COMMISSION OF THE EUROPEAN COMMUNITIES

COM (78) 417 final

Brussels, 29 September 1978

COMMISSION REPORT TO THE COUNCIL

Concerning the quantities of oriental tobacco from the 1976 harvest taken over by the intervention bodies

COM (78) 417 final

S U M M A R Y

EXPLANATORY MEMORANDUM

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1. Under Article 13 (1) of Council Regulation (EEC) No 727/70 of 21 April 1970 on the common organization of the market in raw tobacco [1], it is established that:

   "Where, for a variety or a group of varieties, the quantities taken over by the intervention agencies exceed, for a particular crop, a stated percentage of production, and in any case a stated quantity, the Council shall examine the situation on the basis of a report which the Commission shall submit to it at the end of the marketing year and not later than 30 April of the calendar year following that of the crop."

   The percentages and quantities in question were fixed by the Council in Council Regulation (EEC) No 1469/70 of 20 July 1970 [2].

2. Experience in the operation of the market organization has shown once again that it was not possible for the Commission to submit this report before the final date, i.e. 30 April of the year following that of the harvest in question. Even if the available information can be considered as definitive, the withdrawal actions by the Intervention Agency are, however, still in progress.

3. For the 1976 crop, intervention figures show that for the oriental varieties the quantities bought in amounted to 12.500 t of baled tobacco. This figure must be converted to quantities of leaf tobacco on the basis of the loss-of-weight coefficients used for fixing premiums, i.e. to ± 14.000 t. Consequently, the upper limit of 20 % of production and the maximum permitted quantity (4.000 t) would seem to have been exceeded for these varieties.

   Under these circumstances, the situation as regards production and disposal of these varieties should be examined on the basis of the information contained in the present report.

(1) OJ No L 94 of 28.4.1970
(2) OJ No L 164 of 27.7.1970

I. DEVELOPMENT OF THE SITUATION ON THE INTERNATIONAL MARKET

1. World production of oriental tobacco (approx. 950.000 t) represents about 17 % of the total output (5.5 millions t) and is divided between Europe (40 %), Asia (32 %) and the USSR (24 %). Community production, which is concentrated exclusively in Italy, barely exceeds 3 %. Between 1962 and 1975 oriental tobacco production increased greatly (70 %), but forecasts for 1980-81 predict an increase in line with the general rise in world tobacco consumption (1-2 % per year). International trade in oriental tobacco (approx. 250.000 t) represents about 20 % of the world total (1.3 million t).

2. Between 1962 and 1972 production of oriental tobacco in all the countries mainly concerned, i.e. Turkey, Greece, Bulgaria and Yugoslavia, increased at a fairly constant rate. In the five years from 1962 to 1966 annual average production was 423.000 t and in the five years from 1967 to 1971 410.000 t. From 1972 onwards it gradually increased till it reached a peak in 1976 at 670.000 t. In the five years from 1972 to 1976 annual average production was 524.000 t, an increase of 28 % over the annual average for the preceding 10 years.

3. During the period under consideration prices gradually rose a little, in line with the gradual increase in costs up to the 1973 harvest. This was the result of a wise policy whereby leaf tobacco was purchased with a view, despite difficulties, to reconciling the pressing needs of the growers with the absolute necessity of exporting processed tobacco at a price acceptable to purchasers. Starting with the 1973 harvest, given the extremely brisk demand on the world market and the considerable increase in labour costs, there was a sharp rise in prices. The average export price was 12,10 % higher in 1974 than in 1973, 39 % higher in 1975 than in 1974 and 22,10 % higher in 1976 than in 1975.

4. From the end of the Second World War until 1973 demand increased considerably while changing substantially, under the pressure of different market requirements linked to the introduction and widespread use of filters and the rapid changes in smokers's taste. The reduced consumption of oriental tobacco in the importing traditional western countries was largely offset by the considerable increase in consumption in the producer countries, i.e. Turkey, Greece, Yugoslavia and Bulgaria. Between 1960 and 1976 consumption in these countries increased by about 90 %, cigarettes still being made entirely of oriental tobacco. Between 1974 and 1976 the trend was reversed on the world market, mainly as a result of the sharp rise in prices and also worrying stagnation in countries such as the United States, Japan and West Germany, which traditionally use oriental tobaccos.

