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The agricultural aspects of enlargement of the European Community

SPAIN

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SPAIN

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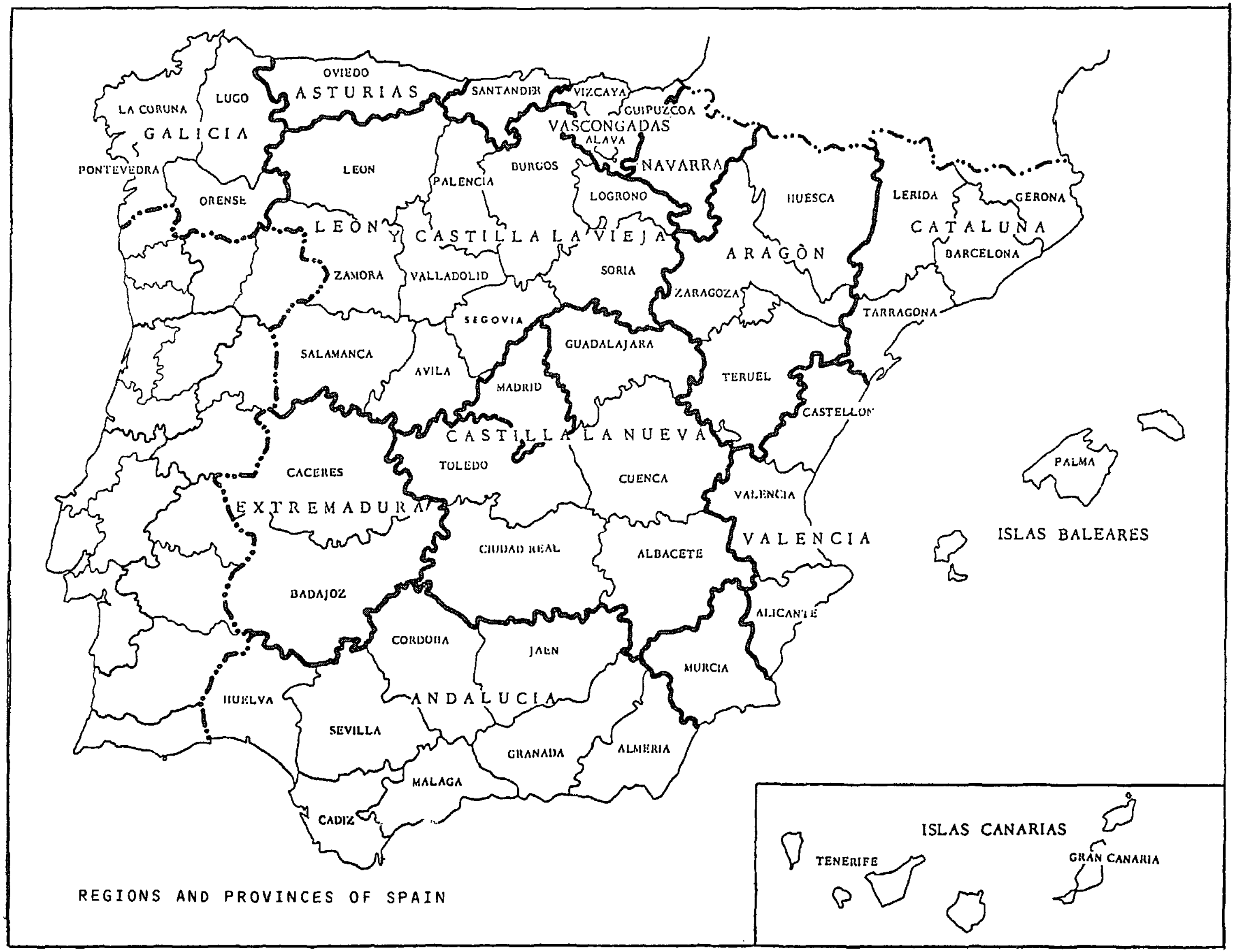


REGIONS AND PROVINCES OF SPAIN

The accession of Spain will go far to change the face of agriculture in the Community. The size of this sector will be increased by almost a third :

- 29 % of utilized agricultural area
- 32 % of the number of farmers and farm workers
- 32 % of the number of holdings.

The consumption potential will be increased by 14 % because of the addition of 36 million consumers, although their average income per head is barely half that of the present Community.

Spanish agriculture differs in many ways from Community agriculture. For example, its share in the Spanish economy is double the corresponding ratio in the present Community.

Despite its relief and its continental climate, Spain is much more Mediterranean in character than the present Community. This is reflected in the predominence of crop products - vegetables, fruit, cereals, wine, olive oil - in contrast with the present Community, where livestock production is the more important of the two branches.

There are differences between producer price levels and in support systems. The most marked differences in price levels are in those for fruit and vegetables, olive oil and white wine. The most marked difference in support systems concerns fruit and vegetables, for these are not supported at all in Spain.

Agricultural production and marketing structures are, generally speaking, less developed in Spain than in the Community.

I. GENERAL PICTURE OF SPANISH AGRICULTURE

A. Agricultural economy and general economy

The share of gross agricultural product in the overall gross domestic product of Spain is 9 % (EEC : 4 %).

Although the gross agricultural product is increasing by about 3.8 % per year. The share of agriculture in the overall economy is declining because other industries are growing more rapidly.

