ISSN 0250-5886

European Community

# GREEN EUROPE

NEWSLETTER ON THE COMMON AGRICULTURAL POLICY

# SHEEPMEAT

FR

MONTHLY • 5-1984

Published by the Agricultural Information Service of the Directorate-General for Information
European Community Commission — 200, rue de la Loi, 1049 Bruxelles

201

## FORKLARENDE BEMÆRKNINGER

Dokumentationsbulletinen omfatter fire udgaver:
— A-udgaven: ugentlig bulletin indeholdende resumeer af retsakter, meddelelser og dokumenter fra institutionerne samt af tidsskriftartikler. De rekster, gennemgås af Centraltjenesten for Dokumentation — (SCAD-IX/C/1) — vedrører institutionernes virksomhed og alle hertil knyttede områder. Europa-Pa mentationstjeneste yder sit bidrag til afsnittet med udvalgte artikler.
— B-udgaven: oplysningsbulletin, der ikke udkommer regelmæssigt, og som indeholder bibliografiske henvisninger vedrørende et bestemt emne. Hvert nyt ni det foregående.
— C-udgaven: sammenfattende oversigt, der ikke udkommer regelmæssigt. Hvert nummer behandler en rubrik i klassifikationen og citerer de henvisning A-udgaven siden den sidste oversigt om samme emne.
— D-udgaven: bulletin reserverer for tidsskrifter, der oplyser om De europæiske Fællesskabers aktiviteter.
Hnevisningerne i A-udgaven og C-udgaven er angivet på følgende måde:

*a)* øverst til venstre: løbenummer:
A (Fællesskabets retsaker osv).
B (udvalgte artikler)
*b)* i selve teksten: bibliografisk beskrivelse
*c)* nederst til venstre: klassifikationsangivelse
*d)* nederst til højre: (eventuelt) SCAD-microfilmnummer eller Publikat talognummer eller forkortelsen PE (E

## HINWEIS

Das Dokumentationsbulletin besteht aus vier Ausgaben:
— Ausgabe A: Wöchentliches Referateblatt. Verweist auf Rechtsakten, Mitteilungen und Dokumente der Gemeinschaften, sowie auf Zeitschriftenartikel. Die — Dokumentation (SCAD-IX/C/1) ausgewerteten Texte betreffen die Tätigkeit der Institutionen und Organe der Gemeinschaften sowie die mit dieser Tat hängenden Gebiete.
Die Zeitschriftenartikel werden unter Mitwirkung der Abteilung Dokumentation des Europäischen Parlaments ausgewählt.
— Ausgabe B: Unregelmässig. Auswahlbibliographie (zu bestimmten Sachbereichen). Jede Neuauflage ersetzt die vorherige Ausgabe.
— Ausgabe C: Unregelmässig. Kumulierende Bibliographie. Nach je einem Sachgebiet der Ausgabe A geordnete Sammlung. Enthält die in einem bestimm öffentlichten Texte.
— Ausgabe D: Veröffentlichungen über die Tätigkeit der Europäischen Gemeinschaften vorbehalten.
Die bibliographischen Referenzen (Ausgaben A und C) sind wie folgt angegeben:

*a)* oben links: laufende nummer:
A (Dokumente der Gemeinschaften usw.)
B (ausgewählte Zeitschriftenartikel)
*b)* Mitte: Bibliographische Beschreibung
*c)* unten links: Klassifikationsziffer
*d)* unten rechts: (ggf) Mikrofilm-Nummer (SCAD), oder Katalogn Amtliche Veröffentlichungen), oder Abkürzung Parlament)

## ΕΠΕΞΗΓΗΜΑΤΙΚΟ ΣΗΜΕΙΩΜΑ

Το πληροφοριακό δελτίο τεκμηριώσεως περιλαμβάνει τέσσερις εκδόσεις:
— Την έκδοση Α: Εβδομαδιαίο αναλυτικό δελτίο που επισημαίνει πράξεις, ανακοινώσεις και έγγραφα των οργάνων καθώς και άρθρα περιοδικών. Τα κείμενα και αναλύονται από την Κεντρική Υπηρεσία τεκμηριώσεως (SCAD-IX/C/1) αφορούν τις δραστηριότητες των οργάνων και όλους τους τομείς που έχουν σχέση με αυτά.
Η Υπηρεσία τεκμηριώσεως του Ευρωπαϊκού Κοινοβουλίου συμβάλλει στην επιλογή των άρθρων των περιοδικών.
— Την έκδοση Β: Έκτακτο δελτίο που περιλαμβάνει τις βιβλιογραφικές πηγές σχετικά με ορισμένο θέμα. Κάθε νεότερη έκδοση ακυρώνει την προηγούμενη.
— Την έκδοση Γ: Έκτακτη συγκεντρωτική βιβλιογραφία. Κάθε τεύχος είναι αφιερωμένο σε ορισμένο θέμα του σχεδιαγράμματος ταξινομήσεως ι βιβλιογραφικές πηγές που έχουν περιληφθεί στην έκδοση Α από της εκδόσεως του προηγουμένου αθροιστικού καταλόγου για το ίδιο θέμα.
— Την έκδοση Δ: Είναι αφιερωμένη στα περιοδικά ενημερώσεως για τις δραστηριότητες των Ευρωπαϊκών Κοινοτήτων.
Η αναφορά των βιβλιογραφικών πηγών στις εκδόσεις Α και Γ γίνεται κατά τον ακόλουθο τρόπο:

*α)* Στη γωνία πάνω αριστερά: αριθμός σειράς:
Α (Κοινοτικές πράξεις, κλπ.)
Β (επιλεγέντα άρθρα)
*β)* Στο κέντρο: βιβλιογραφικά στοιχεία
*γ)* Στη γωνία κάτω αριστερά: δείκτης ταξινομήσεως
*δ)* Στη γωνία κάτω δεξιά: (ενδεχομένως) αριθ. μικροφίλμ του SCAD ή αριθ. καταλόγου της Υπηρεσίας Εκδόσεων ή σύμβολο PE (Ευρωπαϊκό Κοινοβούλιο)

## EXPLANATORY NOTE

The Documentation Bulletin consists of four series.
— Series A: Weekly analytical bulletin listing acts, communications and documents of the institutions as well as articles from periodicals. The texts selected and analysed by the Central Documentation Service (SCAD-IX/C/1) concern the institutions' activities and all related fields.
The documentation service of the European Parliament contributes to the selection of articles from periodicals.
— Series B: Descriptive bulletin. Irregular. Contains bibiographical references on a specified subject. Each new updating cancels the previous one.
— Series C: Cumulative list. Irregular. Each number is devoted to a single subject of the classification scheme and lists the references mentioned in series A since th previous cumulative list on the same subject.
— Series D: Bulletin mentioning periodicals containing information on the activities of the European Communities.
The actual presentation of references in series A and C is as follows:

*a)* top left-hand corner: serial number
A (Community acts, etc.)
B (Selected articles)
*b)* in the centre: bibliographical data
*c)* bottom left-hand corner: index number of classification
*d)* bottom right-hand corner: microfilm number of SCAD or of the Publications Office, or (European Parliament)

## NOTE EXPLICATIVE

Le Bulletin de Renseignements Documentaires comporte quatre éditions:
— l'édition A: Bulletin analytique hebdomadaire signalant des actes, des communications et des documents des institutions ainsi que des articles de péri retenus et analysés par le Service Central de Documentation (SCAD-IX/C/1) concernent les activités des institutions et tous les domaines qui s'y rattachent.
Le Service de documentation du Parlement Européen collabore à la sélection des articles de périodiques.
— l'édition B: Bulletin signalétique à parution irrégulière, comprenant des références bibliographiques sur un sujet déterminé. Chaque mise à jour annule l'
— l'édition C: Répertoire cumulatif à parution irrégulière. Chaque numéro est consacré à une rubrique du plan de classement et reprend les références cité depuis la parution du cumulatif précédent sur le même sujet.
— l'édition D: est réservée à des périodiques d'information sur les activités des Communautés européennes.
La présentation matérielle des références dans les éditions A et C est la suivante:

*a)* en haut et à gauche: numéro d'ordre
A (actes communautaires, etc.)
B (articles sélectionnés)
*b)* corps de la notice: description bibliographique
*c)* en bas et à gauche: indices de classification
*d)* en bas et à droite: (éventuellement) n° de microfilm du SCAD ou n° de c des Publications, ou sigle PE (Parlement Européen)

## AVVERTENZA

Il Bollettino di documentazione consta di quattro edizioni.
— l'Edizione A: è un bollettino analitico settimanale che segnala atti, comunicazioni e documenti comunitari, come pure articoli selezionati da periodici. analizzati dal Servizio Centrale di Documentazione (SCAD-IX/C/1) riguardano le attività delle istituzioni e tutti i settori nei quali esse si esplicano.
Il Servizio di documentazione del Parlamento Europeo collabora alla selezione degli articoli di periodici.
— l'Edizione B: è un bollettino segnaletico non periodico, comprendente i riferimenti bibliografici disponibili su un soggetto determinato. Ogni aggiorna i riferimenti bibliografici pubblicati nel precedente bollettino sullo stesso soggetto, e quindi lo annulla.
— l'Edizione C: è un indice cumulativo, non periodico, relativo ad una sezione del piano di classificazione e contiene tutti i riferimenti bibliografici nell'edizione A a partire dalla data del precedente indice.
— l'Edizione D: è riservata a periodici d'informazione sulle attività delle Comunità Europee.
La presentazione materiale dei riferimenti bibliografici nelle edizioni A e C è la seguente:

*a)* in alto a sinistra: numero d'ordine
A (atti comunitari, ecc.)
B (articoli selezionati)
*b)* al centro: descrizione bibliografica
*c)* in basso a sinistra: indici di classificazione
*d)* in basso a destra: (se necessario) numero del microfilm SCAD, o nume l'Ufficio delle Pubblicazioni o sigla PE peo)

## TOELICHTING

Het documentatiebulletin bestaat uit vier uitgaven.
— Uitgave A: Wekelijks analytisch bulletin dat handelingen, mededelingen en dokumenten van de instellingen zowel als artikelen uit tijdschriften signaleert, door de Centrale dienst documentatie (SCAD-IX/C/1) geselecteerde en geanalyseerde teksten betreffen de activiteiten van de instellingen en alle gebie verband staan. De documentatiedienst van het Europese Parlement werkt mede aan de selectie van tijdschriftartikelen.
— Uitgave B: Bibliografisch bulletin dat onregelmatig verschijnt en dat referenties over een bepaald onderwerp bevat. Ieder bijgewerkt nummer vervangt het voorgaande.
— Uitgave C: Cumulatief deel dat onregelmatig verschijnt. Ieder nummer is gewijd aan een rubriek van de classificatie en neemt de gegevens op vanaf de verschijning van het voorgaand deel over hetzelfde onderwerp werden vermeld.
— Uitgave D: voorbehouden aan de tijdschriften over de werkzaamheden van de Europese Gemeenschappen.
De gegevens in de uitgaven A en C worden als volgt vermeld:

*a)* links boven: volgnummer
A (documenten van de Gemeenschappen enz...)
B (geselecteerde tijdschriftartikelen)
*b)* midden: bibliografische beschrijving
*c)* links onder: classificatienummer
*d)* rechts onder (eventueel) microfilmnummer (SCAD) of catalogusnumn Officiele Publikaties) of beginletters PE (Eur

# SHEEPMEAT

Luxembourg: Office for Official Publications
of the European Communities, 1984

ISSN 0250-5886

Catalogue number: CB-AV-84-201-EN-C



*Printed in Belgium*

# CONTENTS

## SHEEP IN THE COMMON MARKET

Sheep are to be found practically all over the world, in rich countries and poor countries, on fertile land and in the deserts, in the lowlands and the highlands, in the north and in the south. The contrasts, however, are huge! Sheep may most often be raised extensively, unlike other livestock such as cattle or pigs which, especially in Europe, are often raised on very small areas. But there is very little in common between the scanty flock supporting a single family in a number of developing countries and the thousands of head on a Scottish estate or New Zealand sheep station.