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5. Turkey, Greece, Yugoslavia and Bulgaria thus exported about 270.000 t in 1973, 252.000 t in 1974, 207.000 t in 1975 and 206.000 t in 1976, with a drop of 7,35 % in 1974 and about 24 % in 1975 and 1976 compared with total exports in 1973. The considerable increase in production and the drop in exports in the four producer countries resulted in large stocks of unsold tobacco. At the end of 1976 the stocks amounted to 400.000 t, equal to total production for a normal year and 40 % of annual world consumption.

6. In 1977 the situation on the world market showed encouraging signs of improvement. Production fell considerably, with a clear improvement in quality. As a result of the various support measures applied by the governments of the main producer countries the export price was much lower and therefore more competitive with other types of tobacco. This new situation could have a positive effect on consumption in the medium term.

II. DEVELOPMENT OF THE EEC MARKET

1. In the Community the Xanti, Perustitza and Erzegovina varieties, which as is well known are grown only in Southern Italy, generally experienced the same phenomena and trends as in the major producer countries. It should be pointed out, that for some years the average yield per hectare has been increasing as a result of more intensive fertilization, the use of different planting-out system and of higher yielding seeds, and sometimes excessive irrigation. Despite a reduction in acreage, Xanti production has remained more or less steady. In the three-year period from 1975 to 1977, the average area under Perustitza was 97 % up on 1970-1972, with average production increasing by 155 % and average yield by 28 %.
   In the three years 1975-1977, the average area under Erzegovina was 45 % up on 1970-1972. Average production increased by 110 %, for here also, for the reasons already mentioned, average yield increased by 39 %.

2. Although the Community has always applied a cautious policy with regard to price increases for oriental tobaccos (only 14 - 18 %, depending on the variety, between 1970 and 1977), there was nonetheless a considerable increase in the price paid to the grower for the 1974 and 1975 harvests, mainly as the result of the continuous gradual devaluation of the green lira. Between 1970 and 1972 the price paid to growers increased by only 4 %. In 1973 it increased by 15,5 %, in 1974 (compared with 1973) by 45,2 % and in 1975 by 45 %. Between 1970 and 1975 the green lira was devalued by 41 %. In 1976, because of the difficulties in marketing the previous harvest, there was a significant reversal in trends, and in view also of the poor quality of the harvest producers were paid a considerably lower price (about 25 %) than in 1975.

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In 1977 the harvest was small and of good quality. The need to sell baled tobacco at an acceptable market price restrained grower's demands. Nevertheless they obtained an average price of Lit 177.000 per quintal, which was 14 % lower than in 1975 but 14,80 % higher than in 1976.

3. The Community price structure and especially the level of the premium are much more advantageous for Erzegovina and Perustitza in the future because they give higher yields. The yield per hectare of the Xanti variety is much lower, and production costs much higher, than for the other two varieties. Of the three varieties, Xanti gives the lowest return on investment. This is the only explanation for the fact that, in the eight years of the common organization of the market and especially from the 1972 harvest onwards, Xanti production has increased only slightly while production of the two other varieties has doubled.

III. MARKETING STRUCTURES IN THE EEC AND NON-MEMBER COUNTRIES

1. The Italian Monopoly

Annual demand for Italian-produced oriental tobacco, on the basis of the current blends for the most widely-sold cigarettes, is about 12.000 t per year, broken down as follows: 5.000 t of Xanti, 4.000 t of Erzegovina and 3.000 t of Perustitza. So far the Monopoly has purchased 10.000 t, i.e. 2.000 t less than required, because it must use substantial stocks still remaining from previous harvests. Recently a new low-priced "Nazionale" cigarette was put on the market. It seems to have been very successful at least at the initial stage. This cigarette is made only from Italian tobaccos, including 40 % oriental.

2. Community industry

The Community requirement for oriental tobacco is 50.000 t per year, of which 30.000 t are for the German industry alone, which regularly obtains supplies at the rate of 4 to 5.000 t per year on the Italian market. It has a preference for Erzegovina, which is essentially a neutral, very light tobacco very suitable for use as filler. Some Dutch and Belgian firms also make regular purchases of an average of 1.000 t per year.