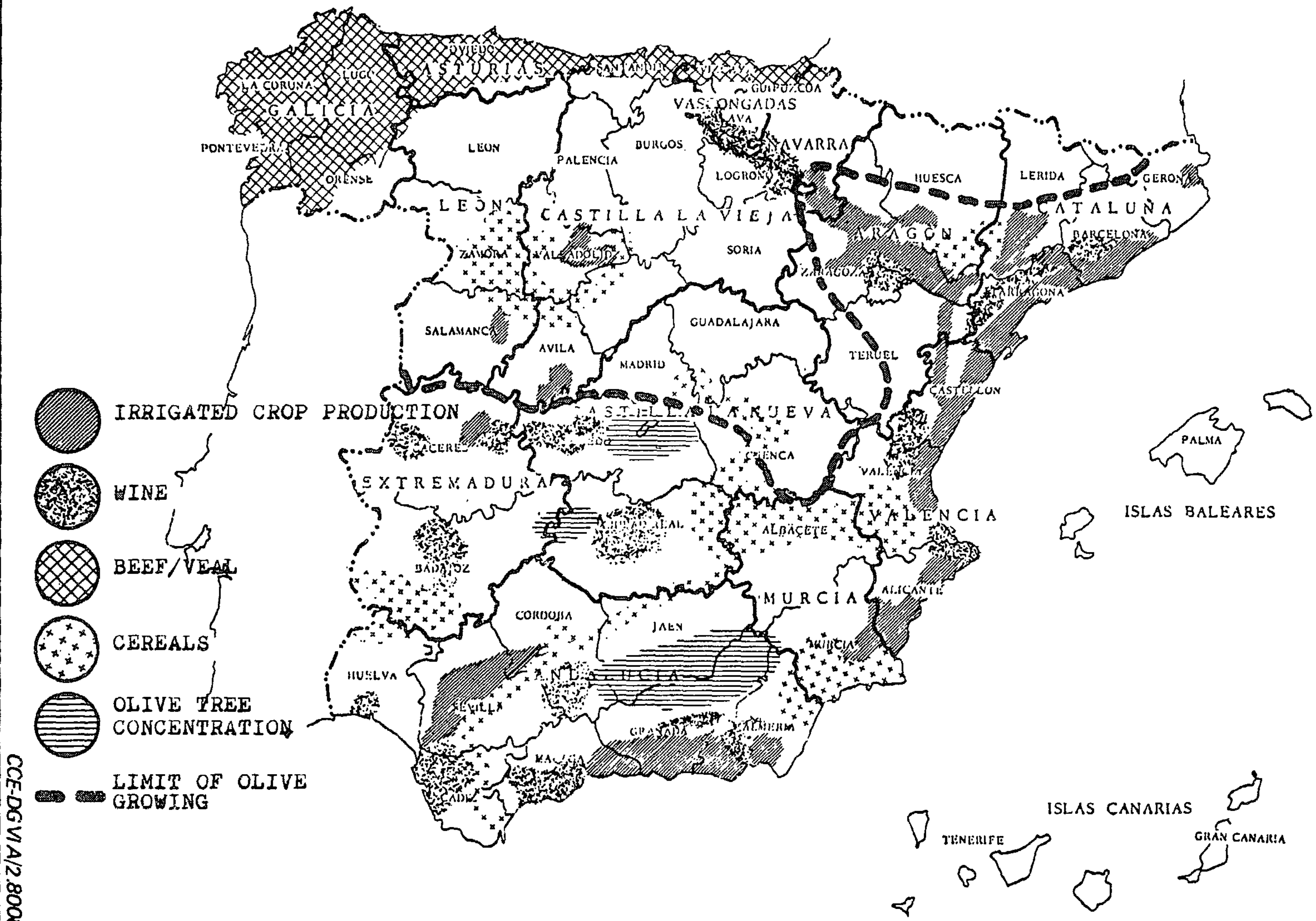
Farmers and farm workers account for 20 % of the total Spanish labour force, but because of the drift from the land this figure is tending to decline. The 2.6 million Spanish farmers and farm workers will increase the Community's land labour force by 32 % (see Table 1 in the Annex).

	Share of gross agricultural product in gross domestic product	Farmers and farm workers as a proportion of total labour force
	%	%
Spain	9	20
Grece	19	28
EEC "9"	4	8
For comparison		
Ireland	18	23
Italy	8	16
France	5	9

Average income of farmers and farm workers in Spain (expressed in terms of the gross domestic product) therefore falls far short of that received in other industries. In 1978, it was only 47 % of average farm incomes per head in the Community.

A feature of Spanisn agriculture in the predominance of crop products : 58 % of final agricultural production as compared with 42 % for livestock products. In the Community of Nine, the ratio is the other way around - 40 % to 60 %. Spanish livestock production has gained ground rapidly in recent years, partly as a result of official policy. In 1964, this kind of production was only 34 % of total production (see Table 2 in the Annex).

SPAIN
MAIN AGRICULTURAL PRODUCTION AREAS



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The production of fruit and vegetables accounts for about 35 % of total Spanish agricultural production. With the production of meat of all kinds - now also accounting for 25 % of total production - it is the leading production sector. Vegetables alone represent 14 % of production and beef/veal 9 %.

Products regarded as more specifically Mediterranean, such as rice, olive oil and fruit and vegetables, account for about 34 % of Spanish final agricultural production, a figure twice as high as that in the Community (see also Table 2 in the Annex).

Spanish production of these products, as compared with the output of the present Community, is very substantial (see also Table 3 in the Annex) :

- Rice : 37 %
- Wine : 19 %
- Olive oil : 82 %
- Citrus fruits : 96 % of which:
  - oranges and mandarins : 122 %
  - gratefruit : 400 %
- Apricots : 86 %
- Tomatoes : 50 %
- Onions : 75 %

Consumption

The Spanish population - 36 million - will increase the number of consumers in the Community by 14 %. Average incomes are, however, only about half of those in the present Community, although average spending on food and drink is rather higher - 34 % compared with 25 % in the present Community (35 % in Italy, 42 % in Ireland).