The advent of refrigerated transport late in the 19th century profoundly altered the world sheepmeat picture by giving a major impulse to trade. There is still today a particularly active trade in sheepmeat, accounting for 15 % of world output, as against 8 % in the case of beef and veal. Key roles in this trade are played by New Zealand, as an exporter, and by the United Kingdom and the oil-producing Arab countries as importers.

The main world producers are the USSR, New Zealand and Australia - where producers derive much of their income from wool - and the European Community.

It is not long since the EEC joined the club of major sheepmeat producers. Until 1973, when the United Kingdom, Denmark and Ireland joined the Community, it was a minor producer, with only France possessing a national flock of much account. This meant that when the Six laid the foundations of "Green Europe", they did not think it worthwhile setting up a common organization of the market in sheepmeat. When the Community expanded from six members to nine, its output took a great leap upward. Ireland and above all the United Kingdom are major producers. In addition, the UK traditionally imports large quantities of frozen lamb from New Zealand.

Fearing British and Irish competition, France closed its frontiers to imports from those two countries. In late 1977, when the transitional period was about to end, the "lamb war" began. It was to last three years. Between Paris and Dublin a compromise was quickly worked out, but a bitter struggle developed between France and Britain: the courts were resorted to, press statements were issued and marathon meetings took place. An unprecedented legal and political struggle developed. Sheepmeat was indeed a complicated matter. How was it to be possible to reconcile the interests of the British, who were used to importing half of their requirements from New Zealand, with those of the French, who were no less used to protecting their own producers by a national organization of the market? What common denominator could be found between a small French sheep farm and a Scottish estate of 100 000 hectares or more ?

Even consumption habits were different: although fairly widely eaten in the United Kingdom, lamb is still a luxury meat in France.

Nonetheless the affair was brought to a successful conclusion and at the end of May 1980, after scores of meetings on the matter, the Ministers of Agriculture of the Nine reached a compromise agreement. A few months later, on 20 October 1980 to be precise, the common market in sheepmeat came into force.

This latest set of rules organizing the market in a particular product is of special benefit to the United Kingdom, whose sheep farmers, in 1981 and 1982, accounted for 97 to 99 % of appropriations from the European farm fund (the Guidance Section of the EAGGF) for the sheepmeat sector.

France in turn was able to reopen its market without prices collapsing, as some had said they would.

This balance owed a lot to patterns in consumption habits and was achieved through sophisticated management instruments.

- To support producers' incomes, a slaughter premium in the United Kingdom, in line with the tradition of deficiency payments (direct aid), and a ewe headage premium in all Member States.

- As regards imports, voluntary restraint agreements negotiated with non-Community countries which are traditional suppliers and protection of the French and Irish markets against such imports through an arrangement recognized by all suppliers.

  These mechanisms may well be complex and burdensome, but they do enable interests which are very much at variance to be brought together.

## II. MAIN FEATURES OF THE WORLD MARKET IN SHEEPMEAT AND GOATMEAT

### Livestock numbers

Has counting sheep sent the livestock experts to sleep? For the fact is that we do not know exactly how many sheep there are in the world, although it is certain that in 1981 there were at least 1 000 million: 1 113 million according to FAO and 1 560 million according to the Meat and Livestock Commission. Sheep are found all over the world, but their numbers vary considerably from region to region.

According to FAO, 30 % of the world's sheep, some 340 million head, are to be found in Asia, but it is Australia and New Zealand, with a smaller area, which have made sheep farming one of their agricultural specialities: they account for 133 and 72 million head respectively 18 % of the world total. Then comes Africa with 180 million head, 16 % of the world figure, followed by Europe, the USSR and the Americas, each accounting for about 12 %, or 135 million head. There are very few sheep in the United States and Canada, but more than 100 million in Latin America, where Argentina alone has 30 million.

### Production

World production of sheepmeat is fairly stable in the long term. From 1977 to 1982 it increased from 4 to 4.46 million tonnes. This is only a small fraction, some 4 %, of world meat output.

Production of sheepmeat is concentrated in a limited number of countries.

The biggest producer is the USSR, whose average production over the last six years has been 845 000 tonnes, 19 % of world output. This, however, is appreciably less than the figure in the early 1970's (954 000 tonnes in 1973).

But it is Australia and New Zealand which are the world champion sheep producers.

New Zealand, with territory amounting to 260 000 $km^2$, about half the size of France, produced over 600 000 tonnes in 1982. Up to 1978 its average output was 500 000 tonnes. Since then production has been rising, to 513 900 tonnes in 1979, 559 700 tonnes in 1980, and 626 200 tonnes in 1981.

Australia produced 523 000 tonnes in 1982. Output in Australia is fairly stable in the long run, but with cyclical variations. From 1973 to 1975 it increased from 456 500 tonnes to 589 700 tonnes and then fell to 491 400 tonnes in 1978 and rose again to 578 600 tonnes in 1980. Since then it has been falling.

In the ten-member Community, 1982 production was 660 000 tonnes. It is expanding regularly.

Then follow Turkey and Iran each with 7 % of world total output in 1982, the United States with 3.6 %, Spain with 2.9 %, Argentina with 2.7 %, Yugoslavia with 1 % and Portugal with 0.3 %.

Total world production increased considerably, by 69 %, from 1948 to 1979, but at differing rates in the various parts of the world:

| | |
|---|---|
| - an appreciable fall in North America | : - 45 % |
| - stagnation in Latin America | : - 5 % |
| - moderate increase in Africa | : + 55 % |
| - moderate increase in Australia/New Zealand | : + 55 % |
| - moderate increase in Europe | : + 70 % |
| - large increase in the USSR | : + 90 % |
| - large increase in the Middle East | : +130 % |
| - large increase in China | : +185 % |

Consumption

As compared with other meats, sheepmeat accounts for only a small part of the contents of the housewife's shopping basket. Few countries have a consumption of more than 1 kg per head per year. The biggest consumers are, naturally, the main producers. Individual consumption is 30.5 kg per year in New Zealand and 17.5 kg in Australia. Europe is also a major consumer, especially in Greece (14 kg), but also in the United Kingdom and Ireland (7.5 kg).

Sheepmeat is traditionally highly prized in the Islamic regions of the Middle East, the Mediterranean seaboard and the southern republics of the USSR. In this part of the world consumption is generally increasing. Iran, for example, practically doubled its consumption between 1970 and 1977 (from 200 000 to 400 000 tonnes). Consumption trends in the main importing consumer countries have varied over the last ten years. In the United States, consumption in 1970 was about 300 000 tonnes, and it fell sharply between 1972 and 1974. It has now levelled out at around 200 000 tonnes. Japanese consumption has been very irregular and the figures for the last three years indicate a contracting market.

According to forecasts, it is the Middle East, Europe and the Islamic parts of the USSR which will be the three main focuses of sheepmeat consumption in the 1990s.

## International trade

Although output of sheepmeat is fairly low compared with other meats, it plays an important role in international trade. Some 15 % of all sheepmeat produced is traded internationally, as against only 8 % of beef and veal, 3 % of pigmeat and 1 % of poultry. The main feature of international trade in sheepmeat is its high degree of concentration.

New Zealand and Australia are the main exporters, while the United Kingdom, Japan and since 1974 the countries of the Middle East, especially Iran, are the main importers. Since 1973 demand in the Middle East for live sheep has also increased considerably.

### . Trade in sheepmeat

World trade in sheepmeat is dominated by two major trade flows:

- New Zealand exports of lamb to the EEC (mainly the United Kingdom), representing two thirds of world trade in lamb;
- Australian exports of mutton to Japan, accounting for half of world trade in mutton.

The remainder of sheepmeat supplies come from Argentina and Uruguay, but the quantities exported vary as they are greatly dependent upon trade policy in

Buenos Aires and Montevideo.

In addition to the EEC and Japan, the main importers of sheepmeat are the United States and Canada, although demand there is falling somewhat, and certain countries in the Far East, including South Korea, where the trend in demand is downward, and the Middle East (Iran, Iraq, Kuwait), whose imports are increasing regularly.

. Trade in live sheep

In 1970 there were two major world trade flows in live sheep:
- exports from Eastern Europe (Bulgaria, Hungary, Romania, Yugoslavia) to Western Europe (Italy, Greece);
- imports by Middle Eastern countries, from neighbouring countries and Australia.

Since then, exports from Eastern Europe to Italy have fallen and those to Greece stopped in 1974.

On the other hand, since 1973 there has been a clear expansion in demand in the Middle East, which has been supplied by Australia and the Eastern European countries, especially the GDR and Yugoslavia. The following figures, in thousands of head, illustrate this trend:

Imports

| | | |
|---|---|---|
| Saudi Arabia | : | increase from 1 250.0 in 1973 to 6 000 in 1981 (x 4.8) |
| Iran | : | increase from 205.8 in 1973 to 2 800 in 1980 (x 13.6)* |
| Kuwait | : | increase from 359.1 in 1973 to 2 100 in 1981 (x 5.8) |

Exports

| | | |
|---|---|---|
| Australia | : | increase from 1 038.6 in 1973 to 5 600 in 1981 (x 5.4) |
| Bulgaria | : | increase from 797.8 in 1973 to 1 400 in 1981 (x 1.7) |
| Turkey | : | increase from 511.6 in 1973 to 1 919 in 1981 (x 3.8) |
| GDR | : | increase from 35.0 in 1973 to 480 in 1981 (x 13) |
| Yugoslavia | : | increase from 2.4 in 1973 to 105 in 1981 (x 44) |

* 1981: not available.

## Trends in supplies from the main exporting countries

The supply of sheepmeat and live sheep on international markets depends to a large extent on world prices for meat and wool. The number of sheep slaughtered tends to fall when the price of wool increases and vice versa.

