and in southern France, in Scotland, in Swedish Norrland, in the Austrian Alps, and in several Italian regions.

### European cattle rearing

	Stock farms		Head of cattle					
			Total		Dairy cows		Breeding cows	
	1990	1995	1980	1996	1980	1996	1980	1996
	<i>thousand</i>							
Belgium	57	47	2 897	3 071	977	650	131	510
Denmark	37	30	2 921	2 052	1 066	697	65	122
Ex-FRG	354	///	15 070	///	5 469	///	170	///
Germany	///	287	///	15 760	///	5 195	///	688
Greece	53	39	824	550	257	185	117	96
Spain	311	225	4 539 <sup>1</sup>	5 904	1 499 <sup>1</sup>	1 279	1 199 <sup>1</sup>	1 692
France	458	345	23 605	20 557	7 120	4 568	2 891	4 152
Ireland	151	138	5 826	6 757	1 449	1 272	419	1 063
Italy	320	252	8 836	7 390	3 013	2 125	750	675
Luxembourg	3	2	220	209	69	48	13	30
Netherlands	66	56	5 010	4 366	2 356	1 646	8	85
Austria	...	116	2 517	2 272	975	698	...	213
Portugal	220	147	1 165	1 311	342	362	246	286
Finland	...	44	1 738	1 150	720 <sup>3</sup>	396	...	30
Sweden	...	42	1 935	1 747	665 <sup>2</sup>	478	66 <sup>2</sup>	150
United Kingdom	144	133	13 061	11 430	3 277	2 511	1 451	1 829
<b>EU-15</b>	<b>...</b>	<b>1 902</b>	<b>...</b>	<b>84 526</b>	<b>...</b>	<b>22 108</b>	<b>...</b>	<b>11 619</b>
<b>EU-12</b>	<b>2 173</b>	<b>1 700</b>	<b>83 973</b>	<b>79 356</b>	<b>26 894</b>	<b>20 537</b>	<b>7 454</b>	<b>11 226</b>
Czech Republic	...	...	3 499	1 988	1 317 <sup>3</sup>	750 <sup>3</sup>	...	...
Estonia	...	...	819	370	314 <sup>3</sup>	185 <sup>3</sup>	...	...
Hungary	...	...	1 918	909	765 <sup>3</sup>	414 <sup>3</sup>	...	...
Poland	...	...	12 649	7 137	5 956 <sup>3</sup>	364 <sup>3</sup>	...	...
Slovenia	...	...	...	475	...	214 <sup>3</sup>	...	...

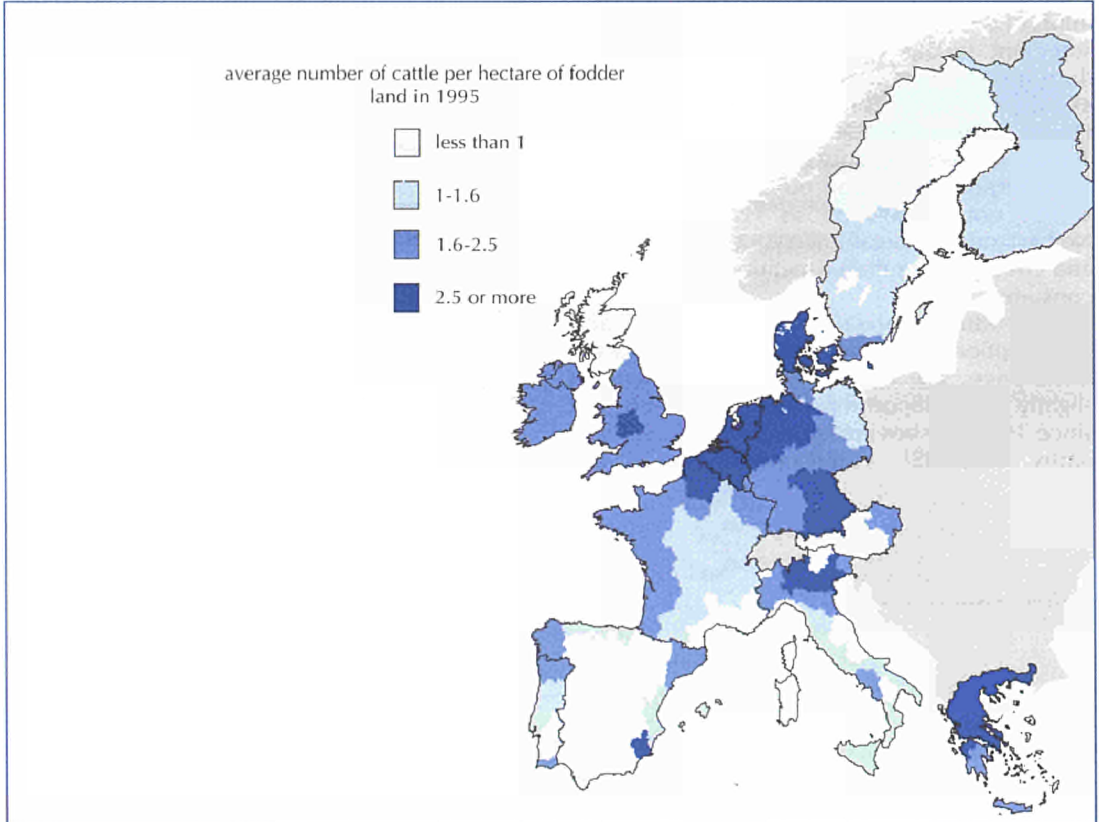
1. 1983 Data. 2. 1982 data. 3. All cows.

Source : Eurostat - Newcronos



## CATTLE REARING

### Intensive cattle farming in the centre-north of the Union



Source : Eurostat - Eurofarm

### World cattle balance sheets

	1979-1981	1989-1991	1996
	<i>thousands</i>		
Mercosur	189 196	217 434	236 327
India	186 500	191 897	196 003
NAFTA	153 186	139 675	144 814
China	52 567	79 282	108 910
EU-15	96 800	91 043	84 311
USSR/CIS	114 748	117 877	81 421
Ethiopia	26 000	29 633	29 900
Australia	26 161	23 086	26 252
ASEAN	14 796	21 397	25 112
<b>World</b>	<b>1 219 756</b>	<b>1 282 872</b>	<b>1 320 928</b>

Source : FAO - For methodological reasons, the data differ from those on page 142.





## BEEF BALANCE SHEETS

In 1995 EU beef production topped the 8 million tonnes mark. France, Germany, the United Kingdom and Italy accounted for two-thirds of this production. Most countries are self-sufficient. Ireland produces eleven times more than it consumes and is top of the European exporters ranking. Its sales go mainly within the Union, principally to the United Kingdom and France. Conversely, Italy only meets two-thirds of its requirements and buys beef from other Union countries such as France and the Netherlands. Portugal imports 43% of its needs and Greece more than two-thirds of the beef it consumes.

Since 1980, European beef production and consumption have developed pretty much at the same pace. The volume of exports has risen slightly, while imports have remained stable. But since 1996 the bovine spongiform encephalopathy crisis (BSE, « mad cow disease »), has

brought on a reduction in beef consumption. The bulk of the beef trade occurs within the Union. In 1996, the EU exported beyond its borders 719.000 tonnes of beef, with more than one-third going to Russia. It imported 180.000 tonnes, with more than one-half coming from the Mercosur zone.

### Definitions

**Gross indigenous production :** total cattle slaughtered, to which the trade balance for live animals is added.

**Self-sufficiency level :** relation between usable production and domestic use. A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of beef imports and exports in 1996 was based on customs declarations.

### Beef balance sheets for 1995

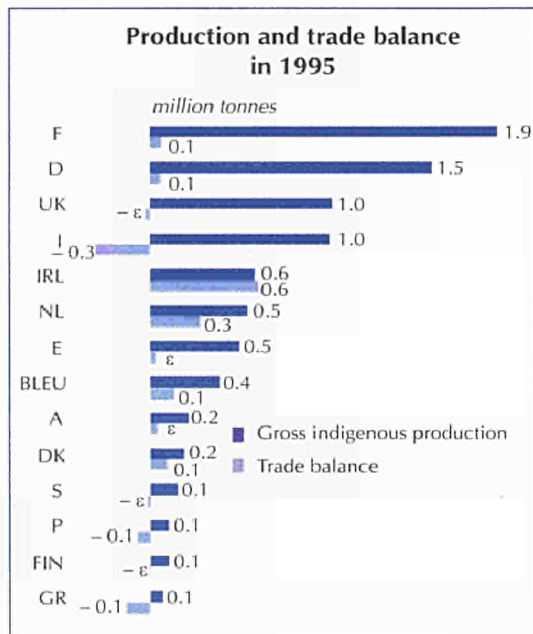
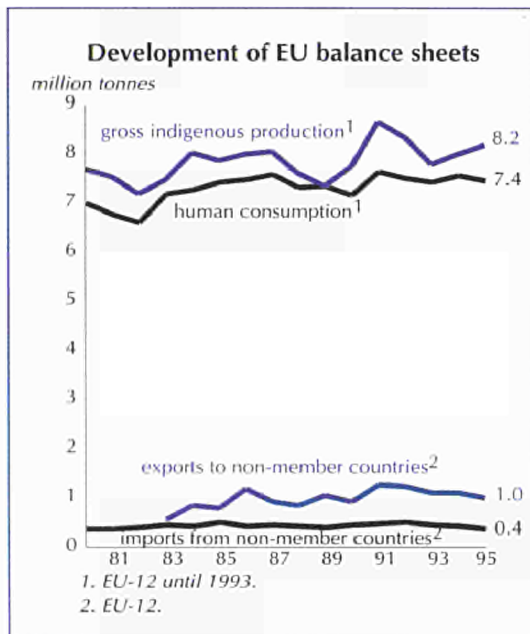
	Gross indigenous production	Imports	Exports	Human consumption	Self-sufficiency level
	thousand tonnes				%
BLEU	376	32	158	223	168.6
Denmark	184	56	145	92	200.0
Germany	1541	386	441	1 357	113.6
Greece	64	147	14	205	31.2
Spain	485	49	78	480	101.0
France	1899	437	496	1 633	116.3
Ireland	572	30	622	52	1 100.0
Italy	979	388	87	1 480	66.1
Netherlands	532	138	412	306	173.9
Austria	209	18	56	157	133.1
Portugal	99	71	-	174	56.9
Finland	96	8	5	97	99.0
Sweden	145	22	6	160	90.6
United Kingdom	995	337	311	1 026	97.0
EU-15	8 176	...	...	7 442	109.9

Source : Eurostat - Balance sheets



## BEEF BALANCE SHEETS

### Low beef trade with countries outside the Union



Source : Eurostat - Balance sheets



Source : Eurostat - Foreign trade



## PIG FARMING

With 13 % of the world's pigs, in 1996, the European Union was the number two pig farming zone in the world behind China. The Chinese herd, which accounts for almost one-half of the world's pigs, has increased by one-quarter in six years. Europe's pigs are distributed among one million farms, in other words, one Community farm out of six. The three North American countries come in third place, with almost 10 % of the world's pigs.

In 1996, Germany reared 20 % of the European pig herd, Spain 16 %, France 13 %, the Netherlands 12 %, and Denmark 9 %. At the other end of the scale, Portugal, Greece, Austria, Finland and Sweden have relatively few pigs.

Fattening pigs account for slightly more than one-third of Europe's pigs, and as much as 54 % in Italy. Poland's possible admission to the Union would make it the number three producer.

As for most other production sectors, the number of farms has been dropping over the years, while the size of the herd has risen. Pigs are thus being concentrated in ever larger farms. In 1995, 18 % of European farms had at least 50 breeding sows. This proportion reached 61 % in Flanders, 70 % in Brittany and 77 % in the Netherlands. On the other hand, large herds are rare in Portugal, Greece, and central and southern Italy.

### European pig farming

Farms with pigs		Numbers of pigs					
		Total		Fattening pigs		Breeding sows	
1990	1995	1980	1996	1980	1996	1980	1996
<i>thousands</i>							

Belgium	20	13	5 011	7 117	1 681	2 687	415	542
Denmark	31	21	9 696	11 079	2 612	3 013	635	794
Ex-FRG	278	///	22 554	///	7 844	///	1 713	///
Germany	///	206	///	24 283	///	9 293	///	1 723
Greece	32	32	1 268	904	...	288	217	72
Spain	311	210	9642 <sup>1</sup>	18 572	...	7 563	1970 <sup>1</sup>	1 383
France	149	90	11 963	14 976	4 822	5 692	798	991
Ireland	3	2	1 031	1 665	399	525	77	128
Italy	346	279	8 928	8 090	4 105	4 350	593	527
Luxembourg	1	8	88	77	25	26	9	7
Netherlands	29	22	10 196	14 253	3 281	4 965	763	959
Austria	...	106	3 206	3 663	533	1 262	375	250
Portugal	239	162	2 391	2 344	...	698	359	203
Finland	...	8	1 410	1 413	...	499	137	133
Sweden	...	11	2 618	2 319	...	695	275 <sup>2</sup>	190
United Kingdom	17	13	7 770	7 616	2 530	2 706	615	608
<b>EU-15</b>	...	<b>1 177</b>	...	<b>118 371</b>	...	<b>44 264</b>	...	<b>8 510</b>
<b>EU-12</b>	<b>1 456</b>	<b>1 053</b>	<b>90 538</b>	<b>110 976</b>	...	<b>41 807</b>	<b>8 164</b>	<b>7 937</b>
Czech Republic	...	...	5 106	4 016	...	...	368	387
Estonia	...	...	1 086	449	...	...	...	23
Hungary	...	...	8 330	5 289	...	...	612	431
Poland	...	...	21 326	17 964	...	...	...	1 677
Slovenia	...	...	...	592	...	...	...	56

1. 1983 data.

2. 1982 data.

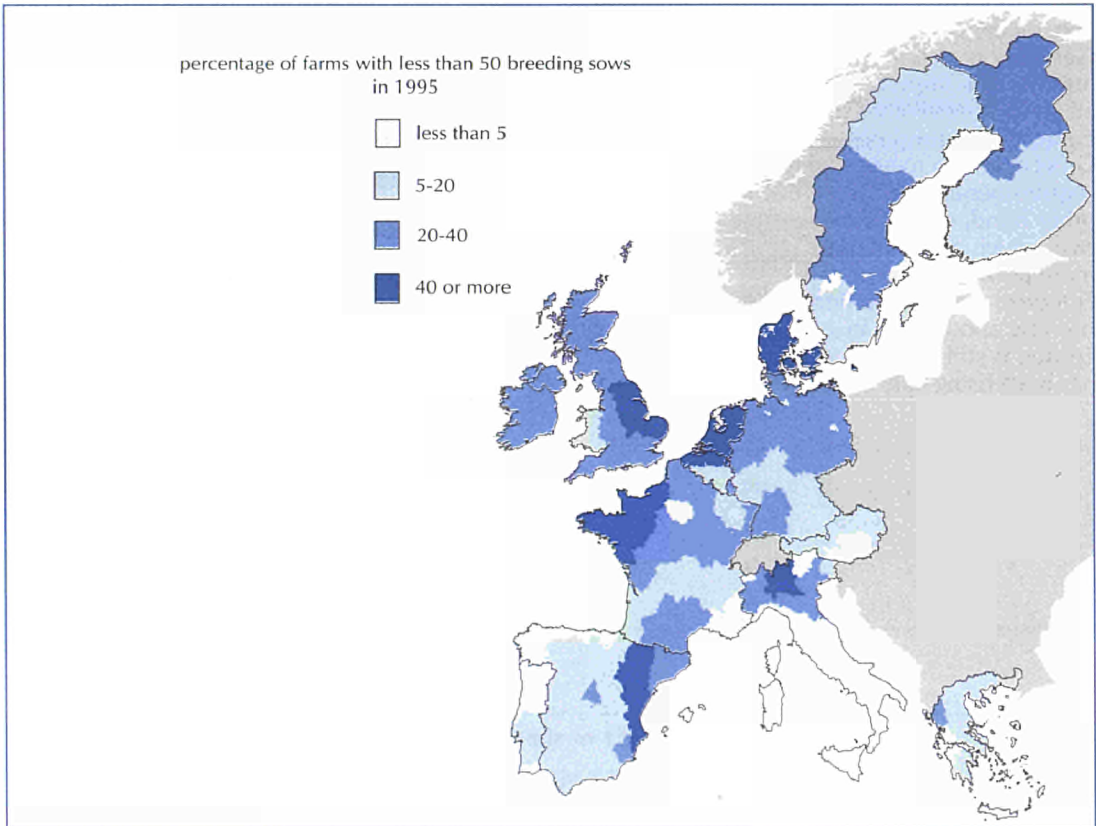
Source : Eurostat - Newcronos





## PIG FARMING

### Intensive pig farming in Flanders and the Netherlands



Source : Eurostat - Newcronos

### World pig balance sheets

	1979-1981	1989-1991	1996
	thousands		
China	313 660	360 247	452 201
EU-15	111 693	120 316	117 210
NAFTA	90 649	80 777	85 746
USSR/CIS	73 588	77 497	43 180
Mercosur	39 270	38 836	42 495
ASEAN	26 583	35 083	41 446
CEFTA	35 848	34 944	28 310
India	9 433	12 000	14 855
Japan	9 851	11 673	9 900
<b>World</b>	<b>778 787</b>	<b>854 340</b>	<b>924 028</b>

Source : FAO - For methodological reasons, the data differ from those on page 146.



## PORK BALANCE SHEETS

The European Union produced 16 millions tonnes of pork in 1995. Germany is the leading producer with 21 % of European production, followed by Spain (14%), and France (13%). Germany is also the leading consumer and the number one importer in Europe. It buys almost all its pork from other Union Members, in particular, the Netherlands, France and Denmark. Greece, which meets slightly more than half its requirements, does likewise. Benelux, on the other hand, meets its requirements more than twice over, and Denmark produces four times more pork than it consumes.

European pork production and consumption has risen by about 30% in 12 years. Trade beyond Europe is still slight. But the volume of exports has been rising little by little for the last 15 years.

In 1996 Europe exported beyond its borders 437 000 tonnes of pork, with Japan the main buyer. The volume of imports was small : 37 000 tonnes, with more than 80 % coming from Hungary.

### Definitions

**Gross indigenous production :** total pigs slaughtered, to which the trade balance for live animals is added.

**Self-sufficiency level :** relation between gross indigenous production and human consumption (domestic use only). A rate of 90 means that 90% of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of pork imports and exports was based, in 1996, on customs declarations.

Pork balance sheets for 1995

	Gross indigenous production	Imports	Exports	Human consumption	Self-sufficiency level
	thousand tonnes				%
BLEU	1 029	86	628	491	209.6
Denmark	1 517	25	1 179	335	452.8
Germany	3 430	1 107	227	4 482	76.5
Greece	144	117	3	259	55.6
Spain	2 172	50	144	2 081	104.4
France	2 140	446	506	2 083	102.7
Ireland	207	23	99	136	152.2
Italy	1 276	626	77	1 894	67.4
Netherlands	1 885	84	992	714	264.0
Austria	454	38	38	457	99.3
Portugal	284	56	10	344	82.6
Finland	168	12	10	164	102.4
Sweden	310	31	24	318	97.5
United Kingdom	1 010	520	160	1 353	74.6
EU-15	16 025	...	...	15 111	106.0

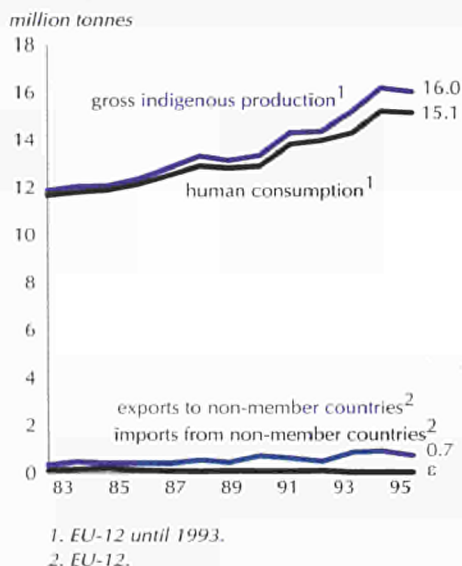
Source : Eurostat - Balance sheets



## PORK BALANCE SHEETS

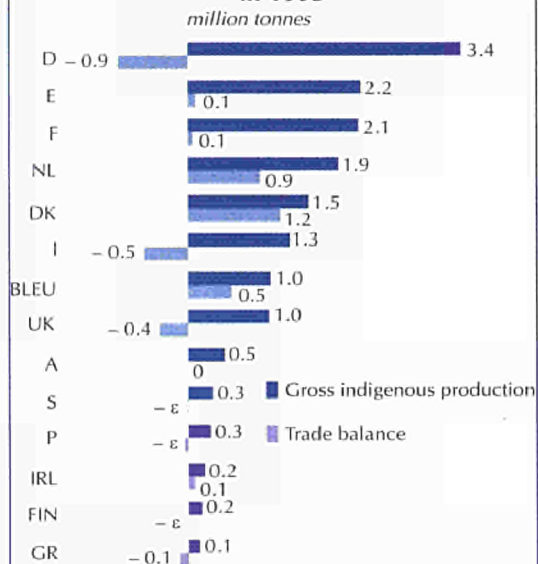
**Pork production and consumption have risen by 30% in twelve years**

### Development of European balance sheets



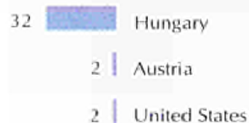
Source : Eurostat - Balance sheets

### Production and trade balance in 1995

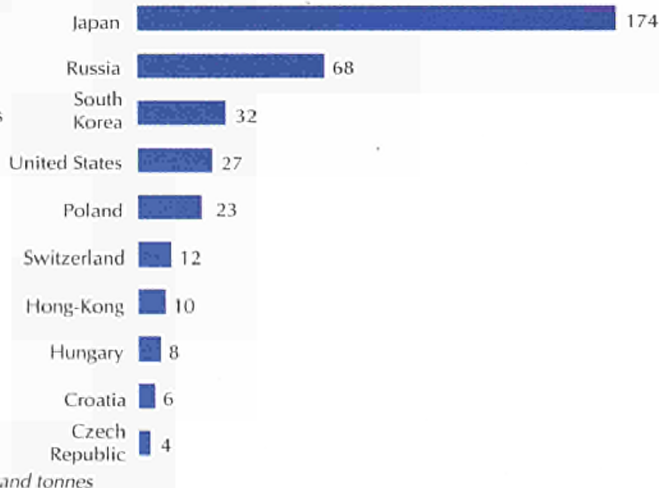


### Extra-European trade in 1996

#### The EU's main suppliers



#### The EU's main customers



Total EU imports : 37

Total EU exports : 437

Source : Eurostat - Foreign trade





## SHEEP AND GOAT FARMING

Ten percent of Community farms rear sheep. The total head count represents 10 % of the world flock. The Union is the world's number three producer after China and Australia, which, between them, rear more than one-quarter of the planet's sheep.

In 1996, the United Kingdom reared 31 % of the European flock, Spain 25 %, Italy 11 %, France 10 % and Greece 10 %. The Union's Nordic countries, plus Austria and the BLEU all have small flocks.

Europe produces few goats : 5 % of farms rear 2 % of the world's flock. China and India between them have 40 % of the world's total head of goats.

In 1996, almost all the Community's goats were to be found in five States. Greece had 47 %, Spain 23 %, Italy 12 %, France 9 % and Portugal 6 %. The number of sheep and goat farms has been dwindling over the years, while sheep population has been rising. Flocks are thus concentrated in ever larger farms. In 1995, one-quarter of European sheep farms had at least 100 head. This proportion reached 69 % in the United Kingdom and as much as 80 % in Rioja and Castile-La Mancha. Large flocks are, on the contrary, rare in Galicia, northern Italy, and Austria.

### European sheep and goat farms

Sheep			
Farms with sheep		Flock	
1990	1995	1980	1996
thousands			

Belgium	8	5	86	118
Denmark	6	4	56	90
Ex-FRG	46	///	1 179	///
Germany	///	39	///	2 302
Greece	160	146	8 048	9 312
Spain	129	108	15 954 <sup>1</sup>	24 512
France	149	113	12 846	9 824
Ireland	55	47	2 344	5 634
Italy	159	153	9 277	10 940
Luxembourg	£	£	4	7
Netherlands	25	22	1 000	1 340
Austria	...	20	191	384
Portugal	101	77	2 038	3 414
Finland	...	5	106	103
Sweden	...	10	392	442
United Kingdom	96	91	21 604	30 118
<b>EU-15</b>	...	<b>840</b>	...	<b>98 539</b>
<b>EU-12</b>	<b>934</b>	<b>806</b>	<b>74 436</b>	<b>97 610</b>
Czech Republic	...	...	308	134
Estonia	...	...	154 <sup>2</sup>	50 <sup>2</sup>
Hungary	...	...	3 000	872
Poland	...	...	4 207	552
Slovenia	...	...	...	27

Goats			
Farms with goats		Flock	
1990	1995	1980	1996
thousands			

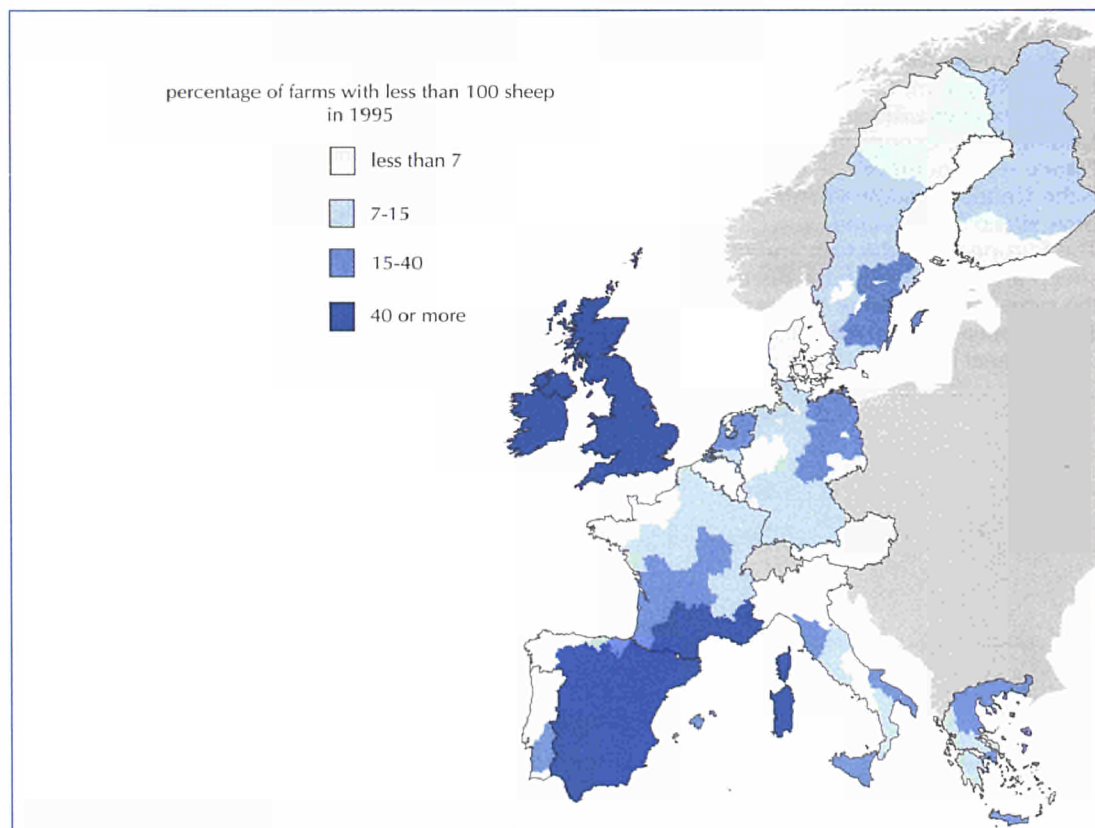
1	1	6	11
-	-	-	-
-	///	40	///
///	£	///	93
203	168	4 755	5 668
97	56	2 178 <sup>1</sup>	2 734
52	33	1 241	1 114
6	5	9	14
87	75	1 009	1 390
£	£	£	1
2	3	30	110
...	12	32	54
94	67	710	781
...	1	2	6
...	£	3 <sup>2</sup>	5
11	9	13	81
...	<b>430</b>	...	<b>12 047</b>
<b>553</b>	<b>417</b>	<b>9 991</b>	<b>11 982</b>
...	...	...	42
...	...	...	...
...	...	15	56
...	...	30	179
...	...	...	11

1. 1983 data. 2. 1986 data.



## SHEEP AND GOAT FARMING

### The United Kingdom and Spain have the largest sheep farms



Source : Eurostat - Newcronos

### World figures

Sheep	
1979-1981	1996
thousands	

China	101 864	127 264
Australia	134 871	121 162
EU-15	77 331	109 643
USSR/CIS	142 591	75 527
Mercosur	69 493	55 255
Iran	31 672	51 499
New Zealand	67 393	48 816
India	44 987	45 481
Turkey	46 199	33 791
<b>World</b>	<b>1 087 985</b>	<b>1 058 037</b>

Goats	
1979-1981	1996
thousands	

China	78 456	149 911
India	82 000	119 903
Pakistan	26 200	45 600
Bangladesh	10 569	33 312
Iran	17 372	25 757
Nigeria	22 000	24 500
ASEAN	10 001	20 988
Sudan	12 755	16 900
EU-15	9 663	12 047
<b>World</b>	<b>465 348</b>	<b>674 139</b>

Source : FAO - For methodological reasons, the data differ from those on page 150.



## SHEEP AND GOAT MEAT BALANCE SHEETS

In 1995, the European Union produced a little more than one million tonnes of sheep and goat meat. One-third of the production came from the United Kingdom and one-fifth from Spain. Among Member States, only Ireland, the United Kingdom, the Netherlands and Finland meet their needs. The United Kingdom, Europe's leading seller, exports mainly within the Union. France is the number one European importer. It is the United Kingdom's main customer, but also buys sheep from Ireland.

The European production and consumption of sheep and goat meat have been developing at the same pace for some 15 years.

The European Union exports virtually no sheep or goat meat beyond its borders. On the contrary,

it imported 218.000 tonnes in 1996. 90 % of its purchases came from New Zealand.

### Definitions

**Gross indigenous production :** total sheep and goats slaughtered, to which the trade balance for live animals is added.

**Self-sufficiency level :** relation between gross indigenous production and human consumption (domestic use only). A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of sheep and goat meat imports and exports was based, in 1996, on customs declarations.

### Sheep and goat meat balance sheets for 1995

	Gross indigenous production	Imports	Exports	Human consumption	Self-sufficiency level
	thousand tonnes				%
BLEU	3	28	11	22	13.6
Denmark	1	6	1	6	16.7
Germany	40	52	2	91	44.0
Greece	123	13	1	142	86.6
Spain	241	17	11	248	97.2
France	147	167	8	307	47.9
Ireland	92	—	63	26	353.8
Italy	54	23	1	99	54.5
Netherlands	22	8	4	20	110.0
Austria	6	3	1	9	66.7
Portugal	27	9	—	36	75.0
Finland	2	1	—	2	100.0
Sweden	4	3	—	6	66.7
United Kingdom	399	144	152	352	113.4
<b>EU-15</b>	<b>1 161</b>	<b>...</b>	<b>...</b>	<b>1 366</b>	<b>85.0</b>

Source : Eurostat - Balance sheets

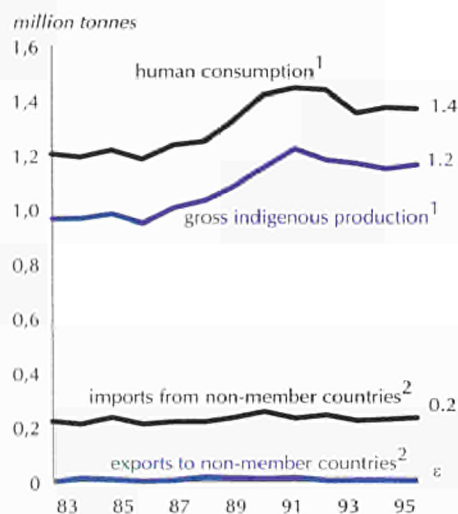




## SHEEP AND GOAT MEAT BALANCE SHEETS

**New Zealand provides one-seventh of the Union's sheep and goat meat requirements**

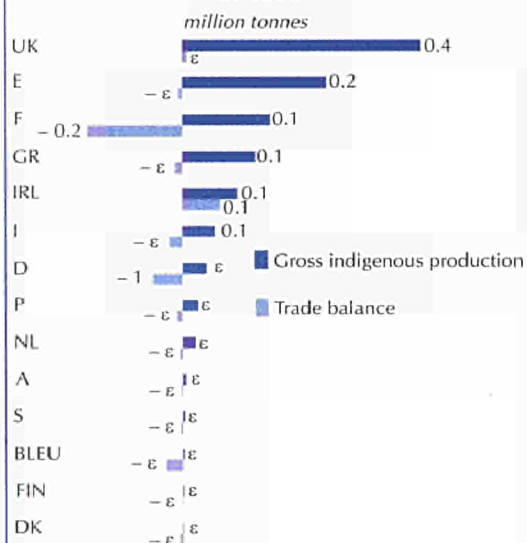
### Development of European balance sheets



1. EU-12 until 1993.

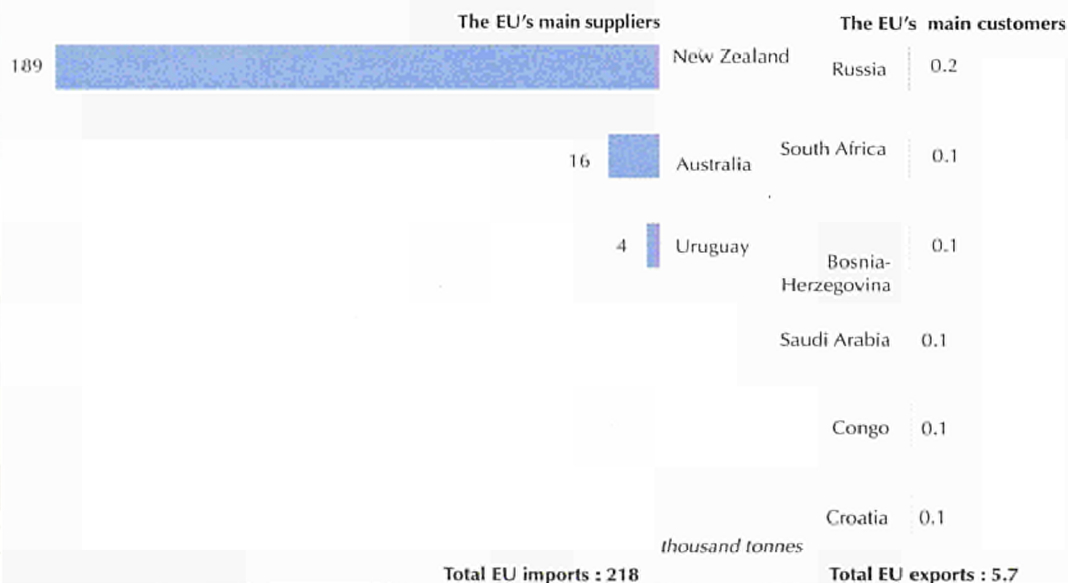
2. EU-12.

### Production and trade balance in 1995



Source : Eurostat - Balance sheets

### Extra-European trade in 1996



Source : Eurostat - Foreign trade



## POULTRY FARMING

More than one-third of Europe's farms rear poultry. In 1996, the Union was the world's number four producer of laying hens and table chickens, just ahead of Brazil. China is the leading producer with 22 % of the world's poultry, followed by the United States which has 12 %. Indonesia is the third poultry rearer and has doubled its production in six years. In 1995, 90 % of EU poultry was accounted for by six States : France, the United Kingdom, Italy, Spain, Germany and the Netherlands. Slightly more than one bird out of every two is a table chicken, and one out of three a laying hen, except in Germany, Luxembourg, Finland and Sweden, where laying hens are in the majority.

Farms are becoming more and more concentrated : they are fewer in number and ever larger in size. There are nevertheless sizeable differences among the Fifteen. In 1995, it was reckoned that there were on average 2 % of farms with more than 5.000 table chickens. But there were 23 % in Denmark and 52 % in the United Kingdom. In Sweden, Finland and the Netherlands, where poultry farms are relatively rare, they nearly all have more than 5,000 chickens. Small poultry units for family consumption are, on the other hand, the rule in the south : more than 99 % of Greek, Portuguese and Italian farms rearing table chickens have less than 5 000.

### European poultry farms

Farms with poultry		Numbers of poultry					
		Total		Laying hens		Table chickens	
1990	1995	1980	1995	1980	1995	1980	1995
<i>thousands</i>							

Belgium	15	9	24 391	33 030	12 559	14 063	9 982	18 548
Denmark	14	10	16 385	19 550	4 563	6 020	8 400	12 585
Ex-FRG	234	///	76 596	///	55 800	///	20 256	///
Germany	///	188	///	96 000	///	51 759	///	36 659
Greece	398	403	31 561	26 200	16 764	11 645	13 673	17 001
Spain	397	303	116 690 <sup>1</sup>	109 310	45 931 <sup>1</sup>	33 384	61 180 <sup>1</sup>	65 270
France	505	337	185 409	280 940	72 550	72 357	75 465	126 517
Ireland	27	17	9 605	12 240	2 800	1 805	5 204	9 351
Italy	761	537	178 259	138 230	47 513	28 811	84 633	83 698
Luxembourg	2	1	131	60	95	49	10	7
Netherlands	6	5	79 847	91 860	34 552	45 734	38 387	43 827
Austria	...	99	...	13 770	...	7 728	...	5 257
Portugal	416	291	37 892	29 970	12 097	10 878	24 317	17 521
Finland	...	8	9 376	10 190	...	5 794	...	4 235
Sweden	...	10	...	12 600	...	7 897	...	4 703
United Kingdom	48	89	133 960	138 240	57 330	48 194	56 292	74 806
<b>EU-15</b>	<b>...</b>	<b>2 306</b>	<b>...</b>	<b>1 012 190</b>	<b>...</b>	<b>346 116</b>	<b>...</b>	<b>519 983</b>
<b>EU-12</b>	<b>2 823</b>	<b>2 189</b>	<b>890 726</b>	<b>975 630</b>	<b>362 554</b>	<b>324 697</b>	<b>397 799</b>	<b>505 788</b>
Czech Republic	...	...	31 472	27 875	14 926	12 030	...	...
Estonia	...	...	6 843	3 130	...	828	...	...
Hungary	...	...	42 764 <sup>2</sup>	27 549 <sup>2</sup>	...	17 132	...	...
Poland	...	...	...	49 993 <sup>2</sup>	...	39 766	...	...
Slovenia	...	...	...	4 920	...	1 653	...	...