Consumption per head in Spain exceeds that in the Community for cereals, rice, wine, potatoes, fruit and vegetables, olive oil and eggs. It is lower for sugar, meat, and milk and milk products. Consumption per head of olive oil is however lower in Spain than in Italy (see Table 4 in the Annex).

Trade

There is heavy Spanish trade in agricultural products. 15 % of imports are of these products and 20 % of exports (see Tables 5, 6 and 7 in the Annex).

None the less, there is a heavy deficit on Spain's trade balance in this class of merchandise with the rest of the world : 520 million EUA, or 25 %, in 1977. The deficit is accounted for partly by the very heavy imports of feed grain (maize), oilseeds (soja) and certain livestock products (beef/veal, milk products).

But Spain has a heavy surplus of exports of agricultural products to the present Community : the figure was over 800 million EUA in 1977. The surpluses are accounted for largely by products such as fresh and processed fruit and vegetables and wine, and by the fact that Spanish imports of agricultural products from the Community are relatively low (mainly milk products and vegetable oils and fats). The Community's share in Spanish agricultural exports is in fact 60 %, breaking down as follows :

- 36 % for olive oil
- 61 % for wine
- 87 % for tomatoes
- 89 % for citrus fruits
- 91 % for potatoes.

On the other hand, the Community's share in Spanish agricultural imports is only 10 % (see Table 5 in the Annex). Spain's import needs are in fact much the same as those of the Community (feed grain, especially maize, and vegetable proteins).

North and South America are Spain's main suppliers of agricultural products, especially feed grains, oilseeds and meat.

Degree of self-supply

Spain produces less than it needs of the main livestock products and types of cattle feed; it produces more than it needs of most crop products, particularly Mediterranean products (see Table 8 in the Annex).

Production of fruit and vegetables, in particular, spurred on by an increase in export demand, has made major progress in recent years, yielding ample exportable surpluses.

As for those crop (feed grains, oilseeds) and livestock (meat, milk) products of which Spain produces less than it needs, efforts to step up output have been effective, especially for barley, pigmeat, eggs and poultry. Spain's output of soya, maize and beef/veal still falls short of needs, though by no means to the same extent for each product.

B. Farming structures

The natural environment in Spain is, generally speaking, not suitable for the expansion of farming: one-fifth of the land lies above 1 000 meters, there is not enough flat land, much of the soil is poor and the climate is often unfavourable.

In terms of Community criteria, about half of the territory of Spain would rank as Mediterranean agriculture regions (1).

Soil use

The utilized agricultural area (UAA) in Spain is about 28 million hectares (2). This will increase the Community's UAA by 29 %.

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(1) Regions for which Mediterranean products (excluding apples) account for at least 40 % of final agricultural production.
(2) To which should be added the 3.6 million hectares of rough grazing and the 3.9 million hectares of open forest which are mainly used by stock farmers.

Spain's UAA covers 55 % of the total surface of the country. This percentage falls short of the Community average (60 %) and even of those of France and Italy (59 % and 58 % respectively).

Arable land represents only 38 % of Spain's UAA (comparing with 49 % of the Community), but the leys are also important (19 % of the UAA), most of these being lands lying fallow under grain crop rotation systems in dry areas. Some of this land could be restored to annual production with sufficient technical progress and the right economic conditions (see Table 9 in the Annex).

Permanent crops represent an important share of the Spanish UAA (18 %, compared with 5 % in the Community). On the other hand, areas permanently under grass take up only 25 % of Spain's UAA, comparing with 45 % on average in the Community.

Livestock numbers are relatively low in Spain, except for cows other than milch cows, sheep and goats. Numbers per hundred acres of agricultural land are well below those of the present Community (see Table 10 in the Annex).

There are about 15 million ha of woodlands in Spain (48 % of the corresponding figure for the Community), 11 million ha of which are productive forests (construction timber and wood for fuel), accounting for 22 % of the total area of the country.

Irrigation

Irrigation is of the greatest importance for agriculture in Spain, especially in the Mediterranean areas.

To cope with the water shortage Spain has in recent years implemented a comprehensive irrigation programme. From 1955 to 1978, the area irrigated almost doubled, to reach by the end of this period about 3 million ha, more than 10 % of the UAA.

By the end of the century about 4 million ha should be irrigated. However, there is increasing competition for water supplies from other sectors (towns, industry, tourism), and water resources available to farmers are being gradually curtailed.

About two-thirds of the irrigated land are used for annual crops and only 20 % for perennial crops, the balance being permanent grassland. There is a varying pattern by product : all Spanish production of rice and citrus fruits and nearly all the production of flowers and of three major types of fruit - apples, pears and peaches - is grown on irrigated land. The figure for maize, early potatoes, sugar-beet and vegetables is just over 50 % of the total area under these crops. There is virtually no irrigation of vineyards (except for table grapes) or for olive-growing.

Yields

Generally speaking, apart from a few exceptions like rice, yields in Spanish farming fall short of those in the Community. There are many reasons for this, but the main ones are natural conditions, the characteristics of the farms, the level of technical progress and price relationships.

Irrigation has boosted yields by something between 100 and 200 % with exceptional cases up to 300 %, especially where crops under glass as, for example, for vegetables are grown.