3. Non-EEC industry

Towards the end of 1973, when the world market was experiencing difficulties because supplies were short while demand was very brisk, the United States industry showed a special interest in the Italian oriental tobacco market.

This market offered considerably better prices than similar types on traditional markets as the result of the application of common agricultural policy mechanisms. Manufacturers in other countries, such as Egypt, Australia, Hungary, Israel and Tunisia, followed the United States example, with the result that at the end of 1974 the volume of sales to non-member countries exceeded 9.000 t and reached the record figure of 15.000 t in 1975.

4. In 1976, a very bad year, the situation suddenly changed. Exports, including sales to Community countries, stayed below 7.000 t. Home consumption remained at the usual level of 9 to 10.000 t but production reached the record figure of 33 to 34.000 t (baled tobacco). The very poor quality in 1976 caused the usual customers to delay their supplies or to turn to other markets. The very high export prices caused by the increase in production costs were responsible for a drastic reduction in the margins between the offer price for the Community product and that for the Greek or Turkish product. Moreover, Greek and Turkish tobacco is offered on the international market at knock-down prices under the heavy export subsidy policy applied by the governments of the two countries concerned in order to dispose of their huge surplus stocks.

5. The EEC granted all the facilities possible to support and expand marketing of the 1976 crop, which it was willing to regard as exceptional so that especially large export refunds could be granted. (Reg. (EEC) No 2266/77 of 1.12.77). The results obtained so far, however, have not been fully up to expectation. The 1977 harvest, which produced a smaller crop of adequate quality, offers decidedly better prospects. It is considered that about 11.000 t can be exported and about 10.000 t can be absorbed by home consumption.

6. <u>Deliveries to the intervention agency</u>

From the 1970 harvest, 3.729 t were sold into intervention; the figure for 1971 was 4.610 t. At that time the new Community rules were at the running-in stage and sales to both Community and non-EEC countries were insignificant. The Italian Monopoly was still the sole purchaser, and it moreover had to reduce its normal purchases in order to dispose of the large stocks it had in store. The situation improved considerably with the 1972 harvest, of which only 1.776 t were delivered to the intervention agency. The situation in 1973 and 1974 was very satisfactory: all the oriental tobacco produced was disposed of on the open market. In 1975, as a result of the changed conditions on the world market, 1.133 t were deliverd to intervention, including 830 t of

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Erzegovina. A large quantity (about 12.500 t) was delivered to intervention in 1976, a very bad and exceptionally wet year which produced an abnormal yield of poor quality. However, this was totally exceptional. As has already been said the 1977 harvest has returned to a satisfactory normal and it is expected that the quantity sold into intervention ought not to exceed 3.500 t (Erzegovina ± 2.500 t).

7. If the quantity of each variety sold into intervention is examined separately from 1972, which is when the running-in stage in the application of Community rules can be considered as completed, we see the following: in 1972, 552 t of Xanti were delivered, 376 t of Perustitza and 848 t of Erzegovina; in 1975, 133 t of Xanti, 171 t of Perustitza and 829 t of Erzegovina; in 1976, ± 2.500 t of Xanti, ± 3.500 t of Perustitza and ± 6.500 t of Erzegovina. Of a total of about 16.000 t, ± 3.200 t were of Xanti, i.e. 20 %, ± 4.200 t of Perustitza, i.e. 26 % and ± 8.500 t of Erzegovina, i.e. 53 %.

8. The tobacco in intervention must be sold. It should be noted that when it is sold, the supply price is minus the premium and any possible export refund. If this sale can be made on a market where there are good sales possibilities the difference between the intervention buying-in price and the selling price when the tobacco leaves intervention is roughly equal to the amount of the premium which has not been granted. In this market situation the financial effect of the intervention buying-in is almost neutral and the only expenditure is an financing and storage costs. However, for the varieties in question, the demand is such that sales by the intervention agency on the world market can only be made at relatively low prices, i.e. at 60 % of the buying-in price (minus the premium) causing relatively large losses for the intervention agency and consequently for the EAGGF. One should remember, however, that in this case no export refund is granted on the tobacco.

Although for the sector as a whole expenditure on public storage is relatively modest (about 10 mu.a.)compared with total expenditure on tobacco (about 210 m u.a.), from the financial point of view it would also be better to adopt measures which would bring about a better balance between supply and demand thus avoiding large-scale intervention support.