Supplies also depend on weather, as the main exporters (New Zealand, Australia) rear their sheep extensively and do not have the infrastructure to protect their flocks in case of drought or other bad weather. Current exporters, incidentally, do not have the capacity to increase their output appreciably, for this they would have to adopt intensive forms of livestock farming, and this they are unlikely to do as it would require the development of modern sheep-raising installations; this would lead to higher running costs, which would increase the price of the meat.

## III. THE SHEEPMEAT MARKET IN THE COMMUNITY

The sheepmeat and goatmeat market in the Community is fairly modest in size compared with those for beef/veal, pigmeat and poultrymeat. This applies to both production and consumption.

Sheepmeat and goatmeat represent only 3 % of total Community meat production, while consumption is higher than production, at 4 % of total meat consumed.

The EEC thus has to import sheepmeat from outside, whereas for other types of meat it is a net exporter.

In addition, market prices for sheepmeat in the EEC are higher than for all other meats: sheepmeat is thus fairly dear in all Member States.

### Sheep numbers

The Community sheep flock currently amounts to nearly 60 million head, 90 % of it being for meat production and 10 % for milk. Four Member States account for 91 % of the total: United Kingdom (39 %), France (20 %), Greece (17 %) and Italy (16 %).

From 1968 to 1983 numbers increased by 10 million head, from 49.8 to 59.7 million. The rise was steady, apart from a slight fall in 1970 and 1971. Apart from Denmark, where sheep farming is of marginal importance, Ireland is the only Member State where the national flock is now smaller than it was in 1968. Since 1980, however, the Irish flock has been expanding again.

The United Kingdom flock shows cyclical variations, but the long-term trend is towards expansion.

The French herd increased from 1968 to 1981 and then fell appreciably in 1982 and 1983.[1]

[1] This statement must be qualified by saying that there has been a change in statistical methods.

Sheep numbers in Greece, Italy, Federal Germany and the Netherlands have risen fairly steadily over the last fifteen years. In Italy expansion has been steady only since 1972. In the Benelux countries sheep numbers are stable.

Sheep farming in the Community is losing ground in lowland areas and expanding in areas where natural conditions do not favour crop production (mountains and hills). There is a noticeable degree of concentration in the areas covered by the Community's Directive 75/268/EEC on mountain and hill farming and farming in certain less-favoured areas. A large proportion of the national sheep flock is to be found in such regions in Italy and Greece (80-90 %), Ireland and France (70-75 %) and the United Kingdom (60-65 %).

The main areas covered by the Directive are the following:

| | |
|---|---|
| Germany : | Schleswig-Holstein, Hessen, Niedersachsen, Baden-Württemberg, Bayern |
| Netherlands : | Friesland, Groningen, Zeeland |
| Belgium : | the extreme east of the country |
| Luxembourg : | the whole country |
| United Kingdom: | hill regions of Northern and Western England, Scotland, Wales and Northern Ireland |
| Ireland : | Counties of Galway, Mayo, Roscommon, Wicklow |
| France : | Massif central, Pyrenees, southern Alps |
| Italy : | the peninsula, Sardinia and Sicily |
| Greece : | Thrace, Epirus, Central Greece, Thessalie, the Peloponnese, Crete. |

Sheep numbers (in thousands of head)

| | 1968 | 1973 | 1982 |
|---|---|---|---|
| Total EEC | 49,825 | 51,381 | 58,795 |
| Germany | 830 | 1,016 | 1,172 |
| France | 9,794 | 10,274 | 12,103 |
| Italy | 8,206 | 7,809 | 9,256 |
| Netherlands | 552 | 657 | 910 |
| Belgium | 84 | 74 | 83 |
| Luxembourg | 5 | 6 | 4 |
| United Kingdom | 19,667 | 20,193 | 22,952 |
| Denmark | 110 | 56 | 61 |
| Greece | 7,724 | 8,367 | 9,830 |
| Ireland | 2,851 | 2,929 | 2,424 |

Goat numbers

Goat numbers are increasing slowly but steadily in the EEC. Between 1968 and 1983 the number increased from 6 to 7 million head. Greece accounts for 66.4 % of the total. The remainder of the Community's goats are divided between France (1.25 million head) and Italy (1 million). Producers derive most of their income from sales of milk and cheese. Intra-Community trade in goatmeat is practically nil.

EEC goat numbers (in thousands of head)

| | 1968 | 1973 | 1982 |
|---|---|---|---|
| Total EEC | 6,072 | 6,411 | 7,026 |
| Germany | 75 | 38 | 36 |
| France | 919 | 923 | 1,220 |
| Italy | 1,045 | 948 | 1,059 |
| Netherlands | 14 | 13 | 30 |
| Belgium | 2 | 4 | 7 |
| Luxembourg | - | - | - |
| United Kingdom | 12 | 13 | 14 |
| Denmark | - | - | - |
| Greece | 4,005 | 4,472 | 4,660 |
| Ireland | - | - | - |

Production

Between 1968 and 1982 Community production of sheepmeat and goatmeat increased from 563 000 to 706 000 tonnes, a rise of 25 %. The EEC has a deficit in this sector. Only Ireland and the Netherlands have surpluses.

The Community's degree of self-sufficiency is nonetheless constantly rising. In 1972 it was 56 % and by 1982 it had reached 72 %.

There has been much fluctuation in production, between 1968 and 1982, both in the Community as a whole and in the Member States separately. A distinction must be made, however, between the United Kingdom and the Benelux countries, showing major cyclical fluctuations, and Germany, France, Italy, the Netherlands and Greece, where yields will have been lower in some years but production has increased more regularly.

Production in Ireland has remained relatively stable.

Community production is divided very unequally between Member States. The UK France and Greece account for 79 % of it.

The leading producer is the United Kingdom, with 38 % of Community output. The shares of France and Greece are 25 % and 16 % respectively. Far behind them come Italy with 8 %, Ireland with 6 %, the Netherlands with 3 %, the FRG with 3 %, and Belgium, Luxembourg and Denmark with 1 %.

Over the next few years production should continue to rise. Assuming that the present market support arrangements stay in operation, output is forecast at some 770 000 tonnes in 1985 and 810 000 tonnes in 1990.

Production (in thousands of tonnes carcase weight)

| | 1968 | 1973 | 1982 | Forecasts | |
|---|---|---|---|---|---|
| | | | | 1985 | 1990 |
| Total EEC | 563 | 566 | 706 | 768 | 807 |
| Germany | 12 | 12 | 20 | 23 | 25 |
| France | 117 | 128 | 184 | 186 | 193 |
| Italy | 39 | 32 | 52 | 60 | 65 |
| Netherlands | 9 | 10 | 19 | 25 | 28 |
| Belgium/Luxembourg | 3 | 4 | 5 | 4 | 4 |
| United Kingdom | 251 | 235 | 266 | 300 | 315 |
| Ireland | 44 | 42 | 42 | 44 | 46 |
| Denmark | 3 | 1 | 0,5 | 1 | 1 |
| Greece | 84 | 102 | 118 | 125 | 130 |

Consumption

Over the last fifteen years consumption has been fairly stable in the Community. It increased from 969 000 tonnes in 1968 to 972 000 tonnes in 1982.

However, this apparent stability hides two opposing trends: a major fall in consumption in the United Kingdom and an appreciable increase in the other Member States, except Ireland. The fall in the UK where consumption has decreased from 591 000 to 420 000 tonnes, has been made up for by increases in the other Member States.

The most spectacular increase has been in France: consumption has risen from 140 000 tonnes in 1968 to 232 000 in 1982. There has also been a major rise in Italy (from 51 000 to 83 000 tonnes) and in Germany (13 000 to 49 000 tonnes).

Consumption in the Benelux has also increased, but to a lesser extent. Consumption in Greece is fairly stable: 130 000 tonnes in 1968 and 135 000 in 1982.

Consumption in Ireland has fallen back notably, from 31 000 tonnes in 1968 to only 26 000 tonnes in 1982.

Community consumption might be approximately 980 000 tonnes in 1985 and 1 000 000 tonnes in 1990, at least if the current market support system in the United Kingdom (variable premium) is continued.

Consumption per head amounted to an average of 3.6 kg in the Community in 1982. At the two extremes are Greece, with 13.8 kg per head and Denmark with 0.6. The Irish and British consume an average of 7.5 kg, the French 4.3, the Belgians and Luxemburgers 1.8, the Italians 1.5, the Germans 0.8 and the Dutch 0.6.

Consumption in thousands of tonnes carcase weight

| | 1968 | 1973 | 1982 | Forecasts 1985 | Forecasts 1990 |
|---|---|---|---|---|---|
| Total EEC | 969 | 929 | 972 | 978 | 1,016 |
| Germany | 13 | 25 | 49 | 55 | 65 |
| France | 140 | 180 | 232 | 245 | 275 |
| Italy | 51 | 61 | 83 | 85 | 90 |
| Netherlands | 3 | 3 | 7 | 10 | 12 |
| Belgium/Luxembourg | 7 | 11 | 18 | 20 | 25 |
| United Kingdom | 591 | 468 | 420 | 390 | 370 |
| Ireland | 31 | 32 | 26 | 25 | 25 |
| Denmark | 3 | 3 | 2 | 3 | 4 |
| Greece | 130 | 147 | 135 | 145 | 150 |

## Incomes

According to the FADN (Farm Accountancy Data Network), sheep farms in the EEC,[1] except Italy, brought in over the period 1978-1982 a real income per farm 5-10 % below the average for all farms. However, there are major differences in income according to locality and the degree of specialization of farms. Generally speaking, incomes in regions not suffering natural handicaps are higher than in less favoured areas.

In the four main producer countries, the returns of the more specialized farms were as follows in the period 1978 to 1982.

| | |
|---|---|
| France : | after an improvement in 1980, returns fell back in 1981 and 1982, bringing the average below the figure for 1978. |
| Italy : | a continuous fall. |
| Ireland : | incomes steady since 1979. |
| United Kingdom: | after a fall in 1979, incomes recovered appreciably in 1980 and continued to improve in 1981 and 1982. |

## Producer prices

The trend in producer prices has been very irregular and has varied greatly from one Member State to another, both before and after the common organization of the market was set up in October 1980.

Thus, prices expressed in ECU rose, for the Community as a whole, by 1.6 % in 1974 as against 1973, by 6.2 % in 1975, then by more than 17 % in 1976 and 1977, falling back by 10.8 % in 1980.

In 1981, with the Community system having been set up in October of the previous year, the average Community price increased by 14.7 % (19.9 % in the United Kingdom, 6.7 % in France, 28.9 % in Greece and 17.5 % in Ireland).

[1] Figures on incomes in Greece are not available.

In 1982 the increase was much less marked at 4.3 % (4.4 % in the United Kingdom, 9.4 % in France, 13.3 % in Greece and 2.1 % in Ireland). In 1983 the Community average price was steady.