The farms

In 1972 (the last date for which figures are available) the number of agricultural production units in Spain was 2.6 million see Table 11 in the Annex). Of these 860 000 were smaller than 1 ha UAA, and many of the farmers involved are still working permanently in agriculture. Of the 1.7 million farms larger than 1 ha UAA, 57 % are smaller than 5 ha and account for only 11 % of the UAA. These percentages can be compared with those of Italy :

68 and 22 %. Only 4 % of Spanish farms are larger than 50 ha, but these account for more than 46 % of the UAA. For historical reasons, the "minifundia" are scattered in the north, which the "latifundia" are concentrated in the south.

Spain's accession to the Community would increase the number of Community farms by 32 %.

In Spain, at the present time, 73 % of the UAA is owner-occupied, 14 % tenant farmed, 4 % share-cropped, and 9 % held in other ways.

Farmers and farm workers

In 1972, a total of 5.8 million persons were working on farms in Spain, many part-time. 2.6 million (42 %) were "farm heads", 6 % were paid farm workers and 52 % were family members.

For more than half of the persons working in agriculture, farming is in fact only a sideline, though often an important one. Even among the farm heads, only 52 % are mainly employed in agriculture.

The number of elderly persons in the Spanish farming population is disproportionately high, and more than a quarter of the farm heads are 65 and over. The uneven distribution is more marked on the small farms : 29 % of the farms in the 1 - 5 ha UAA category are run by farmers who are 65 and over.

Since the last survey made in 1972, the pattern of employment has steadily changed. The total number of those whose main occupation is farming declined between 1970 and 1977 at an annual rate of 5 %. In 1977, there were still 2.5 million persons (3.6 million in 1970) working in agriculture. Their share in Spain's total labour force declined from 28 % in 1970 to 20 % in 1977.

C. Organization of farm products markets in Spain

There are two main categories :

(a) controlled products, for which there are permanent price, intervention and aid arrangements;

(b) uncontrolled products, in respect of which the authorities may intervene to cope with particular situations.

Controlled products account for 58 % of final agricultural production. All the main crop and livestock products are covered by market regulations with one or two notable exceptions : fruit and vegetables, potatoes and sheepmeat. The arrangements for ethyl alcohol are in effect monopoly arrangements.

The products subject to market regulations fall into three categories distinguished by price systems :

(a) products subject to a guaranteed single price for the producer : wheat, tobacco, sugarbeet and sugar cane, hops;

(b) products subject to a minimum guaranteed price : olive-oil, cotton, feed grains, legumes, oilseed;

(c) products subject to more complex price arrangements involving certain guarantees combined with intervention prices which may activate imports, storage and release from storage, etc. : rice, beef/veal, pigmeat, eggs and poultry, cow's milk, wine.

State intervention measures are of two kinds :

- Intervention at production level, which may take the form of a restriction of cultivated acreage (e.g. rice, tobacco), controlled planting (vines), fixing of the volume of production (e.g. sugarbeet and sugar cane, hops) or fixing of maximum expenditure for State intervention in the relevant sector (this was the case, for example, for cotton).

- Intervention in the market, involving, depending on the direction of movement of prices, vitually the entire range of traditional measures (storage and release from storage, limitation on imports or exports, subsidies).

There is direct government intervention in production or on the market for certain products of special importance, for example for tobacco through a growing monopoly and for wheat through a purchasing and reselling monopoly.

At the same time, agricultural products in Spain are subject to a trade system with strong protection against imports. Generally speaking, exports are liberalized. About 60 % of total imports (in value) are carried out under a restrictive system involving, directly or indirectly, quantitative restrictions.

For about 70 products for which there are market organizations, imports are subject to State-trading systems, including meat, milk powder, butter, eggs, wheat, cotton seed, sunflower seeds, safflower seed and sesame seed, vegetable oils except groundnut oil, sugar and tobacco.

II. HOW CAN SPANISH AGRICULTURE BE DOVETAILED INTO THE COMMUNITY ?

A. Major problems

The enlargement question arises for the Community at a time when the Common Agricultural Policy, the principles of which must of course be maintained, requires adjustments. These adjustments are necessitated by :

- disequilibrium on certain markets and the exacerbation of budgetary problems which are, in fact, the financial reflecti of these disequilibria;

- disequilibrium between regions affecting, in particular, the Mediterranean regions.

The Community's internal difficulties may be aggravated by the enlargement in three ways : markets, regional equilibrium and financing.

Spain has a growth potential which is moderate but real. An improvement in yields, generally falling short of the Community average, a further extension of irrigation, higher prices and the introduction of Community support systems should all help to step up Mediterranean production. If this happens, the result could be further market disequilibria whilst on the other hand an increase in markets offered by Spain is unlikely to absorb the structural surpluses which have built up in some sectors, especially the milk and milk products sector.

For certain Mediterranean products : olive oil, fruit and vegetables or wine, strain will develop because of keener competition. Moreover, structural surpluses, already causing difficulties in the present Community, including Greece, will raise more serious problems, even if only through the application to an enlarged Community of support systems designed for a smaller Community with different structures.

The Mediterranean regions of the present Community will be the first to feel the impact of Spanish agriculture. But these are the very regions already suffering from the most serious socio-structural defects. Within Spain, the most efficient regions will be boosted by the introduction of the "acquis communautaire" (1) whilst the poorest regions will have to contend

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(1) The "acquis communautaire" is all those provisions and instruments which have been introduced since the entry into force of the Treaty, notably those relating to the Common Agricultural Policy.

with competition from Community products (especially livestock products). In a word, there is a danger that unless the necessary precautions are taken, the enlargement will lead, in the agricultural area, to additional inequalities.

In budgetary terms, the enlargement will entail an increase in expenditure on a scale exceeding that in the Community's own resources, assuming only the incorporation of the "acquis communautaire" as it now stands. Any effort which is made to temper the dangers of inequality referred to above is bound to cost even more.