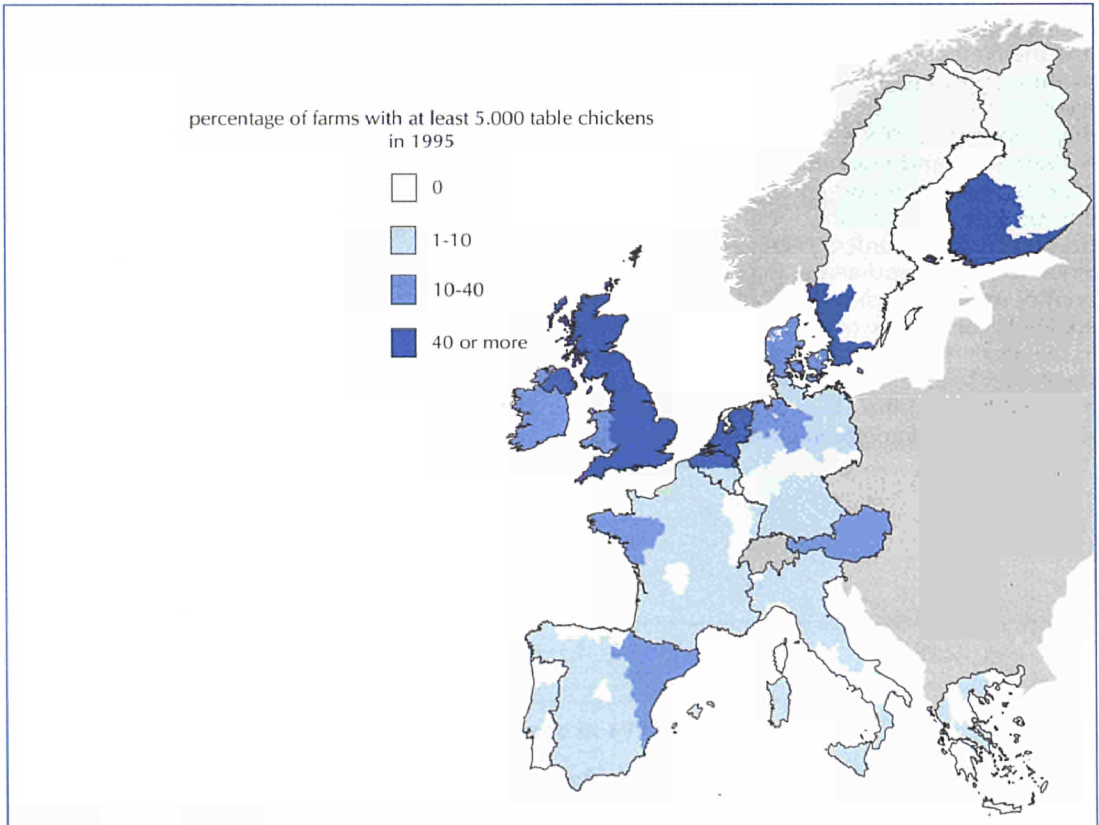
1. 1983 data.

2. Adult fowl.

Source : Eurostat - Newcronos

## POULTRY FARMING

### Rearing chickens for the table is a family business in the South



Source : Eurostat - Newcronos

### World figures for laying hens and table chickens<sup>1</sup>

	1979-1981	1989-1991	1996
	thousands		
China	860	2 121	2 802
United States	1 068	1 333	1 553
Indonesia	168	560	1 103
EU-15	836	876	904
Brazil	426	557	900
USSR/CIS	927	1 138	610
India	160	400	610
Japan	284	338	310
Iran	97	162	202
<b>World</b>	<b>7 130</b>	<b>10 726</b>	<b>12 952</b>

1. Neither category of poultry is dealt with separately in the FAO statistics.

Source : FAO





## POULTRY MEAT BALANCE SHEETS

In 1995, the European Union produced 8 million tonnes of poultry meat. France is the leading producer with 2 million tonnes. Half the Member States are self-sufficient, with Denmark and the Netherlands producing twice as much as they consume. Conversely, Germany only meets 60 % of its requirement. It is the EU's leading importer: it buys its poultry mainly from the Netherlands and France. France, the leading exporter, sells in almost equal quantities within Europe (the United Kingdom, Germany) and beyond Europe's borders (Saudi Arabia, Russia). Since 1980, EU production and consumption of poultry meat have virtually doubled. The same applies to the volume of imports and exports and to the resulting surplus, even if all these balance sheets items are relatively low. The trade in poultry meat beyond the EU is actually much less significant than domestic trade, especially where

imports are concerned. In 1996, the volume of exports reached 818 000 tonnes, with one-third going to Russia and Saudi Arabia. Imports were four times less, with Hungary the main supplier.

### Definitions

**Gross indigenous production:** total poultry slaughtered, to which the trade balance for live animals is added.

**Self-sufficiency level:** relation between gross indigenous production and human consumption (domestic use only). A rate of 90 means that 90 % of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Extra-European trade:** the volume of poultry meat imports and exports in 1996 was based on customs declarations.

### Poultry meat balance sheets for 1995

	Gross indigenous production	Imports	Exports	Human consumption	Self-sufficiency level
	thousand tonnes				%
BLEU	270	110	182	243	111.1
Denmark	184	25	117	80	230.0
Germany	664	554	111	1 092	60.8
Greece	161	31	7	185	87.0
Spain	925	57	23	958	96.6
France	2 079	110	871	1 311	158.6
Ireland	112	22	28	111	100.9
Italy	1 098	32	76	1 051	104.5
Netherlands	610	133	469	310	196.8
Austria	102	27	2	123	82.9
Portugal	231	5	8	228	101.3
Finland	43	3	—	45	95.6
Sweden	80	1	12	69	115.9
United Kingdom	1 390	251	166	1 468	94.7
<b>EU-15</b>	<b>7 948</b>	<b>...</b>	<b>...</b>	<b>7 274</b>	<b>109.3</b>

Source : Eurostat - Balance sheets

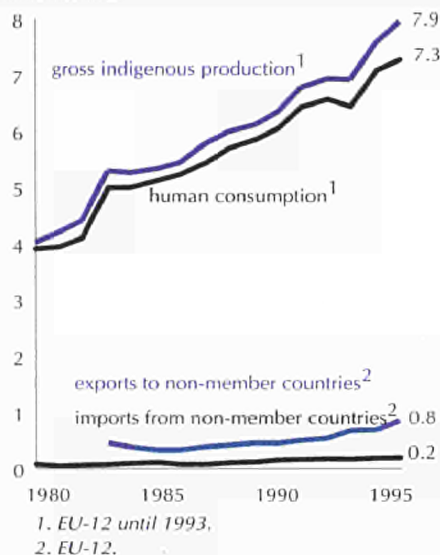


## POULTRY MEAT BALANCE SHEETS

### Poultry meat production has doubled in fifteen years

#### Development of European balance sheets

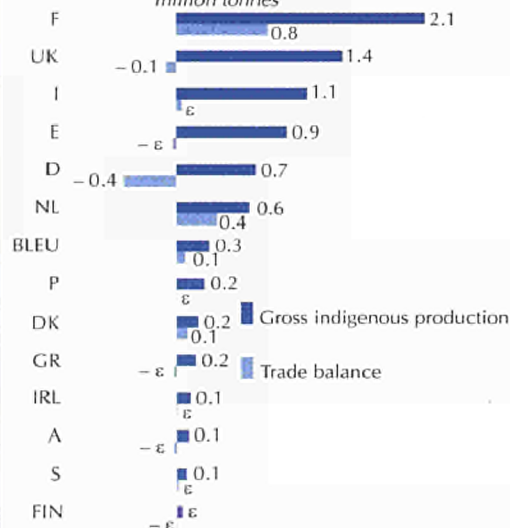
million tonnes



Source : Eurostat - Balance sheets

#### Production and trade balance in 1995

million tonnes

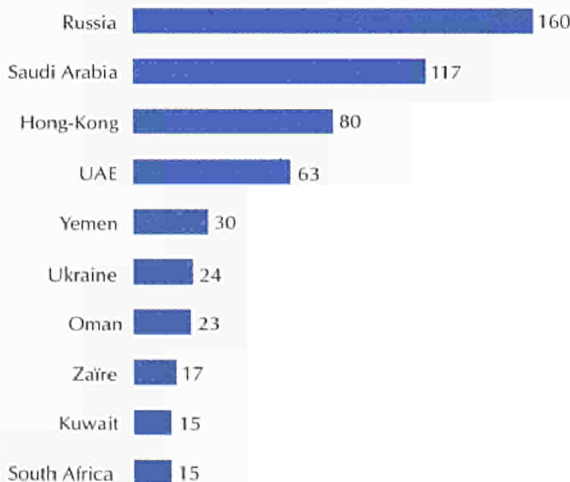


### Extra-European trade in 1996

#### The EU's main suppliers



#### The EU's main customers



thousand tonnes

Total EU imports : 187

Total EU exports : 818

Source : Eurostat - Foreign trade



## MILK PRODUCTION

In 1996, world milk production totalled 540 million tonnes, including 467 million tonnes of cows milk, 54 million of buffalo milk, 10 million of goat's milk and 8 million of sheep's milk. Cow's milk is produced throughout the world, but the production of other kinds of milk is more localized.

With one-quarter of the world's production, the European Union is the leading producer of cow's milk, well ahead of the NAFTA and the CIS, which latter, nevertheless, has the largest herd. The cows of the EU and the NAFTA in fact have milk yields in excess of 5000 kg per annum, whereas the world average comes just above the 2000 kg mark. In 16 years, these yields have risen by 41 % in the Union and 6% on average around the world. EU yields are bettered in just a few countries, including Israel, Japan and South Korea. There are marked differences among the Fifteen: in Sweden, the average milk yield reaches almost 7000 kg while in Greece it is almost 4000

kg.

The average size of dairy herds is on the rise. One EU farm out of nine rears at least 50. While farms in the new German Länder have on average more than 100 dairy cows, and those of England, Scotland and Wales more than 50, farms in the northwest of the Iberian peninsula, Austria, small mountainous areas of Italy, and Greece have less than ten.

More than 90 % of the milk produced in the Union is delivered to creameries for industrial processing. This proportion is distinctly less in Austria, Greece and most of the countries applying for admission to the Union. In Austria, 15 % of the milk is used directly for animal feed, and in the Tyrol 20% of milk is consumed on the spot at farms. In Greece, more than one-third of the sheep's milk and more than one-half of the goat's milk produced are used to make farmhouse cheeses.

### Milk production and use in the EU in 1996

	Production				Use						
	Total	from cows	from sheep	from goats	milk for consump.	from self-consumption	from direct sales	farm-made cheese	animal feed	deliveries to dairies	milk collected per cow
	thousand tonnes										kg
Belgium	3 416	3 416	—	—	63	20	43	10	187	3 021	5 061
Denmark	4 630	4 630	—	—	10	9	1	—	125	4 495	6 624
Germany	28 801	28 779	—	22	301	241	60	3	1481	26 991	5 489
Greece	1 788	741	626	421	182	140	42	404	61	1 106	4 127
Spain	6 729	6 084	318	327	266	148	119	106	258	6 097	4 804
France	25 796	25 084	241	471	414	158	256	250	1130	23 629	5 498
Ireland	5 360	5 360	—	—	60	57	3	3	—	5 297	4 215
Italy	11 638	10 746	700	113	133	80	53	583	198	10 724	4 993
Luxembourg	266	266	—	—	2	2	—	1	7	256	5 620
Netherlands	11 013	11 013	—	—	66	66	—	95	239	10 535	6 599
Austria	3 055	3 034	7	15	188	53	136	38	358	2 347	4 484
Portugal	1 928	1 785	100	43	104	96	8	107	73	1 643	4 848
Finland	2 431	2 431	—	—	36	33	3	5	61	2 329	6 186
Sweden	3 316	3 316	—	—	17	14	3	—	41	3 258	6 885
U. Kingdom	14 763	14 763	—	—	253	59	194	32	349	13 880	5 751
<b>EU-15</b>	<b>124 929</b>	<b>121 447</b>	<b>1 991</b>	<b>1 411</b>	<b>2 095</b>	<b>1 175</b>	<b>921</b>	<b>1 638</b>	<b>4 567</b>	<b>115 607</b>	<b>5 460</b>
Czech Rep.	3 130	3 130	—	—	...	...	...	...	...	2 610	4 221
Estonia	682	682	—	—	...	...	...	...	...	490	3 747
Hungary	1 891	1 891	—	—	...	...	...	...	...	1 522	4 529
Poland	11 696	11 696	—	—	...	...	...	...	...	6 588	3 343
Slovenia	609	609	—	—	...	...	...	...	...	398	2 839

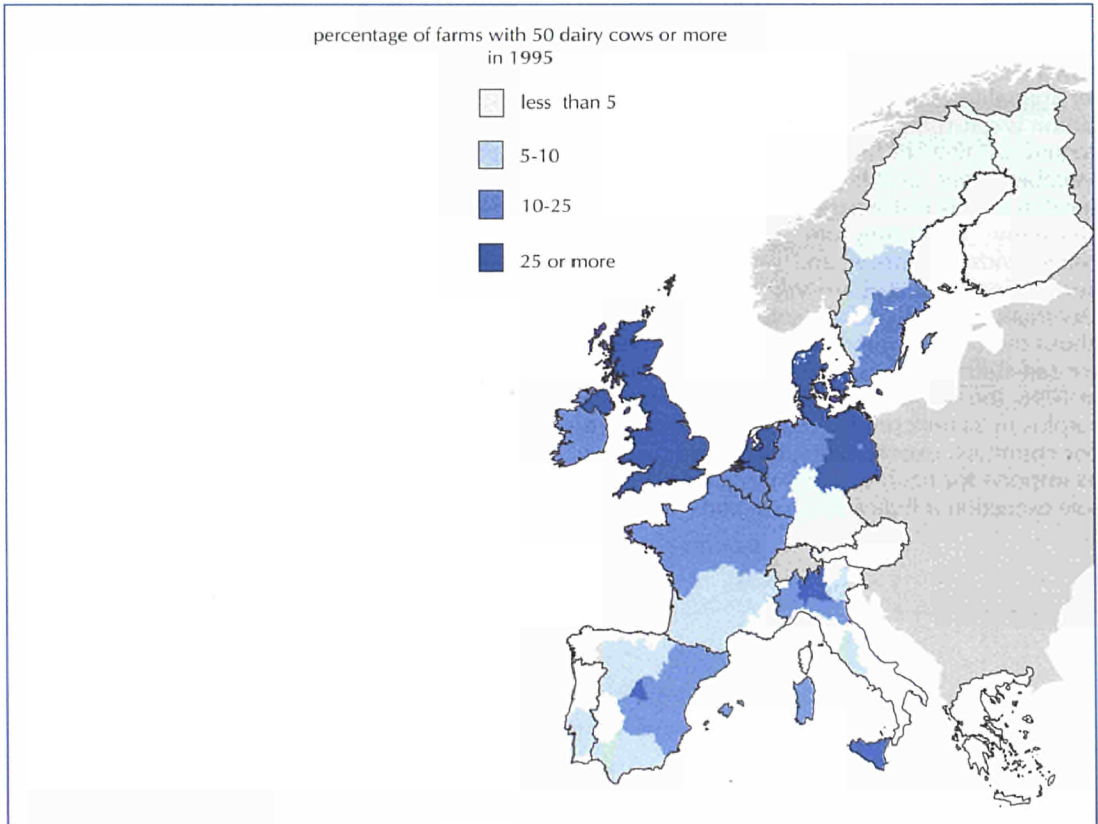
Sources : Eurostat - Newcronos for the European Union and national statistics, ZMP for the other countries





## MILK PRODUCTION

### A majority of large dairy herds and flocks in the United Kingdom and the new Länder



Source : Eurostat - Newcronos

### World producers in 1996

Cow's milk		Goat's milk		Sheep's milk	
thousand tonnes		thousand tonnes		thousand tonnes	
EU-15	121 298	India	2 070	EU-15	2 020
NAFTA	85 715	EU-15	1 465	China	1 064
CIS	67 312	Bangladesh	1 280	Turkey	922
India	33 500	Pakistan	720	Soudan	510
Mercosur	28 901	Soudan	645	Syria	499
CEFTA	18 113	CIS	572	Iran	438
New-Zealand	9 999	Iran	412	Somalia	430
Turkey	9 466	Somalia	390	Rumania	376
<b>World</b>	<b>467 010</b>	<b>World</b>	<b>10 385</b>	<b>World</b>	<b>8 123</b>

Source : FAO - For methodological reasons, the data differ from those on page 158.



## MILK AND DAIRY PRODUCTS

In 1996, Europe of the Fifteen produced almost 125 million tonnes of whole milk, nine-tenths of which were processed. The various products resulting from this processing are almost all earmarked for human consumption. Only powdered skimmed milk is used for the most part for animal feed. Taken as a whole, the European Union is self-sufficient for each of the main processed products of the milk industry. In certain Member States, as it happens, there are various surpluses. This is the case with drinking milk in Germany and Belgium, cheeses in the Netherlands and France, and skimmed milk powder in Germany. But among the Fifteen, only Denmark and Finland are self-sufficient throughout the milk sector. Spain, Italy and Greece are self-sufficient for certain milk products. In 1996, the European Union had a considerable surplus in its milk product trade with non-member countries, exports being three times as high as imports for each of the main products. The sole exception is butter, due to imports from New

Zealand: 75 000 tonnes in 1996, i.e., three-quarters of the Community's butter imports. In 1996, the Union exported more than 500 000 tonnes of powdered whole milk and cheeses, and more than 200 000 tonnes of powdered skimmed milk. Its major customers are Russia and the United States for cheese, with almost 100 000 tonnes going to each. Mexico imported 76 000 tonnes of skimmed milk powder and Algeria 62 000 tonnes of whole milk powder. European cheese imports are the only items which equal the quantity of butter imports, with half of them coming from Switzerland.

### Definitions

**Self-sufficiency level:** relation between usable production and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance:** the difference between the volume of exports and the volume of imports.

**Balance sheets for main dairy products for 1996**

Production	Domestic use	Human consumption	Self-sufficiency level
thousand tonnes			%

Fresh products	39 244	38 815	38 813	101.1
Milk for consumption <sup>1</sup>	29 967	29 558	29 558	101.4
Cream for consumption	1 761	1 750	1 694	100.7
Concentrated milk	1 225	895	895	136.9
Powdered whole milk	910	393	378	231.6
Powdered skimmed milk	1 198	931	403	128.7
Butter	1 879	1 727	1 687	108.8
Cheese	6 490	6 091	5 893	106.6
Cheese spread	513	404	404	126.9

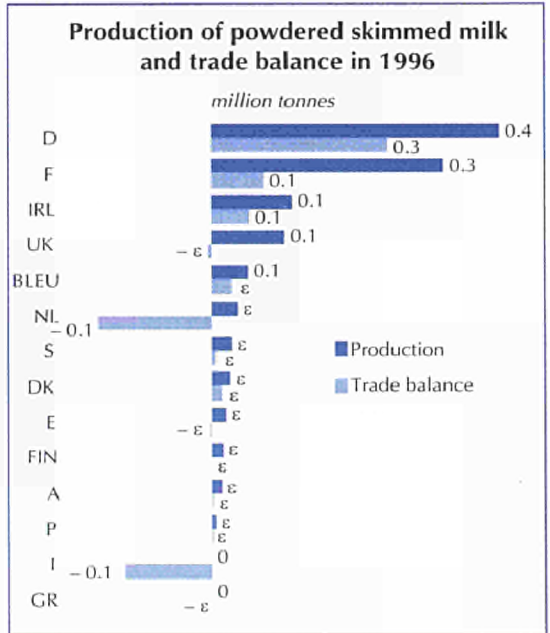
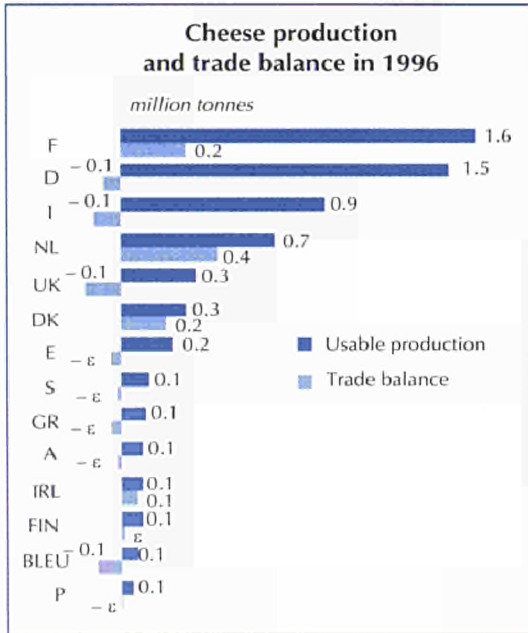
1. Estimate.

Source : Eurostat - Balance sheets



## MILK AND DAIRY PRODUCTS

### Cheese trade surpluses in the Netherlands and milk surpluses in Germany



Source : Eurostat - Balance sheets



Source : Eurostat - Foreign trade





## MILK AND DAIRY PRODUCT BALANCE SHEETS

In 1996, the European Union was the world's number one producer in the milk sector ahead of the NAFTA and the CIS. The production of the EU, for five of the main processed products of this sector, is of the order of 30-40 percent of the corresponding world total. In the milk sector, certain countries and groups of countries have very specialized lines of production, such as Egypt for cheese, India and Pakistan for ghee and buffalo butter, ASEAN and Peru for evaporated and condensed milk.

Since 1980, Community and world production levels have been developing in the same direction, but with a greater range – positive or negative – among the Fifteen. The production of powdered skimmed milk has thus fallen by more than 4 % per annum in the Union and 1 % for all the five continents. For cheeses, production has

increased by 1.7 % per annum worldwide and almost 3 % in the Union. The other variations are lower than 1 %, except for cream for drinking and soured milk products which have clocked up annual average rises of 5 % and 6 % respectively in Europe.

Among the Fifteen, one-quarter of the milk collected is used for drinking in the form of pasteurized, sterilized or UHT liquid milk. But there are considerable differences between countries. Milk for consumption represents one-half of the uses to which milk is put in Portugal and the United Kingdom, and even more than 60 % in Greece and, more particularly, Spain. In major cheese-exporting countries like the Netherlands, Ireland, Denmark, and France, the share of drinking milk is less than 17 %.

### European producers in 1996

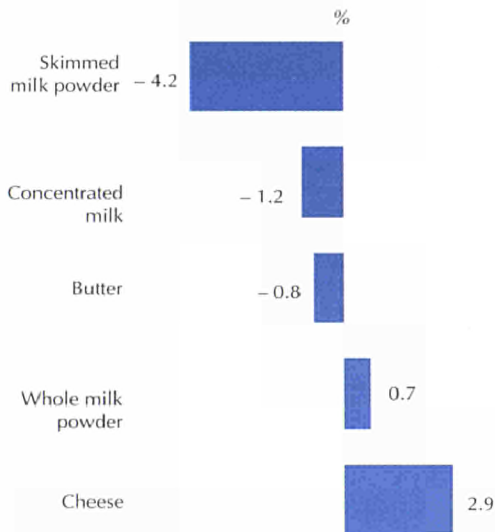
	Milk for consump.	Cream for consump.	Soured milk	Concentrated milk	Butter (incl. dairy fats)	Cheese	Powdered whole milk	Powdered skimmed milk	Whey
<i>thousand tonnes</i>									
Belgium	776	101	191	47	88	69	68	52	66
Denmark	521	60	81	–	77	298	99	28	1 907
Germany	5 613	663	1 310	541	480	1 495	202	401	8 493
Greece	342	11	113	–	2	109	–	–	–
Spain	3 882	46	440	42	23	235	11	14	–
France	3 910	280	1 115	47	461	1 619	237	306	...
Ireland	552	23	26	–	152	97	32	119	1 182
Italy	3 100	83	241	1	116	929	1	–	...
Luxembourg	51	–	–	–	3	3	–	–	2
Netherlands	894	57	343	327	172	700	151	36	7 942
Austria	471	50	106	16	39	98	7	17	824
Portugal	763	9	87	8	19	53	6	10	91
Finland	767	39	199	–	56	95	2	15	875
Sweden	1 058	92	251	–	56	127	–	29	1 333
U. Kingdom	6 858	280	274	195	130	340	83	108	3 014
<b>EU-15</b>	<b>29 558</b>	<b>1 793</b>	<b>4 776</b>	<b>1 215</b>	<b>1 874</b>	<b>6 268</b>	<b>898</b>	<b>1 135</b>	<b>...</b>
Czech Rep.	496	...	113	122	69	86	29	52	...
Estonia	43	...	...	1	17	9	8	22	...
Hungary	571	...	...	...	13	52	3	5	...
Poland	1 296	...	...	...	130	380	36	120	...
Slovenia	149	...	...	...	2	13	2	...	...

Source : Eurostat - Newcronos



## MILK AND DAIRY PRODUCT BALANCE SHEETS

**Average annual development of production in the EU from 1980 to 1996**

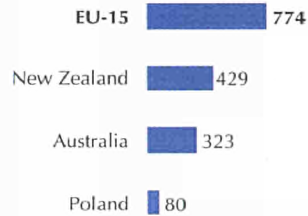


Source : Eurostat

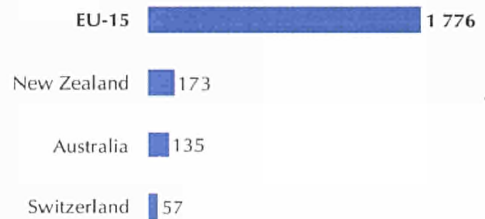
**Main exporters in 1996**

*thousand tonnes*

**Powdered milk**



**Cheese**



Source : FAO

**World producers in 1996**

	Cheese	Butter	Skimmed milk powder	Whole milk powder	Powdered milk
<i>thousand tonnes</i>					
CEFTA	682	249	224	69	140
NAFTA	4 062	671	624	153	1 108
Australia	261	142	228	111	94
CIS	683	601	464	171	447
EU-15	6 414	1 792	1 243	940	1 395
Japan	109	86	200	61	53
Mercosur	459	137	41	363	47
New Zealand	239	297	202	333	1
<b>World</b>	<b>14 921</b>	<b>6 586</b>	<b>3 447</b>	<b>2 420</b>	<b>4 204</b>

Source : FAO - For methodological reasons, the data differ from those on page 162.



## EGG BALANCE SHEETS

In 1996, the Community's egg production exceeded 5 million tonnes and represented 11 % of the world total. More than 80% of eggs come from six countries : France, Germany, United Kingdom, Italy, the Netherlands, and Spain. Most States in the Union are self-sufficient or almost. Only Austria and, above all, Germany, which has a marked shortfall even though it is the Union's second largest producer, are exceptions to this rule. Austria purchases its eggs from Germany and the Netherlands. Germany imports mainly from the Netherlands, whose trade balance accordingly shows a considerable surplus.

Since 1983, the EU production and consumption of eggs have developed pretty much at the same pace. Export and import levels alike are low and have dwindled over the years.

Most of the egg trade occurs within the Union. In 1996, the EU exported beyond its borders 83 300 tonnes of eggs, including one-quarter to Switzerland and one-fifth to Hong Kong. Imports are eleven times less, with half coming from the United States.

### Definitions

**Self-sufficiency level :** relation between usable production and domestic use. A rate of 90 means that 90% of requirements are covered by production.

**Trade balance :** the difference between the volume of exports and the volume of imports.

**Extra-European trade :** the volume of egg imports and exports in 1996 was based on customs declarations.

Balance sheets for 1996

	Usable production	Imports <sup>1</sup>	Exports <sup>1</sup>	Domestic use		Self-sufficiency level
				Total	Human consumption	
	thousand tonnes					%
BLEU	241	53	123	171	153	140.9
Denmark	88	11	15	84	74	104.8
Germany	841	394	86	1 149	1 117	73.2
Greece	119	5	1	123	112	96.7
Spain	578	11	21	568	511	101.8
France	994	91	93	991	904	100.3
Ireland	31	2	–	32	27	96.9
Italy	626	32	29	629	590	99.5
Netherlands	597	75	436	236	189	253.0
Austria	98	21	3	116	112	84.5
Portugal	98	5	2	101	81	97.0
Finland	71	1	14	57	56	124.6
Sweden	111	9	9	111	110	100.0
United Kingdom	673	47	12	709	645	94.9
EU-15	5 166	16	105	5 077	4 683	101.8

1. For EU-15, trade with non-member countries.

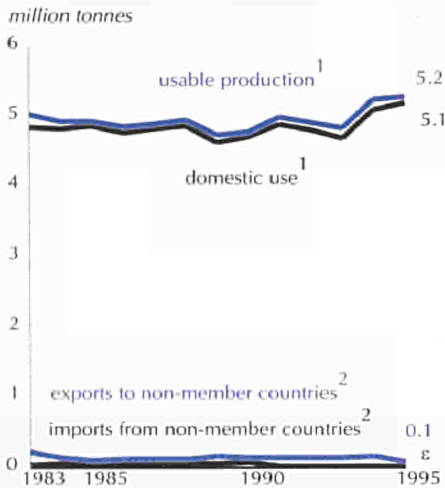
Source : Eurostat - Balance sheets





## EGG BALANCE SHEETS

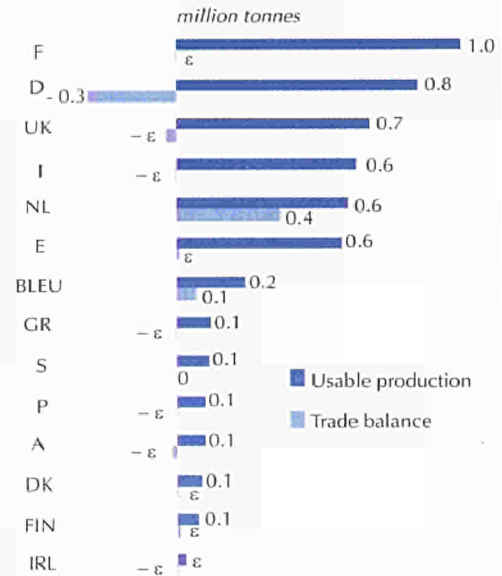
### Development of EU balance sheets



1. EU-12 until 1993.  
2. EU-12 until 1994.

Source : Eurostat - Balance sheets

### Trade in 1993-1994



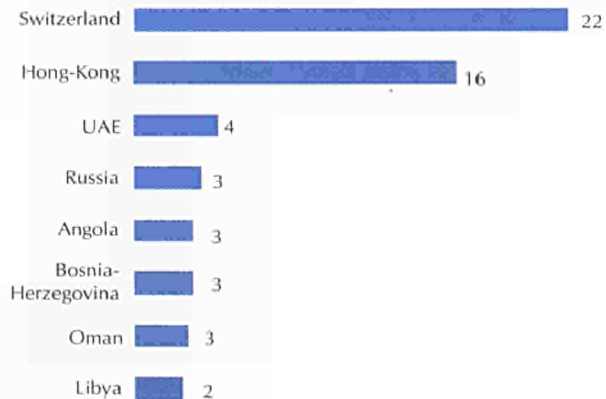
### Extra-European trade in 1996

#### The EU's main suppliers



Total EU imports : 7.4

#### The EU's main customers



Total EU exports : 83.3

thousand tonnes

Source : Eurostat - Foreign trade



## COMPOUND ANIMAL FEED PRODUCTION

The European Union produced more than 124 million tonnes of compound animal feed in 1996. The largest manufactured items were feed earmarked for « industrial » production, like pigs and poultry, which represent respectively 34 % and 28 % of the market. Feed for cattle, dairy cows and « fattened » livestock represent 29 % of total production. Since 1992, France has become the number one European producer of compound feed, ahead of Germany and the Netherlands. France produces more than one-quarter of compound feed for poultry and its share in Community production is increasing steadily. The animal feed industry is becoming more and more concentrated : the number of manufacturing plants in 1997 was 3801, in other words, a drop of more than 20 % as compared with 1990. Animal feed is the leading outlet for cereal crops.

It uses more and more since the 1992 CAP reform reduced prices. This greater use of cereals will probably continue because of the advances made in feed production for poultry and pigs, which uses them in high proportions and because of the rise in the consumption of white meat, and lower consumption of red meat. The rate of cereal incorporation was thus close to 40 % in the European Union in 1997.

Community imports of raw materials earmarked for cattle feed represented almost 56 million tonnes in the 1995-1996 marketing year. They dropped by almost 6 % between the 1992-1993 and 1995-1996 marketing years. 1996 imports included 60.9 % of protein-rich raw materials. These were mainly soya oilcakes and seed, which alone represented almost 43 % of all imports.

**Production of compound animal feed in 1996**

	Totale	of which			
		Cattle	Pigs	Poultry	Others
	thousand tonnes	%			
Belgium	5.9	19	59	18	3
Denmark	5.7	26	60	11	3
Germany	19.3	43	32	21	4
Greece	2.8	53	22	23	2
Spain	15.2	21	43	27	9
France	22.6	19	30	41	10
Ireland	3.2	54	22	15	10
Italy	11.8	32	20	36	11
Luxembourg	...	...	...	...	...
Netherlands	16.4	23	46	22	9
Austria	1.0	20	23	40	17
Portugal	4.0	28	33	34	6
Finland	1.2	40	28	19	13
Sweden	2.6	47	27	21	6
United Kingdom	12.6	37	20	32	10
<b>EU-15<sup>1</sup></b>	<b>124.2</b>	<b>29</b>	<b>35</b>	<b>28</b>	<b>8</b>

1. Apart from Luxembourg.

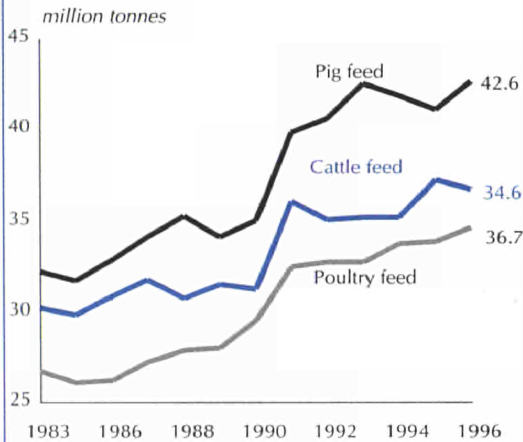
Source : Fefac



## COMPOUND ANIMAL FEED PRODUCTION

### Animal feed is using more and more cereals

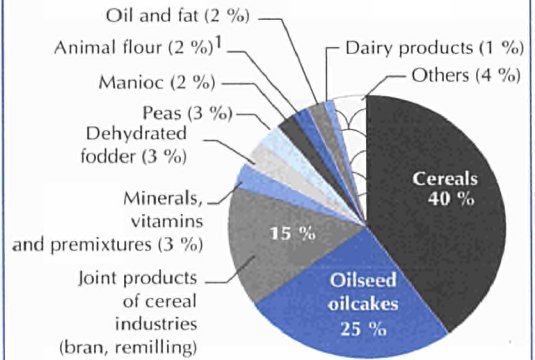
**Development of the production of compound feed by animal species<sup>1</sup>**



1. Without Greece until 1990.  
EU-15 from 1991 on.

Source : Commission of the European Communities and Fefac

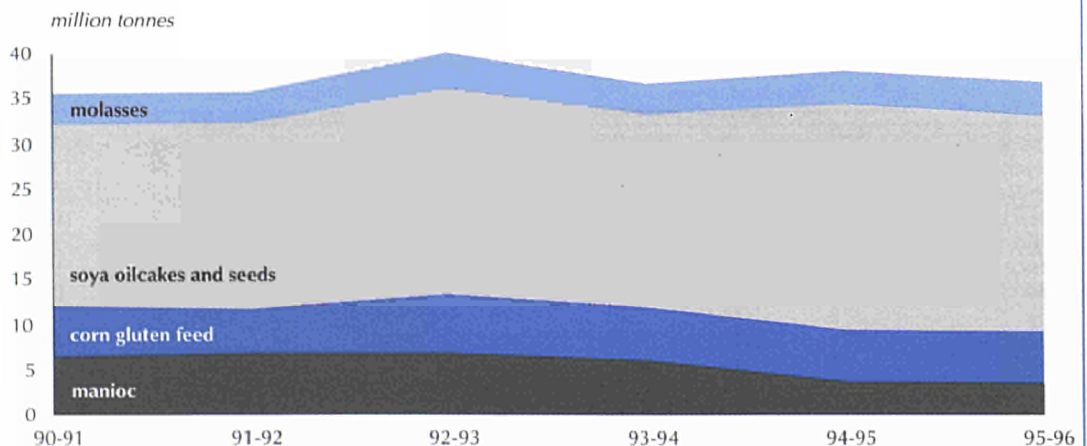
**Average composition of compound animal feed for 1997-1998**



1. Meat flour is no longer used in feed for ruminants.

Source : Fefac

**Community imports of the main raw materials used for the manufacture of compound animal feed<sup>1</sup>**



1. EU-12 until 1994-1995.

Source : Eurostat





## CHOCOLATE AND CONFECTIONERY

For chocolate and for confectionery alike, the European Union more than covers its needs. Chocolate production rose sharply between 1991 and 1996 in many countries, particularly in Italy, France, Germany and Belgium, which has made it possible to establish an ever greater surplus trade balance with non-member countries. Over this period, on the other hand, confectionery manufacturing has tended to level out. Germany and the United Kingdom were the leading producers in 1996, accounting between them for almost one-half of Community production of both chocolate and confectionery. Cocoa bean imports are highest in the United Kingdom, Germany and the Netherlands, and this latter country is a leading exporter of semi-finished products. There is a great deal of intra-community trade for both these types of products, due to the predominance of major international groups. Consumption per inhabitant is variable from

country to country. Where chocolate is concerned, the north-south boundary is distinct, with a German and a Belgian consuming on average 10 kg per annum and per inhabitant as opposed to 1.9 kg for someone from Portugal, and 3.3 kg for an Italian. Consumption differences are less marked for confectionery. The northwestern countries such as Denmark, the Netherlands, the United Kingdom and Ireland are the largest consumers. France occupies a halfway position with an annual average consumption of 6.7 kg per inhabitant for chocolate and 3.4 kg for confectionery.

### Definition

**Chocolate** : the data have to do solely with chocolate end products, not including spreads and preparations for beverages containing cocoa, excluding all semi-finished products.