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IV. STRUCTURE OF EEC PRODUCTION

1. Seventy-eight per cent of oriental tobacco is produced in Apulia, 15 % in Abruzzi, 3 % in Campania and Lucania and only 1 % in Latium. In Apulia most of the tobacco (65 % of the total) is grown in the province of Lecce. Tobacco, which thrives best in light, loose, poor soil in a warm, dry climate, is the mainstay of the economy of a generally fairly poor region not capable of much improvement, both because it enables poor soil to be put to good use and because it employs a large amount of labour both in growing and in the first processing stage, in a thickly populated area.

2. It is calculated that in the tobacco-producing regions as a whole, growing represents about 3.000 work days and first processing about 1.200.000. Tobacco is almost always grown directly by grower families, on holdings of an average area of 70 ares. Growing employs about 40.000 families for 6 months of the year, and in winter time, i.e. the processing period, there are jobs for 20.000 workers.

3. In the regions in which tobacco is grown, because of their soil and climate, there does not seem to be any alternative kind of agriculture capable of ensuring the same labour income. Neither is any form of industry possible in

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the short-term, because of the total lack of any source of energy or raw materials and the long distance from the main consumer markets. To sum up, this is an agricultural area particularly suited to tobacco-growing, an activity which can ensure the grower families a decent job and a secure source of income when growing is combined with the first processing.

4. For some years now many grower families have been finding it necessary to form cooperatives (in 1977 cooperatives were responsible for about 25 % of the total production) in order to organize production and marketing more efficiently. The formation of these cooperatives has, among other things, brought down costs somewhat as a result of mutual assistance during the main cultivation operations such as planting-out and harvesting. Other cooperatives have been set up to carry out the first processing of the product. They have built new establishments on rationalized line, with aid from the EAGGF. However, an efficient marketing structure is still lacking.

V. PROSPECTS ON THE WORLD AND COMMUNITY MARKET

1. The current situation on the world market is difficult because demand is stagnant and considerable stocks remain unsold. Under present conditions it is not expected that there will be a significant increase in demand or that the unsold stocks will be rapidly disposed of. This will only be possible in the long term, and production should gradually be reduced to distinctly lower levels, so as to be more in line with demand. During 1977 a start was made on reducing the area under tobacco. The greek and Turkish Governments are applying measures to limit investment in this area.

2. At Community level the forward analysis of the market for the 1977 harvest does not appear to pose any great problems. This is due to reduced production on the one hand but principally to improved quality. Disposal difficulties will however persist in the medium term. There are two reasons for this:

   - a reduction in the margin of competitivity between offer prices for the Community varieties and those for tobacco from other sources;

   - the amount that will be available and the quality level of certain varieties.

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3. Examination of these figures based on a careful study of the market situation shows that under present circumstances only 22 - 22.000 t of Italian-produced oriental tobaccos can be sold on the open market. There is no doubt that the entire sector urgently needs a complete and thorough reorganization, which by means of a more rational selection of land, genetic improvement of the varieties and application of more suitable cultivation techniques, would produce a better quality crop, even at the expense of quantity.

4. The contract system recently put forward by the Commission, together with the possibility of advance granting of the premium, is bound to result in an effective rationalization of the most important stages of the production process. The Commission is now promoting a major agricultural research programme in the sector with a view to accurately defining the features of the production process which should be corrected.

5. Lastly it remains to be considered what the effect full Greek membership of the Community could have, in view of the fact that Greek tobacco is already known and sold throughout the world and is backed by solid marketing structures. There are grounds for believing that at least in the short-term Greek membership will not give rise to any special problems of adjustment for current EEC production, especially as Italian oriental tobacco is now an established part of the blends for some major cigarettes widely sold at world level.

   In the medium- and long-term however the problem will be essentially one of balancing production and consumption both overall and for individual varieties, and much will depend on the Community price structure for the different varieties produced in the enlarged Community.

CONCLUSIONS

1. Since the situation on the world market in the next few years will be one of standstill in demand, together with considerable stocks, better selling of the 1977 harvest will not prevent large quantities of the Community crop from being taken into intervention. These quantities, mainly of the Erzegovina variety, should not however exceed a ceiling of 4.000 tonnes.