Spain buys 90 % of its agriculture imports from countries other than those in the present Community.

Sixty per cent of Spanish agricultural exports go to the present Community, and they are mainly Mediterranean products such as fruit and vegetables, wine, and olive oil.

Thus the integration of trade in the enlarged Community will have two consequences. In the first place, the Community's agricultural deficit vis-à-vis non member countries will increase. Secondly, in respect of wine, olive oil and many fruits and vegetables, the enlarged Community will be producing more than it consumes. This could engender serious problems for non-member countries, especially for Mediterranean countries now supplying these products.

The countries likely to encounter difficulties in selling on the enlarged Community market include Tunisia, Morocco, Cyprus, and to a lesser extent, Egypt, Turkey and Israel. The main products concerned will be olive oil, certain vegetables (tomatoes and potatoes), certain preserved products (sardines and tomatoes) and possibly, certain citrus fruits.

The products for which prices diverge most as between Spain and the EEC are certain fruits and vegetables, olive oil and wine.

The sharpest difference in the support systems concerns fruit and vegetables, which are not supported at all in Spain.

The enlargement will aggravate the Community's socio-structural defects, both in respect of production structures and marketing structures, which are, generally speaking, less efficient in Spain.

B. ... the right solutions

The enlargement of the Community to include Spain therefore cannot, in the agricultural field, merely consist in applying the present "acquis communautaire" to Spain.

Transitional arrangements - still to be negotiated - for the accession of Spain to the Community cannot be examined without an assessment of the impact of the accession in the agricultural field. In view of the problems mentioned above, the adjustments to the "acquis communautaire" required for enlargement purposes must be examined.

A transitional period of between 7 and 10 years

In principle, Community agricultural mechanisms, subject to essential and justified special cases, must be applied fully by Spain as from the date of joining. This is necessary to enable Spain to integrate from the very outset into the process of Community management of the Common Agricultural Policy.

But without a sufficiently long transitional period, the divergences with regard to prices and their hierarchy, support systems and the actual organization of trade cannot be smoothly eliminated. Again, only time will make it possible to solve without conflict the problems relating to new competition which Spanish agriculture will engender for certain Community vegetable products or which Community agriculture will entail for Spanish livestock products. Lastly, it is clear that differing structures require progressive harmonization which will be feasible and successful only if enough time is taken to ensure the interpenetration of the two economies. The Commission feels that the transitional period should be not less than 7 and not more than 10 years. It should, generally speaking, cover all agricultural products and should be of the same duration for all products.

During the transitional period, agricultural prices should be gradually brought closer together. In order to prevent distortion and disturbance which might arise during this period from the differences in the respective price levels, a system of accession compensatory amounts would be implemented with a view to gradually eliminating the differences between the prices. A safeguard clause would also be applicable, on the basis of reciprocity, during this period.

The progressive approach should also be adopted by Spain for its incorporation of Community arrangements on aids and also with regard to the establishment of the customs union.

However, national aids now paid in Spain would have to be discontinued as from the date of accession wherever they were incompatible with Community legislation as would any quantitative restrictions and other non-tariff barriers to trade.

Adaptation of the "acquis communautaire"

To avoid any aggravation of the disequilibria of certain agricultural markets and the danger of such disequilibria affecting other sectors, some adaptations of the "acquis communautaire" are needed for vegetable oils and fats, fruit and vegetables, and wine.

Some other general principles

The Commission feels that a more harmonious development of Community agricultural structures will be possible only when the structural policy guidelines it sent to the Council a year ago are given effect.

The Community should adopt now guidelines under which the problems which the limitations of their agricultural exports to Europe may cause certain developing Mediterranean countries can be solved when the time comes.

C. Guidelines proposed for certain important products

Vegetable oils and fats

Given present production and consumption, there will be a surplus of olive oil of about 200 000 tons a year in the Community including Greece and Spain. These countries will be dismantling their arrangements for the control of imports of seed oil and the resulting change in the relationship between the prices of olive oil and competing oils (the ratio is at the present time 1.6 : 1 in Spain and 2.5 : 1 in the EEC) will aggravate the Supply/Demand disequilibrium for olive oil as a result of the foreseeable decline in consumption, there being no markets outside the Community likely to take up major quantities of this product on a regular basis.

Marketing Community production would cost a lot of money. The Community will have to find ways and means of financing this extra expenditure. One possibility would be an increase in "own resources", another the introduction of a levy on vegetable oils and fats produced in the Community or imported from non-member countries.

In the enlarged Community, the production of olive oil will be the main source of income in particularly less-favoured regions, where, in many cases, there is no alternative crop to the olive tree and this is the only vegetation ensuring preservation of soil.

The disequilibrium on the olive oil market is essentially a matter of divergence between the systems applicable to the various vegetable oils and fats.

A better equilibrium between production and consumption can be obtained only by an increase in the consumption of olive oil in the Community of the Nine by the establishment of a ratio between the price of olive oil and those of competing oils which is more favourable to olive oil than that at present obtaining in the Community of the Nine. This could be obtained by an increase in aid to consumption, but this again would be expensive.

During the transitional period, Spain will have to raise its olive oil price and eliminate present restrictions on trade in competing vegetable oils. To prevent this occurring too abruptly and affecting the consumption of olive oil, it is planned that restrictions on trade for vegetable oils other than olive oil should be phased out gradually.