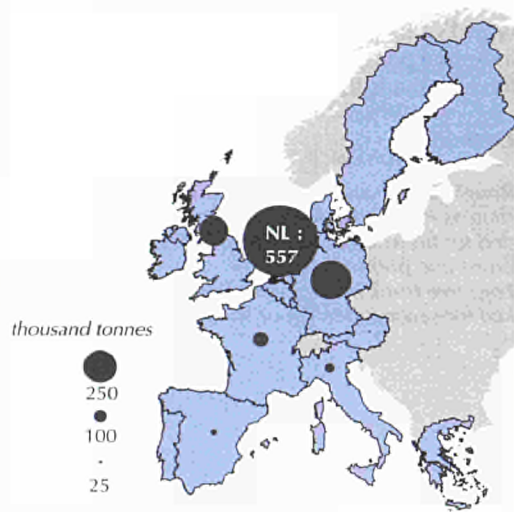
### Chocolate and confectionery balance sheets for 1996

	Chocolate				Confectionery			
	Production	Imports	Export	Self-sufficiency level	Production	Imports	Export	Self-sufficiency level
	thousand tonnes			%	thousand tonnes			%
Belgium	176	42	116	173	66	25	42	136
Denmark	28	29	14	65	57	19	34	136
Germany	1 013	153	337	122	384	81	113	109
Greece	29	11	10	95	22	6	7	103
Spain	161	33	38	103	165	14	59	137
France	393	214	217	101	193	46	42	98
Ireland	33	26	27	102	20	19	19	99
Italy	216	44	73	116	127	22	24	102
Netherlands	171	45	145	242	148	44	90	146
Austria	81	44	48	105	20	14	13	92
Portugal	3	16	—	18	3	7	1	32
Finland	35	7	24	190	21	11	7	83
Sweden	52	19	25	114	30	30	13	63
United Kingdom	545	99	141	108	348	42	92	117
EU-15	2 937	...	...	117	1 604	...	...	112

Source : Caobisco

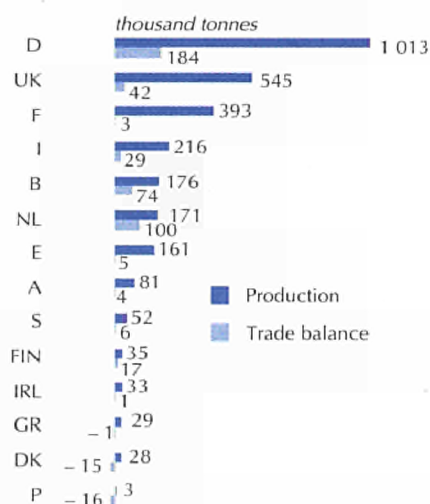
## CHOCOLATE AND CONFECTIONERY

### Cocoa bean imports in 1996<sup>1</sup>

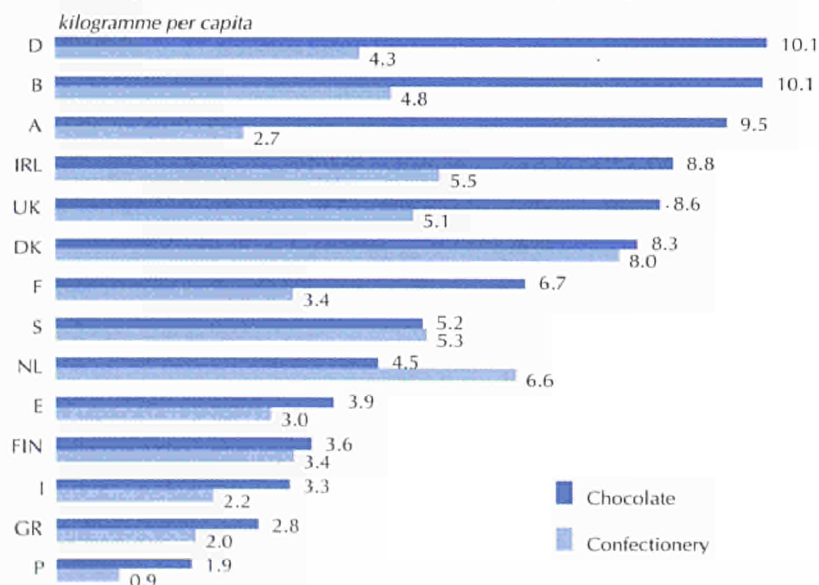


<sup>1</sup> No data for GR, IRL and I.

### Chocolate production and trade balance for 1996



### Consumption of chocolate and confectionery per capita in 1996





## LOGGING

In most European countries, and in particular in Sweden, the United Kingdom and Ireland, Austria, Finland and Germany, more softwood is harvested than hardwood. But the hardwood harvest is greater in Italy and Greece. France, and to a lesser degree Spain, have comparable softwood and hardwood harvests. The leading softwood species are firs and spruces, especially in Germany and Austria, whereas pines and other softwood species are better represented in France and above all in Spain. EU hardwood harvests are more diversified. In the Union, each hectare of wooded land is far from providing the same volume of timber. In the south, Greece, non-Atlantic Spain and Mediterranean France, but also the northern parts of Sweden and Finland, harvested less than 1 m<sup>3</sup> of rough timber per hectare in 1995. Conversely, for the

same year, Baden-Württemberg, Flanders and Belgian Luxembourg exceeded 6 m<sup>3</sup> per hectare. World roundwood production, which, in 1995, topped 3.3 billion m<sup>3</sup>, is usually earmarked as firewood. But the European Union, which is the world's fifth timber producer, uses it mainly for industrial purposes, particularly in the form of logs, for which it is the world's number two producer.

### Definitions

**Rough timber and roundwood:** wood in the natural state as it has been felled and harvested. It is intended for firewood and industrial uses as logs, pit props and pulpwood.

**Log:** tree trunk in the form of rough timber, earmarked for sawing, peeling or slicing.

### Roundwood felled by tree species in 1995

Softwood			Hardwood					All round-wood
Total	including Fir, spruce, douglas fir	Pine and other conifers	Total	Oak	Beech	Poplar	Birch and other broadleaf	
thousand m <sup>3</sup> of roundwood								

BLEU	2 730	...	...	1 455	...	...	...	...	4 185
Denmark	1 220	...	...	706	76	489	← 141 →	...	1 926
Germany	25 566	18 343	7 223	8 245	1 265	← 6 980 →	...	...	33 812
Greece	521	209	312	1 440	839	473	92	36	1 961
Spain	8 653	19	8 635	7 421	538	86	589	6 208 <sup>5</sup>	16 074
France <sup>1</sup>	23 758	8 179	11 350	19 613	2850	1 912	2 560	968	43 371
Ireland	2 163	1 977	186	41	34	6	...	1	2 204
Italy	1 732	1 122	610	7 998	2 641	548	2 135	2 674	9 730
Netherlands <sup>2</sup>	668	236	432	411	19	17	230	7	1 079
Austria <sup>3</sup>	11 786	8 367	1 549	2 019	...	580	...	...	13 805
Portugal	5 117	...	...	4 233	...	...	...	...	9 350
Finland	41 460	22 242	19 218	8 434	...	...	...	...	49 894
Sweden	57 400	...	...	5 500	...	...	...	...	62 900
U. Kingdom <sup>4</sup>	6 844	2 177	1 334	783	102	69	← 158 →	...	7 627
EU-15	189 618	...	...	68 299	...	...	...	...	257 917

1. The French data only apply to logs and softwood pulp, and hardwood logs.

2. The Dutch data only apply to industrial broadleaf roundwood.

3. The Austrian data only apply to industrial roundwood.

4. The British data only apply to logs.

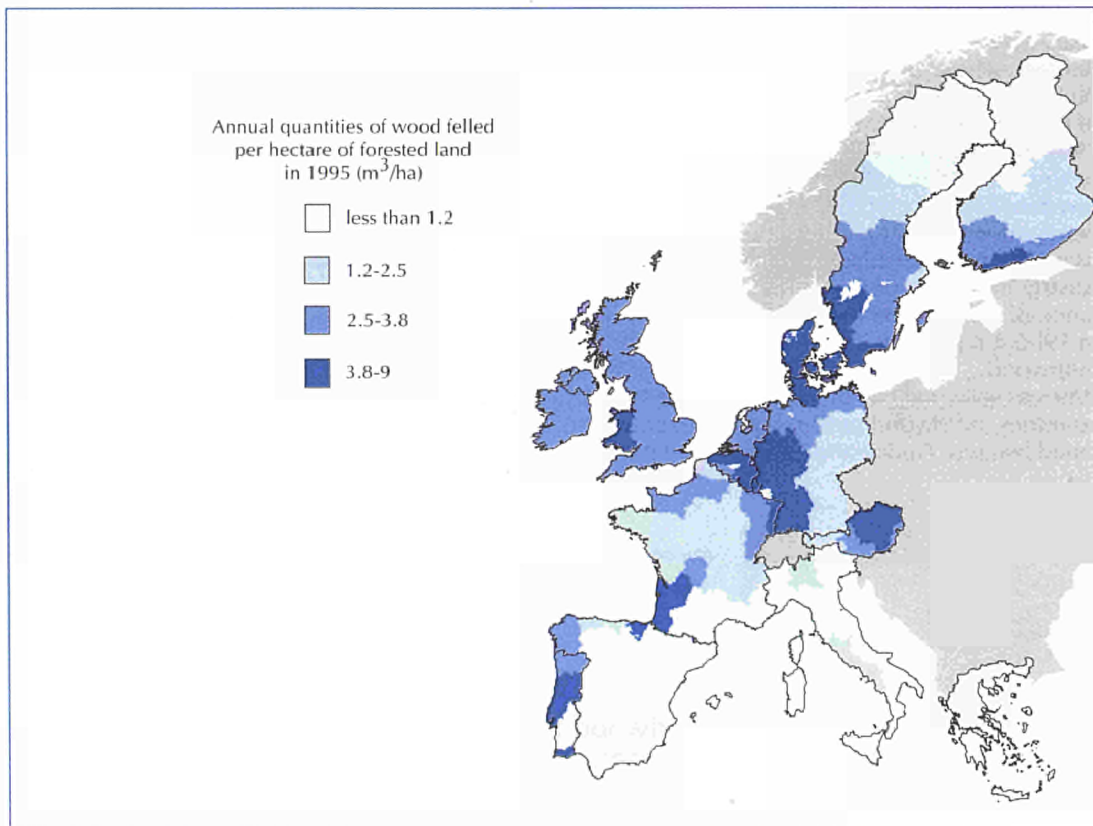
5. Including 3,238 thousand m<sup>3</sup> of eucalyptus.

Source : Eurostat - Working document on forestry statistics (july 1997)



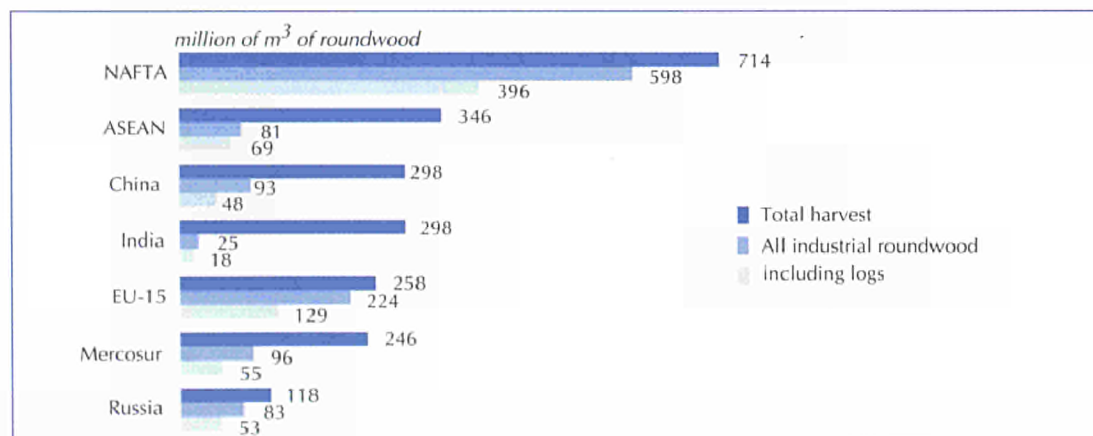


### Intensive logging in the Flemish region and the Rhine basin



Sources : Eurostat - Working document on forestry statistics and national data for Spain

### World's major timber producers in 1995



Sources : Eurostat, FAO



## TIMBER HARVEST

The European Union's timber harvest increased on average by almost 5% per annum between 1991 and 1995. The harvests in all these years were nevertheless still smaller than the 1990 harvest, whose unusually high quantities were due to the series of storms which destroyed part of Germany's forests. The Community harvest in 1995 totalled 258 million m<sup>3</sup> of roundwood. Half of this came from three new Member States, Sweden, Finland and Austria. In the Union, timber is intended first and foremost for industrial uses. The membership of Sweden, Finland and Austria in the Union has reinforced the importance of softwood in the European community. In 1995 it represented 85% of logs and 73% of pulpwood.

Whereas softwood comes mainly from the Nordic countries, hardwood production is better distributed because France and Germany are the lea-

ding producers, ahead of Finland and Spain. Hardwood is used mainly for pulp, but French and German sawmills also use it in large quantities.

### Definitions

**Rough timber and roundwood:** wood in the natural state as it has been felled and harvested. It is earmarked for firewood and industrial uses as logs, props and pulpwood.

**Firewood:** roundwood intended for use as fuel for cooking, heating, and energy production.

**Prop:** rough or chain-sawed wood used in mines.

**Pulpwood:** rough timber other than logs and mine props, earmarked for making wood pulp, particle-board and fibreboard

**Log:** tree trunk in the form of rough timber, earmarked for sawing, peeling or slicing.

## Roundwood felled in 1995

Total	Firewood <sup>1</sup>	Industrial roundwood (i.r.)					
		Logs		Pulpwood		Pit props and other i.r.	All industrial roundwood
		Total	softwood	Total	softwood		

thousand m<sup>3</sup> of roundwood

BLEU	4 185	550	2 550	1 850	875	670	210	3 635
Denmark	1 926	561	734	517	—	—	631	1 365
Germany	33 812	1 377	20 688	17 011	10 902	7 450	844	32 434
Greece	1 961	1 330	389	242	142	92	100	631
Spain	16 074	3 078	6 030	4 375	6 341	3 139	626	12 997
France	43 371	9 800	21 697	13 407	11 414	6 122	460	33 571
Ireland	2 204	64	1 370	1 350	770	758	—	2 140
Italy	9 730	5 262	2 542	942	874	169	1 052	4 468
Netherlands	1 079	138	514	329	352	266	75	941
Austria	13 805	3 059	8 081	7 513	2 665	2 403	—	10 746
Portugal	9 350	500	4 189	3 810	4 480	965	181	8 850
Finland	49 894	4 095	22 831	21 697	22 968	18 375	—	45 799
Sweden	62 900	3 800	34 000	33 600	24 600	21 700	500	59 100
United Kingdom	7 627	231	3 847	3 514	3 088	2 818	461	7 396
<b>EU-15</b>	<b>257 917</b>	<b>33 845</b>	<b>129 462</b>	<b>110 157</b>	<b>89 471</b>	<b>64 927</b>	<b>5 140</b>	<b>224 073</b>

1. Figures underestimated in most countries.

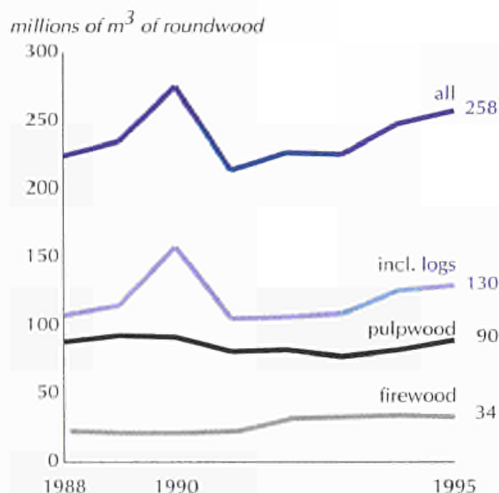
Source : Eurostat - Working document on forestry statistics (july 1997)



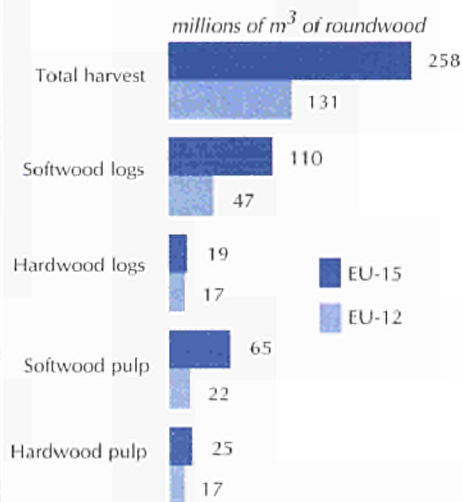
## TIMBER HARVEST

### Timber harvest in European Union

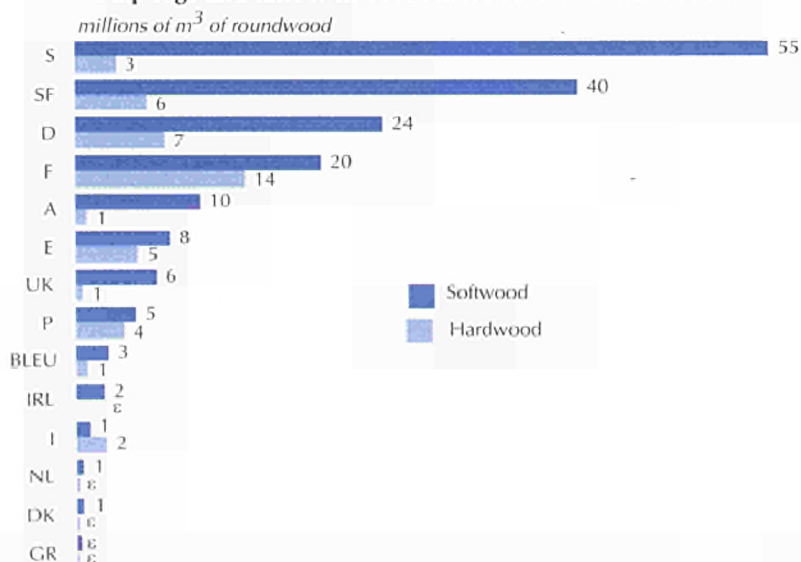
#### A majority of logs



#### The enlargement to 15 doubled the 1995 harvest



#### Pulp logs and timber in 1995: more soft- than hardwood







## TIMBER BALANCE SHEETS

The enlargement of the Union has reduced its dependence on wood sector products with regard to non-member countries. Sweden's and Finland's membership of the Union has first and foremost resulted in an increase in European roundwood imports from 7.4 to 25.4 million m<sup>3</sup>. The Swedes, and above all, the Finns are major hardwood importers, with the latter purchasing large quantities of birch from Karelia and Estonia to manufacture pulp and plywood. Among the other countries, Germany and Ireland are the only ones whose industrial roundwood exports are higher than the imports. France's trade is more or less balanced. The other members of the Union all have negative foreign balances, even if the Netherlands and Denmark export more softwoods than they import. For all countries, the Union buys ten times more rough timber than it sells. Its exports go mainly to Norway.

For all the other stages in the wood sector, the Union's foreign trade balances improved in 1995. Beforehand, only Portugal in EU-12 exported more sawnwood than it imported. The contribution of the three new Member States shifted the Community rate of self-supply in sawnwood from 75 % to 90 %. The Community balance for sawnwood is nevertheless still negative because

ten tonnes are imported for every four tonnes exported. The Europeans export mainly sawnwood from conifers, this represents 95 % of the purchases made by five of their six largest customers. EU imports are more diversified : 59 % of conifers coming mainly from Russia, the Czech Republic, Poland and the Baltic States, 29 % of hardwood species coming mainly from the United States and Brazil, 12 % of tropical wood coming mainly from Malaysia and the Ivory Coast.

The enlargement of the Union to Fifteen has also led to a tripling of the production of woodpulp and a doubling of the production of newsprint.

### Definitions

**Rough timber and roundwood** : wood in the natural state as it has been felled and harvested. It is earmarked for firewood and industrial uses as logs, props and pulpwood.

**Log** : tree trunk in the form of rough timber, earmarked for sawing, peeling or slicing.

**Sawnwood** : product obtained from sawing logs.

**Rate of self-supply** : ratio between production and availability without stocks.

**Karelia** : one of the 21 republics in the Russian Federation, adjoining Finland.

## The Union's foreign trade in 1995

Industrial roundwood			Major wood products		
Total	Softwood	Hardwood	Sawnwood	Wood-based board	All wood pulp
thousand m <sup>3</sup> of barkfree roundwood					

Production	224 073	177 868	46 206	68 078	33 427	31 700
EU imports	13 706	7 413	6 293	17 357	8 126	5 391
Imports from non-member countries	25 441	8 583	16 858	13 328	5 343	8 065
Exports to the EU	10 200	6 499	3 702	21 193	8 752	6 346
Exports to non-member countries	2 959	2 566	393	6 124	2 311	1 121
Availability	246 554	183 885	62 670	75 282	36 459	38 644
Rate of self-supply (%)	91	97	74	90	92	82

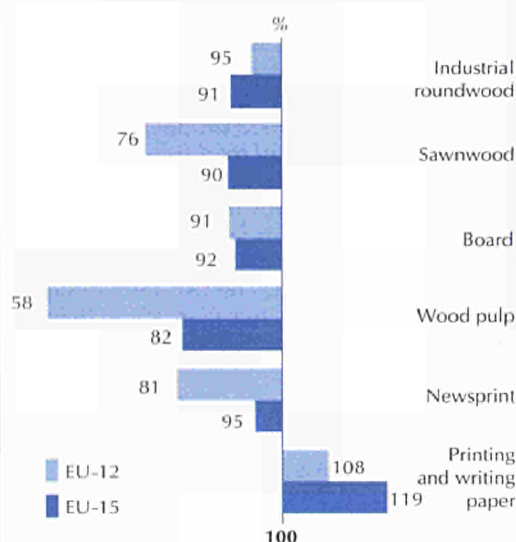
Source : Eurostat - Working document on forestry statistics (july 1997)



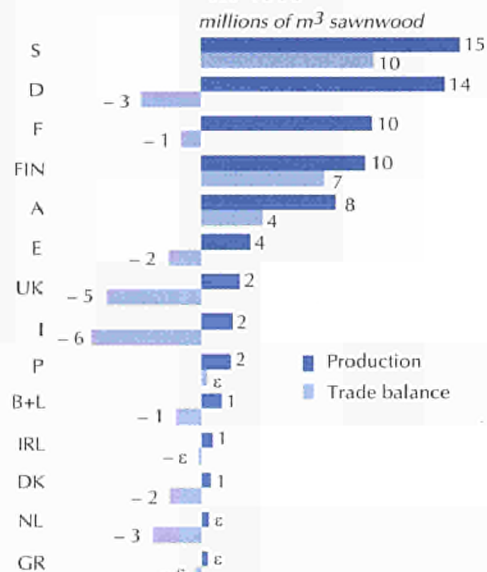
## TIMBER BALANCE SHEETS

Wood trade is usually in the red with non-member countries

Impact of the extension to 15 on rates of self-supply



Sawnwood production and trade balance for 1995



Source : Eurostat - Working document on forestry statistics (july 1997)

### Extra-European trade in 1995

#### Roundwood



Total EU imports : 21.968

Total EU exports : 2.176

#### Sawnwood



Total EU imports : 8 418

Total EU exports : 3 364

thousand tonnes

Source : Eurostat - Foreign trade



## FISH AND FISH-FARMING

In the European Union, catches – not counting fish-farming – of fish, crustaceans and molluscs totalled 7.6 million tonnes of live weight in 1995. Because of Iceland and Norway, the tonnage of the European Economic Area rose to 11.7 million tonnes. More than one-quarter of all Community catches came from Denmark, which, in particular, produced 844 500 of the 862 000 tonnes of sand eels in the Union. Spain and the United Kingdom provide another generous quarter of Community catches.

After dropping in the 1980s, European catches rose by 16% between 1990 and 1995. Denmark, Spain and the United Kingdom thus regained their 1980 production levels in 1995. Ireland, Greece, Sweden, Italy and the Netherlands have been upping their catches since 1980, especially from 1990 on for Ireland and Sweden. French

and Belgian production levels have been falling since 1980, and those of Portugal and Germany ditto since 1990.

Fish-farming production was slightly more than 1 million tonnes of live weight in 1995. It is calculated at 1.3 million tonnes in the European Economic Area, with Norway being the only country to produce as much as France. In the Union, France and Italy provide one-half of the Community's fish-farmed production. Fish-farming represents 12 % of total fisheries and fish-farming taken together. This percentage is 1 % for crustaceans, 6 % for high quality fish, and 43 % for molluscs. This share reaches 32 % in France, 27% in Italy and 48% in Austria, a country that is land-locked. The fish-farm contribution is, on the contrary, less than 3 % in Belgium, Denmark, Portugal, and Sweden.

### Catches in 1995<sup>1</sup>

Total	Fish	including				Crustaceans	Molluscs
		Herring	Mackerel	Sardine	Atl. cod		
tonnes live weight							

Belgium	36 478	33 325	12	107	–	5 938	2 249	904
Denmark	2 034 315	1 908 665	191 414	36 757	36 195	78 332	15 121	110 529
Germany	302 529	261 723	55 918	24 417	35	31 893	11 216	29 590
Greece	198 218	158 848	–	686	20 413	–	4 445	34 925
Spain	1 206 183	1 038 726	–	20 000	214 000	9 563	31 818	135 639
France	604 761	493 433	4 501	12 534	13 446	14 413	20 530	90 798
Ireland	386 543	358 464	46 644	78 534	–	5 651	16 890	11 189
Italy	609 768	321 116	–	–	36 825	–	24 414	264 238
Netherlands	440 715	386 955	99 448	35 788	116	11 199	14 166	39 594
Austria	4 458	4 455	–	–	–	–	3	–
Portugal	259 890	235 597	–	3 073	87 711	7 324	2 173	22 120
Finland	158 937	158 746	94 613	–	–	1 851	191	–
Sweden	407 691	403 894	157 503	6 286	–	33 185	3 743	54
United Kingdom	937 530	800 722	115 186	218 422	7 133	78 681	64 889	71 919
<b>EU-15</b>	<b>7 588 016</b>	<b>6 564 669</b>	<b>765 239</b>	<b>436 605</b>	<b>415 874</b>	<b>278 031</b>	<b>211 849</b>	<b>811 498</b>

Iceland	1 612 162	1 517 234	284 473	–	–	202 867	84 556	10 372
Norway	2 525 162	2 475 264	688 256	202 107	–	368 021	41 033	8 865

1. Not including fish-farming.

Source : Eurostat - Unit F2

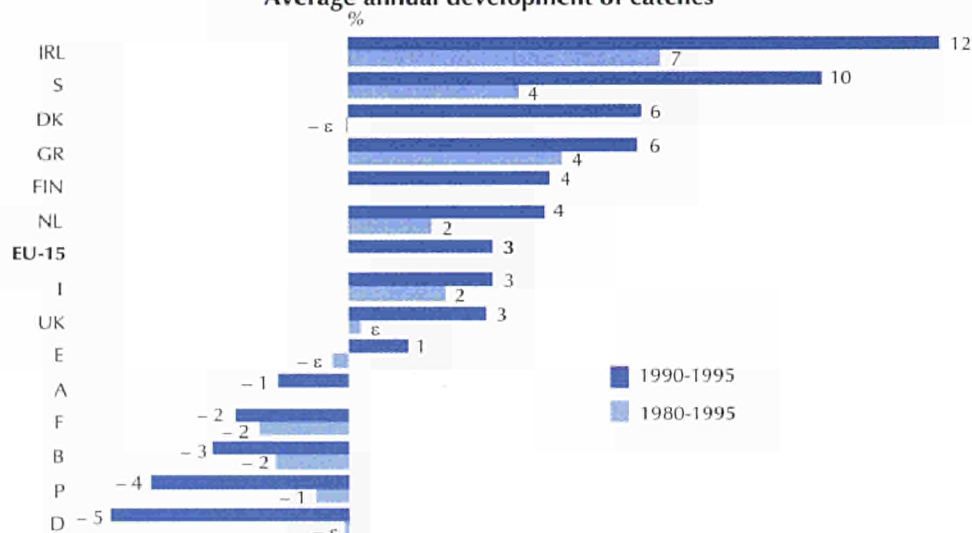




## FISH AND FISH-FARMING

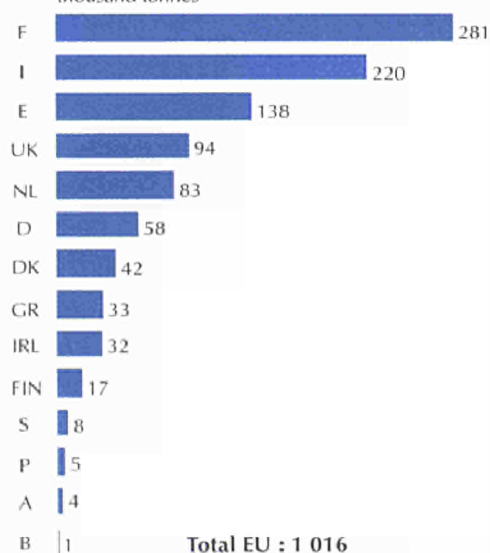
### Marked growth in catches in Ireland and Scandinavia

Average annual development of catches



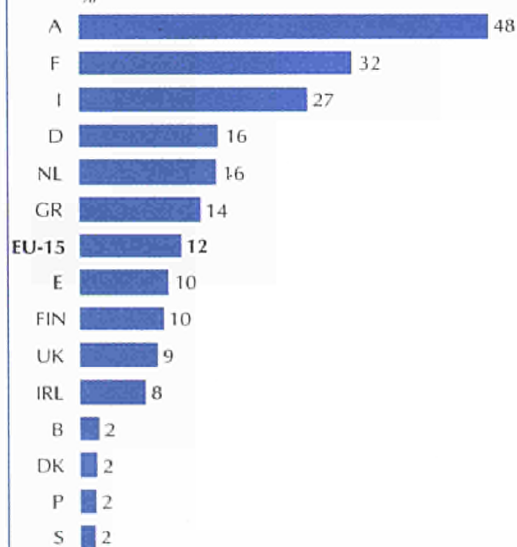
Fish-farm production in the Union in 1995

thousand tonnes



Share of fish-farming in all fisheries and fish-farming in 1995

%





## FISHING : THE EUROPEAN UNION IN THE WORLD

Not counting fish-farming, world catches of fish, molluscs and crustaceans rose by almost one-half over 15 years, to reach 113 million tonnes in 1995.

The development of the leading producers is uneven. Major fishing countries of the Pacific and Indian Oceans, such as China, Peru, Chile and India, increased their catches at a steady rate between 1990 and 1995. Japan and the CIS (ex-USSR) reduced their catches overall in the same period. But these reductions were not linear : a levelling-off of catches in the 1980s was followed by an abrupt drop in 1990.

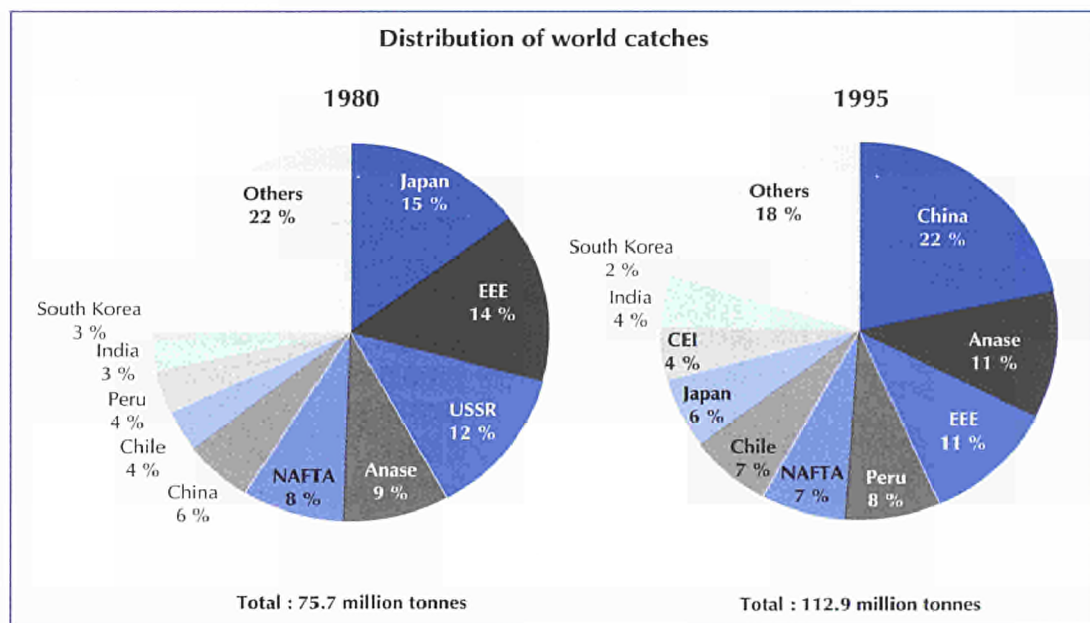
The other countries and groups of countries are developing in differing ways : increased catches in the 1980s, then a drop since 1990 for the NAFTA and South Korea, and the opposite for the European Economic Area (EEA).

Trade within the Community rose in 1995 to 3

billion ecus for fresh, refrigerated and frozen fish and 1.25 billion ecus for crustaceans and molluscs. The United Kingdom, Ireland, the Netherlands, Denmark and Greece have favourable trade balances for these two product groups. In 1995, the Union imported 3 billion ecus' worth of fish from non-member countries, with 1 billion coming from Norway. Community exports rose to just 0.8 billion ecus, with one-quarter bound for Japan. Several countries in the Union have special links with non-member countries. France is the main Community supplier for the Ivory Coast, just as the Netherlands are for Nigeria.

The Union imports ten times more crustaceans and molluscs than it exports. It has many different suppliers. Japan is its number one client, accounting for almost 14 % of European exports.

### One-fifth of catches for China in 1995

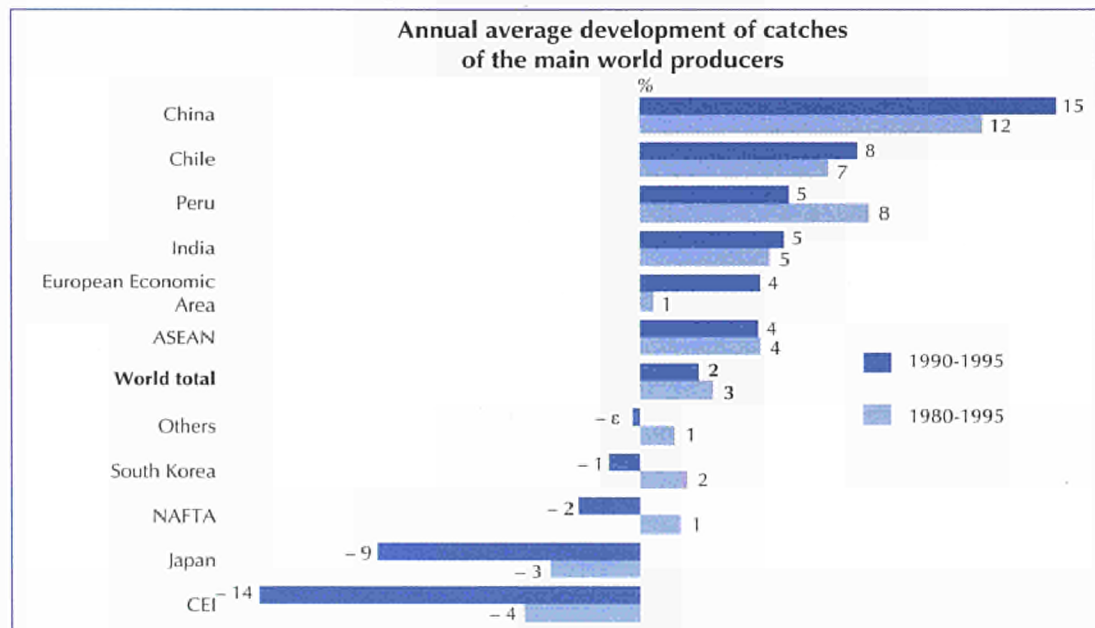


Sources : FAO and Eurostat - Unit F2

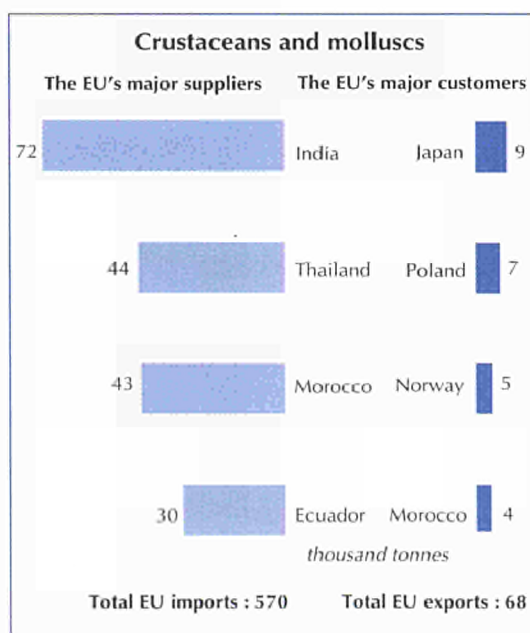
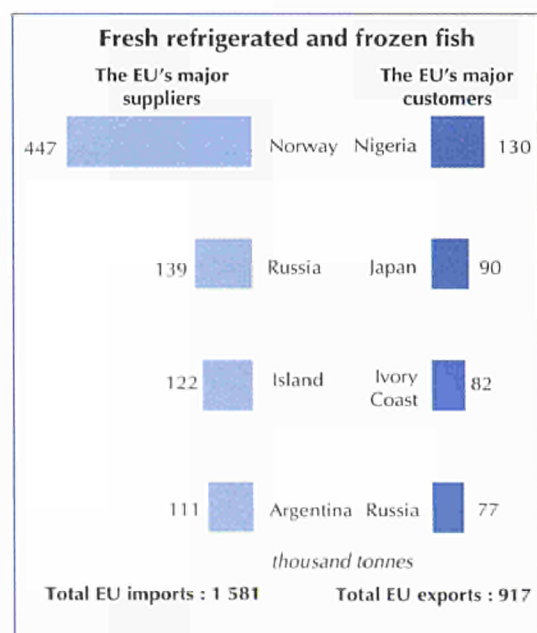


## FISHING : THE EUROPEAN UNION IN THE WORLD

### Conspicuous rise in Pacific catches



### Union's main suppliers in 1995



Source : FAO and Eurostat - Unit F2





## HOUSEHOLD CONSUMPTION

In most European Union countries, 15-25 % of household expenditure goes on foodstuffs. But in Greece, Ireland and Portugal, this share exceeds 30 %. If we leave these countries aside, food consumption patterns are quite homogeneous, with major items being meat, dairy products, and fruit and vegetables.

The food consumption share shows an on-going downward trend : from 23 % in 1980 in the Community as a whole, to 19 % in 1994. The same applies to expenditure associated with furnishing, household items and clothing.

Conversely, the share of expenditure associated with housing is on the rise. It is especially high in Sweden and Denmark, where it represents more than one-quarter of total expenditure. It is also high in Finland, France and Luxembourg, where it exceeds 20 % of all expenditure.