<u>Yearly prices of sheepmeat</u>

ECU/1000 kg carcase weight - green rate

| Country | Weighting coefficient (2) | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | Weighting coefficient (3) | 1981 | 1982 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Deutschland | 2,45 | 198,50 | 198,98 | 214,38 | 218,26 | 248,31 | 270,41 | 276,39 | 275,888 | 2,09 | 346,973 | 355,428 |
| France | 24,66 | 274,86 | 313,53 | 336,62 | 354,71 | 378,57 | 371,73 | 366,37 | 345,657 | 21,54 | 368,817 | 391,373 |
| Italia | 19,38 | 216,89 | 177,72 | 207,09 | 330,65 | 362,57 | 321,15 | 411,70 | 390,119 | 16,63 | 450,417 | 454,147 |
| Nederland | 1,16 | 273,14 | 265,33 | 321,96 | 327,89 | 318,98 | 326,86 | 322,36 | 314,988 | 1,07 | 359,307 | 349,403 |
| Belgique/ België | 0,19 | 259,20 | 284,10 | 324,48 | 329,56 | 375,50 | 307,38 | 308,50 | 300,549 | 0,15 | 363,278 | 411,266 |
| United Kingdom | 46,83 | 169,33 | 172,61 | 174,63 | 198,39 | 272,18 | 267,63 | 267,30 | 215,918 | 39,55 | 258,838 | 270,222 |
| Ireland | 5,21 | 193,25 | 190,64 | 181,40 | 223,51 | 204,02 | 294,36 | 312,89 | 280,344 | 4,31 | 329,387 | 331,724 |
| Danmark | 0,12 | 229,33 | 211,37 | 246,07 | 242,15 | 241,51 | 240,70 | 255,71 | 278,272 | 0,10 | 247,789 | 273,741 |
| Ellas | | | | | (274,77) | (288,04) | (282,83) | (340,228) | (383,643) | 14,56 | 494,439 | 521,068 |
| Region 3 (4) | | | | | | | | | 288,448 | | 348,892 | 352,843 |
| Weighted EEC 9 | 100,00 | 207,93 | 211,27 | 224,27 | 266,17 | 312,50 | 305,86 | 323,02 | 288,035 | | (330,288) | |
| Weighted EEC 10 | | | | | | | | | | 100,00 | 354,652 | 369,862 |

(1) Prices before 9 April 1979 have been converted into ECU at a rate of 1,208953
(2) Until 1980 inclusive
(3) From 1981: EEC 10
(4) Weighted average of: Deutschland, Nederland, Belgique, Danmark.

## Intra-Community trade

France and the United Kingdom occupy a preponderant position in intra-Community trade in sheepmeat, France as an importer and the UK as an exporter. In 1982, of the 81 000 tonnes traded between the Member States, the United Kingdom supplied 37 600 tonnes (46 %) and France took 47 900 (59 %), including 24 400 from the United Kingdom, 1 300 from the Netherlands, 11 000 from Ireland and 1 400 from Germany.

Intra-Community trade expanded considerably from 1971 to 1982, increasing from 37 000 to 81 000 tonnes. However, it should be noted that between 1976 and 1980 an artificial pattern of trade developed. In order to escape the restrictions then imposed by France, the United Kingdom sent meat to the Benelux countries and Germany for subsequent re-export to France. This indirect trade may be estimated at about 10 000 to 15 000 tonnes per year over the period.

If these quantities are deducted, intra-Community trade is seen to have been steady at around 80 000 tonnes per year since 1975.

## External trade

Although the EEC is one of the world's biggest producers of sheepmeat, it has to import in order to meet demand. Since 1972, however, this dependence has been falling, and production has been increasing while consumption has remained steady.

In 1973 the Community produced 566 000 tonnes of sheepmeat and goatmeat and consumed 929 000 tonnes, a self-sufficiency rate of 60 %. In 1982 it produced 706 000 tonnes and consumed 972 000 tonnes, a rate of 72 %.

Community imports fell from 282 000 tonnes in 1976 to 226 000 tonnes in 1981, and then rose again to 281 000 tonnes in 1982.

### Imports

The Community's main source of imported sheepmeat is, by far, New Zealand (frozen meat). It accounts for more than three quarters of Community imports, nearly all of which goes to the United Kingdom. In 1981, for instance, the

EEC took 182 000 tonnes from New Zealand, 80 % of its total imports. Of this the United Kingdom accounted for 159 000 tonnes. The Community's second supplier in 1981 was Hungary (live animals), with 5 % of total EEC imports, far behind New Zealand. Then come Argentina and Australia, for frozen meat, and Poland, Yugoslavia and Bulgaria for live animals.

After the United Kingdom the main Community importers are Germany and Italy, with an average of 20,000 tonnes each since 1976. However, this figure was appreciably exceeded by Germany in 1982 (26 000 tonnes) and in Italy in 1976 (26 000 tonnes also).

In 1982 Greece imported 12 820 tonnes. Since 1976 France has been importing an average of 6 000 tonnes. Imports into Belgium and Luxembourg vary considerably, with 4 293 tonnes in 1976, twice as much in 1979, and under 3 000 tonnes in 1982. Danish imports at 2 000 tonnes account for about 8 % of the Community total, and the Netherlands figure of something over 1 000 tonnes for 5 %. Ireland is recognized as a "sensitive area" and does not import sheepmeat.

## Exports

The Community's exports to other countries are very low, and in 1982 amounted to 3 724 tonnes, going to Switzerland, Algeria, Libya, Saudi Arabia and the Arab Emirates.

From 1976 to 1980 exports averaged 8 000 tonnes. Since then they have been falling (6 027 tonnes in 1981, 3 724 tonnes in 1982). This is due to decreasing exports by France in 1981 and the United Kingdom in 1982.

## IV. THE LONG GESTATION OF THE COMMON MARKET IN SHEEPMEAT

Before the United Kingdom joined the Community in 1973, no need for a common organization of the market in sheepmeat was felt. A draft Regulation for a transitional common organization was put to the Council by the Commission in September 1975; its aim was to effect the progressive liberalization of intra-Community trade, but it was not adopted. Not until 29 May 1980 did the Ministers of Agriculture manage to find a compromise. A few months later, on 20 October 1980, the common organization of the market in sheepmeat came into force. The "lamb war" between Paris and London lasted three years, 1978 to 1980. The main events in this particularly eventful period are the following.

May 1977

Ireland brought France before the European Court of Justice on the grounds that it was violating the Treaty of Rome by banning imports of Irish lamb.

December 1977

Bilateral agreement was reached between Dublin and Paris under which the Irish were authorized to export 100 tonnes of lamb per week to the French market. In return Ireland withdrew its action before the Court of Justice.

January 1978

The United Kingdom contested the validity of the agreement between France and Ireland.

March 1978

The Commission suggested freeing intra-Community trade, with private storage aid to support the market. Protection against non-Community countries would be slightly reinforced, with safeguard measures should prices fall sharply.

France refused on the grounds that such a settlement would not guarantee adequate returns to its producers. The United Kingdom was unhappy because it wanted to maintain access for New Zealand lamb to the Community market and to prevent a sudden rise in prices.

October 1978

After several warnings, the Commission decided to take France before the Court of Justice.

September 1979

The Court of Justice condemned France for continuing to apply, after 1 January 1978, its restrictions on imports of sheepmeat from the United Kingdom and for infringing Community rules on the free movement of goods. Nonetheless Paris refused to open its frontiers to UK sheepmeat until a common organization of the market protecting its producers' interests was set up.

October 1979

France announced its intention of authorizing purchases, limited to 200 tonnes per week, from the United Kingdom. The meat bought would have to be instead of meat imported from outside the Community under traditional quotas.

November 1979

The Commission requested France to provide it with explanations concerning the conditions in which the weekly 200 tonnes of sheepmeat from the United Kingdom were to be imported and stored. As the French Government's reply was not considered satisfactory, the Commission went on to the following stage of the legal procedure, that is, sending a reasoned opinion requesting France to lift the restrictions by 12 December 1979.

December 1979

France replied that it did not intend to open its frontiers completely to imports of sheepmeat from the United Kingdom. The agriculture council instructed the Commission to negotiate voluntary restraint agreements with traditional non-Community supplier countries.

January 1980

The Commission began its second action against France, which then replaced the quantitative restrictions thus far imposed on UK exporters with a levy. This alteration, which did not affect the basic issue, obliged the Commission to begin a third action against France.

March 1980

- The Commission requested the Court to issue an accelerated and provisional judgment as an interim measure, pending final judgments on the cases brought against France.
- The Court of Justice agreed with the conclusions of its Advocate-General that there was no need for the provisional measures requested by the Commission since the Court's judgment of September 1979 already obliged France to

fully open its borders to United Kingdom sheepmeat and that an interim judgment would have to go the same way.

Finn Olav Gundelach, the European Commissioner for Agriculture, proposed to the Council of Ministers that, pending the setting-up of a common organization of the market, a transitional measure be adopted to support the incomes of French sheep farmers, in exchange for the opening of French frontiers, but this effort at a compromise failed.

<u>May 1980</u>

On 29 May the Council agreed in principle on setting up a common organization of the market in sheepmeat. This provided for a system of premiums to producers, intervention buying or slaughter premiums, and voluntary restraint agreements with the main non-Community countries traditionally supplying sheepmeat. However, no date was set for this organization of the market to enter into force.

<u>June 1980</u>

Faced with a glut, and in order to cope with deflections of trade, France decided to limit its imports of sheepmeat from all Member States.

<u>October 1980</u>

On 17 October the voluntary restraint agreement with New Zealand was signed. On 20 October the common organization of the market came into force and France reopened its frontiers.

## V. THE COMMON ORGANIZATION OF THE MARKET IN SHEEPMEAT AND GOATMEAT

### 1. Sheepmeat

There are three aspects to the common organization of the market in sheepmeat:

- a system of premiums paid to producers directly;
- an intervention or deficiency payment system, according to Member State, influencing prices. The deficiency payment mechanism corresponds to the United Kingdom's traditional practice;
- a mechanism for keeping imports within certain limits.

Together these three things do to a large extent ensure free movement of sheepmeat within the EEC and at the same time guarantee returns to producers and access to the Community market for traditional non-Community supplier countries.

The common organization of the market came into force only on 20 October 1980 and is still being run in. This is why it is to be reviewed by 1 April 1984. To this end the Commission sent a report to the Council of Ministers on 31 October 1983, containing a favourable judgment on the operation on the organization of the market from 1980 to 1983. The Commission consequently suggests that the basic mechanisms be left unchanged, but it also favours certain alterations which may keep expenditure by the EAGGF Guarantee Section in this sector down to a more reasonable level.

#### A. The intervention, price and premium system

- Prices

  There are two prices which govern the market support mechanisms:

  - the basic price, on which are calculated the intervention prices and the guide level used to determine the variable slaughter premium
  - the reference price, used for calculating the ewe premium.