Fruit and vegetables

Better market equilibrium must be sought by adapting the "acquis communautaire" in the fields of production and marketing structures, intervention machinery and trade arrangements. This will include an improvement in aid schemes to producers' groups, the introduction of a right to intervene on the wholesale markets and the replacement of the quantitative import restrictions now applied by certain Member States by a reference price system. Arrangements designed to enhance the efficiency of action taken by producers' groups to avoid market distrubance are also being planned. "Penetration" premiums would be gradually phased out.

For oranges and mandarins, the elimination of the premiums would be carried out pari passu with progress made in work under the plan to restructure citrus fruit production in the Community.

For processed fruit and vegetables supported by Community aid, a limit will have to be set on qualifying quantities, for each product.

During the transitional period, for price offsetting purposes, a different mechanism will be needed for fruit and vegetables than that applied to the other sectors, which would be too rigid given the very wide price variations in the fruit and vegetables sector which can occur in the course of a single season. This system would, depending on circumstances, be either unduly severe in respect of exported products or insufficient to prevent distrubances on the market. The compensatory amount would be calculated, as at present, on the basis of the difference between the normal reference price and the entry price of Spanish products, but allowance would be made for the progressive dismantlement of the common customs tariff duties between the Community and Spain.

Wine

In its Action Programme for 1979-1985 (adopted in 1978), the Commission set out guidelines and practical measures to improve equilibrium in this sector. The enlargement will enhance the relevance and importance of these : the Spanish wine market situation - supply slightly exceeds demand - is comparable to that of the Community.

The decisions recently taken by the Council with regard to wine (1) are of course important but must be further supplemented and amplified along the lines set out in the Action Programme. This was important for the present Community and will be even more important for a Community enlarged to include major wine

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(1) See "Wine in the 80s' - Green Europe - News of the Common Agricultural Policy", N° 172.

producers. The measures concern the control of planting, particularly planting of vines for table wine production, quality wines produced in specified regions (quality wines p.s.r.) and table grapes. Adjustment of Community arrangements with regard to irrigation, chaptalization and preventive distillation will have to be envisaged.

In an expanding Community, wine market equilibrium cannot be maintained without measures having a direct link with consumption.

In this connection, it must be recalled that excise duties in some Member States act as deterrents and that consumption cannot be stepped up until they are significantly reduced.

Cereals

Cereals for animal feed - mainly maize and sorghum - are placed at the disposal of Spanish livestock farmers at levels near the world market price, whilst cereals producers receive higher guaranteed prices. In order to avoid a sharp increase in the costs of raising livestock, it is proposed that during a transitional period prices in Spain should be aligned from those presently paid on imports and not from the higher ones applied to production.

In order to avoid penalizing cereal producers, Spain would be authorized to offset during the transitional period the difference between import prices and current producer prices by means of a subsidy chargeable to its budget.

Areas under rice in Spain are subject to state control.

The Spanish prices of long-grained rice varieties are practically at the level of Community prices, whilst those of round-grained and semi-long-grained varieties are substantially lower.

The danger is that the Community principle of freedom of choice of crop combined with the introduction of the higher Community prices might tend to boost production of round-grained and semi-long-grained varieties and add to the surpluses Spain already has to contend with. Community markets being limited, sales on the world market would be possible only on the basis of heavy subsidies.

Restrictive rules in Spain with regard to choice of crop could perhaps, for these reasons, be retained provisionally and phased out over the transitional period.

Table 1

POPULATION

	EEC "9"	Greece	Spain	EEC "11"
Total population (millions)	259,2	9,3	36,6	305,0
Civilian employment (millions)	101,7	3,2	12,4	117,3
Farmers and farm workers (millions)	8,3	0,9	2,6	11,8
Farmers and farm workers as % of total civilian employment	8,0	28,0	20,0	10,0
Inhabitants per km^2	170,0	70,0	73,0	141,0

Table 2

Share of main groups of products in the final agricultural production

% - 1977

	EEC "9"	Greece	Spain	EEC "11"
Crop products	40	69	58	
- vegetables	7	9	14	8
- fruit (including citrus fruit)	4	4	11	5
(total fruit and vegetables)	(11)	(13)	(25)	(13)
- cereals, including rice	11	14	10	11
- wine	4,5	2	4	4,5
- vegetable oils	1	8	4	1,5
Livestock products	60	31	42	
- beef/veal	16	5	9	
- pigmeat	12	4	7,5	
- poultrymeat	4	3	6	
- sheepmeat	1	4	4	
(total meat)	36	18	25	34
- eggs	4	3	4	4
- milk	20	8	9	18

Table 3

Production of certain agricultural products in Spain and comparison with the Community

Average 1975/76/77

1000 t

Products	Spain	EEC "9"	Spanish production as % of that of the EEC "9"
Cereals (total)	14.637	98.367	15
of which - wheat	4.267	38.304	11
- rye	228	2.742	8
- barley	6.322	32.422	20
- oats	518	7.594	7
- maize	1.744	14.071	12
- rice	388	1.057	37
Sugar (unprocessed equivalent)	1.075	11.351	10
Olive oil	440	540	82
Wine for winemaking ('000 hl)	26.204	140.693	19
Citrus fruit (total)	2.845	2.955	96
of which: oranges and mandarins	2.546	2.091	122
- lemons	276	861	32
- grapefruit	8	2	400
Peaches	319	2.024	16
Apricots	138	161	86
Pears	389	2.428	16
Tomatoes	2.308	4.637	50
Potatoes	5.626	33.549	17
Fresh grapes	4.317	23.498	18
Apples	939	8.669	11
Green beans	211	622	34
Onions	959	1.281	75
Pigmeat	662	7.943	8
Beef/veal	434	6.513	7
Sheepmeat and goatmeat	146	536	27
Poultry	687	3.189	21
Eggs	610	3.750	16
Cow's milk (full fresh)	5.183	99.726	5
Butter	16	1.764	1

Sources : Eurostat, Annuario de estadistica agraria, FAO.