The share of transport expenditure is also increasing. In 1995, in most countries, it represented

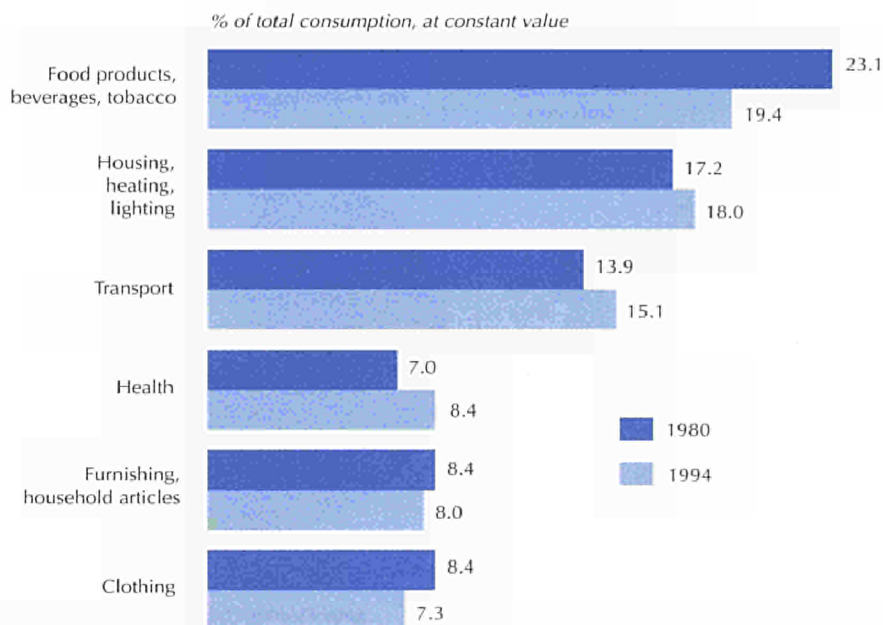
12-20 % of total expenditure. Developments are similar with health expenditure, but this represents less than 10 % of total spending, except for Germany, the Netherlands, Belgium and France. Expenditure earmarked for leisure is relatively low in all countries. Hotel and restaurant expenditure is highest in Spain, where it is the second largest item after food costs.

### Definitions

**Consumption :** the calculations were based on expenditure in ecus, at constant value, and take the expenditure of both nationals and foreigners into account. The list of different consumer items is not exhaustive, so the sum of the percentages is less than 100.

**Food consumption :** includes beverages and tobacco.

### Consumption of European households





## HOUSEHOLD CONSUMPTION

## Household consumption in 1995

	Food products, beverages, tobacco	Housing, heating, lighting	Transport, communications	Health	Furnishing, household articles	Clothing	Restaurant, café, hotel	Leisure, entertainment/shows, culture
% of total consumption								
Belgium	18.2	18.1	12.4	11.0	10.2	7.3	8.6	1.6
Denmark	20.7	25.7	18.0	2.1	5.9	5.2	5.5	3.0
Germany	16.4	18.8	15.7	15.1	8.6	6.8	3.5	...
Greece	38.1	12.1	14.1	4.1	7.8	6.8	6.3	2.0
Spain	21.0	12.9	14.4	5.4	6.6	8.2	17.4 <sup>1</sup>	1.7 <sup>1</sup>
France	18.9	20.5	16.3	10.7	7.4	5.6	6.8	2.2
Ireland	32.4	14.8	13.9	3.4	6.6	6.3	2.6	2.1
Italy	19.9	14.8	12.1	6.8	9.6	9.7	9.9	2.6
Luxembourg <sup>2</sup>	18.3	20.0	19.4	7.3	10.8	5.8	...	...
Netherlands	14.7	18.3	13.1	13.1	6.9	6.8	5.2	3.2
Austria	18.3	18.1	15.7	4.4	5.5	7.8	10.8	3.8
Portugal <sup>2</sup>	30.5	6.7	15.6	4.3	8.6	9.3	10.1 <sup>1</sup>	2.8 <sup>1</sup>
Finland	23.6	22.4	15.0	4.8	5.9	4.8	7.5	3.5
Sweden	22.7	27.0	16.5	2.2	6.8	6.2	4.4	3.7
United Kingdom	20.0	18.0	17.7	1.5	6.9	7.0	8.3	3.5
EU-15 <sup>2</sup>	19.4	18.1	15.2	8.4	8.0	7.3	...	...
1. 1993 data.								
2. 1994 data.								

## Household food consumption in 1995

	Bread and cereals	Meat	Fish	Milk, cheese, eggs	Fruit and vegetables	Non-alcoholic beverages	Alcoholic beverages	Tobacco
% of total food consumption <sup>1</sup>								
Belgium	9.9	27.5	6.6	11.3	13.1	3.2	7.2	7.0
Denmark	8.4	21.7	2.2	11.4	9.4	4.2	14.3	10.6
Germany	...	...	...	...	...	...	17.2	10.4
Greece	6.0	29.6	7.7	16.7	2.5	4.4	8.6	8.5
Spain <sup>2</sup>	10.9	26.3	11.1	12.6	14.0	2.3	6.1	5.8
France	10.5	26.0	5.2	12.5	12.3	3.3	10.4	5.2
Ireland	8.5	15.1	1.7	7.5	6.9	4.1	32.6	10.2
Italy	11.3	25.2	5.8	13.6	19.7	2.2	4.8	6.7
Luxembourg <sup>3</sup>	9.6	20.5	2.3	8.3	...	3.5	6.8	30.9
Netherlands	12.4	19.4	2.3	13.1	14.4	3.9	9.8	8.3
Austria	12.8	20.6	1.4	11.7	12.1	3.8	10.1	9.4
Portugal <sup>2</sup>	11.2	24.2	12.0	7.5	12.7	0.9	10.7	6.5
Finland	12.4	18.1	2.8	12.8	11.2	2.6	17.1	7.0
Sweden	13.4	18.6	3.7	11.8	11.7	3.2	13.4	6.8
United Kingdom	8.5	14.7	2.6	7.1	10.2	5.0	28.4	10.3
EU-15	...	...	...	...	...	...	...	...
1. Including beverages and tobacco.								
2. 1993 data.								
3. 1991 data.								

Source : Eurostat - National accounts





## FOOD CONSUMPTION

In 1995, Europeans in the Union consumed on average 90 kg of meat, i.e. 30% less than in the United States, but twice as much as in Japan. Pork, throughout the Union, is the most popular meat. It represents two-thirds of meat consumption in Denmark, but just one-third in Greece and the United Kingdom. Beef and poultry consumption are on a par. Lamb, mutton and goat consumption is marginal, except in Greece and, to a lesser degree, the United Kingdom and Ireland, Spain and France.

Since 1980, beef consumption has been constantly declining in all countries apart from Denmark, where it is rising, and Italy, where it is stable. The gap is being filled by pork, but above all poultry.

Butter consumption is usually higher in northern Europe, because southern countries tend to use more oil. But the use of butter is on the wane in high-consumption countries. In Ireland, for

example, average consumption per capita shrunk by a factor of three between 1980 and 1995.

The French and the Danes, in 1995, were the largest European consumers of eggs. They were using more than in 1980. On the contrary, German and Spanish consumption, top of the table in 1980, has dropped, as it has in most other countries.

The use of frozen products has greatly increased in recent years. In 1996, the Danes and the British were the leading consumers, with 40 kg on average per person.

### Definitions

**Per capita consumption:** ratio between gross human consumption and the population.

**Frozen products:** vegetables, potatoes, fish, pastries, prepared food, fruit, fruit juice, meat, but not poultry.

### Consumption of meat and frozen products

Beef		Pork		Lamb, mutton, goat		Poultry		Frozen products, except poultry	
1980	1995	1980	1995	1980	1995	1980	1995	1992	1996
kg per capita									

BLEU	28.0	21.2	41.2	46.6	2.2	2.1	13.0	23.1	12.2 <sup>1</sup>	20.3 <sup>1</sup>
Denmark	13.7	17.6	54.3	64.2	0.4	1.2	8.2	15.3	35.5	40.8
Germany	24.7	16.8	58.3	55.0	0.9	1.1	9.9	13.4	17.3	20.1
Greece	21.9	19.6	16.3	24.8	13.2	13.6	12.1	17.7	...	13.9
Spain	...	12.7	...	55.3	...	6.6	...	25.5	...	20.2
France	33.0	28.1	35.7	35.9	4.1	5.3	16.7	22.6	27.8	30.0
Ireland	25.7	14.5	32.5	37.9	7.7	7.2	14.5	30.9	...	...
Italy	26.1	25.9	24.6	33.1	1.5	1.7	18.1	18.4	7.7	9.7
Netherlands	21.7	19.8	39.9	46.3	0.6	1.3	9.1	20.1	16.2	19.0
Austria	25.1	19.6	45.2	56.9	...	1.2	11.0	15.3	...	16.4
Portugal	...	17.6	...	34.7	...	3.6	...	23.0	...	...
Finland	21.0	19.1	33.0	32.2	0.3	0.5	5.2	8.8	11.3	16.1
Sweden	18.3 <sup>2</sup>	18.2	34.5 <sup>2</sup>	36.1	0.6 <sup>2</sup>	0.7	4.9 <sup>2</sup>	7.9	25.5	31.7
United Kingdom	23.0	17.5	26.1	23.1	7.7	6.0	13.4	25.1	29.6	38.0
EU-15	...	20.3	...	41.3	...	3.9	...	20.5	...	...

1. Belgium.

2. National data.

Sources : Eurostat - Balance sheets and FAEPAS for deep frozen products



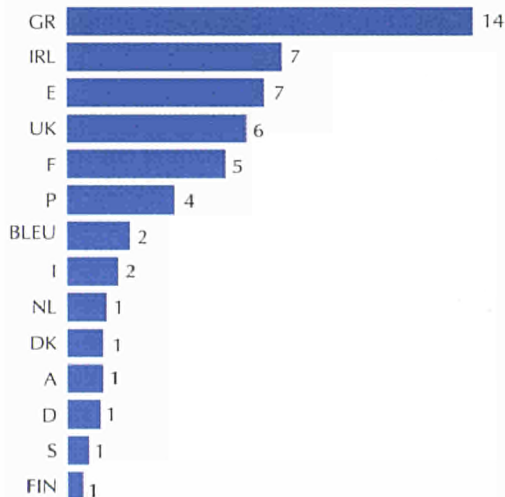


## FOOD CONSUMPTION

## Lamb and mutton in Greece, poultry in Ireland

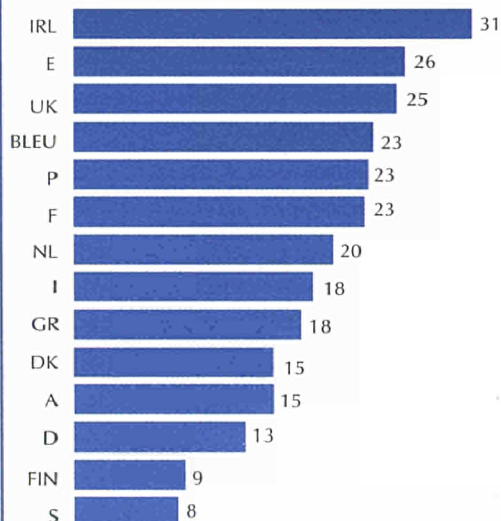
Consumption of lamb, mutton and goat in 1995

kg per capita



Consumption of poultry in 1995

kg per capita



## Consumption of other animal products

	Milk for drinking		Cheese		Butter		Eating eggs	
	1980	1995	1980	1995	1980	1995	1980	1995
kg per capita								
BLEU	77.2	57.9	10.2	14.2	8.5	5.9	13.0	14.5
Denmark	139.6	124.8	9.2	15.9	10.5	9.6	13.5	15.9
Germany	71.9	69.1	12.3	18.4	7.1	7.2	17.2	13.8
Greece	90.0	58.7	17.8	23.4	0.9	1.2	11.6	10.6
Spain	112.0	116.5	...	7.1	1.0	0.6	17.0	15.3
France	83.7	74.9	18.3	23.3	9.3	8.3	14.7	16.0
Ireland	188.2	170.2	2.7	5.3	12.4	3.6	11.8	9.2
Italy	80.2	61.4	13.5	19.0	2.1	2.6	11.4	10.5
Netherlands	109.8	99.0	12.8	14.1	3.6	4.0	10.1	15.3
Austria	148.0	90.9	5.6	14.2	4.0	5.0	15.0	13.8
Portugal	54.0	87.2	...	7.2	1.0	1.5	6.0	8.4
Finland	183.0	177.6	7.9	13.5	11.3	5.4	10.9	11.8
Sweden	161.0	143.6	14.0	15.6	6.0	5.5	13.0	12.0
United Kingdom	134.1	120.6	5.7	7.8	5.8	3.3	14.1	10.1
EU-15	...	88.4	...	15.6	...	4.7	...	13.0

Source : Eurostat - Balance sheets



## FOOD CONSUMPTION

The Italians, who eat lots of pasta, are, along with the Greeks, Europe's largest consumers of cereals, with 121 kg and 115 kg respectively in 1995. The Dutch consume the least, with 57 kg per capita. From 1980 to 1995, the British and Danes increased their cereal consumption by 19% and 28% respectively. The Portuguese reduced theirs by 29% and the Dutch by 11%.

Differences between countries are even more marked for potato consumption. The Italians consumed 39 kg in 1995, and the Irish 170 kg. Sugar consumption is more even: 27 kg per capita in Italy, and 44 in Denmark, with an average for Europe as a whole of 34 kg.

With 62 litres of wine per annum, the French are the largest consumers of wine, ahead of the Italians, the Portuguese and the people of Luxembourg. The French drink ten times more wine than the Irish and the Finns, with their 5-6

litres a year. The Community average is 36 litres per capita per annum. Wine consumption is growing in northern Europe, Denmark and the United Kingdom, and dropping in southerly consumer countries like Greece and Italy, as well as in France.

The Germans are the largest consumers of beer, with 140 litres in 1995, ahead of the Danes (127 litres), the Austrians and the Irish. The Finns consumed 178 litres of milk in 1995, i.e. three times more than the inhabitants of the BLEU. The Greeks and French are the largest consumers of cheese, using five times more than the Irish.

### Definition

**Per capita consumption:** ratio between gross human consumption and the population.

## Crop products consumption

Cereals		Potatoes		Sugar		Wine		Beer	
1980	1995	1980	1995	1980	1995	1980	1995	1980	1994
kg per capita									

BLEU	70.0	73.2	96.0	95.1	31.7	42.2	...	...	135.3	105.6
Belgium	...	...	...	...	...	...	19.0	19.7	...	...
Denmark	63.1	80.9	68.4	56.9	44.9	43.9	12.6	22.4	121.6	126.7
Germany	68.2	72.3	86.0	72.8	36.9	35.1	25.5	22.3	145.9	139.6
Greece	109.4	115.4	70.4	102.9	29.7	29.8	43.9	22.5	...	42.0
Spain	75.0	72.1	111.0	86.9	32.0	29.7	...	40.7	...	66.5
France	73.9	76.4	76.7	57.4	37.3	33.6	96.0	61.6	...	39.3
Ireland	89.3	87.2	141.5	169.6	43.7	39.3	3.2	5.2	...	112.6
Italy	132.2	121.1	39.4	39.4	29.9	27.0	87.5	59.6	...	26.2
Luxembourg	...	...	...	...	...	...	47.2	56.8	...	...
Netherlands	64.4	57.3	83.4	89.2	41.3	35.9	11.9	12.9	86.3	86.0
Austria	71.0	66.2	60.0	56.7 <sup>2</sup>	37.0	40.9	35.1	31.9	105.4 <sup>2</sup>	116.6
Portugal	117.0	83.6	89.0	137.2	30.0	28.2	...	58.0	...	62.3
Finland	72.0	68.7	82.0	58.1	38.0	32.4	...	5.5	...	82.9
Sweden	...	...	80.0	59.5	35.0	40.1	9.5	12.7	47.1 <sup>2</sup>	67.3
United Kingdom	68.7	81.6	98.9	104.6	42.4	37.3	7.4	12.3	118.3	102.4
EU-15	...	...	...	...	...	33.7	...	...	...	...

1. Flour equivalent.

2. National data.

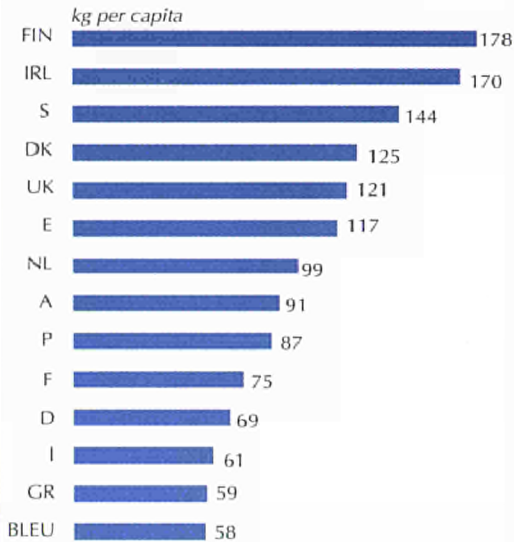
Sources : Eurostat - Balance sheets, and CBMC for beer



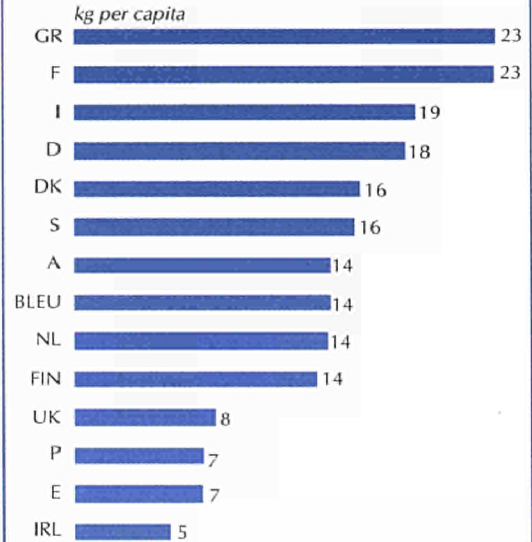
## FOOD CONSUMPTION

**Britons Irish and Scandinavians drink milk, Greeks and French eat cheese**

Milk consumption in 1995

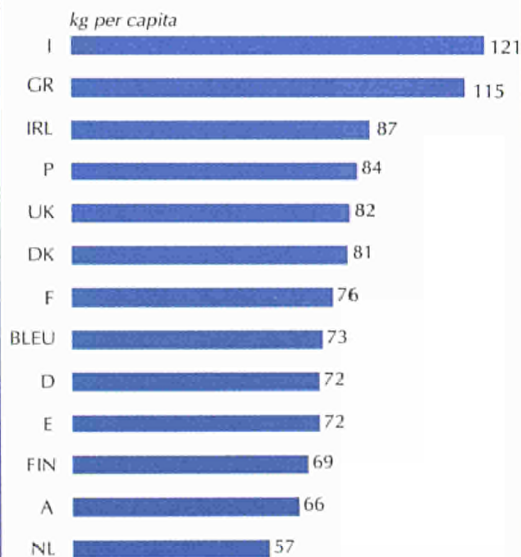


Cheese consumption in 1995

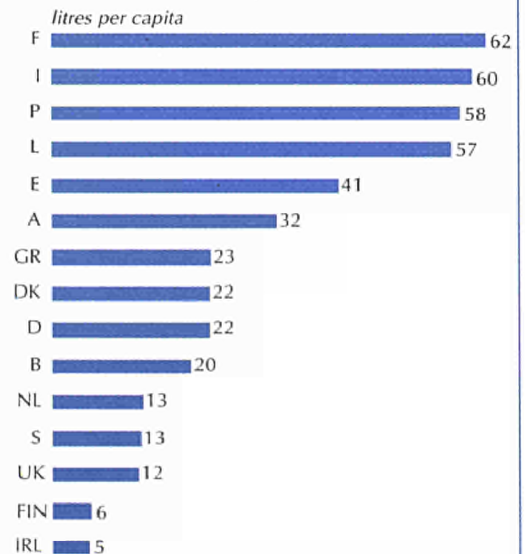


**The Italians and Greeks are the Union's leading cereal consumers**

Cereals consumption in 1995



Wine consumption in 1995







## THE EUROPEAN UNION AND THE WORLD

In 1996, almost 20 % of world exports originated from the United States, not counting intra-Community trade, and the US is still the leading world exporter of food products. They are ahead of the European Union, whose exports to non-member countries represent 17 % of world exports. With exports rising fast, Australia is well ahead of Canada and China, whose food exports are marking time. Although its imports from non-member countries levelled off in 1996, the European Union is still the leading importer of food products, ahead of Japan, whose imports are more or less steady. The United States, which is showing a rapid import growth, comes third in the importers' table, ahead of the Russian Federation.

Among the major economic zones that have been formed in recent years, the European Union has a predominant place when it comes to food trade.

Its global trade, both extra- and intra-Community, represented more than 40 % of world trade in 1996. It was twice that of NAFTA, the planet's second major economic zone, in food trade.

The United States' food exports have scarcely altered in volume since 1980. The volume of their imports, on the other hand, has risen by on average 5.2 % per annum. After growing by 2.5 % per annum between 1980 and 1992, the European Union's exports, in volume terms, with the rest of the world have been dropping by 4.2 % per annum since the CAP reforms.

### Definition

**CCEE:** countries of Central and Eastern Europe, lying between the European Union and the CIS.

## World food trade :

### Main importers

1980	1990	1995	1996
<i>billions of dollars</i>			

<b>EU-15<sup>1</sup></b>	<b>49.4</b>	<b>53.2</b>	<b>64.8</b>	<b>64.0</b>
Japan	17.8	28.7	41.2	41.8
United States	18.2	27.1	33.8	37.9
Russia	...	...	12.8	11.0
Hong-Kong	3.2	6.8	10.6	10.9
South Korea	3.3	6.5	9.6	10.8
Canada	4.6	7.1	9.1	9.5
Brazil	...	2.3	5.9	6.3
<b>EU members<sup>2</sup></b>	<b>110.0</b>	<b>165.2</b>	<b>197.6</b>	<b>202.0</b>
Germany	28.0	38.8	42.8	44.8
France	14.9	22.6	28.8	27.6
U. Kingdom	16.3	23.0	24.3	26.7
Italy	14.9	23.7	23.6	25.6
Netherlands	11.6	18.0	21.5	20.7
BLEU	8.3	12.5	18.2	17.0
<b>World<sup>3</sup></b>	<b>256.0</b>	<b>353.0</b>	<b>460.0</b>	<b>476.0</b>

1. Imports from non-member countries.

2. Sum of total imports of Union Member States refigured for 15-member EU since 1980, thus including imports between Member States.

3. Total foreign trade between States.

### Main exporters

1980	1990	1995	1996
<i>billions of dollars</i>			

United States	42.9	45.2	62.3	66.3
<b>EU-15<sup>1</sup></b>	<b>28.0</b>	<b>38.8</b>	<b>54.5</b>	<b>56.0</b>
Australia	9.2	11.7	12.7	16.1
Canada	7.1	9.2	12.8	14.7
China	...	10.2	14.3	14.3
Brazil	9.3	8.8	13.4	14.3
Argentina	5.5	7.0	10.1	9.8
Thailand	3.3	5.4	9.0	9.5
Malaysia	...	4.4	8.2	7.8
<b>EU members<sup>2</sup></b>	<b>82.0</b>	<b>148.5</b>	<b>192.2</b>	<b>199.0</b>
France	18.5	33.4	40.7	40.1
Netherlands	16.1	30.9	36.9	37.3
Germany	11.2	20.4	24.7	26.5
BLEU	6.5	12.6	19.4	19.0
U. Kingdom	8.2	12.8	14.6	15.4
<b>World<sup>3</sup></b>	<b>248.0</b>	<b>342.0</b>	<b>442.0</b>	<b>464.0</b>

1. Exports to non-member countries.

2. Sum of total exports of Union Member States refigured for 15-member EU since 1980, thus including exports between Member States.

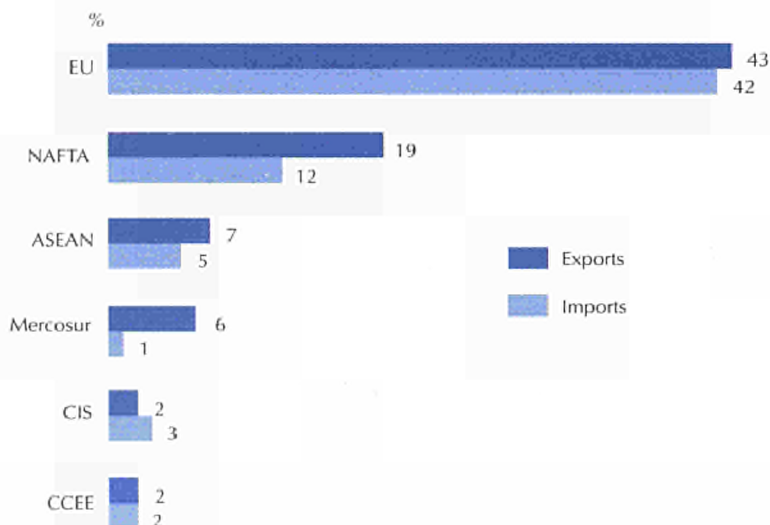
3. Total foreign trade between States.

Sources : FAO, Eurostat



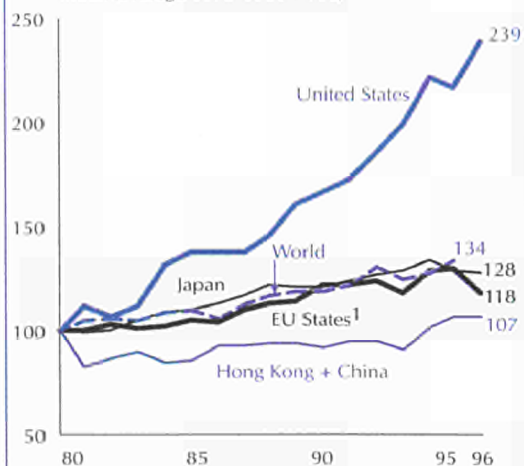
## THE EUROPEAN UNION AND THE WORLD

Share of major economic zones in world food trade in 1996



Food imports by volume

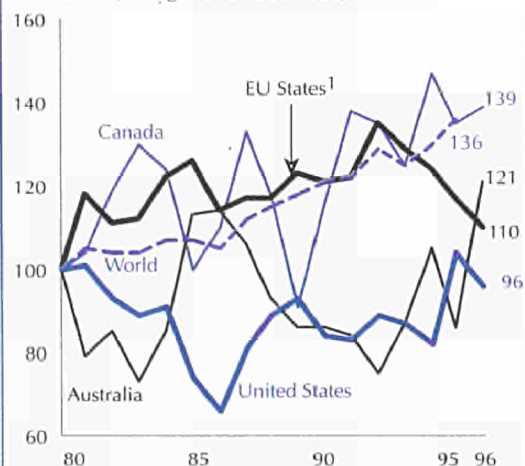
index (average 1979-1981 = 100)



1. Extra-EU imports (EU-12 from 1985 to 1994, EU-15 since).

Food exports by volume

index (average 1979-1981 = 100)



1. Extra-EU exports (EU-12 from 1985 to 1994, EU-15 since).



## TRADE WITH NON-MEMBER COUNTRIES

The Union's food trade with the rest of the world, which is usually in the red, showed a shortfall of 6 billion ecus in 1997. Trade with the American continent lays at the root of this deficit. The European Union in fact chalked up its greatest deficits with Brazil, totalling 5.3 billion ecus, and Argentina, with 2.7 billion ecus, both major suppliers of seeds and soya oilcakes. With the United States, at once the Union's best client and main supplier, the deficit rose to 1.3 billion ecus in 1997. On the other hand, the EU's food trade was in the black with Russia to the tune of 5 billion ecus, and with Japan, with a 3.4 billion surplus.

In 1997, the Union's exports to non-member countries rose to 52 billion ecus, and imports totalled 58 billion. The European Union exports mainly processed farm products such as dairy products and, above all, alcoholic and non alco-

holic drinks; it imports mainly unprocessed farm products like fruit, coffee and oleaginous items. Although non-member countries only account for 30% of the Union's total extra- and intra-community trade, they are still a major outlet. These markets absorb 60% of flour-milling exports and 46% of alcoholic and non alcoholic drinks. On top of this, non-member countries represent a major source of supply for Member States for oleaginous products, fish, fruit and, needless to add, coffee, tea and spices.

While the deficits of principal unprocessed farm products imported by the Union widened between 1990 and 1997, the surpluses they chalked up for processed products developed fast. This applied more specifically to alcoholic and non alcoholic drinks, and food preparations. In all, the European Union's food deficit was halved between 1990 and 1997.

### Food trade in 1997 :

#### main EU clients

EU exports	Share of total non-memb. countries	EU balance
M. of ecus	%	M. of ecus

United States	7 125	13.7	- 1 256
Russia	5 606	10.8	5 038
Japan	3 552	6.8	3 431
Switzerland	3 044	5.9	2 002
Poland	1 563	3.0	485
Saudi Arabia	1 225	2.4	1 217
Hong Kong	1 145	2.2	1 080
Norway	1 142	2.2	- 816
Canada	1 054	2.0	- 339
Algeria	955	1.8	928
<b>Total non-memb. countries</b>	<b>51 960</b>	<b>100.0</b>	<b>- 5 963</b>

#### main EU suppliers

EU exports	Share of total non-memb. countries	EU balance
M. of ecus	%	M. of ecus

United States	8 381	14.5	- 1 256
Brazil	5 977	10.3	- 5 343
Argentina	2 900	5.0	- 2 676
Norway	1 958	3.4	- 816
Turkey	1 900	3.3	- 1 224
Colombia	1 574	2.7	- 1 479
Indonesia	1 456	2.5	- 1 276
New Zealand	1 433	2.5	1 333
Canada	1 393	2.4	- 339
Ivory Coast	1 390	2.4	- 1 141
<b>Total non-memb. countries</b>	<b>57 923</b>	<b>100.0</b>	<b>- 5 963</b>

Source : Eurostat - Foreign trade



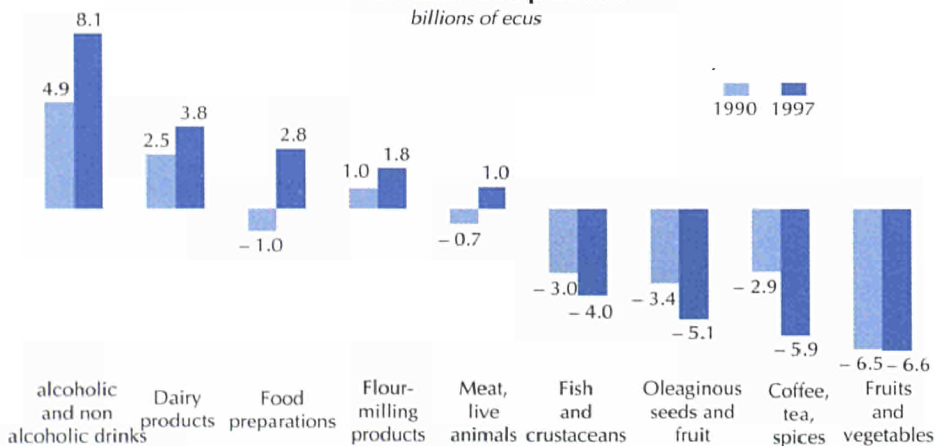


## TRADE WITH NON-MEMBER COUNTRIES

## Structure of EU food trade with non-member countries in 1997

	Balance	Exports		Imports	
		to non-member countries	share in EU total	from non-member countries	share in EU total
	<i>billions of ecus</i>		%	<i>billions of ecus</i>	%
Alcohol. and non alcohol. drinks	8 097	10 094	46	1 998	14
Dairy products	3 772	4 941	26	1 168	8
Cereal based prep.	2 633	3 108	33	475	7
Misc. food prep.	2 006	2 850	36	843	14
Flour-milling products	1 835	1 919	60	84	6
Meat	952	3 826	20	2 874	17
Sugar and sweets	807	2 286	39	1 479	30
Fats and oils	542	2 881	37	2 339	32
Cereals	401	2 106	27	1 705	22
Plants and flowers	205	1 134	17	930	18
Cocoa and its preparations	157	2 020	32	1 863	30
Tobacco	88	2 313	32	2 225	32
Live animals	70	706	18	637	17
Rubber, resins	27	378	51	351	41
Misc. plant products	- 108	13	24	120	79
Misc. animal products	- 478	415	35	892	54
Vegetables	- 876	1 301	15	2 177	22
Veg. and fruit-based prep.	- 941	1 888	23	2 829	31
Meat and fish prep.	- 1 098	1 208	23	2 306	41
Animal feed	- 3 342	1 740	24	5 081	50
Fish and crustaceans	- 4 004	1 440	19	5 444	49
Oleaginous fruit and seeds	- 5 076	774	24	5 850	72
Fruit	- 5 734	1 670	16	7 405	45
Coffee, tea, spices	- 5 898	949	37	6 848	81
<b>Food total</b>	<b>- 5 963</b>	<b>51 960</b>	<b>28</b>	<b>57 923</b>	<b>32</b>

Development of trade balance with non-member countries  
for main food products  
*billions of ecus*





## TRADE BETWEEN MEMBER STATES

Most of the European Union's food trade is conducted between the Member States. In 1997, almost 70% of imports and 72% of the Union's food exports followed this pattern. After rising briskly until 1990, the share of intra-Community trade has since remained at a steady 70%.

While the BLEU and Ireland focus their trade in particular on the European Union, the United Kingdom is the country most oriented towards non-member country trade. Finland exports more than one-third of its food products to Russia.

Germany absorbs 20 % of intra-Community imports. This market is the main outlet for the Union's food products, ahead of France and the United Kingdom. The Netherlands supply 23 % of intra-Community exports. They are the Union's number one suppliers ahead of France.

Processed products account for an ever growing share of the food trade between Member States. The growth in the trade of food preparations such as canned food and prepared dishes, dairy products and alcoholic and non alcoholic drinks is strong. On the other hand, the drop in prices for

unprocessed farm products, such as cereals and oleaginous items, is having an effect on trade in terms of value, and trade has accordingly grown little in recent years, apart from fruit and vegetables.

Food preparations represent 20 % of intra-Community food trade, fruit, vegetables and flowers 17 %, and animals and meat 13 %. Alone, they account for half the Union's food trade. Next come dairy products (11 % of trade) and alcoholic and non alcoholic drinks (9 %).

The Netherlands are showing a growing surplus in their food trade with other Union countries. This surplus, the highest among the EU, totalled 17 billion ecus in 1997. It was way ahead of the French surplus, which has risen little since the early 1990s. The Spanish surplus, which has risen threefold since 1990, caught up with the Danish surplus in 1997, and is fast catching up with the French surplus. Germany's food trade with the other Union members was in the red in 1997, to the tune of 10.2 billion ecus.

### Food trade in 1997

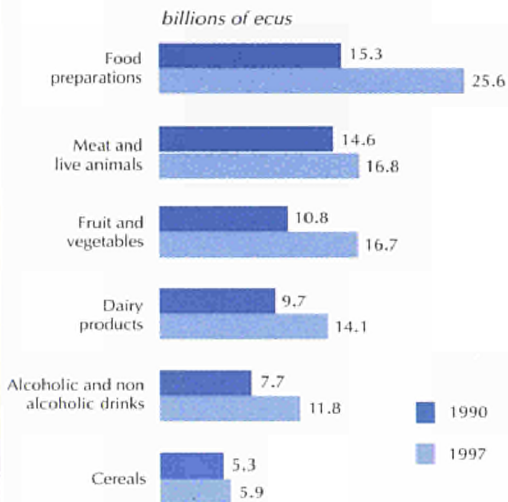
	Exports			Imports		
	Intra EU	Extra EU	Intra/total EU	Intra EU	Extra EU	Intra/total EU
	millions of ecus		%	millions of ecus		%
BLEU	13 828	2 802	83	11 565	4 097	74
Denmark	7 313	3 197	70	3 206	1 594	67
Germany	14 945	8 152	65	25 156	12 323	67
Greece	1 506	1 010	60	2 701	799	77
Spain	11 035	3 305	77	6 917	5 682	55
France	24 938	10 145	71	18 580	6 276	75
Ireland	4 159	1 497	74	2 366	408	85
Italy	9 273	5 170	64	15 224	5 925	72
Netherlands	30 062	7 359	80	13 083	7 767	63
Austria	1 642	856	66	3 358	667	83
Portugal	1 050	462	69	2 483	1 228	67
Finland	345	667	34	1 363	558	71
Sweden	1 148	669	63	2 811	1 055	73
United Kingdom	9 613	6 670	59	17 026	9 546	64
<b>Total EU-15</b>	<b>130 855</b>	<b>51 961</b>	<b>72</b>	<b>125 839</b>	<b>57 925</b>	<b>69</b>

Source : Eurostat

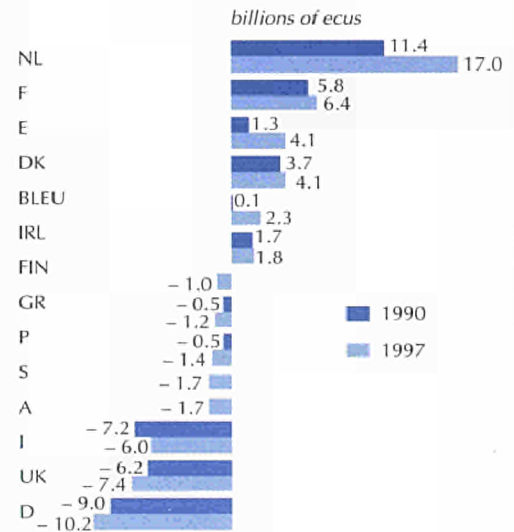


## TRADE BETWEEN MEMBER STATES

## Development of intra-Community imports for main products

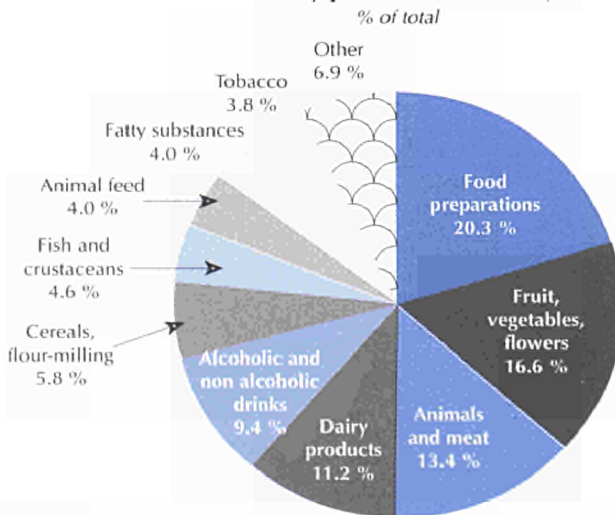


## Development of intra-Community food balances



Source : Eurostat

## Intra-Community imports by product in 1997



Sources : Eurostat and SCEES





# Countries



## LIMITED EMPLOYMENT IN AGRICULTURE

In 1995, Belgian agriculture employed just 2.5 % of the working population. So along with the United Kingdom, Belgium is the Union country where this figure is at its lowest. There are 71,000 Belgian farms, with an average area of 19 hectares. Every other farm covers less than 10 hectares. Belgian farms are usually family concerns : salaried jobs account for just 7 % of permanent farm employment. Belgian farming is also characterized by a far-reaching contrast between Flanders and the Walloon region. Flemish farmers handle 95 % of national pork production, as well as the bulk of Belgian horticulture and vegetable production. In the Walloon region, there is substantial cattle rearing.