2. Medium and long-term prospects do not point to sales of adequate quality tobacco exceeding 20-22.000 tonnes of baled tobacco (average production 1975, 1976, 1977 = 27.000 tonnes). Consequently there is an urgent need for the sector to be thoroughly reorganized in order to ensure

   - more rational planning with regard to quantity in general and the quality of each variety
   - an improvement in the existing quality standards, which do not always correspond to actual market requirements.

3. It should also be emphasised that increased production and the consequent marketing difficulties mainly concern the Erzegovina variety. The considerable increase in production was brought about through the use of production techniques which irrationally forced up yields at the expense of quality.

4. The area where this crop is grown (southern Italy) and its particular production and processing structures (small-scale farms, producer and processor cooperatives) call for caution in applying the procedures laid down in Article 13 of Regulation No 727/70 to restore the market to normal. It should also be pointed out here that the soil and climate of the areas concerned are not suitable for changing to other crops or even to other varieties.

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5. The Commission's plan, therefore, is firstly to encourage measures which contribute to the attainment of the objectives set out in 2 above. This is why, in addition to measures already decided at Community level such as:

   - a contract system (amendment to Regulation (EEC) No 1726/70), based on cultivation contracts;
   - encouragement to form producers' associations (Council Regulation

   the Commission has already begun to study a Community measure to coordinate agricultural research in this sector, with the following three guidelines as a basis:

   1) study of the soil and climate in each production area;
   2) genetic improvement;
   3) improvement in growing and curing techniques.

   The relevant proposal will be presented to the Council and the European Parliament in 1978.

6. Since a technical, economic and commercial analysis of the oriental tobacco sector shows that the problems differ for each of the three oriental varieties, the Commission considers that in future Article 13 should be applied separately to each variety. By treating these varieties as one there is a danger that the production changes and improvement expected from the planned structural measures could be jeopardized.

7. In conclusion, the Commission intends to present to the Council a proposal for amending Regulation (EEC) No 1469/70 by fixing for each variety of oriental tobacco the ceiling specified for the application of Article 13.

   In order to take account of changes in the structure of Community production from 1970 onwards an adaption of the ceilings specified for the varieties as a whole will also be proposed based on the three-year average 1975-77.

   With regard to the fixing of prices and premiums for the forthcoming 1979 harvest, the Commission will submit to the Council proposals which allow for greater differentiation between the individual oriental varieties.

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Superficie mondiale par types de tabac — I

Superficie mondiale per tipi di tabacco

World area by tobacco type

Welt-Anbauflächen nach Tabaktypen

	(Ha)			(%)		
	1970-74	1975	1976	1970-74	1975	1976
Flue cured	1.352.775	1.563.013	1.561.351	33,3	35,1	35,0
Burley	205.515	279.770	273.654	5,1	6,1	6,1
Sun cured (Orient)	854.054	901.485	973.378	21,1	20,9	21,9
Light air cured	285.455	279.119	304.719	7,1	6,5	6,8
Dark air e sun cured	1.173.866	1.159.817	1.158.604	28,9	26,8	26,0
Dark air cured(sigari)	118.143	89.153	110.231	2,9	2,1	2,6
Dark fire cured	65.542	62.597	71.686	1,6	1,5	1,6
TOTAL:	4.055.347	4.334.954	4.453.623	100,0	100,0	100,0

Production mondiale par types de tabac — II

Produzione mondiale per tipi di tabacco

World production by tobacco type

Welt-Erzeugung nach Tabaktypen

	(000 T.)			(%)		
	1970-74	1975	1976	1970-74	1975	1976
Flue cured	1.900.336	2.313.432	2.228.860	40,1	43,1	41,2
Burley	439.448	562.558	568.755	9,3	10,4	10,5
Sun cured (Orient)	793.446	889.194	945.844	16,8	16,6	17,5
Light air cured	334.636	344.870	361.163	7,1	6,4	6,7
Dark air e sun cured	1.059.263	1.090.544	1.131.801	22,3	20,3	20,9
Dark air cured(sigari)	150.378	115.976	109.113	3,2	2,2	2,1
Dark fire cured	56.571	52.656	58.890	1,2	1,0	1,1
TOTAL:	4.734.078	5.369.230	5.404.426	100,0	100,0	100,0

Source: FAO

Superficie mondiale de sun cured (ORIENT.)