Table 4

Consumption per head of various agricultural products in Spain and in the Community

Products	Consumption kg/head/year		
	Spain	EEC "9"	Highest and lowest national consumption in the EEC "9"
Wheat	75	74	120 - 41
Potatoes	116	75	118 - 36
Sugar	31	37	48 - 28
Fresh fruit (excluding citrus)	99	59 (1)	85 - 27 (1)
Fresh citrus fruit	24	24	46 - 11
Fresh vegetables (excluding tomatoes)	89	77	118 - 37
Fresh tomatoes	32	20	35 - 9
Wine [2]	61	50	103 - 2
Fresh milk products (excluding cream)	96	102	213 - 75
Butter	0,5	6 (3)	11 - 2 (3)
Eggs	17	14	17 - 11
Total meat	64	77 (4)	92 - 64 (4)
Total oils and fats	24	19 (5)	25 - 9 (5)
of which olive oil	8,4	2,6 (6)	11,5 - 0

Source : National statistics

Spain : 1976

Community : average 1975/76/77

1 including preserved fruit and fruit juice

2 litre/head/year

3 average 1974/75/76

4 excluding offals

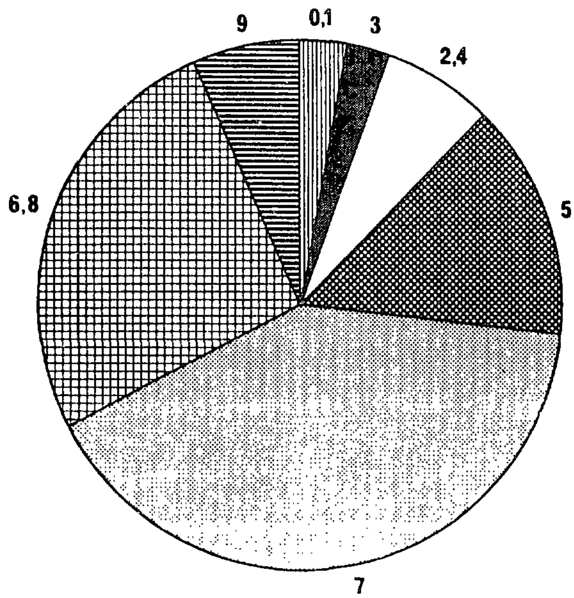
5 excluding butter

6 estimate

IMPORTS AND EXPORTS BY GROUPS OF PRODUCTS

(1977)

Imports



Food, beverages and Tobacco
Energy products
Raw materials
Chemicals
Transport machinery and equipment
Other manufactured products
Unclassified products

Exports

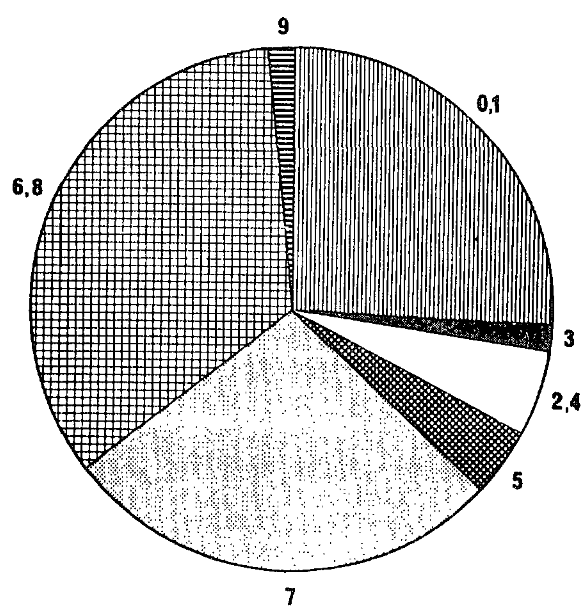


Table 5

SPAIN : EXTERNAL TRADE

1977

(million EUA and %)

IMPORTS

	From all other countries		from EEC "9"		Share of EEC "9" in total
	Million EUA	%	Million EUA	%	%
All products	15.577	100	5.320	100	34
Agricultural products	2.346	15	239	4,5	10

EXPORTS

	To all other countries		to EEC "9"		Share of EEC "9" in total
	Mio EUA	%	Mio EUA	%	%
All products	8.942	100	4.138	100	46
Agricultural products	1.824	20	1.067	26	59

TRADE BALANCE

	With all other countries	With EEC "9"
	Million EUA	Million EUA
All products	- 6.634	- 1.181
Agricultural products[1]	- 522	+ 827

[1] Products listed in Annex II of the Treaty.

Table 6

SPANISH EXPORTS OF MAIN AGRICULTURAL PRODUCTS (1977)

Products	Total exports Million EUA (1)	Products as % of total (2)	Exports to EEC "9" Million EUA (3)	Exports to EEC "9" as % of total exports (3) / (1)
Total agricultural products (a)	1.824	100	1.067	59
Fresh fruit	473	26	389	82
of which: - citrus fruit	332	18	294	88
- almonds	54	3	32	60
- fresh grapes	27	1,5	20	74
Preserved fruit and vegetables	301	16	158	52
of which: - preserved olives	92	5	18	19
- preserved tomatoes	45	2,5	26	58
- satsuma jams	32	2	31	96
- fruit juice	21	1	9	44
Beverages	225	12	127	56
of which: - wines	197	11	120	61
Fresh vegetables	203	11	166	82
of which: - tomatoes	56	3	49	87
- potatoes	38	2	34	91
- onions	19	1	17	92
- dried garlic	18	1	4	21
- cucumbers	10	1	10	95
Oils and fats	201	11	65	32
of which: - olive oil	121	7	43	36
- soja oil	64	3,5	10	16
Fish, crustaceans	124	7	49	40
Meat and fish preparations	83	5	21	26
Coffee, tea, spices	36	2	13	36
Residues	30	2	25	85
of which: - beet pulp	21	1	20	99
Total of 9 groups of products	1.675	92	1.014	60