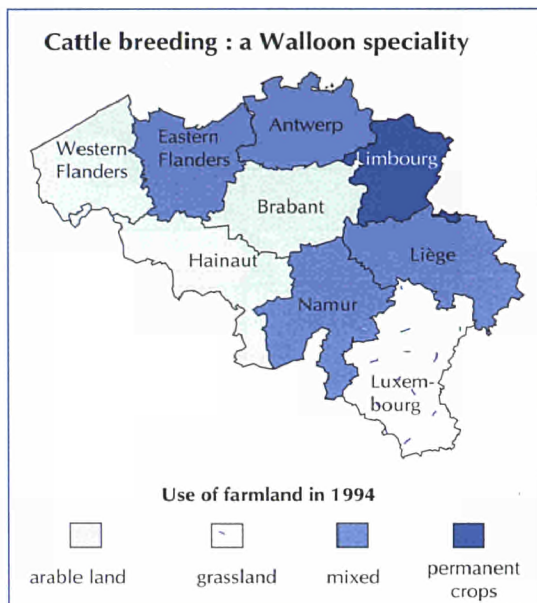
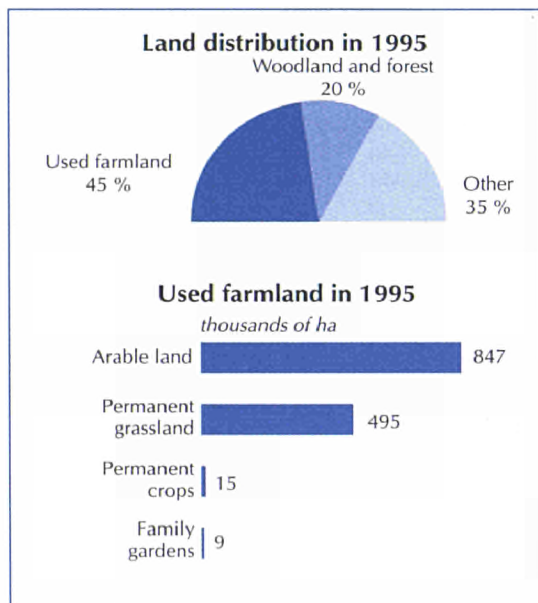
In 1996, animal production represented almost two-thirds of Belgian farm production. The major sectors were the production of pork and beef, with livestock herds of 7 and 3 million head respectively, followed by milk production. But if pig numbers are still on the rise, the cattle head has stabilized. The production of poultry is slight when compared with pork and beef. The main

plant crops are fresh vegetables, sugar beet and fresh fruit.

The external food trade of the Belgium-Luxembourg Economic Union (BLEU) showed a surplus of 400 million ecus in 1995. It came from Community trade, which represented three-quarters of imports and 84 % of exports for the BLEU. Non-Community trade, on the other hand, was in the red, particularly because of soya imports coming from the United States. France and the Netherlands are the BLEU's two main partners. France and the BLEU trade mainly French dairy products, wine and cereals, and Belgian meat. Trade with the Netherlands has mainly to do with dairy products. Overall, BLEU trade is in surplus for animal products and in deficit for main crop products and livestock feed. Unlike the food trade, the timber trade showed a deficit of 1 billion ecus in 1995. This comes essentially from paper and cardboard, which Belgium purchases largely from Germany, Finland, France and the Netherlands.



## Land use



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>85</b>	<b>76</b>	<b>71</b>
Proportion of less than 10 ha (%)	52	50	48
from 10 to 20 ha (%)	20	19	18
from 20 to 50 ha (%)	22	24	26
50 ha or more (%)	6	7	8
<b>Average area (hectare)</b>	<b>16</b>	<b>18</b>	<b>19</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>3.3</b>	<b>2.6</b>	<b>2.7</b>
<b>Permanent farm employees ('000)</b>	<b>141</b>	<b>132</b>	<b>122</b>
incl. family workers	134	123	113
salaried employees	7	9	9
<b>Head of holding ('000)</b>	<b>85</b>	<b>75</b>	<b>70</b>
Proportion of less than 35 years (%)	12	12	16
35-55 years (%)	38	39	42
55-65 years (%)	30	28	25
65 or older (%)	20	21	17

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Fresh vegetables	37	50	...	733	1 136	1 292	441	824	859
tomatoes	1	1	1	93	268	286	70	187	233
Sugar beet	117	108	98	5 876	6 418	6 075	200	311	327
Fresh fruit	...	...	...	445	340	498	122	244	306
Cereals	391	335	295	1 894	1 987	2 534	237	287	268
Flowers and ornam. plants	1	2	1	...	...	...	141	270	224

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Pigs	5 011	6 426	7 117	666	742	1 056	925	1 160	1 725
Cattle	2 897	3 146	3 071	301	322	387	840	1 239	895
Poultry	24 391	26 900	33 030 <sup>1</sup>	113	167	297	126	200	335

	Livestock ( <sup>'000</sup> head)			Milk coll., eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	977	831	650	2 986	2 976	3 022	686	915	935
Laying hens	12 559	10 792	12 300	199 <sup>2</sup>	186 <sup>2</sup>	24 <sup>2</sup>	178	175	250

1. 1995 data. 2. BLEU data.

Sources : Eurostat - Newcronos and Eurofarm for poultry

## BLEU food trade in 1995

millions of ecus

Imports		Exports	
All	14 516	All	14 933
Of which EU	10 834	Of which EU	12 581

France	4 023	France	3 785
Netherlands	3 537	Netherlands	3 258
Germany	1 471	Germany	2 969
United Kingdom	595	United Kingdom	986
United States	483	Italy	707

Dairy products	2 157	Dairy products	1 886
Fruit	1 538	Meat	1 820
Cereals	1 153	Fruit	1 333
Beverages	1 133	Vegetables	925
Animal feed	797	Vegetable prep.	855

## BLEU timber trade in 1995

millions of ecus

Imports		Exports	
All	5 050	All	4 028
Of which EU	3 920	Of which EU	3 653

Germany	955	Netherlands	1 161
France	771	France	1 047
Netherlands	767	Germany	743
Finland	641	United Kingdom	269
Sweden	260	Italy	242

Paper-cardboard	3 182	Paper-cardboard	2 597
Mechanical work	760	Mechanical work	862
Sawnwood	522	Sawnwood	214
Pulp	386	Pulp	209
Rough lumber	200	Rough lumber	145

Source : Eurostat



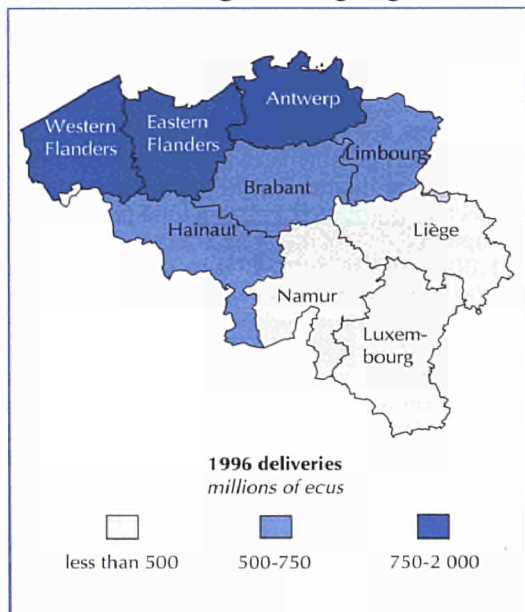
## A majority of animal products

1996 deliveries

Animal products %	Pork millions of ecus	Dairy products millions of ecus
----------------------	--------------------------	------------------------------------

Belgium	63	1 757	935
Luxembourg	83	4	47
Western Flanders	73	869	162
Antwerp	68	264	140
Liège	64	21	152
Eastern Flanders	62	355	148
Hainaut	54	29	115
Namur	53	7	55
Limbourg	52	148	65
Brabant flemish	40	52	33
Brabant wallon	35	8	17

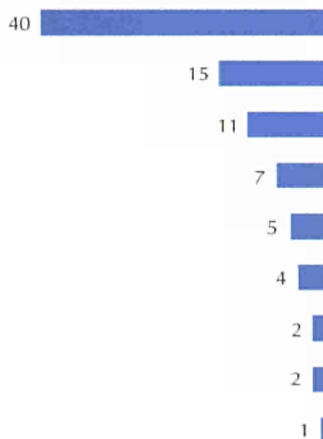
## Flanders : the leading farming regions



## Main food processing sectors in 1995<sup>1</sup>

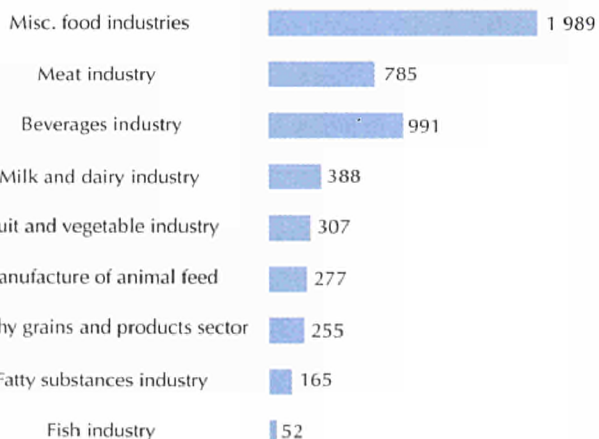
### Number of employees

thousand



### Value added at factor cost

millions of ecus



1. Companies with 20 employees or more.





## THE LARGEST FISHERY POWER IN THE UNION

**L**and used for farming, which takes up almost two-thirds of Danish territory, is proportionately among the most sizable in the Union. But it is shrinking, as in the other countries, and has been losing 0.4 % per annum over the past 15 years. In the main the land is arable, accounting for 92 % of farmland. In 1995, the Danish farming sector contributed 2.5 % of total production. It employed 4 % of the working population, i.e. 141,000 permanent workers distributed on 69,000 farms with an average size of 40 hectares. Danish agriculture includes few small farms. Only one in five covers less than 10 hectares.

Danish farming, which is essentially intensive, is focused on animal production. In 1996, this accounted for 71 % of final farm production. Pig production, with a herd totalling 11 million head in 1996, is the number one agricultural activity. Cattle rearing, with 2 million heads, is concentrated more on milk than meat production. Denmark also produces furs, with deliveries representing 6 % of animal production. Crop production, mainly cereals, is largely used for animal feed. Barley, the major crop until the 1992 CAP reform, has now been overtaken by wheat.

With 400-500,000 tonnes depending on the year, the rye harvest represents one-seventh of Union production. Flowers and ornamental plants are the major non-cereal item in value. Danish fishing is the largest in Europe of the Fifteen, with a production of 2 million tonnes in 1995, made up mainly of herring, cod, mackerel and mussels. One of its specialities is "flour-milling" fishing, earmarked for the manufacture of fish meal.

The Danish food trade is not limited to the European Union. One-third of exports and slightly less than half of its imports are with non-Community partners. Since 1991, Japan has thus been Denmark's third largest client, ahead of Italy and France. Norway is Denmark's second supplier. The Danish trade balance had a 5 billion ecus surplus in 1995. The main products exported are pork, fish and cheese. Denmark buys fish, animal feed and beverages. The timber trade, on the other hand, showed a 1 billion ecu deficit in 1995. This results from the paper and cardboard which Denmark buys from its German, Swedish and Finnish neighbours. Purchases from Canada, another major world producer, are slight.



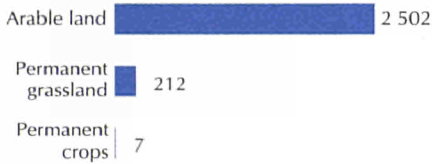
## Land use

## Land distribution in 1995

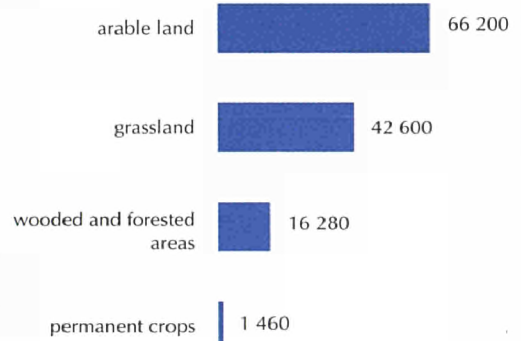


## Used farmland in 1995

thousands of ha



## Number of farms in 1995 with...



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>81</b>	<b>74</b>	<b>69</b>
Proportion of less than 10 ha (%)	18	19	19
from 10 to 20 ha (%)	25	23	22
from 20 to 50 ha (%)	38	36	34
50 ha or more (%)	19	22	25
<b>Average area (hectare)</b>	<b>34</b>	<b>37</b>	<b>40</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>5.6</b>	<b>5.1</b>	<b>4.4</b>
<b>Permanent farm employees ('000)</b>	<b>139</b>	<b>142</b>	<b>141</b>
incl. family workers	119	115	103
salaried employees	20	28	38
<b>Head of holding ('000)</b>	<b>81</b>	<b>73</b>	<b>68</b>
Proportion of less than 35 years (%)	11	9	9
35-55 years (%)	43	44	44
55-65 years (%)	26	25	24
65 or older (%)	20	22	23

Source : Eurostat



## Main crop products ...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals	1 816	1 582	1 545	7 070	9 607	9 217	632	1 074	853
wheat	139	535	674	652	3 953	4 757	104	495	455
barley	1 577	910	764	6 044	4 987	3 953	486	504	348
Flowers and ornam. plants	1	8	...	...	...	...	156	382	422
Sugar beet	77	66	70	3 010	3 533	3 064	107	143	149
Fresh vegetables	11	9	...	215	31	...	67	118	134

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production (thousands of ect)			Deliveries (million ecus)		
Pigs	9 696	9 282	11 079	979	1 208	1 489	1 308	1 902	2 417
Cattle	2 921	2 241	2 052	246	201	181	549	590	433
Fur animals	...	...	...	...	...	...	122	191	285
Poultry	16 385	16 340	19 550 <sup>1</sup>	97	132	182	84	123	161

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	1 066	769	697	4 917	4 542	4 495	1 115	1 604	1 538

1. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm for poultry

## Food trade in 1995

millions of ecus

Imports		Exports	
All	4 454	All	9 773
Of which EU	2 459	Of which EU	6 546

Germany	731	Germany	2 174
Norway	540	United Kingdom	1 026
Netherlands	461	Japan	758
France	301	France	755
Sweden	212	Italy	703

Fish	961	Meat	2 662
Animal feed	504	Fish	1 438
Beverages	330	Dairy products	1 232
Meat	289	Meat-fish prep.	875
Meat-fish prep.	245	Cereal prep.	440

## Timber trade in 1995

millions of ecus

Imports		Exports	
All	2 128	All	1 161
Of which EU	1 776	Of which EU	924

Sweden	769	Germany	430
Finland	396	Sweden	152
Germany	363	United Kingdom	80
Norway	126	Norway	69
Netherlands	80	Netherlands	64

Paper-cardboard	1 228	Mechanical work	557
Sawnwood	438	Paper-cardboard	445
Mechanical work	340	Pulp	65
Rough lumber	70	Sawnwood	63
Pulp	52	Rough lumber	31

Source : Eurostat



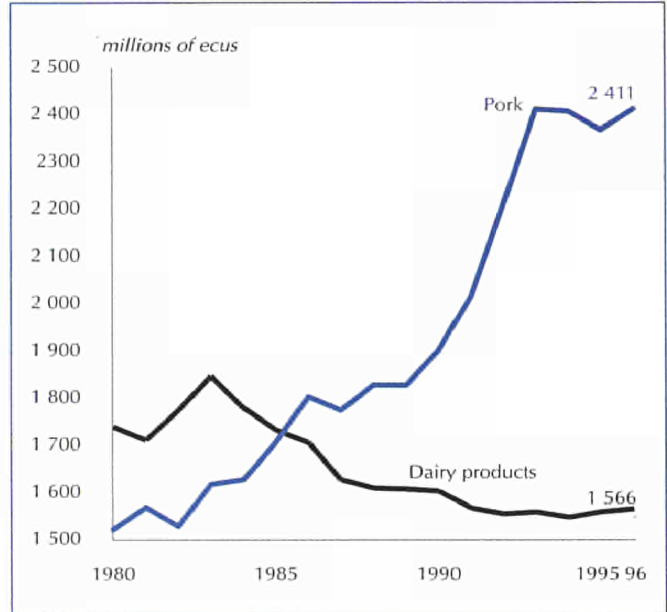


## Two-thirds animal products

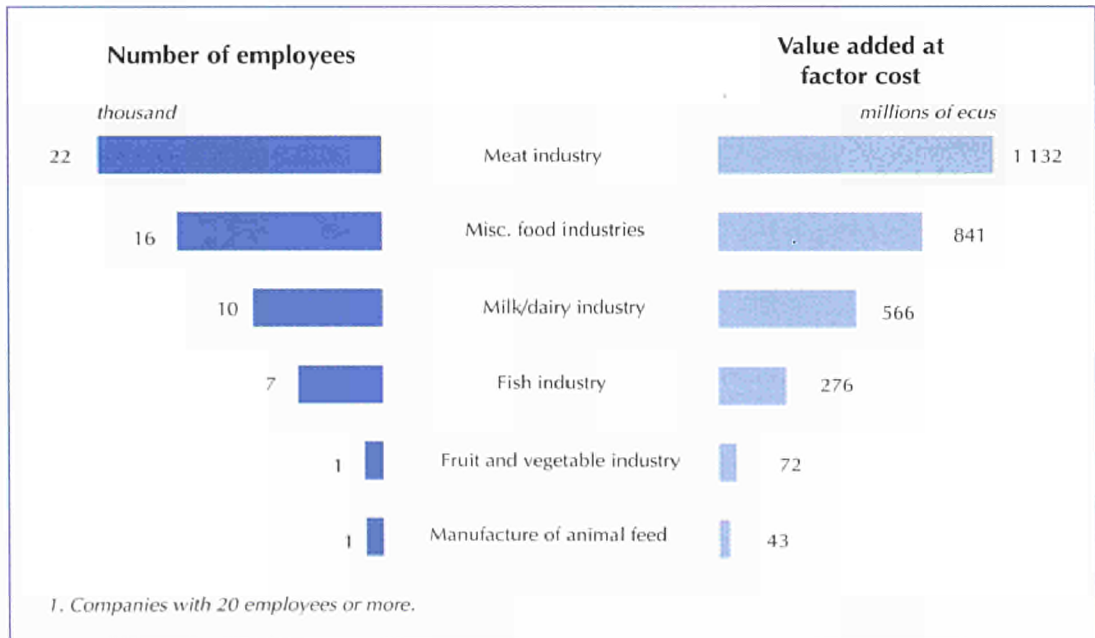
1996 deliveries

	%
<b>Animal products</b>	<b>71</b>
pork	35
milk and dairy prod.	22
cattle	6
fur animals	4
poultry	2
<b>Crop products</b>	<b>29</b>
wheat	7
flowers and ornamental plants	6
barley	5
sugar beet	2
fresh vegetables	2
potatoes	2

## Contrasting evolution of deliveries for two major Danish products



## Main food processing sectors in 1995<sup>1</sup>



Source : Eurostat



## THE EAST OF THE COUNTRY IS ADAPTING

In 1995, as a result of reunification, Germany became the Union's second largest agricultural force. Its farming work force, in 1995, totalled almost 1.3 million people, but only one-third were full-time. Yet it has suffered a marked drop-off since 1991, mainly in the new Länder, where the number of farm-workers was reduced four-fold between 1989 and 1994. In 1995, there were some 570,000 farms in all of Germany, differing greatly from region to region. They are numerous and quite small in the west, with an average area of 22 hectares, and covering 180 hectares on average, usually in cooperative form, in the east. Taken together, Germany's farms cover 17 million hectares, i.e. almost half the country, usually in the form of arable land. But Bavarian farms, and those in Baden-Württemberg and Rhineland-Palatinate, have plenty of grassland. Overall, German agriculture contributed 0.8 % to the gross domestic product in 1996.

The restructuring of the new Länder entailed the slaughter of a large percentage of the livestock in former East Germany. The number of cattle there was reduced by 50 %, and pigs and sheep by more than 70 %. But reunification also helped to increase by 50 % the wheat yields in the eastern Länder. In 1996, animal products were Germany's major farm product with 60 % of the

total. But figures here have been dropping for several years. Milk production is the leading item in German animal production, way ahead of pork and beef production. The German pig herd is the largest in Europe. Germany is also the leading community producer of rye, hops, oats and barley.

The German food industry is the country's number three industrial sector, with 10 % of total industrial production. The major sectors are the bread and pastry/confectionery industries, and beverages. The food industry has become highly concentrated in recent years, shedding 7 % of its companies and 9 % of its employees between 1992 and 1995.

Germany's external food trade is running a deficit, structurally speaking. This deficit totalled 15 billion ecus in 1995. Because Germany, which is the world's fourth food exporter, is also the leading importer. It buys fruit and vegetables, and meat, and exports mainly dairy products and beverages. Half of its external deficit results from its trade with its two main partners, which are the Netherlands and France. Germany's external timber trade more or less breaks even, despite a marked deficit in pulp, with Canada, Sweden and Finland.

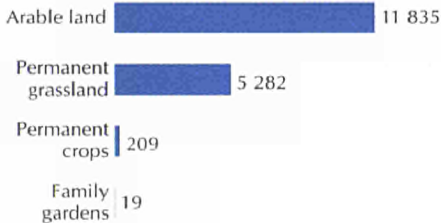
## Land use

## Land distribution in 1995

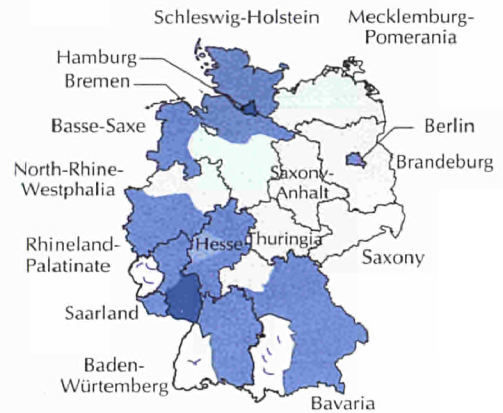


## Used farmland in 1995

thousands of ha



## Arable land in the East



## Use of farmland in 1995



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>654</b>	<b>606</b>	<b>567</b>
Proportion of less than 10 ha (%)	49	47	46
from 10 to 20 ha (%)	19	19	18
from 20 to 50 ha (%)	23	23	23
50 ha or more (%)	9	11	13
<b>Average area (hectare)</b>	<b>26</b>	<b>28</b>	<b>30</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>3.7</b>	<b>3.5</b>	<b>3.2</b>
<b>Permanent farm employees ('000)</b>	<b>1 776</b>	<b>1 478</b>	<b>1 325</b>
incl. family workers	1 372	1 269	1 147
salaried employees	404	209	178
<b>Head of holding ('000)</b>	<b>646</b>	<b>600</b>	<b>561</b>
Proportion of less than 35 years (%)	16	17	18
35-55 years ((%)	49	49	48
55-65 years (%)	28	27	27
65 or older (%)	7	7	7

Source : Eurostat





## Main crop products<sup>1...</sup>

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>000</sup> ha)			Production ( <sup>000</sup> tonnes)			Deliveries (million ecus)		
Cereals	5 212	4 471	6 707	23 087	25 883	42 136	2 187	2 367	3 543
wheat	1668	1 671	2 594	8 156	11 053	18 922	1 079	1 225	1 872
Fresh fruit	...	...	...	3 263	2 956	...	778	1 411	1 808
Flowers and ornam. plants	7	9	9	...	...	...	878	1 096	1 576
Sugar beet	395	406	515	19 122	23 310	26 064	849	1 132	1 334
Wine grapes <sup>2</sup>	95	101	102	649	1 150	1 133	524	1 000	1 286
Fresh vegetables	47	55	90	1 100	1 620	2 773	431	771	1 222

## ... and animal products

	Livestock ( <sup>000</sup> head)			Meat production ( <sup>000</sup> tec)			Deliveries (million ecus)		
Pigs	22 554	22 035	24 283	3 136	3 142	3 439	4 284	4 649	5 621
Cattle	15 069	14 542	15 760	1 575	1 675	1 570	3 867	4 392	3 696

	Livestock ( <sup>000</sup> head)			Milk coll., eggs produced ( <sup>000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	5 469	4 771	5 195	22 948	21 474	27 179	5 408	6 996	8 359
Laying hens	55 800	43 800	50 600	785	692	841	887	840	1 205

1. Federal Republic of Germany for 1980 and 1990 and reunified Germany for 1996.

2. Wine and must for deliveries.

Source : Eurostat - Newcronos

## Food trade in 1995

million ecus

Imports		Exports	
All	36 153	All	20 824
Of which EU	24 939	Of which EU	14 137

Netherlands	8 763	Netherlands	3 166
France	4 581	France	2 653
Italy	2 969	Italy	2 559
BLEU	2 411	BLEU	1 358
Denmark	1 829	United Kingdom	1 307

Fruit	4 296	Dairy products	3 797
Meat	3 721	Beverages	1 546
Dairy products	3 059	Fats, oils	1 488
Vegetables	2 936	Meat	1 348
Beverages	2 333	Cereals	1 194

Source : Eurostat

## Timber trade in 1995

million ecus

Imports		Exports	
All	14 589	All	12 326
Of which EU	9 728	Of which EU	8 404

Sweden	1 853	France	1 853
Finland	1 815	Netherlands	1 295
France	1 252	United Kingdom	1 048
Netherlands	1 099	Austria	986
Austria	936	BLEU	956

Paper-cardboard	7 215	Paper-cardboard	9 625
Mechanical work	3 132	Mechanical work	1 421
Pulp	2 693	Pulp	625
Sawnwood	1 271	Sawnwood	361
Rough lumber	279	Rough lumber	293



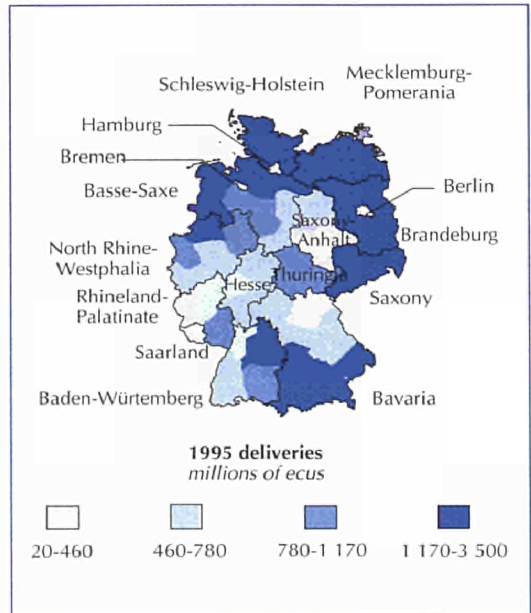
## A majority of animal products<sup>1</sup>

Animal products %  
Dairy products million ecus  
Pork million ecus

Germany	60	8 359	5 621
Bavaria	73	2 327	757
Basse-Saxe	68	1 642	1 484
Schleswig-Holstein	66	746	258
North Rhine-Westphalia	63	855	1 187
Brandenburg	62	356	150
Saarland	61	28	5
Thuringia	58	256	132
Hesse	58	313	196
Saxony	58	418	116
Mecklemburg-former Pomerania	55	361	109
Baden-Württemberg	54	732	434
Saxony-Anhalt	46	288	148
Bremen	41	7	1
Rhineland-Palatinate	29	253	86
Berlin	7	1	€
Hamburg	4	3	1

1. 1995 deliveries for the Länder and 1996 for Germany.

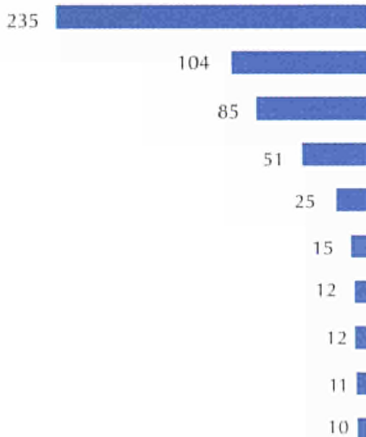
## Large farming regions throughout the country



## Main food processing sectors in 1995<sup>1</sup>

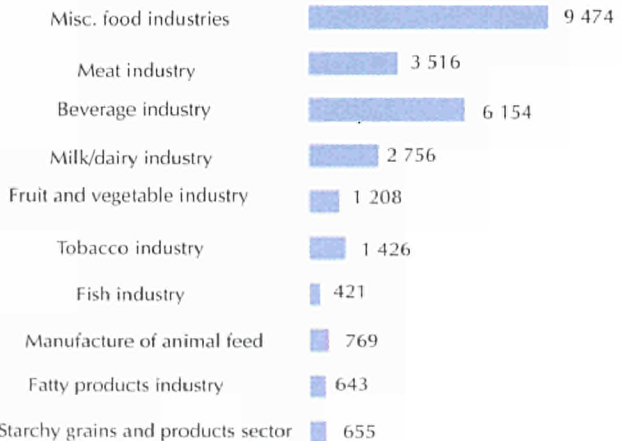
### Number of employees

thousand



### Value added at factor cost

millions of ecus



1. Companies with 20 employees or more.



## THE IMPORTANCE OF FARMING

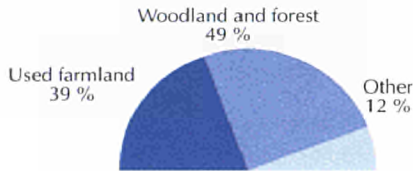
In a country that is essentially mountainous, Greece's cultivable land covers just 39 % of the total area. One-half of it is arable, one-third grassland, and one-fifth permanent crops. Irrigation is crucial to offset the effects of long, dry summers. Farming is nonetheless a major area of activity, as it is throughout the Mediterranean basin. It represented 6.7 % of the GDP in 1996, and employed 1.5 million permanent farm workers. Today, Greece has 800 000 farms. They are the smallest in the European Union, with an average area of 4 hectares. The tendency to merge farms, occurring in the rest of the Union, is slower in Greece. Greek farms hardly ever employ salaried persons, who represent less than 1 % of permanent farm workers. As a result of European funding, Greek farming has developed considerably since Greece joined the Community in 1981. Crop products accounted for almost three-quarters of farm production in 1996, and came for the most part from single-crop farms in the south of the country, or from mixed-crop farms in the centre and north. The main crops are olives, with Greece Europe's third

largest producer, fresh vegetables and fibre plants, with tobacco accounting for 40 % of Community production. Goats are the main livestock – Greece has half the Union's herd – and sheep, though to a lesser extent. With 550 000 head in 1996, including 185 000 dairy cows, cattle farming is a lesser activity. Trade having been stepped up between Greece and the other Union countries, the food trade balance went into deficit in 1985. In 1995, the deficit reached 770 million ecus. Greece is supplied primarily by the Netherlands, France and Germany, from which it buys meat, dairy products and cereals. It exports mainly to Italy and Germany, fruit and vegetables, processed and otherwise, tobacco and wine. Non-Community trade is limited and shows a surplus. It is conducted in the main with the United States, Russia and Albania. The trade balance for timber shows an even greater deficit than for food. Greece may have large forested areas, but they are not very productive. In addition, because of a poorly developed industry, Greece has to import the bulk of its paper and cardboard.



## Land use

## Land distribution in 1995

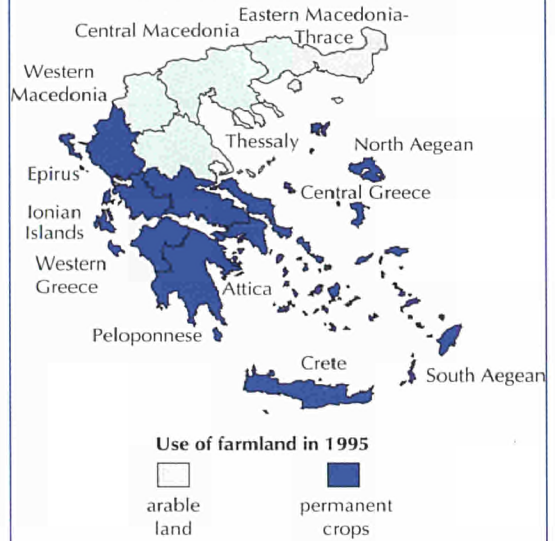
Used farmland in 1995<sup>1</sup>

thousands of ha



1. SCEES estimate.

## Arable land in the North



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>850</b>	<b>819</b>	<b>802</b>
Proportion of less than 10 ha (%)	91	91	90
from 10 to 20 ha (%)	7	7	7
from 20 to 50 ha (%)	2	2	3
50 ha or more (%)	8	8	8
<b>Average area (/hectare)</b>	<b>4</b>	<b>4</b>	<b>4</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>23.9</b>	<b>21.3</b>	<b>20.4</b>
<b>Permanent farm employees ('000)</b>	<b>1 543</b>	<b>1 774</b>	<b>1 567</b>
incl. family workers	1 538	1 767	1 557
salaried employees	6	6	9
<b>Head of holding ('000)</b>	<b>850</b>	<b>819</b>	<b>802</b>
Proportion of less than 35 years (%)	9	7	6
35-55 years (%)	37	36	35
55-65 years (%)	29	28	28
65 or older (%)	25	29	31

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Olive oil	509	571	601	1 549	803	2 250	479	585	1 202
Fresh vegetables	144	133	134	4 173	3 829	4 167	510	1 033	1 048
tomatoes	37	38	37	1 933	1 844	2 230	186	469	430
Fibre plants	142	...	...	117	...	...	198	602	927
Fresh fruit	...	...	...	2 512	3 040	3 154	509	595	741
Cereals (including rice)	1 606	1 470	1 301	5 336	4 581	4 409	698	700	556
Olives for eating	122	120	128	197	66	70	139	141	265

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Sheep and goats	12 803	16 068	14 912	...	129	127	474	572	588
Pigs	948	1 143	904	...	147	142	240	269	277
Poultry	31 561	33 840	27 090	120	160	176	144	219	258

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	376	242	185	...	561	608	442	845	854

1. 1995 data

Sources : Eurostat - Newcronos and Eurofarm for poultry

## Food trade in 1995

millions of ecus

Imports		Exports	
All	3 147	All	2 381
Of which EU	2 593	Of which EU	1 593

Netherlands	710	Italy	550
France	473	Germany	421
Germany	395	United Kingdom	175
Italy	269	Spain	153
United Kingdom	230	Netherlands	104

Meat	661	Vegetable prep.	474
Dairy products	461	Fats, oils	451
Cereals	225	Fruit	370
Beverages	197	Tobacco	303
Tobacco	188	Beverages	155

Source : Eurostat

## Timber trade in 1995

millions of ecus

Imports		Exports	
All	958	All	117
Of which EU	642	Of which EU	33

Italy	139	Italy	11
Germany	123	Germany	7
Finland	108	United Kingdom	6
Sweden	76	Netherlands	4
Russia	43	Russia	3

Paper-cardboard	589	Paper-cardboard	68
Sawnwood	117	Mechanical work	36
Mechanical work	120	Sawnwood	7
Pulp	96	Rough lumber	5
Rough lumber	35	Pulp	2



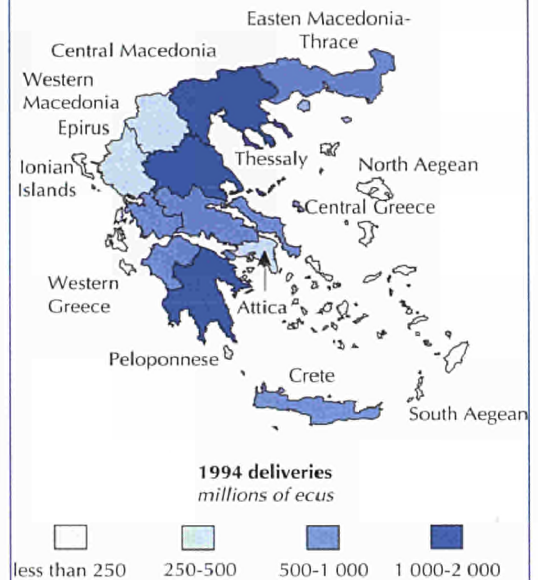
## Livestock predominates only in Epirus<sup>1</sup>

Crop products %	Olive oil millions of ecus	Fresh vegetables millions of ecus
71	1 202	1 049

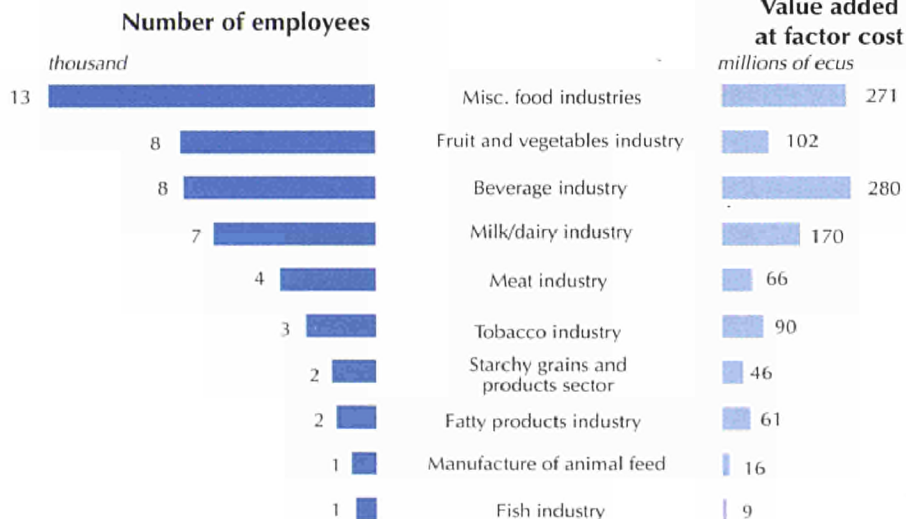
Greece	71	1 202	1 049
Eastern Macedonia-Thrace	76	5	61
Central Macedonia	74	25	246
Peloponnese	74	348	141
Ionian Islands	72	99	29
Crete	72	381	129
Thessaly	72	17	76
Western Greece	71	122	133
Central Greece	66	91	142
Western Macedonia	57	-	9
Attica	54	13	45
North Aegean	54	68	15
South Aegean	51	22	34
Epirus	37	16	29

1. 1991 deliveries for the regions and 1996 for Greece, 1990-1992 arithmetic mean for regional percentages.

## Major farming regions in the North



## Main food processing sectors in 1995<sup>1</sup>



1. Companies with 20 employees or more.





## THE UNION'S LEADING CITRUS PRODUCER

In terms of employment, Spanish agriculture is one of the largest sectors in the Union. In 1995, it numbered 2.5 million permanent farm workers. It is also one of the most elderly sectors, with 60 % of farm heads over the age of 55. Use of salaried employees is rare on farms, where they represent just 6 % of farm labour. Farms have an average area of 20 hectares, and seven out of ten have an area of less than 10 hectares. There are major differences between farms in Galicia, which cover 4 hectares on average, and those in Extremadura and Aragon, which cover more than 30 hectares. As in all the Mediterranean countries, Spanish farming gives great emphasis to permanent crops – vineyards and orchards – which represent 15 % of farmland. They are particularly well developed in the south.

In 1996, crop production accounted for 60 % of agricultural end production principally fresh vegetables, cereals, where barley is the main crop, fresh fruit and citrus, obtained as a result of high-yield irrigated crops. Spanish vineyards area is the largest in the world, but yields are low. One Community olive out of every three is Spanish. Olives are grown for both oil and the table. Livestock is occupying a more and more conspicuous place in Spanish farming. With a herd of 18 million head in 1996, almost one-third of which is in Catalonia, pig production is the number one animal sector. Sheep-farming, which is a traditional Spanish activity, still boasts 24 million head. Recent decades have seen a revival of

cattle farming, both as a result of herd development and genetic improvements. The growth of milk production, however, has been halted by the introduction of milk quotas. Spanish fisheries, with a production of 1.2 million tons in 1995, are the Union's second largest.