Superficie mondiale di sun cured (ORIENT.)

World area: sun-cured tobacco (ORIENT.)

Welt-Anbauflächen von sun cured (ORIENT.)

Par continent/Per continente/by continent/nach Kontinenten III

	1970-74		1975		1976	
	Ha	%	Ha	%	Ha	%
North/Nord America/ Amérique	798	0,1	428	-	748	0,1
South/Sud America/ Amérique	564	0,1	924	0,1	350	-
Europa/Europe	292.795	34,3	316.689	35,1	342.242	35,2
CEE/EEG/EWG	19.487	2,3	24.482	2,7	26.000	2,7
West/Europa Occid.	100.120	11,7	117.254	13,0	141.044	14,5
East/Europa/dell'Est	192.675	22,6	199.435	22,1	201.198	20,7
URSS (USSR)	159.005	18,6	174.000	19,3	168.000	17,2
Africa/Afrique	2.974	0,3	3.398	0,4	3.043	0,3
Asia/Asie	397.917	46,6	406.046	45,1	458.985	47,2
Oceania/Oceanie	-	-	-	-	-	-
TOTAL	854.054	100,00	901.485	100,00	973.378	100,0

Production mondiale de sun cured (ORIENT.) IV

Produzione mondiale di sun cured (ORIENT.)

World production of sun cured tobacco (ORIENT.)

Welt-Erzeugung von sun-cured (ORIENT.)

Par continent/Per continente/by continent/nach Kontinenten

Source : F.A.O.

	1970-74		1975		1976	
	(000 T.)	%	(000 T.)	%	(000 T.)	%
Nord America	808	0,1	423	-	1.047	0,1
Sud America	381	-	751	0,1	300	-
Europa	288.434	36,6	360.862	40,6	365.326	38,7
CEE	20.648	2,6	31.364	3,5	29.500	3,1
Europa Occid.	94.213	12,0	136.264	15,4	141.070	14,9
Europa dell'Est	194.220	24,6	224.598	25,2	224.256	23,8
URSS	261.058	32,8	278.000	31,4	270.000	28,6
Africa/Afrique	1.239	-	1.418	-	1.330	0,1
Asia/Asie	241.528	30,6	247.740	27,8	307.841	32,5
Oceania/Oceanie	-	-	-	-	-	-
TOTAL	793.446	100,00	889.194	100,0	945.844	100,0

- TABAC BRUT : Evolution des superficies (S) et de la production (P) par types de tabac dans la CEE
- TABACCO GREGGIO : Evoluzione delle superfici (S) e della produzione (P) per tipi di tabacco nella CEE
- RAW TOBACCO : Development of the area (S) and production (P) by tobacco types in the EEC
- ROHTABAK : Entwicklung der Anbauflächen (S) und der Erzeugung (P) nach Tabaktypen in der EWG

	S ha		P t		S %	P %	S %		P %	
	1970	1976	1970	1976	1976	1970	1970	1976	1970	1976
Dark air cured	27.410	30.128	61.968	74.891	+ 9,9	+ 20,9	47	33	49	41
Sun cured (Orient.)	18.273	30.616	15.310	38.355	+ 67,5	+150,5	28	34	12	21
Light air cured	10.576	16.612	33.120	48.338	+ 57,1	+ 47,0	16	19	26	27
Flue cured	5.305	8.075	9.406	13.805	+ 52,9	+ 46,8	8	9	7	8
Fire cured	4.372	4,443	6.513	5.350	+ 1,6	- 17,9	7	5	5	3
Autre/Altri/ Other/Andere	60	332	82	531	+453,3	+547,6	0	0	0	0
TOTAL	65.996	90.206	126.399	181.270	+ 36,7	+ 43,4	100	100	100	100

Source : VI-D-3

SUN CURED (ORIENT.) : Evolution des superficies (S), du rendement (R) et de la production (P) dans la CEE
SUN CURED (ORIENT.) : Evoluzione delle superfici (S), delle rese (R) e della produzione (P) nella CEE
SUN CURED (ORIENT.) : Development of area (S), yield (R) and production (P) in the EEC
SUN CURED (ORIENT.) : Entwicklung der Anbauflächen (S), Erträge (R) und Erzeugung (P) in der EWG