  These prices apply for one marketing year (12 months), starting on the first Monday in April. However, in order that the market situation may be taken more fully into account, the Commission proposes that from 1985 the marketing year should start on 1 January.

## Basic price

This price applies to the whole of the EEC and is fixed by the Ministers of Agriculture for each marketing year. It applies to fresh sheep carcases of a certain quality and represents the average price which the Community wishes producers to obtain over the marketing year. A number of factors are taken into account in fixing it, including the market situation and prospects, production costs in the EEC, and the market situation for other types of meat, especially beef/veal. The basic price is seasonally adjusted on a weekly basis, as the normal seasonal variations in the market have to be taken into account. The Commission proposes that from 1984/85 the seasonal adjustment of the basic price should be altered so as to reduce market price variations in the United Kingdom, which are considered excessive.

## Reference price

To take account of differences in market prices and production structures before the common organization of the market was set up in October 1980, the Ministers of Agriculture initially fixed regional reference prices for each marketing year. The regions are currently as follows:

Region 1 : Italy
Region 2 : France
Region 3 : Federal Republic of Germany, Denmark, Belgium, Luxembourg, Netherlands
Region 4 : Ireland
Region 5 : Great Britain
Region 6 : Northern Ireland
Region 7 : Greece.

The seven reference prices have been gradually brought together, in order to achieve a single reference price from the 1984/85 marketing year. It has been decided to align the other reference prices on that applicable in France, which corresponds to the EEC basic price.

- Operation of the premium and intervention system

The Community rules give the Member States a choice between an intervention buying system (with public and private storage) or a variable slaughter premium system, together in either case with an annual ewe premium. France has opted for intervention and the United Kingdom for the variable slaughter system. The other Member States merely apply the ewe premium system.

. Ewe premium

In order to make up for any loss of income resulting from the new common organization of the market, producers are able to receive a premium if prices are not satisfactory during the marketing year. This premium is based on the difference between the regionally adjusted reference price (which is to be replaced by a single reference price from 1984/85) and market prices. This difference, known as the loss of income, is multiplied by the tonnage of meat produced in each region during the previous year. This amount is then divided by the number of ewes recorded in each region. The result is the estimated amount of the premium payable per ewe in each region.

An advance of 50 % of the estimated amount of the premium is paid to producers on the basis of applications submitted at the beginning of the year; the balance is paid at the end of the year.

The Commission is proposing to the Council the following three amendments from the 1984/85 marketing year:

- calculating the premium directly on the difference between the reference price and the market price recorded in each region and using a coefficient corresponding to normal lamb meat production per ewe in that region. The purpose here is to avoid confusion between the number of ewes recorded and the number of ewes declared;
- paying the whole of the premium in one go, after the loss of income has actually been determined. Advances too often give rise to inexact sums being paid, in view of the difficulties of exactly forecasting market prices;

- reducing the number of regions from 7 to 5. The scheme proposed is:
  - Region 1 : Italy and Greece
  - Region 2 : Belgium, Denmark, France, Luxembourg, Germany and the Netherlands
  - Region 3 : Ireland
  - Region 4 : Northern Ireland
  - Region 5 : Great Britain.

Grouping together on the one hand Italy and Greece, and on the other hand Germany, Denmark, France, Luxembourg, the Netherlands and Belgium is desirable in that these Member States have very comparable production structures and depend closely upon each other in trade. Previously only Germany, Denmark, the Netherlands, Belgium and Luxembourg formed as a single region.

The Commission will re-examine the division into regions in two years time, in the light of developments on the different sheepmeat markets, with a view to further reducing their number. If necessary it will put a proposal to the Council, by November 1985.

## Market support measures

### Variable slaughter premium

The variable slaughter premium is applied only in the United Kingdom (and not in Northern Ireland since the beginning of the 1982/83 marketing year). It is paid to producers when the market price is below the seasonally adjusted guide level (85 % of the basic price).

This premium is equal to the difference between the seasonally adjusted guide level and the seasonally adjusted market price. Payments in Great Britain under the slaughter premium are deducted from the amount of the ewe premium.

In order to avoid distortions of competition, those exporting sheepmeat from Great Britain have to pay back the slaughter premium if the meat is going to other Member States of the Community. The recovery of the premium goes under the name of "clawback". There is no clawback on exports outside the Community.

The Commission is proposing alterations to the system.

Firstly, the Commission considers that the seasonal adjustment of the guide level has not achieved the two ends for which it was designed: production has not become better spread throughout the year in Great Britain and intra-Community trade has not expanded, mainly because of currency and price disparities between France and the United Kingdom.

The Commission is therefore proposing that, from the 1984/85 marketing year, the seasonal adjustment of the basic price be changed so that the seasonally adjusted guide level, which is derived from the basic price, should more closely follow seasonal changes in the market price in Great Britain. The aim is to level out the production peak which occurs in summer. In addition, in order to make the variable premium more effective, the Commission is suggesting that, initially, a ceiling of 25 % of the guide level be put on the variable slaughter premium. This ceiling, which would also apply to the clawback, could be reviewed each year when farm prices were adopted.

Intervention

The intervention price is set at 85 % of the basic price. Like the basic price it is seasonally adjusted. If between 15 July and 15 December the Community market price falls to or below the intervention price, and at the same time the price on the representative markets of a particular region is at or below the seasonally adjusted intervention price, the intervention agencies in Member States which have so requested may be authorized to have recourse to public intervention buying. So far only France has requested this.

In the event of serious disturbance of the market intervention may be introduced at other times of the year.

Since the introduction of the community sheepmeat regime, no intervention buying has actually taken place.

Private storage aid

Aid may be granted for private storage when the Community representative market price falls below the basic price. Although this happened several times during 1982/83 and 1983/84, private storage aid has never been resorted to.

The Commission is proposing that from 1984/85 both the criteria for introducing private storage and arrangements for implementing it should be regionalized.

- Agri-monetary system

There are no monetary compensatory amounts (MCAs) in trade in sheepmeat. On the other hand the green rates are used in calculating prices and aids. They are also used for recording market prices. This leads to certain anomalies, since in weak-currency countries the premium is less than it would be if calculated at the commercial rate. The opposite applies in the other Member States.

Effect of currency fluctuations on intra-Community trade

As monetary compensatory amounts do not apply to sheepmeat, trade is liable to the effects of currency fluctuations. In particular, the exchange rate of the pound sterling against the French franc has a significant effect on the level of UK exports to France, which constitute the main intra-Community trade flow.

As returns to UK exporters are affected by the pound/franc exchange rate, they time their exports to France in their own best interests. Exports are thus low in months where the rate is unfavourable and vice versa.

The common organization of the market has not upset price relativities

The introduction of the common organization of the market in sheepmeat and goatmeat has not led to the price distortions so much feared by some, i.e. a collapse in France and a steep rise in Britain.

The market price in Great Britain is still about 70 % of that in France. In addition the almost constant fall in prices in the Community as a whole from 1960 to 1980 has slowed down somewhat since the common organization of the market was set up.

- Budgetary consequences of the common organization of the market

Financially it is the United Kingdom which is the main beneficiary of the common organization of the market. Most of the EAGGF expenditure involved goes on paying the variable slaughter premium, which is granted only to British sheep farmers. Farm fund expenditure on the sheepmeat sector has increased appreciably: 191 million ECU in 1981, 251 million in 1982 and 360 million in 1983.

## B. System of trade with non-Community countries

- System governing imports

At the same time as the Community market support mechanisms came into effect on 20 October 1980, voluntary restraint agreements negotiated by the EEC with the main traditional non-Community supplier countries also came into force. Under these agreements, 12 countries (Argentina, Australia, Austria, Bulgaria, Czechoslovakia, Hungary, Iceland, New Zealand, Poland, Romania, Uruguay, Yugoslavia) agreed not to send more than a certain volume of exports each year to the Community.

In return for this quantitative limitation, the EEC granted them tariff concessions. Instead of a variable import levy of up to 20 % *ad valorem*, as laid down in the Community import rules in this sector, the levy to be paid by these 12 countries is limited to 10 %.

The annual quantities of sheepmeat and goatmeat which the countries concerned are able to export to the EEC are the following:

(tonnes carcase equivalent)

| Country | Live animals | Fresh meat | Frozen meat | Total |
|---|---|---|---|---|
| Argentina | - | - | 23,000 | 23,000 |
| Australia | - | - | 17,500 | 17,500 |
| Austria | 300 | - | - | 300 |
| Bulgaria | 2,000 | 1,250 | - | 3,250 |
| Hungary | 10,050 | 1,150 | - | 11,200 |
| Iceland | - | - | (1) 600 | 600 |
| New Zealand | - | - | 245,500 | 245,500 |
| Poland | 5,800 | 200 | - | 6,000 |
| Romania | 475 | 75 | - | 550 |
| Czechoslovakia | - | 800 | - | 800 |
| Uruguay | - | - | 5,800 | 5,800 |
| Yugoslavia | 200 | 4,800 | - | 5,000 |
| Total 12 non-Community countries | 18,825 | 8,275 | 292,400 | 319,500 |

(1) a maximum of 10 % of which may be made up by fresh meat.

To the other non-Community supplier countries which have not yet signed voluntary restraint agreements (the main ones being Chile and Spain) the Community has granted autonomously the same advantages subject to quotas based on traditional imports. These quotas have been fixed each year at the following levels:

(tonnes carcase equivalent)

| | Live animals | Meat |
|---|---|---|
| Chile | - | 1,490 |
| Spain | - | 500 |
| Other non-Community countries | 100 | 200 |

All Community imports of live animals and fresh, chilled or frozen meat are currently covered by voluntary restraint agreements with the non-member country concerned or are subject to quotas. Thus the general Community import regime (20 % customs duty under GATT) applies in practice only to a very small and insignificant number of products, mainly salt, dried or smoked sheepmeat or goatmeat or meat in brine.

The provisions of the voluntary restraint agreements are subject to review by the signatory countries, including the EEC, by 1 April 1984.

The Community has expressed its intention of negotiating with the countries concerned a reduction of the quantities currently provided for by these agreements. The Commission is also proposing the introduction of a minimum import price. It should be noted here that the main non-Community suppliers of frozen meat (New Zealand, Argentina, Australia) have in general not fully used the possibilities offered them by the voluntary restraint agreements.

Sensitive areas

All the traditional non-Community supplier countries have agreed to recognize that the French and Irish markets constitute sensitive areas. Under this arrangement, only 7 000 tonnes may enter France each year, while Ireland takes none.

Under the voluntary restraint agreements, the "sensitive areas" concept should apply until 31 March 1984. However, on the grounds that this special arrangement has enabled fairly satisfactory market conditions to be maintained in France and Ireland, the Commission intends to negotiate its extension beyond that date with the non-Community countries concerned.

- System governing exports

Provision is made for the granting of export refunds. However, neither the general nor the detailed rules of implementation have yet been adopted by the Council and Commission.