In Spain, the food industry contributes one-fifth of industrial production. It is a fragmented sector, where 97 % of firms have fewer than 20 employees. The largest companies are often owned by foreign capital.

Spain's external trade in food chalked up a deficit of 770 million ecus in 1995, about the total amount of its trade deficit with the United States. For Spain has long been a keen customer for American maize and soya. Its Community trade, on the other hand, is well balanced. Spain exports mainly fruit and vegetables, processed and otherwise, wine and olive oil. It imports the products of major crops such as cereals and oleaginous plants, and fish. France is Spain's leading supplier, ahead of the United States. France sells Spain cereals, dairy products, sugar and live animals. It is also France's major supplier, above all fruit and vegetables. In 1995, the external trade in timber showed a deficit higher than the food deficit. With a total debt of 1.4 billion ecus, this deficit derived from every aspect of the timber trade. But the largest item is accounted for by purchases of paper and cardboard, made primarily from Finland, France and Germany.

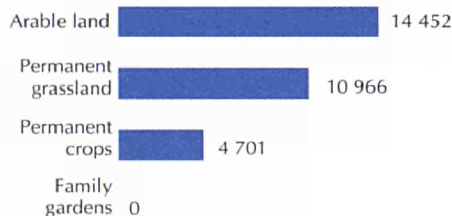
## Land use

Land distribution in 1995

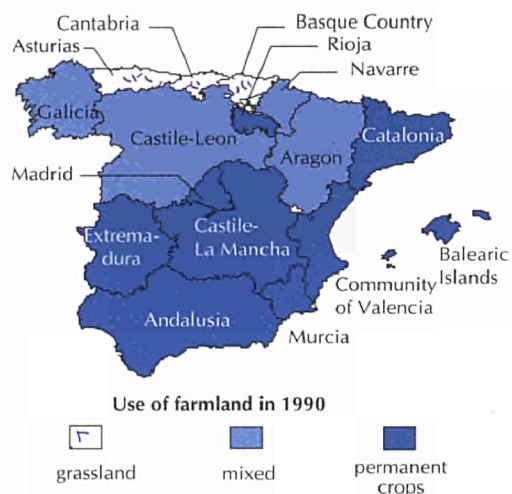


Used farmland in 1995

thousand of ha



Permanent crops in the South



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>1 594</b>	<b>1 384</b>	<b>1 265</b>
Proportion of less than 10 ha (%)	76	74	72
from 10 to 20 ha (%)	10	11	11
from 20 to 50 ha (%)	8	8	9
50 ha or more (%)	6	7	8
<b>Average area (hectare)</b>	<b>15</b>	<b>18</b>	<b>20</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>11.9</b>	<b>10.2</b>	<b>9.3</b>
<b>Permanent farm employees ('000)</b>	<b>2 839</b>	<b>2 571</b>	<b>2 543</b>
incl. family workers	2 707	2 430	2 385
salaried employees	131	141	158
<b>Head of holding ('000)</b>	<b>1 568</b>	<b>1 354</b>	<b>1 241</b>
Proportion of less than 35 years (%)	7	6	6
35-55 years (%)	37	36	34
55-65 years (%)	31	31	30
65 or older (%)	25	27	30

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Fresh vegetables	439	496	388	8 412	11 497	...	1 709	4 717	3 864
Cereals (including rice)	7 524	7 553	6 767	18 665	18 763	22 379	1 885	2 258	3 012
Fresh fruit	...	...	...	6 662	8 670	8 695	1 090	1 584	1 797
Citrus	220	265	276	2 962	4 831	4 225	565	1 177	1 655
Wine-grapes <sup>1</sup>	1 643	1 393	1 123	6 316	6 093	4 605	615	1 196	1 480
Olives for oil	1 962	1 927	2 131	2 097	3 153	4 317	539	1 135	1 119

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Pigs	11 263	15 949	18 572	...	1 763	2 324	1 420	2 696	3 610
Cattle	4 495	5 104	5 904	...	501	562	1 027	1 829	1 606
Poultry	...	117 500	109 310 <sup>2</sup>	...	834	954	898	1 077	1 332
Sheep and goats	16 157	27 548	26 671	...	222	241	742	1 260	1 167

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	1 852	1 575	1 279	...	4 502	5 547	1 368	2 294	2 083

1. Wine and must for delivery. 2. 1995 data.

Sources : Eurostat-Newcronos and Eurofarm for poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	11 845	All	11 075
Of which EU	6 531	Of which EU	7 871

France	2 217	France	1 935
United States	1 118	Germany	1 708
United Kingdom	1 032	Portugal	1 061
Netherlands	928	Italy	892
Germany	650	United Kingdom	849

Fish	2 096	Fruit	2 657
Cereals	1 161	Vegetables	1 510
Oleaginous	906	Beverages	1 079
Beverages	773	Vegetable prep.	919
Tobacco	708	Fats, oils	758

## Timber trade in 1995

million ecus

Imports		Exports	
All	3 511	All	2 156
Of which EU	2 700	Of which EU	1 506

France	649	France	414
Finland	475	Portugal	330
Portugal	418	Germany	211
Germany	358	United Kingdom	198
United States	294	Italy	172

Paper-cardboard	2 137	Paper-cardboard	1 201
Sawnwood	426	Mechanical work	476
Pulp	405	Pulp	376
Mechanical work	349	Rough lumber	78
Rough lumber	195	Sawnwood	25

Source : Eurostat



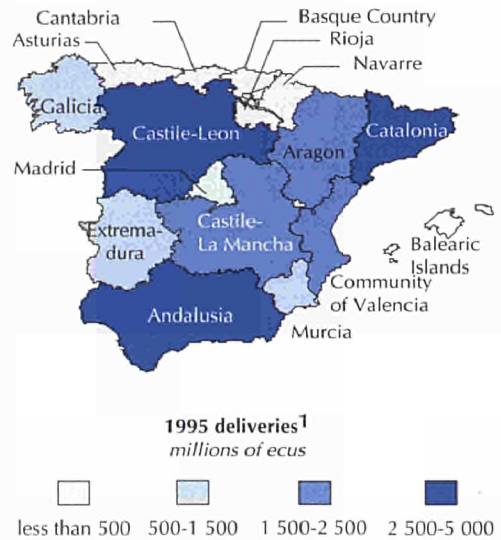
## The North is devoted mainly to livestock<sup>1</sup>

Crop products %	Fresh vegetables millions of ecus	Pork
-----------------	-----------------------------------	------

Spain	59	3 864	3 610
Andalusia	86	1 290	231
Community of Valencia	82	435	174
Canary Islands	79	225	12
Murcia	75	611	265
Rioja	70	118	27
Castile-La Mancha	66	377	103
Extremadura	60	180	197
Balearic Islands	54	72	24
Navarre	51	79	79
Aragon	51	77	420
Basque Country	49	125	15
Castile-Leon	46	137	458
Madrid	37	50	3
Catalonia	33	267	984
Galicia	26	111	212
Asturias	12	18	9
Cantabria	7	8	4

1. 1991 deliveries for the regions and 1996 for Spain.

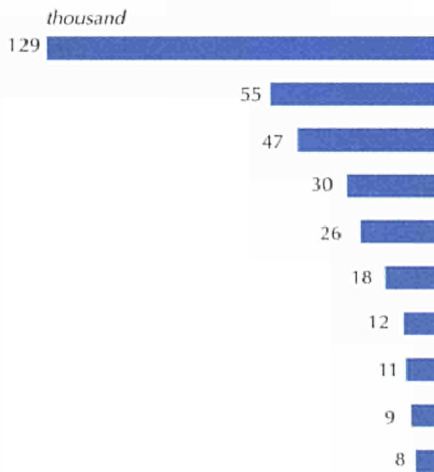
## Almost half the deliveries in just three regions



1. SCEES estimate.

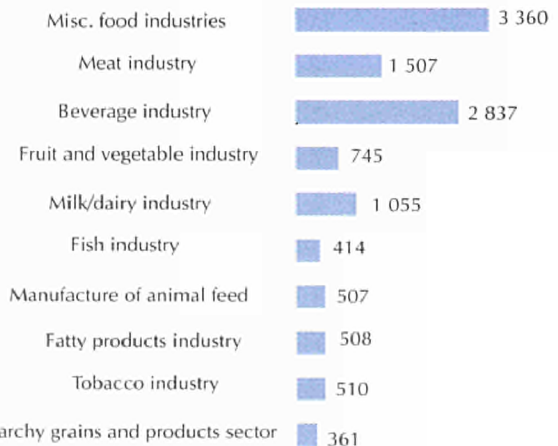
## Main food processing sectors in 1995<sup>1</sup>

### Number of employees



### Value added at factor cost

millions of ecus



1. Companies with 20 employees or more.



## THE UNION'S LEADING AGRICULTURAL POWER

France's farmland is dwindling steadily, and being replaced by non-farmland and forest, but is still the largest area in the Union. In 1996, it covered almost 30 million hectares. Sixty per cent of this area is taken up by arable land and more than a third by permanent grassland. After their downturn in 1993 and 1994, following the CAP reform, areas put to cereals increased again in 1995. The number of farms keeps on dropping. In 1995, there were 735 000, i.e. half the number recorded in 1970. This trend towards concentration has gone hand in hand with an increase in size. It is in fact often already established farms that take on land freed up by terminations of business and retirement. As a result, the average size of farms rose from 31 hectares in 1990 to 38 hectares in 1995. Early retirement is now easier, and has speeded up the rate of business terminations in recent years. Even if French farm production represents more than one-fifth of Community production, its share in the national economy is still on the decline. In 1996, it contributed no more than 2 % to France's GDP, and 6 % if food processing industries are factored in. In France, animal and crop production are on a par. This puts this farm sector at the halfway mark between farming in the northern European countries, dominated by livestock, and farming in the countries of southern Europe, focused on crop products. But there are marked regional differences in France. In the West and the Massif Central, 75 % of production is animal products. The Parisian basin, on the other hand, produces essentially crop products. Wine and poultry are products

whose value is rising the fastest. The value of the wine harvest is now close on the heels of cereals, and poultry products represent the equivalent of three-fifths of beef deliveries.

France's external trade in food showed a marked surplus, with a positive balance in 1995 of almost 9 billion ecus. In size, it is number two in the Union, well behind the Dutch surplus. Almost three-quarters of the French food trade is conducted with Community partners. Germany, the Belgium-Luxembourg Union, Italy, the United Kingdom, and Spain are France's major partners, buying from it more than they sell to it. France's food trade with the Netherlands, on the other hand, is in deficit, due to the scale of French imports of tobacco, flowers, beef and pork. With its commercial partners as a whole, France shows surpluses with beverages – mainly wine and cognac – , cereals and dairy products. Its largest deficits have to do with fish, purchased mainly from Denmark and the United Kingdom, tobacco and fruit usually coming from Spain. Outside the Union, the United States is still France's leading food partner. Trade mainly involves oleaginous products and wines. The timber trade balance is always in deficit. The value of imports thus exceeded that of exports by 2.2 billion ecus in 1995. This shortfall affects every stage in the field, from rough lumber to paper and cardboard. Whereas the largest deficits are recorded in trade with Finland and Sweden, Germany is France's leading supplier where the timber trade is concerned.



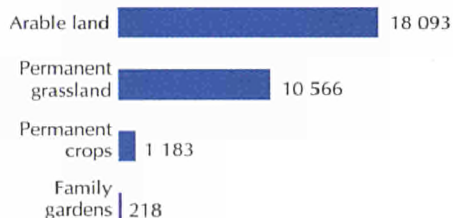
## Land use

### Land distribution in 1995

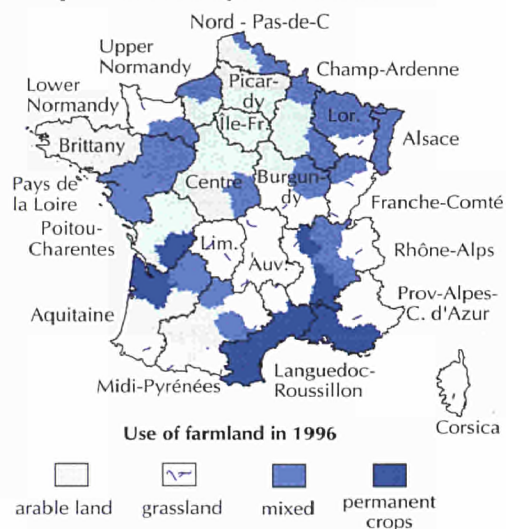


### Used farmland in 1995

thousands of ha



### Arable land in the north, permanent crops in the south



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>924</b>	<b>801</b>	<b>735</b>
Proportion of less than 10 ha (%)	38	37	37
from 10 to 20 ha (%)	15	13	12
from 20 to 50 ha (%)	28	26	24
50 ha or more (%)	19	24	27
<b>Average area (hectare)</b>	<b>31</b>	<b>35</b>	<b>38</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>6.4</b>	<b>5.5</b>	<b>4.9</b>
<b>Permanent farm employees ('000)</b>	<b>1 859</b>	<b>1 610</b>	<b>1 507</b>
incl. family workers	1 691	1 443	1 337
salaried employees	168	167	170
<b>Head of holding ('000)</b>	<b>910</b>	<b>786</b>	<b>718</b>
Proportion of less than 35 years (%)	13	13	13
35-55 years (%)	43	45	48
55-65 years (%)	30	27	24
65 or older (%)	14	15	15

Source : Eurostat





## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals (including rice)	9 892	9 061	8 838	48 021	55 112	62 586	6 104	8 366	7 123
wheat	4 590	5 147	5 037	23 781	33 346	35 921	3 506	5 117	4 173
maize-seed	1 754	1 562	1 734	9 323	9 401	14 544	1 327	1 914	1 858
Wine grapes <sup>1</sup>	1 123	939	902	8 576	8 060	7 590	3 081	6 842	6 522
Fresh vegetables	...	332	321	4 614	5 486	6 132	1 857	2 784	3 110
Fresh fruit	...	...	...	3 351	3 484	3 759	1 091	1 742	1 680
Sugar beet	549	475	461	28 442	31 746	31 211	1 002	1 206	1 262

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Cattle	23 605	21 446	20 557	1 965	1 929	1 965	5 029	6 849	5 823
Pigs	11 963	12 013	14 976	1 570	1 727	2 170	2 150	2 921	3 600
Poultry	185 408	244 790	280 940 <sup>2</sup>	1 238	1 665	2 230	1 489	2 571	3 481

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	7 120	5 271	4 568	24 830	24 127	23 109	5 634	7 564	7 869

1. Wine and must for delivery.

2. 1995 data

Sources : Eurostat - Newcronos and Eurofarm for poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	23 446	All	32 025
Of which EU	17 529	Of which EU	23 264

Netherlands	3 738	Germany	5 541
BLEU	3 467	BLEU	4 256
Germany	2 933	Italy	3 947
United Kingdom	1 993	United Kingdom	2 885
Spain	1 958	Spain	2 378

Meat	2 745	Beverages	6 334
Fruit	2 120	Cereals	4 058
Fish	1 820	Dairy products	3 620
Dairy products	1 684	Meat	3 086
Vegetable prep.	1 419	Sugar	1 808

## Timber trade in 1995

million ecus

Imports		Exports	
All	9 138	All	6 914
Of which EU	7 065	Of which EU	5 422

Germany	1 930	Germany	1 645
BLEU	1 050	Italy	775
Finland	784	BLEU	773
Sweden	717	United Kingdom	747
Italy	612	Spain	666

Paper-cardboard	5 677	Paper-cardboard	4 873
Pulp	1 449	Mechanical work	1 026
Mechanical work	899	Pulp	415
Sawnwood	585	Sawnwood	301
Rough lumber	382	Rough lumber	299

Source : Eurostat



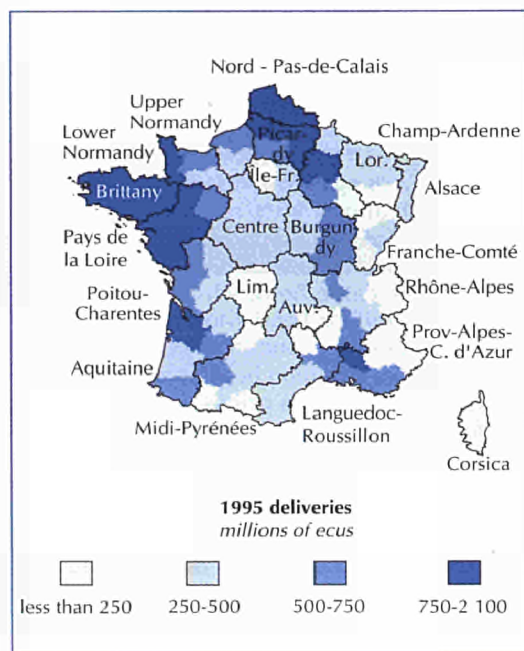
## A wide range of farming activities

1996 deliveries

Crop products %	Dairy products %	Cereals incl. rice millions of ecus
-----------------	------------------	-------------------------------------

France	52	7 869	7 123
Provence-Alpes-Côte d'Azur	94	19	80
Île-de-France	90	16	282
Languedoc-Roussillon	91	52	91
Champagne-Ardenne	84	212	560
Picardy	74	301	620
Centre	74	183	857
Aquitaine	71	266	557
Alsace	69	104	162
Burgundy	65	151	375
Corsica	64	11	1
Nord - Pas-de-Calais	56	434	370
Poitou-Charentes	53	306	475
Upper-Normandy	51	270	264
Rhône-Alpes	51	578	269
Midi-Pyrénées	50	420	581
Lorraine	38	371	275
Pays de la Loire	29	1 046	430
Auvergne	25	365	177
Franche-Comté	24	388	86
Lower-Normandy	22	842	199
Limousin	16	65	36
Brittany	14	1 468	377

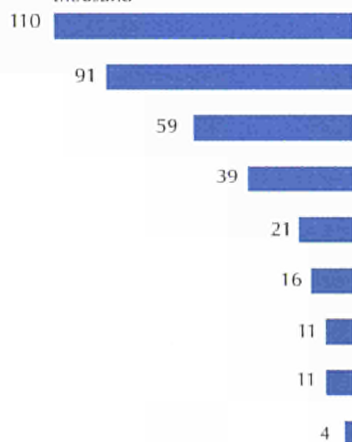
## The largest farming regions in the North and West



## Main food processing sectors in 1995<sup>1</sup>

### Number of employees

thousand



### Value added at factor cost

millions of ecus



1. Companies with 20 employees or more.



## THE IMPORTANCE OF FOOD PROCESSING

Irish agriculture is still a vital activity for the country's economy. It contributes 8 % of the gross domestic product. In 1995, there were 150 000 essentially family-run farms, most of which are farmed by the owners themselves. The average area of these farms is 28 hectares.

The major farming activity in Ireland is livestock rearing, with almost 90 % of total farm production in 1996. Grassland, which accounts for three-quarters of all farmland, covers 3.4 million hectares. The cattle herd, which is the largest, numbers 6.8 million head. Most of the meat and milk production is exported. Sheep production, with more than 5 million head, is also important, but its volume, like its prices, is on the wane. Irish farmers also produce pigs and poultry. Crop production is much less significant. It involves above all cereal crops – oats and barley –, fresh vegetables, and sugar beet.

The food processing sector is a mainstay of Irish industry. It contributes 37 % of total industrial production and 20 % of exports. It relies on a

handful of large fast-growing companies, which have been making purchases abroad for some years now. Exports from and, even more so, imports to Ireland involve the European Union. The United Kingdom is the country's leading economic partner. It absorbs one-third of Ireland's exports and supplies it with more than half its imports. Beyond the Union, Irish sales are made mainly to the United States, and Middle Eastern countries like Egypt, Saudi Arabia and Iran. Ireland imports mainly feed for cattle, and exports processed products and meat. Ireland has a strong farming tradition, and exports more than it imports. Its food trade surplus totalled 4.4 billion ecus in 1995. Foreign timber trade is poorly developed when compared with the food sector. It represents about ten times less imports and exports. In 1995, the timber deficit ran to 600 million ecus. It was due principally to purchases of paper and cardboard from the United Kingdom.



## Land use

## Land distribution in 1995

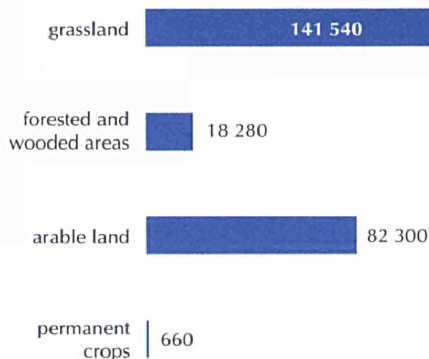


## Used farmland in 1995

thousands of ha



## Number of farms in 1995 with...



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>171</b>	<b>159</b>	<b>153</b>
Proportion of less than 10 ha (%)	25	24	23
from 10 to 20 ha (%)	28	28	27
from 20 to 50 ha (%)	35	36	37
50 ha or more (%)	12	12	13
<b>Average area (hectare)</b>	<b>26</b>	<b>27</b>	<b>28</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>15.3</b>	<b>13.1</b>	<b>12.0</b>
<b>Permanent farm employees ('000)</b>	<b>313</b>	<b>320</b>	<b>293</b>
incl. family workers	299	305	278
salaried employees	13	15	15
<b>Head of holding ('000)</b>	<b>170</b>	<b>159</b>	<b>153</b>
Proportion of less than 35 years (%)	13	15	14
35-55 years (%)	42	42	42
55-65 years (%)	22	23	23
65 or older (%)	23	20	21

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals	444	301	294	2 023	1 959	2 142	197	222	200
barley	366	207	181	1 659	1 219	1 225	159	131	123
wheat	53	70	86	273	596	771	35	82	69
Fresh vegetables	7	7	...	185	227	...	58	114	159
Sugar beet	33	32	32	1 156	1 480	1 476	45	72	74

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Cattle	5 826	6 100	6 757	549	571	582	926	1 615	1 446
Pigs	1 031	1 249	1 665	143	158	212	192	238	370
Sheep and goats	2 344	5 864	5 391	...	89	91	79	185	256
Poultry	9 604	12 050	12 240 <sup>1</sup>	50	81	118	73	128	156
Horses	69	55	...	4	1	€	32	89	97

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	1 449	1 322	1 272	4 556	5 269	5 297	800	1 342	1 524

1. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm

## Food trade in 1995

million ecus

Imports		Exports	
All	2 200	All	6 623
Of which EU	1 857	Of which EU	5 042

United Kingdom	1 293	United Kingdom	2 181
Netherlands	224	Germany	971
United States	140	France	582
France	127	Netherlands	489
BLEU	53	Spain	186

Animal feed	322	Misc. food prep.	1 813
Cereal prep.	207	Meat	1 337
Beverages	190	Dairy products	1 212
Dairy products	152	Beverages	511
Vegetable prep.	116	Cereal prep.	439

Source : Eurostat

## Timber trade in 1995

million ecus

Imports		Exports	
All	895	All	272
Of which EU	768	Of which EU	254

United Kingdom	478	United Kingdom	216
Sweden	92	BLEU	12
Finland	64	Netherlands	10
Germany	45	United States	7
United States	41	France	6

Paper-cardboard	670	Paper-cardboard	132
Mechanical work	111	Mechanical work	77
Sawnwood	85	Sawnwood	37
Pulp	15	Rough lumber	19
Rough lumber	14	Pulp	7

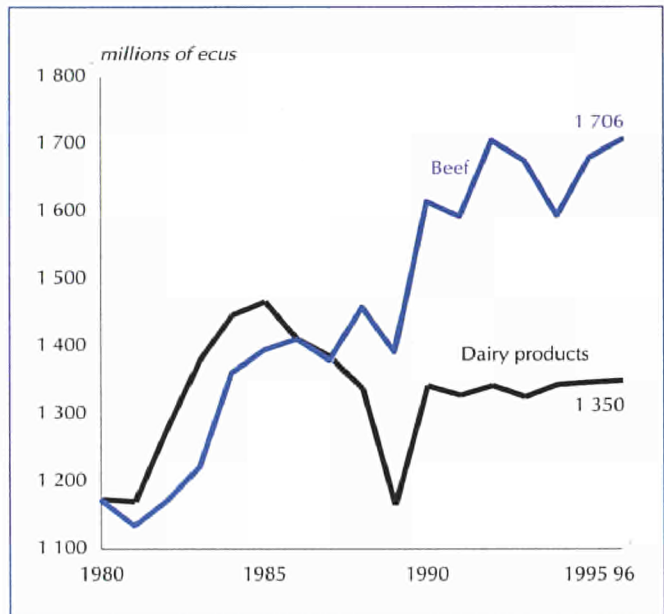


## Two-thirds cattle farming

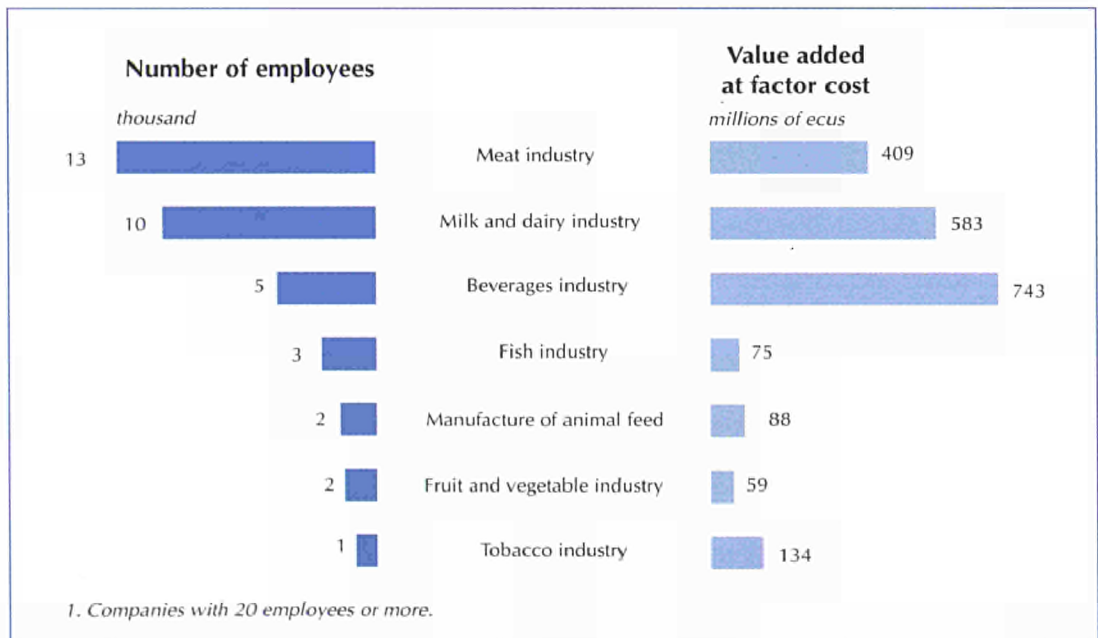
1996 deliveries

	%
<b>Animal products</b>	<b>87</b>
milk and dairy products	34
cattle	32
pigs	8
sheep and goats	6
poultry	3
horses	2
<b>Plant products</b>	<b>13</b>
fresh vegetables	4
barley	3
sugar beet	2
wheat	2

## Contrasting evolution of deliveries for the two major Irish products



## Main food processing sectors in 1995<sup>1</sup>



Source : Eurostat





## A MAJOR AGRICULTURAL POWER TO BE RECKONED WITH

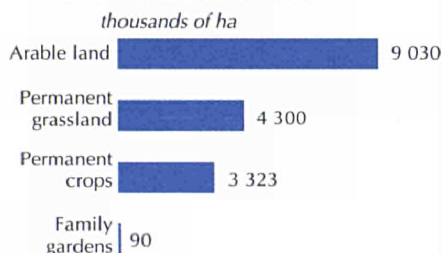
Depending on the year, Italy is the Union's second or third agricultural power. Its farming area covers almost 17 million hectares; more than half the country. A lot of land devoted to permanent crops is established throughout the peninsula. Grassland is limited to the north of the country and Sardinia, where it is used for fairly unproductive livestock breeding. Italian farming offers many features of southern agriculture. There are a lot of smallish farms – 6 hectares on average as compared with 16 for the Union as a whole – and farmers who are often elderly: more than six out of ten are over 55. As throughout the Mediterranean basin, farms use few permanent employees and resort for the most part to family labour. They numbered 4.8 million permanent farm workers in 1995.

In 1996, crop production represented 60 % of Italy's total agricultural production; largely vegetables, wines, cereals, fresh fruit and flowers. The Italians also produce one-quarter of the Union's maize, and 60 % of its rice. Proportionately, the southern regions produce many more crop products than the northern ones. Apulia, Sicily and Campania thus generate more than three-quarters of the crop products. Lombardy, on the other

hand, which is Italy's number one agricultural region, produces three-quarters of all animal products. The major animal products are beef and pork, resulting from herds of 7 and 8 million head respectively. The sheep and goat herds, which total almost 12 million head, are the Union's third largest.

Italy's food trade is structurally in deficit. In 1995, imports exceeded exports by 6 billion ecus. The drop in the value of the lira occurring in the mid-1990s did little to alter the trade balance, with imports and exports evolving at the same pace. The European Union absorbs two-thirds of Italian exports. Germany is Italy's leading client, buying essentially fruit and vegetables, and, to a lesser degree, wine and dairy products. France is the country's second customer with purchases of canned foods, dried groceries and beverages. Seven per cent of Italian sales go to the United States. Italian imports come first and foremost from France – which sells it cereals, meat and dairy products – , then Germany and the Netherlands. The timber trade balance shows a constant deficit. In 1995 it totalled 3.9 billion ecus and resulted from trade in rough lumber, sawnwood, mechanical wood working and pulp.

## Land use

Land distribution in 1995<sup>1</sup>Used farmland in 1995<sup>1</sup>

1. SCEES estimate.

## Cattle farming in the North and in Sardinia



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>2 665</b>	<b>2 488</b>	<b>2 482</b>
Proportion of less than 10 ha (%)	90	88	88
from 10 to 20 ha (%)	6	6	6
from 20 to 50 ha (%)	3	4	4
50 ha or more (%)	1	2	2
<b>Average area (hectare)</b>	<b>6</b>	<b>6</b>	<b>6</b>
<b>Share of farming, silvicultural and fishing employment in total employment (%)</b>	<b>9.0</b>	<b>8.0</b>	<b>7.5</b>
<b>Permanent farm employees ('000)</b>	<b>5 287</b>	<b>4 762</b>	<b>4 773</b>
incl. family workers	5 197	4 690	4 696
salaried employees	90	72	78
<b>Head of holding ('000)</b>	<b>2 647</b>	<b>2 475</b>	<b>2 471</b>
Proportion of less than 35 years (%)	5	6	5
35-55 years (%)	34	32	30
55-65 years (%)	29	28	28
65 or older (%)	32	34	37

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Fresh vegetables	541	...	...	11 457	12 246	...	3 446	5 430	4 836
Wine grapes <sup>1</sup>	1 227	971	842	12 119	7 518	56 202	2 249	3 098	3 503
Cereals (including rice)	5 111	4 407	4 094	17 995	17 394	20 033	2 741	3 430	3 396
wheat	3 408	2 763	2 422	9 156	8 082	8 010	1 857	1 805	1 335
Fresh fruit	...	...	...	9 967	10 057	...	1 918	2 765	2 308
Flowers and ornamental pl.	8	9	...	...	...	...	681	1 680	1 898
Olives for oil	...	...	...	3 411	868	...	1 298	486	1 374

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tec)			Deliveries (million ecus)		
Cattle	8 836	8 235	7 390	920	892	987	2 744	3 279	3 166
Pigs	8 928	8 837	8 090	984	1 211	1 342	1 524	2 349	2 329
Poultry	178 259	172 430	138 230 <sup>2</sup>	1 009	1 100	1 117	1 430	2 039	1 972

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	3 013	2 664	2 125	7 867	10 026	10 133	2 725	4 677	4 203

1. Wine and must for deliveries. 2. 1995 data

Sources : Eurostat - Newcronos and Eurofarm

## Food trade in 1995

million ecus

Imports		Exports	
All	18 449	All	12 256
Of which EU	13 465	Of which EU	8 265

France	3 793	Germany	3 273
Germany	2 739	France	1 722
Netherlands	2 536	United Kingdom	903
Spain	942	United States	817
Denmark	798	Switzerland	572

Meat	2 706	Beverages	2 199
Dairy products	2 360	Fruit	1 661
Fish	1 515	Cereal prep.	1 328
Cereals	1 312	Vegetable prep.	1 291
Live animals	1 187	Fats, oils	776

Source : Eurostat

## Timber trade in 1995

million ecus

Imports		Exports	
All	7 824	All	3 923
Of which EU	4 456	Of which EU	2 697

Germany	1 012	Germany	941
Austria	959	France	680
France	807	Spain	243
United States	700	United Kingdom	235
Sweden	605	BLEU	148

Paper-cardboard	3 065	Paper-cardboard	2 924
Pulp	1 881	Mechanical work	894
Sawnwood	1 426	Sawnwood	80
Mechanical work	825	Pulp	19
Rough lumber	627	Rough lumber	6



## 60 % crop products

1996 deliveries

Plant products	Fresh vegetables	Milk and dairy products
%	million ecus	million ecus

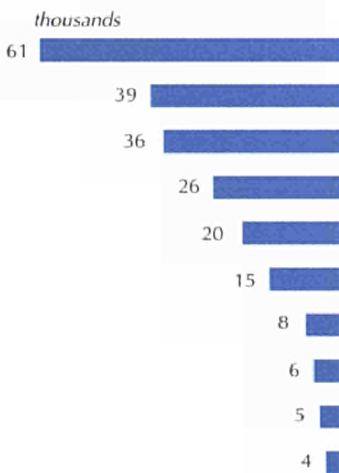
Italy	60	4 843	4 187
Apulia	89	927	138
Liguria	88	48	9
Calabria	83	186	50
Sicily	82	712	138
Abruzzi	75	195	28
Campania	75	558	149
Tuscany	70	139	82
Basilicata	70	81	33
Trentino-Alto-Adige	65	48	176
Lazio	64	440	236
The Marches	64	162	30
Friuli-Venezia-Giulia	59	25	76
Umbria	57	30	25
Veneto	51	346	432
Emilia-Romagna	50	384	643
Piedmont	50	168	314
Molise	48	26	36
Sardinia	40	177	292
Lombardy	28	188	1 279
Val d'Aosta	13	1	23

## The major farming regions : the North and Sicily

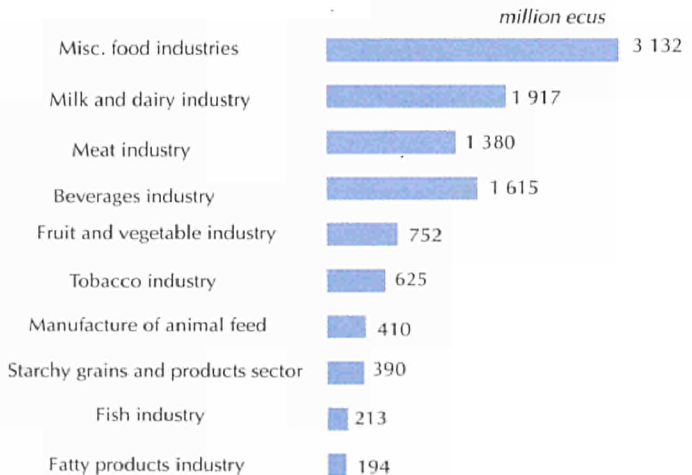


## Main food processing sectors in 1995<sup>1</sup>

### Number of employees



### Value added at factor cost



1. Companies with 20 employees or more



## LIVESTOCK FARMING, TIMBER AND A LITTLE WINE

**A**griculture is of minor importance in Luxembourg. In 1995 it accounted for less than 1 % of the GDP and 2.4 % of employment, in a country whose wealth stems mainly from the service sector. In 1995, there were 3,000 farms in Luxembourg, with an average area of 40 hectares.

The utilised agricultural area – half the country – is divided up into 53 % grassland and pasture and 45% arable land. Animal production is the sector that is developing fastest. With a herd of 209 000 head in 1996, cattle production repre-

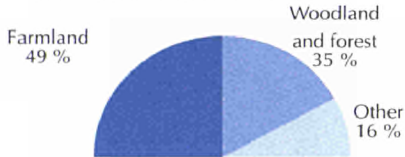
sented more than a quarter of total farm production, and pig production 10 %. Wine production represents almost one-tenth of total farm production. Winegrowing, which is an age-old tradition in Luxembourg, produced 150 000 hl of wine in 1996. As the result of forests which cover one-quarter of the Grand Duchy, forestry produced 326 000 m<sup>3</sup> of timber in 1995, mostly softwood.

Luxembourg, a rich country but with little agriculture, imports a lot of food products and exports few.



## Land use

Land distribution in 1995

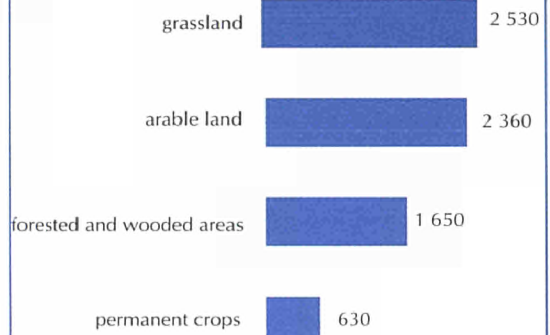


Farmland in 1995

thousand ha



Number of farms in 1995 with...