(a) Products listed in Annex II of the Treaty. Source: Estadística del Commercio exterior de Espãna

Table 7

SPANISH IMPORTS OF MAIN AGRICULTURAL PRODUCTS (1977)

Products	Total imports Million EUA (1)	Products as % of the total (2)	Imports from EEC "9" Million EUA (3)	Imports from EEC "9" as % of total imports (3) / (1)
Total agricultural products (a)	2.346	100	239	10
Oil seeds and fruit	497	21	10	2
of which : soya beans	454	19	-	-
Cereals	480	20	0,5	0,1
of which : maize	393	17	0,1	-
Coffee, tea, spices	403	17	4	1
Fish, crustaceans	124	5	43	35
Residues	115	5	7	6
of which : - soya cake	96	4	-	-
Tobacco	112	5	0,8	0,7
Cocoa	111	5	0,3	0,2
Meat and offals	85	4	4	4
of which : - beef/veal	59	2,5	3	4
Sugar, syrup	71	3	7	10
Milk products	68	3	47	69
of which : - milk and milk cream	38	1,5	26	69
- cheese	27	1	19	70
Oils and fats	67	3	11	16
of which : - fats	25	1	2	8
Total of 11 groups of products	2.133	91	134	6

(a) Products listed in Annex II of the Treaty. Source: Estadistica del Commercio exterior de Espãna

Table 8

SELF-SUPPLY IN MAIN AGRICULTURAL PRODUCTS

Average 1975/76/77

Products	Spain %	EEC "9" %
Cereals (total)	87	87
of which : wheat (total)	104	104
- rye	101	98
- barley	116	102
- oats	105	97
- maize	32	53
- rice	121	93
Sugar (raw/equivalent)	94	113
Olive oil	146	88
Wine	94	98
Citrus fruit (total)	235	51
of which : oranges and mandarins	243	47
- lemons	198	94
grapefruit	162	1
Peaches	105	101
Apricots	108	86
Pears	101	101
Tomatoes	110	94
Potatoes	102	99
Fresh grapes	103	100
Cherries	100	99
Apples	103	99
Green beans	109	97
Peas	107	100
Onions	120	85
Meat		
of which : pigmeat	94	99
- beef/veal	89	101
- sheepmeat and goatmeat	99	66
- poultry	99	102
Eggs	103	101
Cow's milk (full, fresh)	99	100
Butter	89	100

Source : Eurostat
Anuario de estadistica agraria
F.A.O.

Table 9

SOIL UTILIZATION

1977

	UNIT	EEC "9"	SPAIN
Total area	million ha	152,6	50,5
Utilized agricultural area (UAA)	million ha	93,6	27,6
	% [1]	60	55
Woodlands	million ha	32,0	15,2
	% [1]	21	30
Arable land	million ha	46,3	10,3
	% [2]	49	38
Permanent grassland	million ha	41,8	7,0
	% [2]	45	25
Permanent crops	million ha	4,9	5,0
	% [2]	5	18
Leys	million ha	1,4	5,3
	% [2]	1	19
Irrigated area	million ha	--	2,9
	% [2]	--	10

[1] Of total geographic area.

[2] Of the UAA.

Table 10

DENSITY OF LIVESTOCK

1977

	EEC "9"	SPAIN
	million head	
Bovines	77,6	4,5
of which : - dairy cows	25,1	2,0
- other cows	5,3	5,7
Sheep	44,8	14,5
Goats	2,0	2,2
Pigs	72,1	9,8
Poultry	316,5	45,1
	Head per 100 ha UAA	
Bovines	83	16
of which : - dairy cows	27	7
- other cows	6	2
Sheep	48	53
Goats	2	8
Pigs	77	36
Poultry	339	163

Table 11

STRUCTURE OF SPANISH FARMS

1972

Size categories in ha UAA	Number of farms	Utilized agricultural area
Total	2,6 million	8 million ha
of which : less than 1 ha	860.000	6,5 " "
Farms of more than 1 ha	1,7 million	21,5 million ha
of which : from 1 to 5 ha	57 %	11 %
from 5 to 10 ha	19 %	10 %
from 10 to 20 ha	12 %	13 %
from 20 to 50 ha	8 %	20 %
more than 50 ha	4 %	46 %

PRICES OF MAIN AGRICULTURAL PRODUCTS IN THE COMMUNITY AND IN SPAIN (1979/80)

Products the Spanish prices of which are higher than those in the Community

Maize (to producers)	Table grapes
Sugarbeet (including direct aid)	Oranges (for processing)
Milk	
Butter	

Products the Spanish prices of which are much the same as those in the Community

Common wheat	Cauliflowers
White sugar	Peaches
Red wine	Long-grained-rice (to producers)
Beef/veal	
Pigmeat	

Products the Spanish prices of which are lower than those in the Community

Durum wheat (to producers)	Tomatoes
Barley	Cucumbers
Maize (to users)	Pears
Sorghum (to users)	
Round grained and semi-long-grained rice (to producers)	
Rice of all varieties (to users)	

Products the Spanish prices of which are well below those in the Community

Olive oil	Apples
White wine	Citrus fruits
Durum wheat (to users)	Tomatoes (for processing)