## 2. Goatmeat

Protection against imports of goatmeat is the same as for sheepmeat. In practice, however, the EEC's voluntary restraint agreements with the main traditional non-Community supplier countries are not very relevant, as imports of goatmeat are very low.

There is for the moment no Community market support for goatmeat. The Commission is examining whether goatmeat should be included under the internal arrangements of the common organization of the market in sheepmeat.

## VI. THE CONSEQUENCES OF SPAIN AND PORTUGAL JOINING THE EEC

The enlargement of the Community to include Spain and Portugal will have only a minor effect on the sheepmeat sector. At most there might be increased competition for the UK from Spanish exports to France in spring (when Spanish production is highest).

With sheep and goatmeat production of something like 130 000 tonnes Spain would become the third Community producer country, after the United Kingdom and France.

Spain is practically self-sufficient and imports an average of 2 000 tonnes per year and exports 1 000.

Portugal produces about 20 000 tonnes of sheep and goatmeat per year. Imports and exports are practically nil.

It is likely that implementation in the two applicant countries of the Community directive on agriculture in hill and mountain areas and certain less-favoured areas will lead to a slight increase in their sheep and goat flocks.

# VII. THE SITUATION IN THE MAIN EXPORTING COUNTRIES

## New Zealand

At a distance of some 12 000 miles from Europe, New Zealand has a national sheep flock of 70 million head. Each year the country produces about 360 million kg of wool and slaughters some 40 million head, representing some 600 000 tonnes of meat.

Unlike other parts of the world, where sheep production is above all for home consumption, in New Zealand it is an export-oriented industry. The country accounts for a half of international trade in sheepmeat. Sales of wool and meat account for nearly 30 % of its export income, a figure which may be compared with what France, for instance, earns from its exports of motor vehicles and machinery.

It all began a century ago, when refrigerated transport was introduced. New Zealand sent its first cargo of frozen lamb to the United Kingdom in 1882. The UK, which was then one of the world's main importers of food products, was until the 1960s practically the only market for New Zealand lamb, more and more of which was produced.

Today, although it is still very dependent on the UK market and still has a special relationship with London, New Zealand has managed to find new outlets in many parts of the world, including the other countries of Europe, the United States, Canada, North Africa, the USSR and the Middle East. The Middle East would seem to be the most promising area: New Zealand obtained an order for more than 200 000 tonnes for Iran over the period 1979-1983.

New Zealand's sales of lamb to Iran and Iraq accounted for 5 % of its exports in 1979, 21 % in 1980, 31 % in 1981 and only 17 % in 1982. In 1983 New Zealand obtained a contract for 140 000 tonnes, the largest so far concluded.

Over the same period New Zealand exports to the EEC, since 1980 limited by the voluntary restraint agreements to 245 000 tonnes a year, have been affected by sales to these two countries; 74 % of total exports in 1979, 56.6 % in 1980, 47.6 % in 1981 and 65 % in 1982.

In 1982 New Zealand exports of sheepmeat to the EEC amounted to 218 000 tonnes, of which 191 000 went to the United Kingdom, 9 500 to the Netherlands, 9 500 to Greece, 4 500 to the FRG, 3 700 to Italy, 3 400 to France, 1 730 to Belgium and Luxembourg and 795 to Denmark.

## Australia

With 133 million head, Australia has one of the world's largest sheep flocks. In 1980 meat production amounted to 548 000 tonnes, including 294 000 tonnes of mutton and 254 000 tonnes of lamb. Most sheep stations have wool production as their main enterprise and meat is only secondary. Slaughterings tend to increase when the price of wool falls and vice versa. Meat production is also much affected by the weather. Large amounts of lamb are consumed at home and a mere 16 % is exported. Exports of mutton, largely to Japan, are much more significant and are increasing regularly. Between 1974 and 1983 they increased from 83 000 to 179 000 tonnes. Australian exports of live animals are also increasing appreciably (from 1,4 million head in 1974 to 5,6 million in 1980).

This very steep increase is largely due to strong demand from the Middle East.

## Argentina

Argentina has about 30 million head of sheep, which are steadily losing ground to cattle. Production is very irregular and varies with the price of wool and sometimes the price of beef. In 1973 it was 126 000 tonnes and in 1977 133 000 tonnes. In 1980 it was no more than 100 000 tonnes. Argentina's exports have followed a similar course: 24 300 tonnes in 1973, 28 400 in 1977 and only 11 100 in 1980.

Most of these exports go to Western Europe and the Middle East. However, seeing how they have fallen, it seems unlikely that Argentina will become a major exporter again in the near future.

# CONCLUSION

Over the next few years world trade in sheepmeat should remain very active, especially if demand from the Arab oil-producing countries remains high. New Zealand should continue as the world's main exporter.

Community production will probably continue to increase.

Consumption is also expected to rise slightly.

The common organization of the market in sheepmeat is still being run in and in the Commission's view should undergo some alterations from the 1984/85 marketing year. However, the main features of the mechanisms set up on 20 October 1980 should continue unchanged. They have shown themselves able to ensure efficient management of the market in sheepmeat.

# VIII. A N N E X

| | Community | FRG | France | Italy | Netherlands | Belgium-Luxemb. | United Kingdom | Ireland | Denmark | Greece |
|---|---|---|---|---|---|---|---|---|---|---|
| Sheep flock at 31 December 1982 ('000 head) (1) | 58.795 (59.768) | 1.172 (1.172) | 12.103 (12.100) | 9.256 (9.356) | 910 (910) | 83 4 (85) (4) | 22.952 (23.700) | 2.424 (2.550) | 61 (61) | 9.830 (9.830) |
| Total indigenous production of sheepmeat and goatmeet 1982 ('000 tonnes carcase weight) (1) | 706 (730) | 20 (21) | 184 (178) | 52 (56) | 19 (19) | 5 (5) | 266 (287) | 42 (42) | 0,5 (1) | 118 (121) |
| Consumption of sheepmeat and goatmeat 1982 ('000 tonnes carcase weight) (1) | 972 (980) | 49 (52) | 232 (232) | 83 (82) | 7 (7) | 18 (18) | 420 (419) | 26 (26) | 2 (3) | 135 (141) |
| 1982 market prices (2) in ECU/100 kg (3) | 369,862 + 4,3 % | 355,428 + 2,4 % | 391,373 + 6,1 % | 454,147 + 0,8 % | 349,403 − 2,8 % | 411,266 + 13,2% | 270,222 + 4,4 % | 331,724 + 0,6 % | 273,724 +10,5 % | 521,068 + 5,4 % |
| Intra-Community trade 1982 (4) (tonnes) | 78.150 | 3.382 | 6.252 | 95 | 10.928 | 3.546 | 37.636 | 16.205 | 106 | 0 |
| French imports from other Member States 1982 (tonnes) | 47.899 | 1.401 | − | 89 | 9.191 | 1.318 | 24.407 | 11.486 | 6 | 0 |
| United Kingdom exports to other Member States (tonnes) | 37.677 | 6.216 | 22.909 | 925 | 366 | 6.102 | − | 1.106 | 21 | 32 |
| EEC exports to non-Community countries 1982 (tonnes carcase weight) | 3.724 | 232 | 975 | 105 | 20 | 11 | 2.217 | 64 | 100 | 0 |
| EEC imports from non-Community countries 1982 (tonnes carcase weight) | 280.642 | 26.591 | 6.777 | 21.616 | 1.005 | 2.967 | 206.837 | 0 | 2.029 | 12.820 |

(1) In brackets, estimated figures for 1983
(2) In brackets, change as against 1981
(3) Converted to ECU at green rates
(4) On basis of exports.

## 1982

**TOTAL TRADE IN SHEEPMEAT AND GOATMEAT**

**BETWEEN MEMBER STATES**

(on basis of exports)

Q = tonnes carcase weight

| | Exporting Country | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | FRANCE | BLEU | NETHERLANDS | FRG | ITALY | ROYAUME-UNI | IRELAND | DENMARK | GREECE |
| Importing Country | | | | | | | | | |
| FRANCE | - | 1.416 | 9.107 | 1.432 | 72 | 22.867 | 11.421 | 9 | 0 |
| BLEU | 1.017 | - | 1.435 | 247 | 0 | 6.102 | 3.234 | 0 | 0 |
| NETHERLANDS | 27 | 261 | - | 43 | 0 | 366 | 30 | 0 | 0 |
| F.R. GERMANY | 525 | 1.230 | 125 | - | 0 | 6.217 | 367 | 92 | 0 |
| ITALY | 4.376 | 636 | 112 | 1.325 | - | 925 | 309 | 5 | 0 |
| UNITED KINGDOM | 12 | 0 | 78 | 219 | 16 | - | 844 | 0 | 0 |
| IRELAND | 0 | 0 | 0 | 0 | 0 | 1.106 | - | 0 | 0 |
| DENMARK | 0 | 0 | 0 | 40 | 0 | 21 | 0 | - | 0 |
| GREECE | 295 | 3 | 71 | 76 | 7 | 32 | 0 | 0 | - |
| TOTAL | 6.252 | 3.546 | 10.928 | 3.382 | 95 | 37.636 | 16.205 | 106 | 0 |

SOURCE : NIMEXE - SIENA

Coefficients : - Live animals: carcase weight = live weight x 0.47
- Deboned meat: weight of product x 1.7 = carcase weight.

Imports into the Community of Ten

(in tonnes carcase weight for live animals and tonnes weight of product for meat)

| | 1978 | 1979 | 1980 | 1981 | 1982 |
|---|---|---|---|---|---|
| Spain | 1.002 | 8 | 251 | 416 | 441 |
| Portugal | 8 | - | - | - | - |
| New Zealand | 243.225 | 228.771 | 198.263 | 179.240 | 218.719 |
| Argentina | 11.640 | 11.281 | 7.358 | 5.992 | 8.941 |
| Australia | 12.452 | 3.885 | 4.699 | 4.107 | 7.815 |
| Hungary | 6.866 | 12.790 | 12.983 | 10.995 | 12.003 |
| Bulgaria | 2.488 | 4.883 | 4.820 | 3.136 | 3.197 |
| Poland | 4.822 | 5.997 | 7.203 | 4.853 | 4.732 |
| Yugoslavia | 3.850 | 3.148 | 2.946 | 3.265 | 4.460 |
| Uruguay | 2.189 | 4.005 | 1.513 | 1.412 | 1.632 |
| GDR | 3.625 | 3.969 | 5.002 | 340 | 195 |
| Romania | 418 | 233 | 268 | 377 | 647 |
| Czechoslovakia | 641 | 655 | 537 | 705 | 725 |
| Iceland | 367 | 617 | 379 | 427 | 400 |
| Others | 1.469 | 578 | 1.518 | 3.042 | 1.872 |
| Total | 295.062 | 285.820 | 247.740 | 218.307 (1) | 265.779 (2) |
| of which: | | | | | |
| live animals | 16.618 | 22.906 | 25.467 | 17.734 | 18.466 |
| fresh meat | 7.734 | 6.646 | 7.414 | 7.966 | 9.118 |
| frozen meat | 270.710 | 256.268 | 214.859 | 192.429 | 238.088 |