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>4.0</b>	<b>3.4</b>	<b>3.2</b>
Proportion of less than 10 ha (%)	35	35	34
from 10 to 20 ha (%)	11	8	8
from 20 to 50 ha (%)	27	23	21
50 ha or more (%)	27	34	37
<b>Average area (hectare)</b>	<b>32</b>	<b>37</b>	<b>40</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	<b>3.8</b>	<b>3.0</b>	<b>3.9</b>
<b>Permanent farm employees ('000)</b>	<b>9.3</b>	<b>7.9</b>	<b>7.3</b>
incl. family workers	8.7	7.3	6.6
salaried employees	0.6	0.6	0.6
<b>Head of holding ('000)</b>	<b>3.9</b>	<b>3.4</b>	<b>3.1</b>
Proportion of less than 35 years (%)	11	11	12
35-55 years (%)	44	45	47
55-65 years (%)	28	25	22
65 or older (%)	17	19	19

Source : Eurostat





## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Wine grapes <sup>1</sup>	1	1	1	6	20	17	5	16	14
Cereals	40	33	30	121	148	176	6	10	9
wheat	9	9	10	28	44	64	3	5	5
barley	19	16	13	59	70	72	2	4	3
Fresh fruit	...	...	...	...	7	11	2	1	5
Potatoes	1	1	1	34	25	20	2	3	3
Oleaginous seeds and fruit	8	2	2	1	5	...	8	2	1

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cattle	220	215	209	8	7	19	35	47	49
Pigs	88	70	77	8	9	7	12	16	18

	Livestock ( <sup>'000</sup> head)			Milk collected, eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	69	59	48	254	208	187	51	95	84
Laying hens	95	69	62	199 <sup>2</sup>	186 <sup>2</sup>	241 <sup>2</sup>	3	2	2

1. Wine and must for deliveries. 2. Data for the BLEU.

Source : Eurostat - Newcronos

## BLEU food trade in 1995

million ecus

Imports		Exports	
All	14 516	All	14 933
Of which EU	10 834	Of which EU	12 581

France	4 023	France	3 785
Netherlands	3 537	Netherlands	3 258
Germany	1 471	Germany	2 969
United Kingdom	595	United Kingdom	986
United States	483	Italy	707

Dairy products	2 157	Dairy products	1 886
Fruits	1 538	Meat	1 820
Cereals	1 153	Fruits	1 333
Beverages	1 133	Vegetables	925
Animal feed	797	Vegetable prep.	855

Source : Eurostat

## BLEU timber trade in 1995

million ecus

Imports		Exports	
All	5 050	All	4 028
Of which EU	3 920	Of which EU	3 653

Germany	955	Netherlands	1 161
France	771	France	1 047
Netherlands	767	Germany	743
Finland	641	United Kingdom	269
Sweden	260	Italy	242

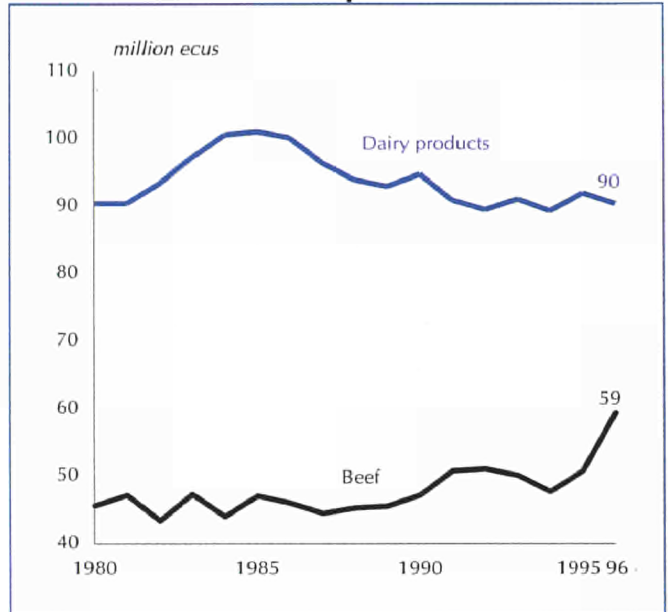
Paper-cardboard	3 182	Paper-cardboard	2 597
Mechanical work	760	Mechanical work	862
Sawnwood	522	Sawnwood	214
Pulp	386	Pulp	209
Rough lumber	200	Rough lumber	145

## 70 % cattle production

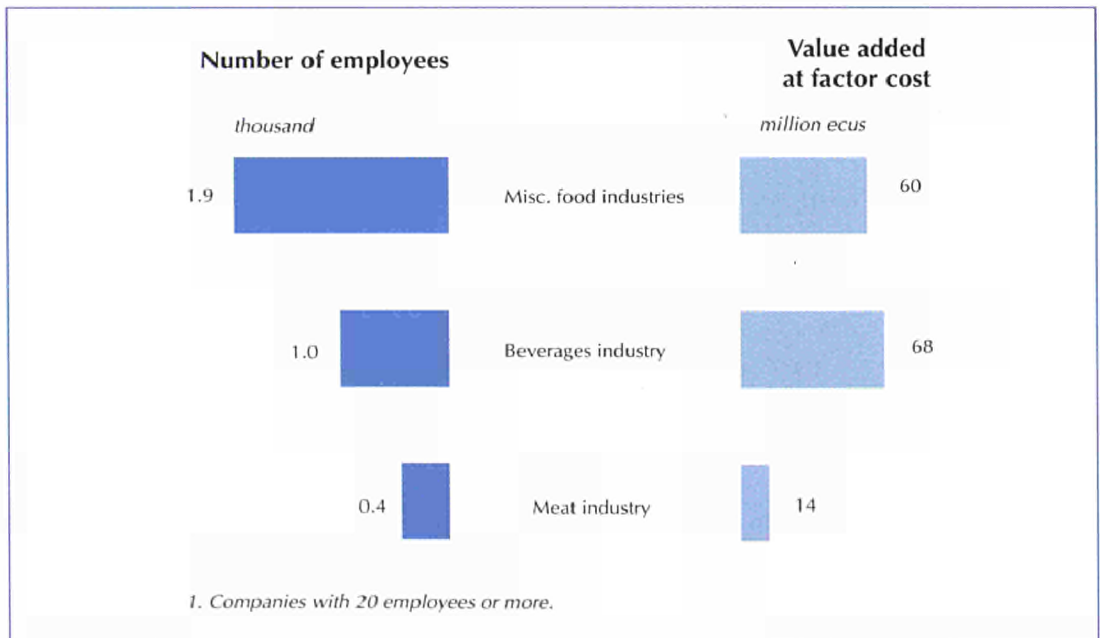
1996 deliveries

	%
<b>Animal products</b>	<b>82</b>
milk and dairy products	44
beef	26
pork	10
<b>Plant products</b>	<b>18</b>
must and wine	7
wheat	3
fresh fruit	2
barley	2
potatoes	2

## Development of deliveries for Luxembourg's two basic products



## Main food processing sectors in 1995<sup>1</sup>



Source : Eurostat



## THE UNION'S LEADING EXPORTER

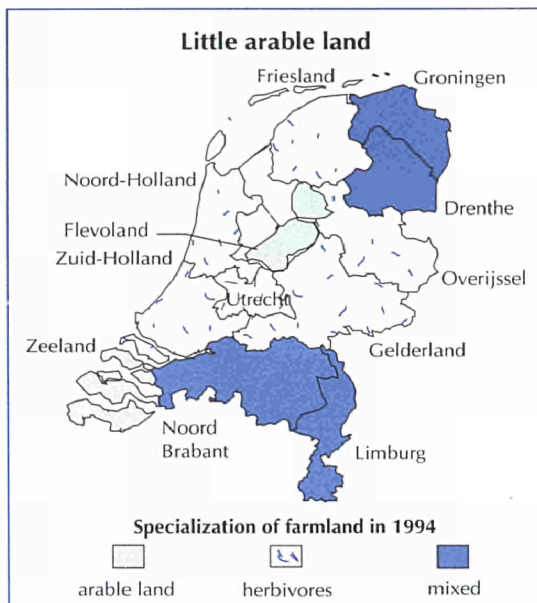
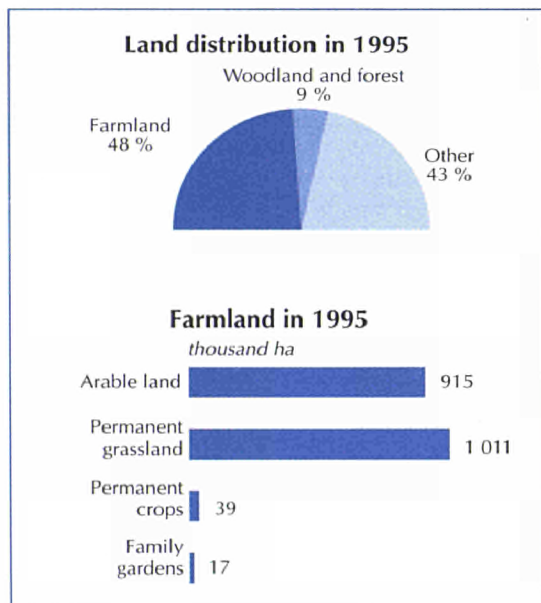
Dutch farming is very intensive. It is carried on in a country of just 41 000 km<sup>2</sup> which is very densely populated. Its output figures are among the highest in the world. The utilised agricultural area accounts for half the country. Grassland has a more important role than arable land. Permanent crops represent just 2 % of all farmland. In 1995, fewer than 300 000 people worked in farming, on about 100 000 farms. The average area of the farms, 18 hectares, is low when compared with farms in Northern Europe. But this small size is one of the features of any intensive farming. The total production of the Netherlands represents almost 9 % of the Union's production.

Dutch farming is livestock-oriented, be it dairy cows on grassland or the battery farming of pigs, poultry and calves. The dairy herd, which numbered 1.7 million cows in 1996 has been cut by a quarter since the introduction of milk quotas in 1984. In terms of raw material, it is a source of major cheese production, which nevertheless calls for not inconsiderable milk imports from Germany. Battery farming is hallmarked by the great density of its animals in small farms. It has the advantage of good supply conditions for animal feed due to the proximity of the port of Rotterdam. Horticulture, starting with flowers and vegetables, is the main plant production in the Netherlands. Major crops, especially potatoes, are not far behind.

The foreign food trade of the Netherlands is based on a very powerful farm product processing industry, which accounts for one-quarter of the turnover of the industry as a whole. This food processing sector includes some of the largest worldwide groups, starting with Unilever. The foreign food surplus is the second largest in the world after that of the United States, totalling 13 billion ecus in 1995. This surplus comes essentially from trade with the Union, because Dutch trade with other countries runs at a slight loss. With an area 12 times smaller than France, the Netherlands export almost as many food products. These are mainly dairy products, meat and flowers. Imports are mainly dairy products – but in quantities lower than exports – fruit and the animal feed that is vital to battery farming. Seventy percent of Dutch foreign trade is with the European Union, and more specifically with Germany, France and the Belgium-Luxembourg Economic Union. The Netherlands has little woodland and so shows a marked deficit in the trade in timber sector products: 1.9 billion ecus in 1995. This deficit stems from every sector in the industry, from rough lumber to paper and cardboard. But the highest deficits in the Netherlands come from its pulp purchases from Sweden, Finland and the United States.



## Land use



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>125</b>	<b>120</b>	<b>113</b>
Proportion of less than 10 ha (%)	50	50	49
from 10 to 20 ha (%)	20	19	19
from 20 to 50 ha (%)	25	25	27
50 ha or more (%)	5	6	6
<b>Average area (hectare)</b>	<b>16</b>	<b>17</b>	<b>18</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	<b>4.8</b>	<b>4.1</b>	<b>3.8</b>
<b>Permanent farm employees ('000)</b>	<b>289</b>	<b>290</b>	<b>276</b>
incl. family workers	238	228	213
salaried employees	51	61	63
<b>Head of holding ('000)</b>	<b>122</b>	<b>116</b>	<b>110</b>
Proportion of less than 35 years (%)	9	10	9
35-55 years (%)	48	46	46
55-65 years (%)	28	28	28
65 or older (%)	15	16	17

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Flowers and plants	1	3	3	...	...	...	1 070	2 644	2 216
Fresh vegetables	69	64	74	2 285	3 479	3 579	891	1 808	1 922
Tomatoes	3	2	1	396	650	480	253	470	436
Nursery plants	6	9	...	...	...	...	117	297	1 721
Potatoes	172	175	185	6 267	7 036	8 081	331	644	508
Fresh fruit	...	...	...	759	559	610	137	303	352
Sugar beet	121	125	117	5 931	8 623	6 416	258	363	336

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Pigs	10 196	13 788	14 253	1 351	1 909	1 894	1 636	2 734	2 942
Cattle	5 010	4 830	4 366	430	474	543	1 039	1 528	1 373
Poultry	79 847	95 280	91 860 <sup>1</sup>	410	520	650	388	577	638

	Livestock ( <sup>'000</sup> head)			Milk collected, eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	2 356	1 917	1 646	11 444	10 778	10 535	2 574	3 442	3 471
Laying hens	34 552	44 320	39 579	540	652	597	406	488	495

1. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm for livestock and poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	18 175	All	31 520
Of which EU	10 582	Of which EU	24 805

Germany	3 272	Germany	9 670
BLEU	2 367	France	3 769
France	1 936	BLEU	3 105
United States	1 658	United Kingdom	2 591
United Kingdom	1 014	Italy	2 245

Dairy products	2 316	Dairy products	3 902
Oleaginous	1 548	Meat	3 758
Fruit	1 321	Live plants	3 602
Animal feed	1 295	Vegetables	2 871
Fats, oils	1 198	Tobacco	2 187

Source : Eurostat

## Timber trade in 1995

million ecus

Imports		Exports	
All	6 018	All	4 109
Of which EU	4 461	Of which EU	3 495

Germany	1 414	Germany	1 306
Sweden	793	Belgium-Luxemb.	695
Belgium-Luxemb.	703	France	553
United States	441	United Kingdom	438
Finland	440	Spain	91

Paper-cardboard	3 473	Paper-cardboard	3 097
Mechanical work	945	Mechanical work	468
Pulp	817	Pulp	374
Sawnwood	715	Sawnwood	143
Rough lumber	67	Rough lumber	28

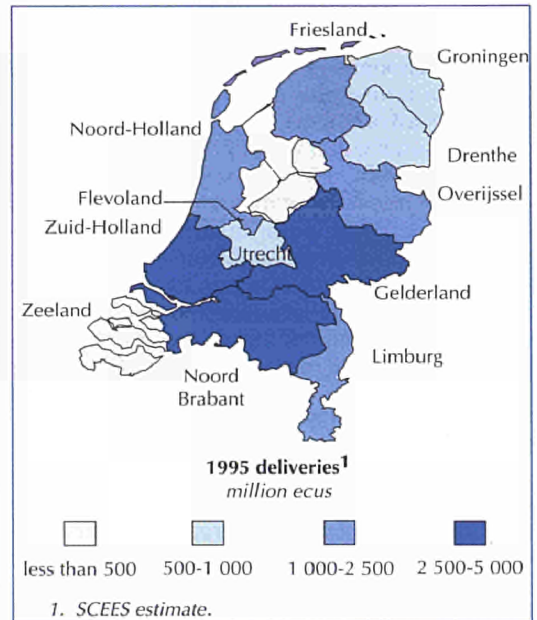


## Plants in the west of the country<sup>1</sup>

## More than half the deliveries for three regions

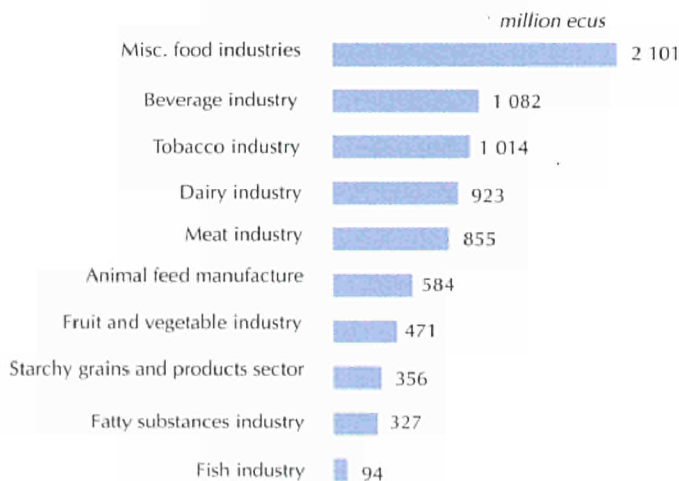
	Animal products %	Dairy products million ecus	Pork million ecus
<b>Netherlands</b>	<b>54</b>	<b>3 471</b>	<b>2 942</b>
Overijssel	94	586	292
Friesland	87	594	19
Gelderland	79	619	485
Utrecht	78	206	77
Noord-Brabant	74	610	927
Drenthe	65	223	44
Limburg	57	145	284
Groningen	55	172	21
Noord-Holland	21	192	8
Flevoland	20	56	4
Zeeland	20	25	12
Zuid-Holland	12	253	40

1. 1993 deliveries for the provinces and 1996 for the Netherlands.



## Main food processing sectors in 1995<sup>1</sup>

### Value added at factor cost



1. Companies with 20 employees or more.





## ORGANIC FARMING IS FIRMLY ESTABLISHED

In a country where mountains cover 70 % of the land, Austrian farming is carried on in difficult conditions. In 1995, there were 100 000 mountain farms, plus 50 000 other farms situated in disadvantaged zones, out of a total of 220 000 farming and forestry enterprises. Austrian farms are small, 16 hectares on average, and more than one-third of them cover less than five hectares. Another major feature is organic farming, which is firmly established in Austria, in so much as 6 % of farms practise it. There are 550 000 permanent farm workers. As with other new Union members, those running the farms are young: slightly more than 2 out of 3 of them are less than 55 years old. Farming contributed 1 % to Austria's GDP in 1996.

In order to be admitted to the European Union, Austria adapted its farming so as to increase its competitiveness both in the world market and in the Community market. Cereal and dairy production have been subjected to quotas, rape and soya crops have been encouraged, and organic farming has been developed. In addition, as in Sweden and Finland, temporary measures have been taken dating from Austria's admission to the Union in 1995. These consists in the payment of bonuses, which have been graduated until 1999,

to make up for the drop in farm prices.

Austrian farming is essentially livestock oriented. Animal production accounted for two-thirds of farm production in 1996. Milk, pork and beef products were the major factors. The pig and cattle herds which numbered respectively 3.7 million and 2.3 million head in 1996, are also helping Austria to be self-sufficient. Poultry, on the other hand, is lower than national consumption. Wine and fresh fruit are the major plant products in Austria's agricultural end production. Austria's foreign food trade is in the red. In 1995, imports exceeded exports by 1.5 billion ecus. This deficit stemmed solely from Community trade, because Austria, overall, balances its trade with its Central European neighbours. Forty percent of Austria's imports come from Germany, which sells it cattle feed, coffee and tea, and dairy products. But Austria's major purchases are fruit and vegetables, often of Italian origin. Austria exports beverages with wine top of the list, and meat. Unlike the food trade, Austria's foreign timber trade showed a surplus of 1.9 billion ecus in 1995. This more than made up for the food deficit. The bulk of the surplus in the timber sector comes from trade in paper and cardboard, particularly with Germany.

## Land use

## Land distribution in 1995



## Farmland in 1995

thousand ha



## Mountain livestock farming



## Use of farmland in 1995



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	...	...	222
Proportion of less than 10 ha (%)	...	...	58
from 10 to 20 ha (%)	...	...	22
from 20 to 50 ha (%)	...	...	16
50 ha or more (%)	...	...	4
<b>Average area (hectare)</b>	...	...	15
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	...	...	7.3
<b>Permanent farm employees ('000)</b>	...	...	547
incl. family workers	...	...	526
salaried employees	...	...	22
<b>Head of holding ('000)</b>	...	...	217
Proportion of less than 35 years (%)	...	...	18
35-55 years (%)	...	...	50
55-65 years (%)	...	...	22
65 or older (%)	...	...	10

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Wine grapes <sup>1</sup>	54	55	49	...	427	285	176	270	236
Fresh fruit	...	...	...	...	153	200	155	276	218
Cereals	1 077	948	810	4 856	5 290	4 493	253	441	171
Sugar beet	51	50	53	2 587	2 494	3 131	95	126	143
Fresh vegetables	15	10	12	...	...	395	100	118	122
Flowers and ornamental pl.	...	...	€	...	...	...	48	89	101

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Pigs	3 706	3 688	3 664	...	469	470	534	832	765
Cattle	2 517	2 584	2 272	...	249	240	538	868	577
Poultry	...	...	13 770 <sup>2</sup>	...	93	98	81	131	105

	Livestock ( <sup>'000</sup> head)			Milk collected, eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	975	905	698	...	2 244	2 392	591	947	770
Laying hens	...	6 374	5 752	...	96	98	104	125	110

1. Wine and must for deliveries. 2. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm for livestock and poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	3 359	All	1 855
Of which EU	2 697	Of which EU	1 121
Germany	1 380	Germany	527
Netherlands	401	Italy	363
Italy	381	Switzerland	95
France	193	Hungary	73
Hungary	114	Czech Republic	69
Fruit	389	Beverages	258
Vegetables	335	Meat	208
Cereal prep.	245	Dairy products	186
Meat	220	Vegetable prep.	167
Coffee and tea	207	Cereal prep.	120

## Timber trade in 1995

million ecus

Imports		Exports	
All	2 677	All	4 613
Of which EU	1 966	Of which EU	3 262
Germany	1 147	Germany	1 416
Sweden	221	Italy	962
Czech Republic	188	France	218
Finland	159	United Kingdom	192
Italy	116	Netherlands	168
Paper-cardboard	1 130	Paper-cardboard	2 847
Mechanical work	531	Sawnwood	800
Pulp	449	Mechanical work	782
Rough lumber	347	Pulp	105
Sawnwood	219	Rough lumber	79

Source : Eurostat

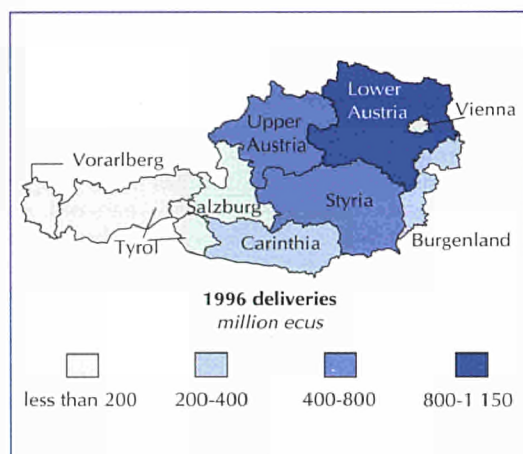


## Livestock farming predominant in mountainous areas<sup>1</sup>

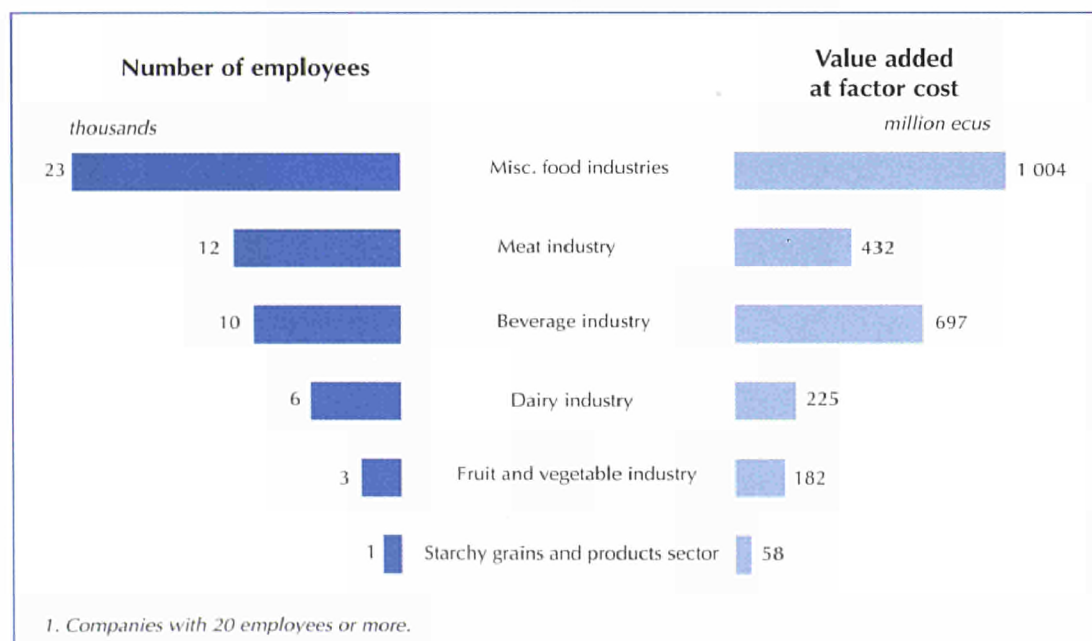
	Animal products %	Herd	
		pig thousand head	dairy cows thousand head
<b>Austria</b>	<b>69</b>	<b>3 664</b>	<b>697</b>
Lower Austria	75	1 186	218
Vorarlberg	72	17	27
Tyrol	71	41	75
Salzburg	68	25	69
Styria	62	1 016	113
Carinthia	57	192	45
Upper Austria	47	1 070	140
Burgenland	27	116	10
Vienna	1	1	€

1. 1992 deliveries for the % and 1996 data for the herd.

## Two major farming regions



## Main food processing sectors in 1995<sup>1</sup>





## THE WORLD'S NUMBER ONE PRODUCER OF CORK

Portugal's 450 000 farms are small, with an average area of 9 hectares. Large farms are rare, there being just 2 % of more than 50 hectares, although these take up more than one-half of utilised agricultural area. Farm workers – 13 % of the total working population – are usually elderly. In 1995, almost two out of three people running farms were more than 55 years old. As with most southern farming systems, the use of permanent employees is not very common. Portugal's farm yields are low, often equivalent to one-third of Community yields, because of difficult climatic conditions and limited equipment on most of the farms. So irrigation is not well developed and energy costs are an obstacle to agricultural development.

Like France, Portugal balanced its crop and animal end production in 1996. Livestock farming has a slight edge in the Centre and the Alentejo, and cattle production is the agricultural mainstay of the Azores, whereas vegetables, fruit and wine are predominant in the Lisbon region and the North, and much more so in the Algarve and Madeira. Portuguese livestock included 3 mil-

lion sheep, 2.4 million pigs and 1.3 million cattle in 1996. Milk production accounted for one-eighth of total farm production. Portugal also produces wine, particularly in the Oporto region. Portugal's food trade balance is structurally in the red and is continually declining. In 1995, the deficit totalled 2.2 billion ecus. Portugal imports fish as well as meat, cereals as well as fruit. For all these products its trading figures show a loss. One-third of its exports is accounted for by beverages due to the scale of its wine production. Spain is Portugal's leading trading partner, ahead of France. Spain sells mainly fish and olive oil to Portugal, and buys fish and dairy products from it. France exports cereals and beef and imports wine. Because of cork, for which Portugal is the world's number one producer, the country's foreign trade in timber shows a surplus. In 1995, exports thus exceeded imports by 1 billion ecus. But Portugal also balances its purchases and its sales of paper and cardboard. Spain and France are Portugal's two main clients. Brazil, which exports rough lumber to Portugal, is still a major supplier.

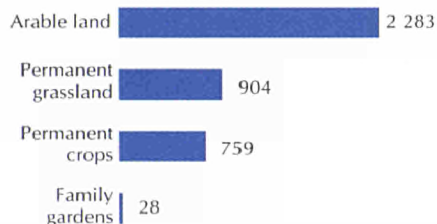
## Land use

Land distribution in 1995

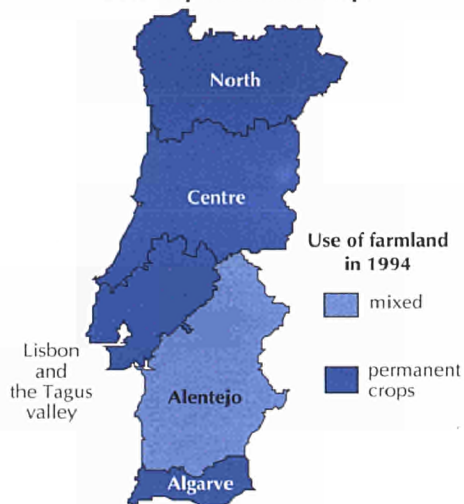


Farmland in 1995

thousand ha



Lots of permanent crops



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>599</b>	<b>489</b>	<b>450</b>
Proportion of less than 10 ha (%)	92	89	88
from 10 to 20 ha (%)	5	6	6
from 20 to 50 ha (%)	2	3	4
50 ha or more (%)	1	2	2
<b>Average area (hectare)</b>	<b>7</b>	<b>8</b>	<b>9</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	<b>18.1</b>	<b>11.6</b>	<b>11.5</b>
<b>Permanent farm employees ('000)</b>	<b>1 561</b>	<b>1 263</b>	<b>1 173</b>
incl. family workers	1 475	1 198	1 111
salaried employees	86	66	62
<b>Head of holding ('000)</b>	<b>594</b>	<b>484</b>	<b>445</b>
Proportion of less than 35 years (%)	6	5	4
35-55 years (%)	36	33	32
55-65 years (%)	29	29	29
65 or older (%)	29	33	35

Source : Eurostat





## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area (*000 ha)			Production (*000 tonnes)			Deliveries (million ecus)		
Wine grapes <sup>1</sup>	264	255	256	1 389	1 497	1 242	335	707	827
Fresh vegetables	90	82	...	1 492	2 120	...	185	546	461
Fresh fruit	...	...	...	645	885	819	108	362	349
Cereals (including rice)	1 104	757	670	1 408	1 426	1 672	179	308	253
Olives for oil	308	325	312	215	177	275	72	115	181
Potatoes	123	120	89	1 200	1 343	1 326	122	173	155

## ... and animal products

	Livestock (*000 head)			Meat production (*000 tonnes)			Deliveries (million ecus)		
Pigs	2 401	2 664	2 344	...	248	278	240	516	810
Cattle	1 170	1 340	1 311	...	112	98	258	494	291
Sheep and goats	...	4 217	4 161	...	15	13	88	257	259
Poultry	37 926	31 150	29 970 <sup>2</sup>	...	191	245	170	159	188

	Livestock (*000 head)			Milk collected (*000 tonnes)			Deliveries (million ecus)		
Dairy cows	342	396	362	...	1 530	1 632	198	547	590

1. Wine and must for deliveries. 2. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm for livestock and poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	3 457	All	1 284
Of which EU	2 202	Of which EU	881

Spain	912	Spain	258
France	512	France	197
United States	277	United Kingdom	116
United Kingdom	213	Italy	70
Netherlands	196	BLEU	68

Fish	573	Beverages	431
Cereals	417	Fats, oils	118
Meat	339	Meat/fish prep.	117
Oleaginous	266	Fish	117
Fruit	208	Vegetable prep.	114

## Timber trade in 1995

million ecus

Imports		Exports	
All	959	All	1 924
Of which EU	691	Of which EU	1 562

Spain	301	Spain	456
Sweden	89	France	294
Brazil	67	United Kingdom	228
France	64	Germany	207
Finland	64	Netherlands	149

Paper-cardboard	531	Mechanical work	700
Rough lumber	216	Pulp	564
Mechanical work	103	Paper-cardboard	516
Pulp	57	Rough lumber	78
Sawnwood	52	Sawnwood	66

Source : Eurostat

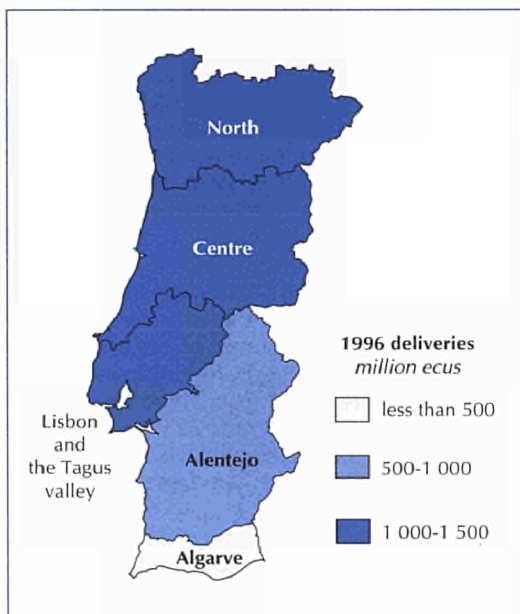
## Livestock farming in the Centre and North...

1996 deliveries

	Vegetable products %	Wine and must million ecus	Pork
Portugal	51	827	810
Algarve	74	1	25
Madeira	69	11	6
North	59	335	65
Lisbon and the Tagus valley	54	282	381
Alentejo	47	54	135
Centre	45	141	185
Azores	16	4	14

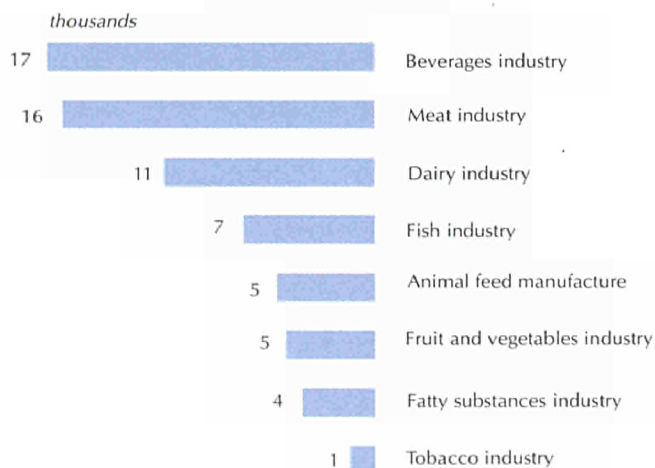
Portugal	51	827	810
Algarve	74	1	25
Madeira	69	11	6
North	59	335	65
Lisbon and the Tagus valley	54	282	381
Alentejo	47	54	135
Centre	45	141	185
Azores	16	4	14

## ... is the main farming activity



## Main food processing sectors in 1995<sup>1</sup>

### Number of employees



1. Companies with 20 employees or more.



## FARMS RUN BY YOUNG PEOPLE

**F**innish farming has to tackle very difficult natural conditions. One-third of the country lies north of the Arctic Circle, so growing periods are short and yields limited. What is more, because 69 % of the land is covered with forests and 10 % with water, there is little room left for farming. Added to all this are the restrictions implicit in the environmentally aware attitudes the Finns have made the rule. To deal with all these drawbacks, farming received considerable assistance until Finland's admission to the Union, assistance that resulted in farm prices that were twice as high as Community prices and limited imports. In 1995, agriculture employed 8 % of the total working population. There are 100 000 farms with an average area of 22 hectares. Those running these farms are the youngest in the Union: 3 out of 4 of them are less than 55 years old.

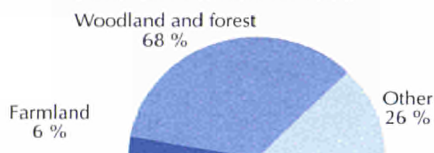
In 1996, cereals were Finland's main crop. They covered one-half of all farmland with nine-tenths used for animal feed (barley and oats), and the rest for crops suitable for making bread, such as wheat and rye. The other major plant products are vegetables, potatoes and flowers. Dairy herds contribute one-third to national farm production. Beef is a secondary product associated with milk production. With a herd of 1.4 million head in 1996, pig farming is also well established in

Finland. A not inconsiderable part of this production is, incidentally, exported. Finland also produces reindeer hides and furs, which represented 15 % of animal production in 1996. Forestry, particularly involving conifers and birches is an essential activity in Finland. Finland buys more food products than it sells. In 1995, its deficit rose to 650 million ecus. All this shortfall comes from Community trade, conducted mainly with Sweden, Denmark and the Netherlands. Despite the amount of coffee purchases made in South America, Finland's trade with the rest of the world shows a surplus, particularly due to sales of goods to Russia. But in Finland, the food trade is insignificant when compared with the timber trade. In concrete terms, Finland shows a surplus of 9 billion ecus in its timber trade, as opposed to a 650 million ecu food deficit. Because of its forest resources, Finland exports more wood and sawnwood than it imports, but most importantly of all it has installed an efficient processing industry. As a result, Finland exports 7.5 billion ecus' worth of paper and cardboard, whereas it only imports 400 million ecus' worth. The bulk of Finland's foreign trade in timber is done with European partners. Germany, the United Kingdom and France were thus its major buyers in 1995, but the Finns also export to the United States, Norway and Russia.

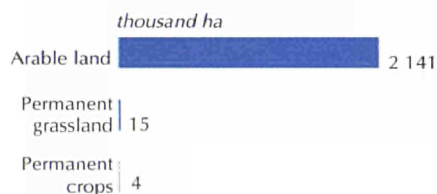


## Land use

## Land distribution in 1995



## Farmland in 1995



## Farmland is restricted to the South



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	...	...	<b>101</b>
Proportion of less than 10 ha (%)	...	...	28
from 10 to 20 ha (%)	...	...	30
from 20 to 50 ha (%)	...	...	35
50 ha or more (%)	...	...	7
<b>Average area (hectare)</b>	...	...	<b>22</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	...	...	<b>7.8</b>
<b>Permanent farm employees ('000)</b>	...	...	<b>296</b>
incl. family workers	...	...	294
salaried employees	...	...	2
<b>Head of holding ('000)</b>	...	...	<b>101</b>
Proportion of less than 35 years (%)	...	...	16
35-55 years (%)	...	...	59
55-65 years (%)	...	...	18
65 or older (%)	...	...	7

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals	1 171	1 213	1 075	3 306	4 296	3 700	301	1 087	242
barley	533	486	543	1 534	1 720	1 860	112	320	113
wheat	124	191	113	357	627	459	83	322	61
oats	448	453	374	1 258	1 662	1 261	62	300	58
Fresh vegetables	...	7	11	...	191	230	68	133	103
Flowers and ornam. plants	...	...	€	...	...	...	70	142	97
Potatoes	41	41	35	736	881	766	100	113	83

## ... and animal products

	Livestock ( <sup>000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Pigs	1 410	1 394	1 413	...	187	171	330	684	236
Cattle	1 738	1 360	1 150	...	118	96	358	679	221

	Livestock ( <sup>'000</sup> head)			Milk collected ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	709	492	396	2 949	2 678	2 329	956	1 584	797
Reindeer hides, furs	...	...	...	...	...	...	195	94	241

Source : Eurostat - Newcronos

## Food trade in 1995

million ecus

Imports		Exports	
All	1 404	All	747
Of which EU	980	Of which EU	297

Sweden	206	Russia	211
Netherlands	172	Sweden	104
Denmark	144	BLEU	33
Germany	132	Germany	32
France	70	Norway	27

Fruit	169	Dairy products	157
Coffee/tea	137	Cocoa	80
Beverages	114	Beverages	70
Misc. food prep.	98	Fats, oils	57
Vegetable prep.	89	Cereal prep	52

## Timber trade in 1995

million ecus

Imports		Exports	
All	1 014	All	10 355
Of which EU	463	Of which EU	7 224

Russia	324	Germany	1 978
Sweden	173	United Kingdom	1 598
Germany	122	France	756
Netherlands	37	BLEU	576
Norway	28	United States	564

Rough lumber	392	Paper-cardboard	7 445
Paper-cardboard	389	Sawnwood	1 300
Pulp	117	Pulp	792
Mechanical work	68	Mechanical work	734
Sawnwood	48	Rough lumber	842

Source : Eurostat



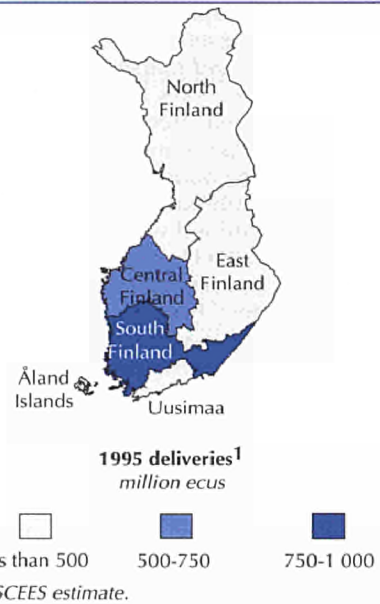
## Cereals predominate in the south<sup>1</sup>

Dairy cows	Pigs	Cereals
thousand head		thousand tonnes

<b>Finland</b>	<b>396</b>	<b>1 413</b>	<b>3 328</b>
South Finland and Uusimaa and Åland	116	854	1 972
East Finland	106	101	288
Central Finland	109	417	824
North Finland	65	42	244

1. 1995 deliveries for cereals and 1996 for livestock.