Variétés/Varieta Varieties/Sorten		70	71	72	73	74	75	76	77 (P)
XANTY YAKA	S	8.064	7.314	5.565	5.045	6.186	7.422	9.238	7.500
	R	8,0	7,1	8,4	10,8	10,1	11,1	11,5	9,6
	P	6.439	5.197	4.656	5.472	6.224	8.275	10.601	7.200
PERUSTITZA	S	3.490	3.926	4.043	4.730	4.875	7.518	8.112	7.000
	R	9,8	9,1	12,3	10,3	13,1	13,7	12,6	9,1
	P	3.424	3.580	4.962	4.892	6.370	10.263	10.244	6.400
ERZEGOVINA	S	6.719	6.834	9.301	11.218	9.889	9.542	13.266	12.500
	R	8,1	8,3	10,9	10,7	10,4	13,4	13,2	9,6
	P	5.447	5.666	10.109	11.985	10.309	12.826	17.510	12.000
TOTAL	S	18.273	18.074	18.909	20.993	20.950	24.482	30.616	27.000
	R	8,4	8,0	10,4	10,6	10,9	12,8	12,5	9,5
	P	15.310	14.443	19.727	22.349	22.903	31.364	38.355	25.600

Source: VI-D-3

(S) = ha
(R) = 100 kg/ha
(P) = tonnes

(P) provisoire, provvisorio, provisional, vorläufig

SUN CURED (ORIENT) - Evolution de la Production et des Echanges
Evoluzione della Produzione e degli Scambi
Development of the Production and Trade
Entwicklung der Erzeugung und des Handels
(t)

		Xanti	Perustitza	Erzegovina	TOTAL
1	Production	6.439	3.424	5.447	15.310
9	Export (intra)	22	4	-	26
7	(extra)	-	6	-	6
0	dont Restitut.	-	-	-	-
1	Production	5.197	3.580	5.666	14.443
9	Export (intra)	200	69	22	291
7	(extra)	574	253	534	1.361
1	dont Restitut.	-	-	-	-
1	Production	4.656	4.962	10.109	19.727
9	Export (intra)	501	1.175	1.714	3.390
7	(extra)	1.921	1.091	1.388	4.400
2	dont Restitut.	-	-	-	-
1	Production	5.472	4.892	11.985	22.349
9	Export (intra)	1.223	1.033	3.270	5.526
7	(extra)	4.096	2.887	5.600	12.583
3	dont Restitut.	-	-	-	-
1	Production	6.224	6.370	10.309	22.903
9	Export (intra)	1.362	1.072	2.188	4.622
7	(extra)	3.488	3.630	3.689	10.807
4	dont Restitut.	2.695	2.621	-	5.216
1	Production	8.275	10.263	12.826	31.364
9	Export (intra)	1.143	1.176	1.400	3.719
7	(extra)	3.342	3.421	3.751	10.514
5	dont Restitut.	3.130	3.397	2.924	9.451
p.					
1	Production	10.601	10.244	17.510	38.355
9	Export (intra)	964	464	1.254	2.682
7	(extra)	1.279	737	1.520	3.536
6	dont Restitut.	1.279	737	1.520	3.536
p.					
1	Production	7.200	6.400	12.000	25.600
9	Export (intra)				
7	(extra)				
7	dont Restitut.				

Situation 4/1978

p = provisoire - provvisorio - provisional - vorläufig.

RAPPORT ENTRE PRODUCTION ET INTERVENTION DES VARIETES
RELAZIONE TRA LA PRODUZIONE E L'INTERVENTO DELLE VARIETA
RELATIONSHIP BETWEEN PRODUCTION AND INTERVENTION FOR THE VARIETIES
VERHÄLTNIS ZWISCHEN ERZEUGUNG UND INTERVENTION DER SORTEN
XANTI-YAKA (X), PERUSTITZA (P) & ERZEGOVINA (E)