(1) Including 178 tonnes of preparations and preserves; in carcase weight equivalent, the total becomes 225,922 tonnes

(2) Including 107 tonnes of preparations and preserves; in carcase weight equivalent, the total becomes 280,642 tonnes

Source : Commission Report of October 1983 (COM(83) 585 final)

| MAIN PRODUCERS AND THEIR OUTPUT ('OOO TONNES CARCASE WEIGHT) | | | | | | |
|---|---|---|---|---|---|---|
| | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 |
| Argentina | 133 | 130 | 131 | 124 | 122 | 120 |
| Australia | 514 | 491 | 549 | 579 | 506 | 517 (1) |
| Iran | 220 | 224 | 274 | 277 | 270 | 270 (1) |
| New Zealand | 498 | 502 | 514 | 560 | 626 | 659 (1) |
| Spain | 131 | 130 | 121 | 127 | 129 | 128 (1) |
| Turkey | 275 | 262 | 298 | 295 | 302 | 309 (1) |
| USSR | 859 | 881 | 860 | 900 | 900 | 850 |
| United States | 155 | 136 | 129 | 141 | 149 | 162 |
| EEC | 621 | 638 | 649 | 720 | 701 | 706 (2) |

(1) Forecasts

Source : Meat and Dairy Products and EEC Report October 1983 (2)

| WORLD TRADE IN SHEEPMEAT ('000 tonnes weight of product) | | | | | | |
|---|---|---|---|---|---|---|
| | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 |
| Exports | | | | | | |
| New Zealand | 406 | 378 | 434 | 450 | 470 | 442 |
| Australia | 200 | 170 | 165 | 228 | 159 | 158 |
| Argentina | 28 | 24 | 23 | 11 | 14 | 14 |
| Imports | | | | | | |
| EEC | 254 | 266 | 251 | 243 | 226 | 296 |
| Japan | 148 | 140 | 118 | 179 | 88 | 85 |
| Iran | 60 | 50 | 55 | 105 (1) | 124 (1) | - |
| Iraq | 15 | 3 | 14 | 14 (1) | 31 (1) | - |
| South Korea | 30 | 41 | 37 | 13 | 11 (1) | - |
| United States | 10 | 17 | 20 | 15 | 14 | 9 |
| Kuweit | 17 | 17 | 12 | 12 | 11 (1) | - |
| Canada | 13 | 15 | 18 | 13 | 10 | 10 |
| Greece | 8 | 12 | 12 | 4 | 7 | - |

(1) Forecasts

Source : Meat and Dairy Products

| WORLD TRADE IN LIVE SHEEP ('000 head) | | | | | | |
|---|---|---|---|---|---|---|
| | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 |
| **Exports** | | | | | | |
| Australia | 4.124 | 3.865 | 5.706 | 5.770 | 6.051 (1) | 6.600 (1) |
| Bulgaria | 723 | 1.050 | 1.454 | 1.547 | 1.395 | - |
| Romania | 1.573 | 1.546 | 1.378 | 1.173(1) | 1.400 (1) | - |
| Turkey | 317 | 612 | 451 | 934 | 1.919 | - |
| Hungary | 822 | 704 | 1.036 | 1.008 | 1.022 | - |
| Poland | 229 | 269 | 340 | 382 | 305 | - |
| GDR | 140 | 225 | 400 | 413(1) | 480 (1) | - |
| Yugoslavia | 93 | 171 | 159 | 105 | 130 | - |
| **Imports** | | | | | | |
| EEC (2) | 1.115 | 1.192 | 1.664 | 1.693 | 1.392 | - |
| Saudi Arabia | 1.855 | 3.750 | 3.661 | 4.344 | 6.029 | - |
| Iran | 3.100 | 3.056 | 2.500 | 1.800(1) | 1.200 (1) | - |
| USSR | 465 | 430 | 448 | 430(1) | 315 (1) | - |
| Jordan | 275 | 342 | 394 | 404(1) | 430 (1) | - |
| Kuweit | 764 | 976 | 1.426 | 1.475(1) | 2.100 (1) | - |

(1) Forecast

(2) : 1977 to 1980 : EEC 9

1980 to 1982 : EEC 10

Source : Meat and Dairy Products

| AUSTRALIA | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 |
|---|---|---|---|---|---|---|
| Production ('000 tonnes carcase weight) | 514 | 491 | 549 | 579 | 506 | 517(1) |
| Flock (million head) | - | 131 | 134 | 136 | 134 | 137(1) |
| Exports | | | | | | |
| - sheepmeat ('000 tonnes carcase weight) | 200 | 170 | 165 | 228 | 159 | 158 |
| - live sheep ('000 head) | 4.124 | 3.865 | 5.706 | 5.770 | 6.051(1) | 6.600(1) |

(1) Forecast

Source : Meat and Dairy Products

| NEW ZEALAND | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 |
|---|---|---|---|---|---|---|
| Production ('000 tonnes carcase weight) | 498 | 502 | 514 | 560 | 626 | 659 |
| Flock (million head) | 59 | 62 | 64 | 69 | 70 | 70 |
| Exports ('000 tonnes carcase weight) | 406 | 378 | 436 | 450 | 470 | 442 |

Source : Meat and Dairy Products

SHEEPMEAT CONSUMPTION IN SOME NON-COMMUNITY COUNTRIES
('000 tonnes)

| | 1980 | 1981 | 1982 (1) |
|---|---|---|---|
| Argentina | 100 | 97 | 96 |
| Australia | 338 | 274 | 299 |
| Brazil | 47 | 47 | 47 |
| Colombia | 11 | 12 | 12 |
| Canada | 20 | 17 | 17 |
| Japan | 176 | 180 | 180 |
| Mexico | 57 | 58 | 59 |
| New Zealand | 98 | 92 | not available |
| Poland | 22 | 20 | 18 |
| Uruguay | 22 | 37 | 30 |
| U.S.A. | 159 | 165 | 176 |
| U.S.S.R. | 1.001 | 960 | 110 |

(1) Forecast

Source : USDA

| Production ('000 tonnes carcase weight) | | | | |
|---|---|---|---|---|
| | 1968 | 1973 | 1982 | 1983 (1) |
| Total EEC | 563 | 566 | 706 | 730 |
| Germany | 12 | 12 | 20 | 21 |
| France | 117 | 128 | 184 | 178 |
| Italy | 39 | 32 | 52 | 56 |
| Netherlands | 9 | 10 | 19 | 19 |
| Belgium/Luxembourg | 3 | 4 | 5 | 5 |
| United Kingdom | 251 | 235 | 266 | 287 |
| Ireland | 44 | 42 | 42 | 42 |
| Denmark | 3 | 1 | 0,5 | 1 |
| Greece | 84 | 102 | 118 | 121 |

(1) Forecast

<u>Source</u> : Commission report of October 1983 (COM(83) 585 final)

| Sheep numbers ('000 head) | | | | |
|---|---|---|---|---|
| | 1968 | 1973 | 1982 | 1983 (1) |
| Total EEC | 49.823 | 51.381 | 58.795 | 59.768 |
| Germany | 830 | 1.016 | 1.172 | 1.172 |
| France | 9.794 | 10.274 | 12.103 | 12.100 |
| Italy | 8.206 | 7.809 | 9.256 | 9.356 |
| Netherlands | 552 | 657 | 910 | 910 |
| Belgium | 84 | 74 | 83 | 85 |
| Luxembourg | 5 | 6 | 4 | 4 |
| United Kingdom | 19.667 | 20.193 | 22.952 | 23.700 |
| Ireland | 2.851 | 2.929 | 2.424 | 2.550 |
| Denmark | 110 | 56 | 61 | 61 |
| Greece | 7.724 | 8.367 | 9.830 | 9.830 |

(1) Forecast

Source : Commission report of October 1983 (COM(83)585 final)

| Goat numbers ('000 head) | | | | |
|---|---|---|---|---|
| | 1968 | 1973 | 1982 | 1983 (1) |
| Total EEC | 6.072 | 6.411 | 7.015 | 7.026 |
| Germany | 75 | 38 | 36 | 36 |
| France | 919 | 923 | 1.257 | 1.257 |
| Italy | 1.045 | 948 | 1.030 | 1.031 |
| Netherlands | 14 | 13 | 12 | 12 |
| Belgium | 2 | 4 | 6 | 6 |
| Luxembourg | - | - | - | - |
| United Kingdom | 12 | 13 | 14 | 14 |
| Ireland | - | - | - | - |
| Denmark | - | - | - | - |
| Greece | 4.005 | 4.472 | 4.660 | 4.670 |

(1) Forecast

Source : Commission report of October 1983 (COM(83)585 final)

Comparison of sheep farming in New Zealand (extensively reared sheep alone) and France (sheep raised on mixed cropping (livestock farms, or modern intensive units). The United Kingdom occupies something of an intermediate position.

| | New Zealand | United Kingdom | France |
|---|---|---|---|
| Area of country ('000 $km^2$) | 268 | 244 | 547 |
| Population (millions) | 3,11 | 55,8 | 53,5 |
| Farm workforce/ total workforce | 12 % | 2,7 % | 10 % |
| UAA in ha per person in farming | 130 | 60 | 30 |
| No. of lambs per full-time MWU raising sheep | 1,000 | 400 | 150 |
| No. of lambs per ewe per year | 0,8 | 1,0 | 1,2 |
| Farmer's return per kg of meat FF 1978 | 7 (including FF 3.5 for the wool) | 12 | 21 |

| Consumption ('000 tonnes carcase weight) | | | | |
|---|---|---|---|---|
| | 1968 | 1973 | 1982 | 1983 (1) |
| Total EEC | 969 | 929 | 972 | 980 |
| Germany | 13 | 25 | 49 | 52 |
| France | 140 | 180 | 232 | 232 |
| Italy | 51 | 61 | 83 | 82 |
| Netherlands | 3 | 3 | 7 | 7 |
| Belgium/Luxembourg | 7 | 11 | 18 | 18 |
| United Kingdom | 591 | 488 | 420 | 419 |
| Ireland | 31 | 32 | 26 | 26 |
| Denmark | 3 | 3 | 2 | 3 |
| Greece | 130 | 147 | 135 | 141 |

(1) Forecast

Source: Commission report of October 1983 (COM(83)585 final)