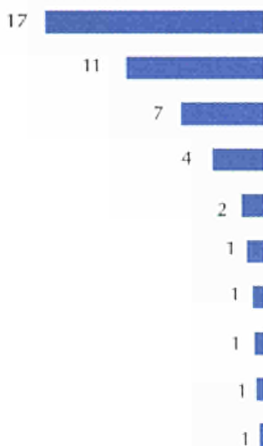
## Farming is concentrated in the South



## Main food processing sectors in 1995<sup>1</sup>

### Number of employees

thousands



### Value added at factor cost

million ecus



1. Companies with 20 employees or more.





## THE UNION'S LEADING POWER WHEN IT COMES TO FORESTRY

Sweden's geography is ill-suited to farming activities. Forests cover half the country, mountains, lakes and marshes more than one-third. Farmland occupies less than one-tenth of Sweden's land area. Because of the climatic conditions, farming is concentrated in the South and Centre of the country. In 1995, there were 89 000 farms, mainly family concerns. Their activity is often combined with forestry. As in the other countries in the Union, Swedish farms have become larger and less numerous over the past 40 years. Today they have an average area of 35 hectares and offer livelihoods to 164 000 permanent employees. Those running the farms are young: half of them are between 35 and 55 years old. Through their cooperative societies, Swedish farmers process and market a large proportion of farm products.

Swedish farm production is broadly livestock oriented. Pigs predominate with 2.3 million head in 1996. Beef production is also important. Among the various plant crops, cereals – headed by barley, oats and wheat –, fodder crops and flowers are the most highly developed. Autumn rape and sugar beet are cultivated in Scania in the southern part of southern Sweden, while the other crops are distributed between the South and Centre of the country. Sweden is the Union's number one timber producer, with a harvest of 56 million m<sup>3</sup> in 1996. Sweden's admission to the European Union put a brake on the agricul-

tural deregulation policy introduced in the early 1990s. This has entailed a return to more generous subsidies. Cereal, sugar beet and potato producers have been the major beneficiaries of EU membership unlike producers of oleaginous crops and meat.

Sweden produces only 30% of its farm and food requirements, which forces it to import large quantities. In 1995, its balance of trade deficit for food rose to 2 billion ecus. Its purchases involve mainly fruit and vegetables, beverages, tea, coffee and products from the sea. For Swedish meat there is less competition from imported meat. The fact is that all imported meat has to undergo systematic inspection for salmonella in the producer countries. This exception to Community rules, following the salmonella epidemic of 1954, thus makes imports more expensive and thus discourages them. Sweden exports two and a half times fewer products than it imports. These imports are mainly beverages such as vodka and cooking fats and oils. Much of Sweden's food trade is conducted with its Nordic neighbours, Finland, Denmark and Norway. As the Union's leading country where forestry is concerned, Sweden shows large foreign surpluses in its timber sector. These totalled 8.3 billion ecus in 1995. In addition to its raw material resources, Sweden has established a wood processing industry, which enables it to export sawnwood, pulp, and paper and cardboard. Its



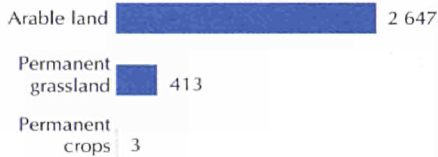
## Land use

### Land distribution in 1995



### Farmland in 1995

thousand ha



### A majority of arable land

#### Specialization of farmland in 1994



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	...	...	<b>89</b>
Proportion of less than 10 ha (%)	...	...	30
from 10 to 20 ha (%)	...	...	21
from 20 to 50 ha (%)	...	...	28
50 ha or more (%)	...	...	21
<b>Average area (hectare)</b>	...	...	<b>34</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	...	...	<b>3.3</b>
<b>Permanent farm employees ('000)</b>	...	...	<b>164</b>
incl. family workers	...	...	135
salaried employees	...	...	29
<b>Head of holding ('000)</b>	...	...	<b>83</b>
Proportion of less than 35 years (%)	...	...	9
35-55 years (%)	...	...	48
55-65 years (%)	...	...	21
65 or older (%)	...	...	22

Source : Eurostat



## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals	1 604	1 287	1 210	...	6 484	5 954	505	747	378
wheat	297	348	328	1 193	2 243	2 030	180	380	170
barley	648	468	469	2 172	2 123	2 113	177	177	112
Flowers and ornam. pl.	...	...	...	...	...	...	122	190	131
Sugar beet	52	50	59	2 257	2 776	2 430	78	118	130
Fresh vegetables	...	...	7	...	...	227	90	151	123
Potatoes	40	36	37	1 084	1 366	1 201	100	119	122

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Pigs	2 618	2 264	2 319	...	291	320	499	575	473
Cattle	1 935	1 719	1 747	...	145	138	467	522	334

	Livestock ( <sup>'000</sup> head)			Milk collected, eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	656	555	478	...	3 433	3 258	1 033	1 374	1 163
Laying hens	5 937	6 392	5 709	...	122	111	114	138	96

Source : Eurostat - Newcronos

## Food trade in 1995

million ecus

Imports		Exports	
All	3 405	All	1 372
Of which EU	2 200	Of which EU	783

Denmark	526	Finland	180
Netherlands	518	Denmark	176
Germany	313	United States	167
Norway	308	Norway	155
United Kingdom	149	Germany	121

Fruit	351	Fats, oils	161
Fish	296	Beverages	149
Coffee/tea	289	Fish	136
Vegetables	243	Cereal prep.	134
Beverages	243	Misc. food prep.	123

## Timber trade in 1995

million ecus

Imports		Exports	
All	1 738	All	10 039
Of which EU	1 034	Of which EU	7 700

Finland	317	Germany	2 142
Germany	284	United Kingdom	1 595
Norway	223	Denmark	773
Denmark	158	Netherlands	746
Russia	86	Norway	732

Paper-cardboard	764	Paper-cardboard	5 805
Rough lumber	379	Sawnwood	1 973
Mechanical work	279	Pulp	1 542
Pulp	217	Mechanical work	590
Sawnwood	98	Rough lumber	128

Source : Eurostat





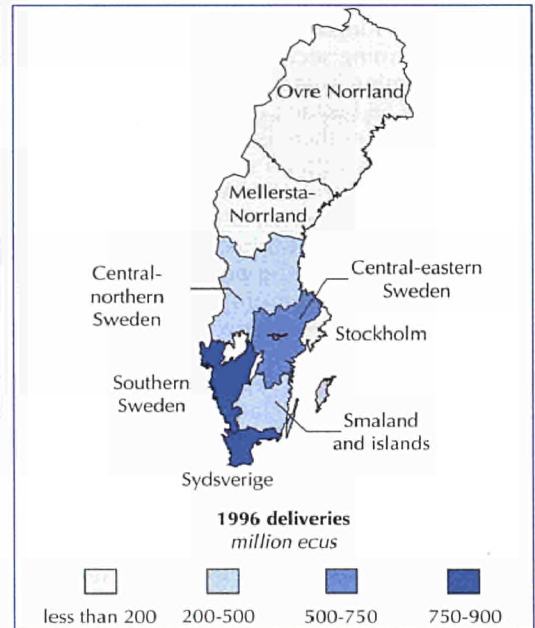
## Production focused...

1996 deliveries

Animal products	Dairy products	Pork
%	million ecus	

## ... in the South

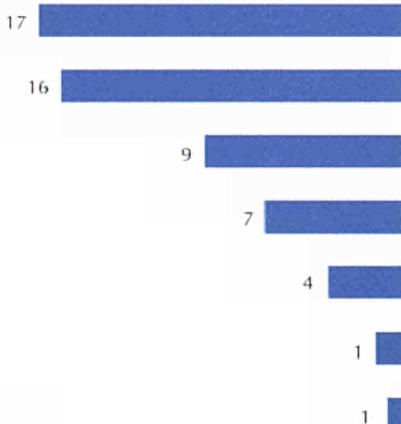
Sweden	69	1 163	473
Mellersta Norrland	94	71	3
Övre Norrland	90	83	13
Småland and islands	86	260	40
Southern Sweden	77	270	149
Central-northern Sweden	77	112	18
Central-eastern Sweden	61	199	75
Sydsverige	52	150	168
Stockholm	51	18	6



## Main food processing sectors in 1995<sup>1</sup>

### Number of employees

thousands



### Value added at factor cost

million ecus



1. Companies with 20 employees or more.



## THE UNION'S LARGEST FARMS

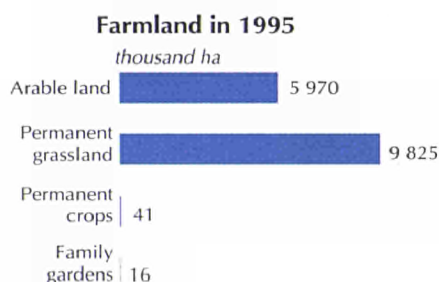
**T**he United Kingdom features several quite different farming sectors which all co-exist. In England, farming is geared towards large crops, with farms of 58 hectares on average. In Northern Ireland and Wales there is an abundance of average sized farms with an area of 34 hectares in Northern Ireland and 48 in Wales. In Scotland, there is extensive livestock farming on farms with an average area of 160 hectares. The United Kingdom's farm working population included 572 000 permanent employees in 1995, one-quarter of whom were salaried. Livestock rearing accounts for almost two-thirds of farmland. In 1995, animal products represented three-fifths of the United Kingdom's farm production and as much as 94 % in Wales and 91 % in Northern Ireland. Dairy products are the principal production. Beef was the second most important product until 1995 but the "mad cow" (BSE-bovine spongiform encephalitis) crisis had a drastic effect on this sector and, in 1996, it dropped below cereal, poultry and pig production. The cattle herd numbered 11 million head in 1996. Sheep production is also well established, what is more, the sheep herd is the Union's largest with 30 million head, but it has been declining for some years. Cereals—especially soft wheat—are

the principal crop products. They are grown mainly in eastern England. Next come fresh vegetables and potatoes.

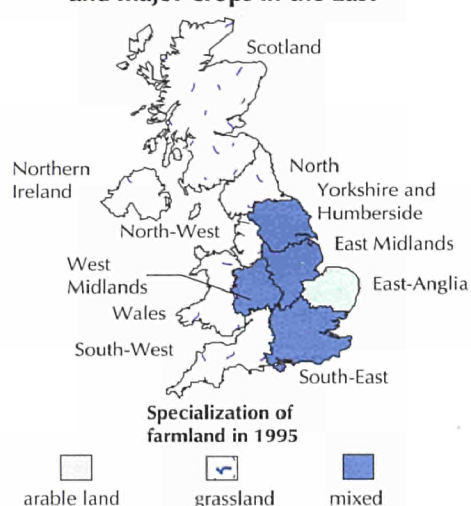
The United Kingdom's foreign food trade is usually in the red. In 1995, imports exceeded exports by 8.4 million ecus. This deficit stems mainly from fruit bought from France and Spain. The United Kingdom is also a major importer of beverages, with more than one-third coming from France. But the trade balance in its beverage trade is in the black, thanks to whisky sales. France is the United Kingdom's leading food trading partner, where both imports and exports are concerned. Despite the United Kingdom's age old trade relations with the Commonwealth, more than 60 % of its food products are today supplied from within the Union. This proportion is close to that of Germany. Foreign trade in the timber sector is as deeply in the red as the food trade. Imports exceeded exports by 7 billion ecus in 1995. The bulk of this deficit stems from paper and cardboard and pulp. But, in 1995, the trade balance in mechanical woodworking also showed a deficit of 1.1 billion ecus. As with the food processing industry, timber industry trade is conducted mainly with Union partners. But the United States is still the United Kingdom's fourth supplier.



## Land use



## Livestock farming in the West and major crops in the East



## Structural data

	1990	1993	1995
<b>Farms ('000)</b>	<b>243</b>	<b>243</b>	<b>235</b>
Proportion of less than 10 ha (%)	26	28	26
from 10 to 20 ha (%)	16	15	16
from 20 to 50 ha (%)	25	24	24
50 ha or more (%)	33	33	34
<b>Average area (hectare)</b>	<b>68</b>	<b>67</b>	<b>70</b>
<b>Share of farming, forestry and fishing employment in total employment (%)</b>	<b>2.2</b>	<b>2.0</b>	<b>2.1</b>
<b>Permanent farm employees ('000)</b>	<b>659</b>	<b>651</b>	<b>572</b>
incl. family workers	461	462	422
salaried employees	198	189	149
<b>Head of holding ('000)</b>	<b>227</b>	<b>228</b>	<b>225</b>
Proportion of less than 35 years (%)	8	7	6
35-55 years (%)	44	45	43
55-65 years (%)	26	26	26
65 or older (%)	22	22	25

Source : Eurostat





## Main crop products...

	1980	1990	1996	1980	1990	1996	1980	1990	1996
	Area ( <sup>'000</sup> ha)			Production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Cereals	3 938	3 658	3 358	19 474	22 583	24 581	2 438	2 996	2 888
wheat	1 441	2 013	1 976	8 470	14 033	16 102	1 320	2 087	2 048
barley	2 330	1 517	1 268	10 320	7 911	7 784	1 071	851	778
Fresh vegetables	176	143	147	3 324	3 008	3 048	946	1 528	1 340
Potatoes	206	177	177	7 032	6 533	7 219	546	744	684

## ... and animal products

	Livestock ( <sup>'000</sup> head)			Meat production ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Poultry	133960	137670	138240	747	1 043	1 465	873	1 512	1 842
Pigs	7 770	7 400	7 621	946	954	993	1 300	1 429	1 625
Cattle	13 061	11 967	11 430	1 090	986	704	2 313	2 508	1 427
Sheep and goats	21 617	30 626	28 337	286	391	383	559	850	1 048

	Livestock ( <sup>'000</sup> head)			Milk collected, eggs produced ( <sup>'000</sup> tonnes)			Deliveries (million ecus)		
Dairy cows	3 277	2 891	2 511	15 494	14 650	14 058	3 317	3 992	4 372
Laying hens	57330	50 085	41292	822	721	658	750	621	586

1. 1995 data.

Sources : Eurostat - Newcronos and Eurofarm for poultry

## Food trade in 1995

million ecus

Imports		Exports	
All	20 862	All	12 452
Of which EU	13 038	Of which EU	8 363

France	2 815	France	2 002
Netherlands	2 625	Ireland	1 322
Ireland	2 105	Netherlands	1 006
Germany	1 393	Germany	975
United States	1 121	Spain	885

Beverages	2 352	Beverages	3 244
Meat	2 104	Meat	1 608
Fruit	2 010	Dairy products	906
Vegetables	1 399	Cereal prep.	821
Vegetable prep.	1 246	Fish	739

Source : Eurostat

## Timber trade in 1995

million ecus

Imports		Exports	
All	10 356	All	3 279
Of which EU	6 875	Of which EU	2 187

Sweden	1 664	Germany	468
Finland	1 512	Ireland	452
Germany	1 097	France	395
United States	848	Netherlands	270
France	746	United States	231

Paper-cardboard	6 405	Paper-cardboard	2 877
Mechanical work	1 345	Mechanical work	232
Pulp	1 266	Pulp	133
Sawnwood	1 204	Rough lumber	22
Rough lumber	136	Sawnwood	15

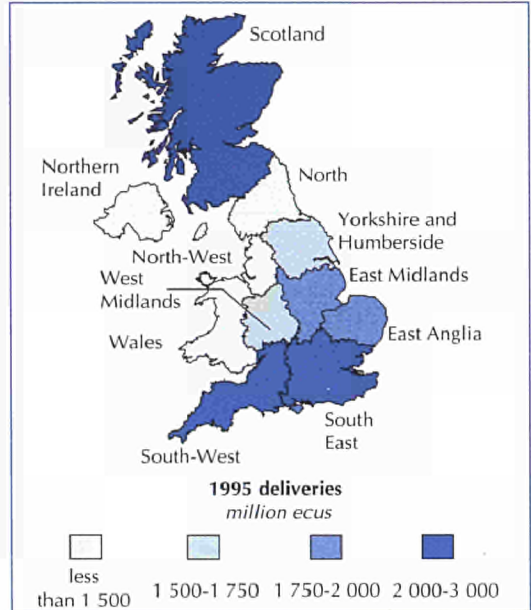


## Cereals only predominate in the southeast quarter<sup>1</sup>

Animal products %	Dairy products million ecus	Cereals products (incl. rice) million ecus
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United Kingdom	61	4 373	2 888
Wales	94	433	12
Northern Ireland	90	424	17
South-West	80	1 111	241
North	80	286	116
North-West	76	404	41
Scotland	67	360	320
West Midlands	65	454	189
Yorkshire and Humberside	55	245	334
South-East	41	284	499
East Midlands	40	226	433
East Anglia	30	54	400

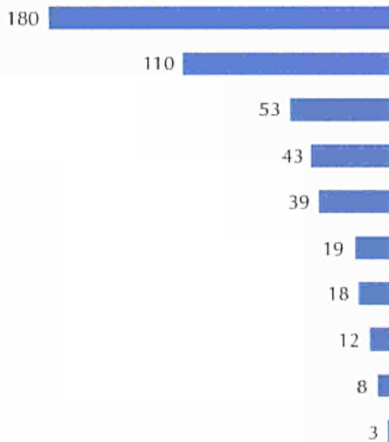
1. 1995 deliveries for the regions and 1996 for the United Kingdom.



## Main food processing sectors in 1995<sup>1</sup>

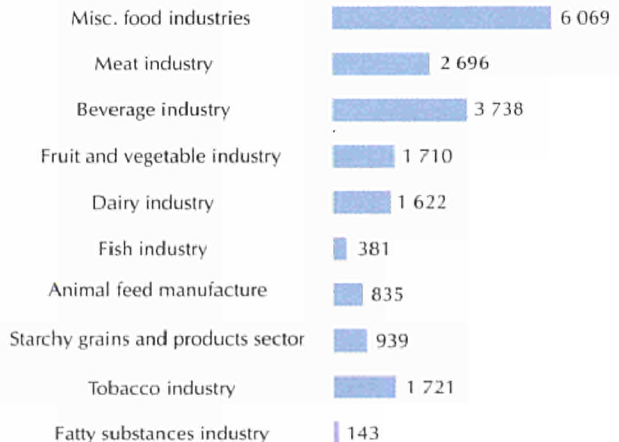
### Number of employees

thousands



### Value added at factor cost

million ecus



1. Companies with 20 employees or more.





# Appendices



## THE MAJOR STAGES OF THE EUROPEAN UNION

**1948** : Creation of the Benelux Union, comprising Belgium, the Netherlands and Luxembourg.

**1952** : Creation of the European Coal and Steel Community (ECSC) on 25 July, for 50 years.

**1957** : Treaty of Rome setting up the European Economic Community (EEC) for an unlimited duration.

**1958** : On 1 January, Treaty of Rome and the treaty setting up Euratom both come into effect; subsequent creation of a Commission and a Council per Community, the Court of Justice, the Assembly, and the European Investment Bank (EIB).

**1960** : Treaty setting up the European Free Trade Association (EFTA), grouping of seven non-EEC member countries.

**1968** : First stage of the EEC's economic incorporation in a customs union ; common customs tariff for non-member countries.

**1972** : Adoption by Member States of the "currency snake", a system for the concerted floating of Community currencies.

**1973** : Denmark (with Greenland, but without the Faroe Islands), Ireland and the United Kingdom become members of the EEC. In a referendum held in September 1972, the people of Norway refused to become the 10th EEC member.

**1978** : Adoption of the ECU, made up of fixed amounts of Member States' currencies.

**1979** : The European Monetary System (EMS) replaces the currency snake. The United Kingdom remains outside the system. First direct election of the European Parliament, to be renewed every five years.

**1981** : Greece becomes a member of the Community on 1 January.

**1983** : Date of the first "European Union" declaration.

**1984** : Greenland leaves the EC.

**1986** : On 1 January, Spain and Portugal become members of the Community. In February, the Twelve sign the Single European Act aimed at

relaunching the process of European integration and creating a real domestic European market by 1993.

**1989** : Approval of the Delors Report to create the Economic and Monetary Union (EMU). The Berlin Wall comes down on 9 November.

**1990** : On 1 July, the free circulation of capital comes into effect, the first stage of the EMU. On 3 October, the German unification treaty comes into effect, with the eastward extension of the EEC.

**1992** : Signing in February, at Maastricht, of the Treaty on European Union. Signing, in May, at Oporto, of an agreement between the EEC and the EFTA on the creation of a European Economic Area (EEA). The Swiss refuse to join the EEA on 6 December.

**1993** : The European domestic market becomes a reality on 1 January. In early August, transition of margins of fluctuation of currencies from 2.5% to 15%, to offset very considerable speculation on the money market.

**1994** : The Maastricht Treaty setting up the European Union, comes into effect on 1 January, start of the second stage of the EMU. The agreement setting up the EEA also comes into effect. There will henceforth be free circulation of goods, people, services and capital between the Union and the Member States of the EFTA (with the exception of Switzerland).

**1995** : On 1 January, Austria, Finland and Sweden become part of the EU, something which the people of Norway had again rejected November 1994. In April, the people of Liechtenstein approve its admission to the EEA ; the principality thereby joins Iceland and Norway. Switzerland refuses to join. Naming of the new single European currency in December : the EURO.

**1997** : The EU announces that in 1998 it will open membership negotiations with Cyprus, the Czech Republic, Estonia, Hungary, Poland and Slovenia.



## THE MAJOR STAGES OF GREEN EUROPE

**1958** : The Common Agricultural Policy (CAP) is introduced as part of the Treaty of Rome on 25 March 1957. Its primary aim is to encourage European farmers to produce more, by modernizing their production techniques, in order to achieve self-sufficiency in most products. It is also designed to guarantee fair prices for consumers.

Three major principles help to turn these goals into a reality : single market and price for every agricultural product, Community preference, and financial cohesion to cover expenditures managed on the basis of the European Agricultural Guidance and Guarantee Fund (EAGGF).

**1962** : Establishment of rules for the main Common Market Organizations (CMO) for each major branch of agriculture : the CMOs are based on the fixing of a price that the Community wants to guarantee each year for producers.

**1965** : As from 6 July, France practices the empty chair policy, an outcome of differences of opinion to do with the financing of the CAP ; the "Luxembourg compromise" of 29 January 1966, whereby France would reoccupy its place, would replace majority decisions by unanimous decisions, whenever vital interests are at stake.

**1967** : CMOs come into effect for cereals, pork, eggs, poultry, and oleaginous seeds.

**1968** : CMOs come into effect for sugar, beef, milk, and floricultural plants and products.

**1979** : The Community Agriculture Ministers decide to make milk producers pay a "joint responsibility deduction", so as to contribute to the storage costs of surpluses on world markets.

**1984** : Establishment of milk quotas to curb the ever-increasing over-production of milk...

**1988** : Introduction of "guarantee limits" or stabilizers for every type of agricultural product, permitting the automatic reduction of the Community's financial competition.

**1989** : Public cereal stocks exceed 25 million tons at the start of the year.

**1992** : Price lowering has become crucial to guarantee greater competitiveness within and outside the Community. A CAP reform is thus launched to gradually lower the price of markedly surplus products (cereals, beef...) by undertaking to compensate for farmer's lower incomes by direct aid packages. Land set-aside rates are introduced for cereals, oleaginous crops and proteinaceous crops in order to limit the overall volume of aid being paid out.

**1995** : Public cereal stocks are not more than 5 million tons. In September, the decision to reduce set-aside rates is taken, because world demand is once again on the rise.

**1997** : Reduction of set-aside rates for 1997-1998.





## THE PRINCIPAL FEATURES OF THE COMMON AGRICULTURAL POLICY

*This appendix briefly describes the broad outline of the common agricultural policy (CAP) and its reform in the early 1990s.*

### **The outline of the CAP since 1957**

At the dawn of the creation of the European agricultural market, the countries of Western Europe, and in particular Germany, France and Italy, were considerably in deficit in the food sector. The CAP, introduced as part of the Treaty of Rome of 25 March 1957, was intended to make it possible to limit the reliance of European Community member countries on the rest of the world.

The goal of this policy was thus to encourage European farmers to produce more by modernizing their production techniques, in the best possible financial conditions, in order to achieve self-sufficiency in most products, meeting Community requirements and guaranteeing fair prices for consumers. Three major principles helped to turn these aims into reality: single market and price for each farm product circulating freely within the Community, Community preference to encourage trade between Member States, financial cohesion to cover expenditures managed on the basis of the European Agricultural Guidance and Guarantee Fund (EAGGF).

Common market organizations (CMOs), of which the management methods may vary from one product to the next, were then set up for each major branch of agriculture (cereals, sugar, beef...) and are still broadly operating today. A significant proportion of Community farm production enjoys external protection and on-going price support. This applies to most cereals, sugar, dairy products and beef. The CMOs are thus based on the fixing of a price that the Community wishes to guarantee every year for producers. They plan the storage of part of the surplus supply, in the event of over-production, by the intervention mechanism. In addition, because the Community rate is usually higher than the world rate, exports of member countries of the European agricultural union to non-member countries are aided, and the Community then pays a refund to the

exporter, covering the price differential. The operating rules of the main market organizations were laid down in 1962, but it was not until 1967 and 1968 that they came into effect for the principal products (in 1967 for cereals, pigs, eggs, poultry, oleaginous seeds, and in 1968 for sugar, beef, milk and floricultural plants and products). To deal with the management costs incurred by surplus production, adjustments to the CAP were introduced in the 1980s: milk quotas, joint-responsibility taxes, and guaranteed maximum quantities for cereals.

### **The May 1992 CAP reform**

In the early 1990s, a far-reaching reform of the CAP was deemed necessary to encourage farmers to adopt less productive strategies. The main measures were applied in 1992, and then in mid-1993. The CAP reform particularly affects the arable crop sector.

The intervention purchase prices for cereals were lowered by almost 25 % for 1993-1994, and by 6.7 % for 1994-1995 and 1995-1996. The prices for proteinaceous crops are henceforth fixed on the world market, as was already the case with oleaginous crops, as from July 1992. These reductions are made up for by direct aid packages per hectare. Furthermore, the payment of these sums is subject to a set-aside of a part of the overall area earmarked for cereals, oleaginous and proteinaceous crops (ACOP). However, this restriction is not applied to small producers, that is to those whose production is lower than a reference threshold. The loss of revenue incurred by land set-aside is also compensated for by a per-hectare aid package. If the ACOP is exceeded, direct aid is reduced. In addition, the percentage of the excess entails an additional set-aside at an equivalent rate during the following year, with no compensation. For all this, lands that have been set aside may be used for crops with non-dietary uses. This cultivated land is known as "industrial fallow".

The cattle sector is also affected by the CAP reform. In addition to the maintenance of milk



## THE PRINCIPAL FEATURES OF THE COMMON AGRICULTURAL POLICY

quotas, the intervention prices dropped by 5 % on 1 July in 1993, 1994, and 1995. The drop is made up for by a re-evaluation of the bonuses per milking cow and male cattle.

All things being equal, the CAP reform entails a reduction of market support expenditures, whether these have to do with intervention purchases or export refunds. By means of cutting the prices

of farm products, the CAP reform is advantageous to user industries (food-processing industries) and to consumers. The increase of subsidies, linked with the new direct aid packages, thus is the result of a change to the agricultural support system: part of the support by prices is replaced by direct aid paid to farmers.



## THE WORLD'S MAJOR ECONOMIC ZONES

*To help readers to situate the European Union in relation to the world's major economic zones, comparisons have been made wherever possible with these zones, specifically where production-related data are concerned.*

### **EFTA (European Free Trade Association)**

Created on 3 January 1960 in Stockholm, EFTA at that time encompassed Denmark, Switzerland, Norway, Austria, Portugal, Sweden, the United Kingdom, and then Finland, a year later. Today, it is made up of Switzerland, Norway, Iceland and Liechtenstein.

EFTA has totally done away with customs dues and quantitative restrictions on industrial products between its member countries, and also with the European Union. With one or two minor exceptions, farm products are still not included in free trade agreements. There is no common foreign tariff.

### **CEFTA (Central European Free Trade Association)**

Created in 1992, after negotiations got under way in mid-February 1991 in Visegrad, it initially included Hungary, Poland and Czechoslovakia, which was replaced after its split on 1 January 1993 by the Czech Republic and Slovakia. In 1995, Slovenia became the fifth member.

It is a free trade zone for Central Europe. Farm products are divided into three groups. Products imported from non-member countries, such as coffee, rice, tropical fruit, are not liable to customs dues. Products coming from the temperate zone, such as sugar beet, hops, malt, powdered milk, poultry and vegetable oils are taxed at 13.8%. Other farm products are not affected by this free trade area.

### **NAFTA (North American Free Trade Association)**

Created on 1 January 1994, this agreement opened up a free trade area of 370 million consumers between the United States, Canada and Mexico, aimed at doing away with barriers to the free circulation of products within ten years.

For the farming sector, it includes three bilateral agreements, in order to exclude from the free trade system certain products like Canadian milk and poultry, Mexican chicken and maize, and American horticultural products and cotton, all fragile items in the face of imports.

### **ASEAN (Association of South-East Asian Nations)**

This is an Asian free trade agreement, signed by Singapore, Malaysia, Indonesia, Brunei, the Philippines and Thailand in 1992, and joined later by Vietnam.

Its aim is to introduce a limitation on customs duties in order to encourage intra-regional trade.

### **CIS (Commonwealth of Independent States)**

Formed when the USSR broke up, following the meeting between eleven heads of state on 21 December 1991 at Almaty, it includes twelve of the fifteen former republics of the USSR, the three Baltic republics having become completely independent a few months earlier.

Among other things, it aims at introducing a common economic area to bolster the integration process.

### **EEA (European Economic Area)**

Created on 2 May 1992 at Oporto by an agreement between the EEC and the EFTA, and coming into effect on 1 January 1994, it encompasses the countries of both the European Union and EFTA, apart from Switzerland.

It entails a far-reaching change in the relations between the European Union and the Member States by permitting the free circulation of people, services and capital.

### **Mercosur or Mercosul (MERCado COMun del Sur/ MERCado COMun do SUL)**

Created on 1 January 1995 in Montevideo, after four years of negotiations and a gradual lowering of customs dues, and forming the world's third largest economic bloc, it includes Argentina, Brazil, Paraguay and Uruguay, i.e. 45% of world production of soya and 13% of beef production. It has introduced a common external tariff, fixed on average at 11%, with a gradual adjustment up until 2006 in certain cases. These rates are 8% for barley, maize and soya seed, 10% for wheat, rice, soya oil and meat products.





## THE AGRICULTURAL POLICY OF THE UNITED STATES

*The aim of this appendix is to describe the main direction of the agricultural policy of the United States, and, in particular, the broad outline of the Fair Act signed on 4 April 1996 by President Clinton.*

### Emerging from the Great Depression of 1929.

The foundations of American agricultural policy were laid after the Great Depression of 1929. In 1933, the Roosevelt administration voted in the Agricultural Adjustment Act (AAA), a law concerning the adjustment of agriculture, and part of the New Deal implemented to get the country out of the Great Depression.

The AAA laid the ground for federal intervention in farming:

- farmers who agreed to reduce their cereal crops, or reach marketing agreements with processors, received direct help;
- farmers taking part in land reduction programmes enjoyed loan rates that enabled them not to immediately market their harvest. These loans were "non-payable on demand", which meant that the farmer could repay them by handing his harvest over to the Commodity Credit Corporation (CCC), a public intervention agency.

- These measures were completed by the implementation of natural resource conservation programmes as well as rural development projects.

The 1933 AAA and its amendments of 1938 and 1949 form the on-going legislative framework for farm support. The laws voted in subsequently are, essentially, amendments to these two legislative acts, to do with production monitoring and price support levels.

### The change in the CAP in 1965

With the law of 1965, American agricultural policy began a change of direction. Support prices were brought to the level of international rates. Henceforth, revenue aid depended essentially on direct assistance, and thus on budgetary efforts.

This trend was backed up by the law of 1973, which created the target price system per crop, which was supposed to guarantee proper remuneration for farmers, because it was based on production costs.

The Farm Acts of 1985 and 1990 further complemented the price support programmes for many farm products, in particular with the intro-

duction of export promotion and development programmes for American farm products. Legislation passed in 1990 stressed the 1985 tendency towards a stepped-up market role, a drop in support expenditures, and a greater environmental awareness.

### The Fair Act (Federal Agriculture Improvement and Reform Act) of 1996

Like previous legislative measures, the Fair Act covers a wide range of measures which go well beyond mere farm revenue support. The law draws up a set of measures with a direct or indirect impact on farming activities: subsidies, guaranteed prices, agronomic research, environmental protection, and it also incorporates food aid for the most disadvantaged Americans. This aid alone uses two-thirds of the budget of the USDA (US Department of Agriculture). The Fair Act defines farm support programmes for the period 1996-2002. It covers the main crop products and milk. Meat does not enjoy any direct aid, but it is directly affected by the costs of animal feed, and thus by measures involving plant products.

The Fair Act liberalizes and simplifies the policy affecting major crops such as wheat, maize, sorghum, barley, rice and cotton. It gives greater leeway to market mechanisms, as a result of three main series of measures:

- The elimination of annual fallow puts an end to an obligation imposed for decades on farmers taking part in the cereal and cotton support programmes.

- The easing of the long-term fallow programme (Conservation Reserve Program, or CRP), established in 1985. This programme was aimed at protecting land liable to erosion or land of environmental interest. Some fifteen million hectares were thus put in reserve. The CRP has been extended, but the conditions for putting land back to crops have been considerably relaxed.

- The elimination of aid linked with production. Direct aid for specific crops was paid to farmers taking part in support programmes. Henceforth, aid is set per farm, based on historical land-area references, yields and types of production, provided that a production flexibility contract is signed for seven years with the USDA. Aid is scaled down over time. Farmers have almost total freedom in their choice of crop rotation.



## THE AGRICULTURAL POLICY OF THE UNITED STATES

The Fair Act slightly alters the rules governing sugar. The loan rate is frozen at its current level for sugar beet, but the intervention system only operates below an import threshold. Producers are given total domestic marketing freedom.

The Fair Act introduces deregulation in the dairy products sector. Intervention procedures are extended for cheese, and adjusted for butter and skimmed milk powder up until 1999. The support price for milk is lowered for the period 1996-2000. From the year 2000, the price support programme will be replaced by a system of recoverable loans to processors. Deductions on the price of milk, paid by producers to fund intervention purchases, are being done away with. Last of all, the minimum price-fixing system (marketing orders) for higher quality milk, depending on production areas, and depending on end use, is being simplified.

### Export support measures

The United States helps its farm exports, either directly by export subsidies, or indirectly by credit guarantees, food aid programmes and finan-

cing to promote American products on foreign markets.

The Fair Act reduces exports subsidies and promotional assistance packages, but retains export credit guarantees.

### Agro-environmental programmes

Existing environment protection programmes are maintained and new ones are being created. The major new measure is undoubtedly the Environment Quality Incentives Program (EQUIP). The aim of the EQUIP is to help farmers improve the protection of natural resources against farm-related sources of pollution.

### Sources :

Blanchet (J.), Chéreau (C.), Debar (J.-C.), Revel (A.), *La révolution agricole américaine*, Éd. Economica-Cyclope poche, Paris, 1996.  
*Lettre de la DPE*, n° 1, avril 1996. Ministry of Agriculture and Fisheries, France.  
USDA Internet site.



## METHODOLOGY

### Land use maps (by country)

These are constructed using a breakdown of the utilised agricultural area (UAA) into three categories : arable land, permanent grassland, and permanent crops.

A zone is classified as **arable land** if the UAA includes at least 75 % arable land. Failing this, it is classified as **grassland** if it includes at least 50 % permanent grassland. Failing this, it is classified as **permanent crops** if the UAA includes

at least 10 % permanent crops. Zones which do not meet any of these criteria are classified as **mixed**.

### Foreign trade in timber (by country)

This involves rough lumber, sawnwood, products from mechanical wood working, pulp, paper and cardboard. A list of the products concerned is included below, with their coding based on customs nomenclature.

Nomenclature codes	Headings	Nomenclature codes	Headings
130190	timber by-products	4412	plywood
4401	firewood	4413	densified wood
4402	charcoal	4414	wooden frames
4403	rough lumber	4415	crates
4404	hoop wood	4416	casks and barrels
4405	wood wool	4417	tools
4406	timber for railway sleepers	4418	woodwork, joinery and structures
4407	sawnwood	4419	kitchen articles
4408	vener sheets	4420	marquetry wood
4409	profiled wood	4421	other items
4410	particleboard	4500	cork
4411	fibreboard	4700	pulp
		4800	paper and cardboard





## FOR FURTHER INFORMATION

### AGRESTE

AGRESTE covers all the data collected and disseminated by the agricultural statisticians at the French Ministry of Agriculture and Fisheries.

The range of national publications from AGRESTE includes general works - such as *GraphAgri Europe* - and also thematic works treating different domains of agriculture, forestry and fisheries and the agri-food industries. It also includes data on magnetic media.

### GENERAL WORKS

#### The Graph agri collection

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### OTHER PUBLICATIONS

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## INDEX OF ACRONYMS

**AFI** : Agri-food industry.

**ASEAN** : Association of South East Asian Nations.

**Benelux** : Economic Union comprising Belgium, the Netherlands and Luxembourg.

**BLEU** : Belgium Luxembourg Economic Union.

**Caobisco** : Association of Sweet Products Industries of the EEC.

**CAP** : Common Agricultural Policy.

**CBMC** : Working Community of Common Market Brewers.

**CEEC** : Central and Eastern European Countries.

**CEFTA** : Central European Free Trade Agreement.

**Cestat** : Harmonised statistics of Central European countries.

**CIS** : Commonwealth of Independent States.

**EAGGF** : European Agricultural Guidance and Guarantee Fund.

**ECU** : European currency unit.

**EEA** : European Economic Area.

**EEC** : European Economic Community.

**EFTA** : European Free Trade Agreement.

**EU** : European Union.

**Euratom** : European Community for Atomic Energy.

**Eurofarm** : Eurostat database of farm structure data.

**Eurostat** : Statistical Office of the European Communities.

**Ex-FRG** : Former Federal Republic of Germany, as it existed before the unification of 3 October 1990.

**FAFPAS** : European Federation of Frozen Food Manufacturers.

**FAO** : Food and Agriculture Organisation of the United Nations.

**FEFAC** : European Feed Manufacturers Federation.

**GDP** : Gross domestic product.

**INE** : Instituto Nacional de Estadística : Statistical Office of Spain.

**IWC** : International Wheat Council.

**Mercosur** : Mercado común del sur : Southern common market, comprising Argentina, Brazil, Paraguay and Uruguay.

**NAFTA** : North American Free Trade Agreement.

**Scees** : Central Service for Surveys and Statistical Studies, Ministry of Agriculture, France.

**UHT** : Ultra high temperature.

**USDA** : United States Department of Agriculture.

**USSR** : Union of Soviet Socialist Republics.

**VAT** : Value added tax.

**ZMP** : Zentrale Markt- und Preisberichtsstelle : German organisation which follows agricultural markets in Germany, the European Union and the World.



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