		Production	Intervention	I:P %
1970	X	6.439	3.028	47
	P	3.424	464	14
	E	5.447	221	4
TOTAL		15.310	3.713	24
1971	X	5.197	3.798	73
	P	3.580	632	18
	E	5.666	180	3
TOTAL		14.443	4.610	32
1972	X	4.656	552	12
	P	4.962	376	8
	E	10.109	848	8
TOTAL		19.727	1.776	9
1973	X	5.472	-	-
	P	4.892	-	-
	E	11.985	-	-
TOTAL		22.349	-	-
1974	X	6.224	-	-
	P	6.370	-	-
	E	10.309	-	-
TOTAL		22.903	-	-
1975	X	8.275	133	2
	P	10.263	171	2
	E	12.826	829	6
TOTAL		31.364	1.133	4
1976	X	10.601	2.532	24
	P	10.244	3.683	36
	E	17.510	6.809	39
TOTAL		38.355	13.024	34
1977 p.	X	7.200	-	-
	P	6.400	500-800	8 -13
	E	12.000	2.000-3.000	17-25
TOTAL		25.600	2.500-3.200	8-15

Source : AIMA

p.= provisoire - provvisorio - provisional - vorläufig.

Prix moyens à la production dans la zone typique (Lecce)
Prezzi medi alla produzione nella zona tipica (Lecce)
Average production prices in the representative zone (Lecce)
Mittlere Erzeugerpreise im Hauptanbaugebiet (Lecce)

LIT/100 kg

Variétés/Varieta Varieties/Sorten	1970	1971	1972	1973	1974	1975	1976
XANTY YAKA	88.980	91.560	95.010	110.890	161.350	234.295	164.475
PERUSTITZA	74.200	79.960	87.050	106.710	145.580	229.593	144.550
ERZEGOVINA	69.170	72.200	79.300	89.490	126.620	176.250	122.415
Ø	78.925	81.935	84.970	98.180	141.570	205.340	154.100
%		+ 3,8 %	+ 3,7 %	+ 15,5 %	+ 44,2 %	+ 45,0 %	- 25,0 %

Source: Données professionnelles
Dati professionali
Commercial informations
Berufsständische Angaben

16

Sun cured (Orient.) Evolution des prix d'objectif (POF) et de la prime (PRF)
Sun cured (Orient.) Evoluzione dei prezzi: d'objectivo (POF) e del premio (PRF)
Sun cured (Oriental townes) Development of target prices (POF) and premiuns
Sun cured (Orient.) Entwicklung der Zielpreise (POF) und Prämien (PRF)

X

Récolte Ernte	POF			
	UC/Uf	indice	Lit/kg	indice
Xanti-Yara				
1970	2,125	100	1.328	100
71	"	"	"	"
72	2,168	102	1.355	102
73	"	"	1.409	106
74	2,325	110	1,940	146
75	"	"	2,052	155
76	2,422	114	2,332	176
77	2,434	115	2,587	195
78	"	"	2,809	212
Perustitza				
1970	1,953	100	1.221	100
71	"	"	"	"
72	2,031	104	1,269	104
73	2,051	105	1,333	109
74	2,206	113	1,838	151
75	"	"	1,943	159
76	2,294	117	2,209	191
77	2,305	118	2.450	201
78	"	"	2,660	218
Erzegovina				
1970	1,749	100	1.093	100
71	"	"	"	"
72	1,819	104	1,137	104
73	1,837	105	1,194	109
74	1,981	113	1,650	151
75	"	"	1,745	160
76	2,060	118	1,984	182
77	2,070	118	2,200	201
78	"	"	2,389	219

PRF			
UC/Uf	indice	Lit/Kg	indice
1,190	100	744	100
"	"	"	"
1,435	121	857	121
"	"	933	125
"	"	1,195	161
1,445	121	1,273	171
1,459	123	1.405	189
1,474	124	1,567	211
1,494	126	1,724	232
1,128	100	705	100
"	"	"	"
1,328	118	830	118
1,348	120	876	124
"	"	1,123	159
1,358	120	1,196	170
1,372	122	1,321	187
1,399	124	1,487	211
1,419	126	1,638	232
1,070	100	669	100
"	"	"	"
1,184	111	740	111
1,202	112	781	117
"	"	1,001	150
1,230	115	1,084	162
1,242	116	1,196	179
1,254	117	1,333	199
"	"	1,447	216

Source:
VI-D-3