GREEN EUROPE - NEWSLETTER ON THE COMMON AGRICULTURAL POLICY

| No. | | Language : |
|---|---|---|
| 165 | 15 years of Green Europe | DA, DE, EN, FR, IT, NL |
| 166 | Milk : problem child of european agriculture | DA, DE, EN, FR, IT, NL |
| 167 | EEC agriculture : the world dimension | DA, DE, EN, FR, IT, NL |
| 168 | European agriculture 1979 | DA, DE, EN, FR, IT, NL |
| 169 | European agriculture into the nineteen-eighties | DA, DE, EN, FR, IT, NL |
| 170 | Agriculture and the problem of surpluses | DA, DE, EN, FR, IT, NL |
| 171 | EEC food imports : the New Zealand file | DA, DE, EN, FR, IT, NL |
| 172 | Wine in the eighties | DA, DE, EN, FR, IT, NL, EL |
| 173 | The agricultural aspects of enlargement of the European Community : Greece | DA, DE, EN, FR, IT, NL, EL |
| 174 | The agricultural aspects of enlargement of the European Community : Spain | DA, DE, EN, FR, IT, NL |
| 175 | The common agricultural policy and world food shortages - Food aid | DA, DE, EN, FR, IT, NL |
| 176 | Aspects of the common agricultural policy of concern to consumers | DA, DE, EN, FR, IT, NL |
| 177 | Policy for animal feedingstuffs : the case of cereal "substitutes" | FR |
| 178 | The enlargement of the Community | FR |
| 179 | The Community's agricultural and food exports | FR |
| 180 | A new common organization of the markets in sugar as from 1 July 1981 | DA, DE, EN, FR, IT, NL |
| 181 | A new common agricultural structure policy | DA, DE, EN, FR, IT, NL |

| Nº | | Language : |
|---|---|---|
| 182 | Financing the market side of the common agricultural policy - EAGGF-Guarantee | DA, DE, EN, FR, IT, NL |
| 183 | Co-ordination of agricultural research in the Community | DA, DE, EN, FR, IT, NL |
| 184 | Community food aid | DA, DE, EN, FR, IT, NL |
| 185 | The contribution of the common agricultural policy to the economic development of the Community | DA, DE, EN, FR, IT, NL |
| 186 | The development of veterinary legislation | DA, DE, EN, FR, IT, NL |
| 187 | The Community's agricultural policy and policy on trade in agricultural products | DA, DE, EN, FR, IT, NL |
| 188 | Mechanisms of the common organization of agricultural markets - Livestock products | DA, DE, EN, FR, IT, NL |
| 189 | Mechanisms of the common organization of agricultural markets - Crop products | DA, DE, EN, FR, IT, NL |
| 190 | The agricultural aspects of enlargement of the European Community Portugal | DA, DE, EN, FR, IT, NL |
| 191 | State aids and the common agricultural policy | DA, DE, EN, FR, IT, NL, EL |
| 192 | The common agricultural policy and agricultural trade with the developing countries | DA, DE, EN, FR, IT, NL, EL |
| 193 | Prevention of frauds against the agricultural fund | DA, DE, EN, FR, IT, NL, EL |
| 194 | Implications for the agricultural sector of the lack of a matching degree of integration in the other areas of Community policy | DA, DE, EN, FR, IT, NL, EL |
| 195 | Agriculture and energy: current problems and future outlook | DA, DE, EN, FR, IT, NL, EL |
| 196 | The common agricultural policy and the food industry | DA, DE, EN, FR, IT, NL, EL |
| 197 | The integrated mediterranean programmes for the Southern regions of the Community | DA, DE, EN, FR, IT, NL, EL |
| 198 | The miracle of the CAP | DA, DE, EN, FR, IT, NL, EL |

| Nº | | Language |
|---|---|---|
| 199 | The new common agricultural structures policy | DA, DE, EN, FR, IT, NL, EL |
| 200 | Agriculture in the United States and in the European Community: a comparison | DA, DE, EN, FR, IT, NL, EL |

SALG af De Europæiske Fællesskaber Tidende og Europa-Parlamentets mødedokumenter samt af publikationer med angivelse af forkortelsen BV varetages af:

**VERTRIEBSBÜROS** für Amtsblätter, Sitzungsberichte des Europäischen Parlamentes, Veröffentlichungen mit Angabe der Abkürzung BV:

Οι Επίσημες Εφημερίδες, (ΕΕ) τα έγγραφα των συνεδριάσεων του Ευρωπαϊκού Κοινοβουλίου και οι εκδόσεις που φέρουν το σύμβολο BV διατίθενται προς ΠΩΛΗΣΗ στις εξ ής διευθύνσεις:

The Official Journal (OJ) and session documents of the European Parliament (EP doc.) as well as the publications with mention of the abbreviation BV can be **OBTAINED** at:

La **VENTE** des Journaux Officiels (JO), des documents de séance du Parlement européen (PE doc.) et des publications avec mention du sigle BV est assurée par:

I fascicoli della Gazzetta Ufficiale, i documenti di seduta del Parlamento Europeo e le pubblicazioni comportanti l'indicazione BV possono essere **ACQUISTATI** presso;

De **VERKOOP** van Publikatiebladen, zittingsdocumenten van het Europese Parlement en publikaties waarbij de letters BV vermeld staan wordt verzorgd door:

**BELGIQUE / BELGIË**

**Moniteur belge / Belgisch Staatsblad**
Rue de Louvain 40-42 / Leuvensestraat 40-42
1000 Bruxelles / 1000 Brussel
Tél. 512 00 26
CCP/Postrekening 000-2005502-27

Sous-dépôts / Agentschappen:

**Librairie européenne / Europese Boekhandel**
Rue de la Loi 244 / Wetstraat 244
*1040 Bruxelles / 1040 Brussel*

**CREDOC**
Rue de la Montagne 34 / Bergstraat 34
Bte 11 / Bus 11
1000 Bruxelles / 1000 Brussel

**DANMARK**

**Schultz Forlag**
Møntergade 21
1116 København K
Tlf: (01) 12 11 95
*Girokonto* 200 11 95

**BR DEUTSCHLAND**

**Verlag Bundesanzeiger**
Breite Straße
Postfach 10 80 06
5000 Köln 1
Tel. (02 21) 20 29-0
Fernschreiber:
ANZEIGER BONN 8 882 595

**GREECE**

**G.C. Eleftheroudakis SA**
International Bookstore
4 Nikis Street
Athens (126)
Tel. 322 63 23
Telex 219410 ELEF

Sub-agent for Northern Greece:

**Molho's Bookstore**
The Business Bookshop
10 Tsimiski Street
Thessaloniki
Tel. 275 271
Telex 412885 LIMO

**FRANCE**

**Service de vente en France des publications des Communautés européennes**

**Journal officiel**
26, rue Desaix
75732 Paris Cedex 15
Tél. (1) 578 61 39

**IRELAND**

**Government Publications Sales Office**
Sun Alliance House
Molesworth Street
Dublin 2
Tel. 71 03 09

or by post

**Stationery Office**
St Martin's House
Waterloo Road
Dublin 4
Tel. 78 96 44

**ITALIA**

**Licosa Spa**
Via Lamarmora, 45
Casella postale 552
50 121 Firenze
Tel. 57 97 51
Telex 570466 LICOSA I
CCP 343 509

Subagente:

**Libreria scientifica Lucio de Biasio - AEIOU**
Via Meravigli, 16
20 123 Milano
Tel. 80 76 79

**GRAND-DUCHÉ DE LUXEMBOURG**

**Office des publications officielles des Communautés européennes**
5, rue du Commerce
L-2985 Luxembourg
Tél. 49 00 81 - 49 01 91
Télex PUBLOF - Lu 1322
CCP 19190-81
*CC bancaire BIL 8-109/6003/300*

**NEDERLAND**

**Staatsdrukkerij- en uitgeverijbedrijf**
Christoffel Plantijnstraat
Postbus 20014
2500 EA 's-Gravenhage
Tel. (070) 78 99 11

**UNITED KINGDOM**

**HM Stationery Office**
HMSO Publications Centre
51 Nine Elms Lane
London SW8 5DR
Tel. 01-211 8595

Sub-agent:

**Alan Armstrong & Associates**
European Bookshop
London Business School
Sussex Place
London NW1 4SA
Tel. 01-723 3902

**ESPAÑA**

**Mundi-Prensa Libros, S.A.**
Castelló 37
Madrid 1
Tel. (91) 275 46 55
Telex 49370-MPLI-E

**PORTUGAL**

**Livraria Bertrand, s.a.r.l.**
Rua João de Deus
Venda Nova
Amadora
Tél. 97 45 71
Telex 12709-LITRAN-P

**SCHWEIZ / SUISSE / SVIZZERA**

**FOMA**
5, avenue de Longemalle
Case postale 367
*CH 1020 Renens* - Lausanne
Tél. (021) 35 13 61
Télex 25416

Sous-dépôt:

**Librairie Payot**
6, rue Grenus
1211 Genève
Tél. 31 89 50
CCP 12-236

**UNITED STATES OF AMERICA**

**European Community Information Service**
2100 M Street, NW
Suite 707
Washington, DC 20037
Tel. (202) 862 9500

**CANADA**

**Renouf Publishing Co., Ltd**
2182 St Catherine Street West
Montreal
Quebec *H3H 1M7*
Tel. (514) 937 3519

**JAPAN**

**Kinokuniya Company Ltd**
17-7 Shinjuku 3-Chome
Shiniuku-ku
Tokyo 160-91
Tel. (03) 354 0131

**Grand-Duché de Luxembourg**

Andre lande • Andere Länder • Άλλες Χώρες • Other countries • Autres pays • Altri paesi • Andere landen

Kontoret for De europæiske Fællesskabers officielle Publikationer - Amt für amtliche Veröffentlichungen der Europäischen Gemeinschaften - Υπηρεσία Επισήμων Εκδόσεων των Ευρωπαϊκών Κοινοτήτων - Office for Official Publications of the European Communities - Office des publications officielles des Communautés européennes - Ufficio delle pubblicazioni ufficiali delle Comunità europee - Bureau voor officiële publikaties der Europese Gemeenschappen

L-2985 Luxembourg - 5, rue du Commerce - Tél. 490081

Price (excluding VAT) in Luxembourg

ECU 1,20 BFR 50 IRL 0.85 UKL 0.70 USD 1.30

KONTORET FOR DE EUROPÆISKE FÆLLESSKABERS OFFICIELLE PUBLIKATIONER
AMT FÜR AMTLICHE VERÖFFENTLICHUNGEN DER EUROPÄISCHEN GEMEINSCHAFTEN
ΥΠΗΡΕΣΙΑ ΕΠΙΣΗΜΩΝ ΕΚΔΟΣΕΩΝ ΤΩΝ ΕΥΡΩΠΑΪΚΩΝ ΚΟΙΝΟΤΗΤΩΝ
OFFICE FOR OFFICIAL PUBLICATIONS OF THE EUROPEAN COMMUNITIES
OFFICE DES PUBLICATIONS OFFICIELLES DES COMMUNAUTÉS EUROPÉENNES
UFFICIO DELLE PUBBLICAZIONI UFFICIALI DELLE COMUNITÀ EUROPEE
BUREAU VOOR OFFICIËLE PUBLIKATIES DER EUROPESE GEMEENSCHAPPEN

ISSN 0250-5886

L-2985 Luxembourg

Kat./Cat.: CB-AV-84-201-EN-C