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The agricultural aspects of enlargement of the European Community PORTUGAL

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SUMMARY OF CONTENTS

Note : Readers will notice that the statistical data relating to Portugal quoted in this publication is often several years old and is not always concordant. This is dependent on the various Portuguese statistical sources which are available.

INTRODUCTION

Greece's accession as from 1 January 1981 and that - under negotiation - of Spain and Portugal cause agriculture in the Community to take on a completely new dimension : the change-over from a 9 member to a 12 member Community would in the immediate future increase the number of workers in the agricultural sector by 57 %, the utilised agricultural area by 44 %, the number of farms by 57 % and the value of end agricultural production by 17 %. The contribution of agriculture to the gross domestic product in these three countries and their scale of agricultural employment substantially exceed those of the 9 member Community.

It is essential to bear this overall context in mind when examining in more detail the various agricultural aspects of Portugal's accession.

It should also be remembered that this enlargement complies primarily with political requirements in accordance with the objectives of the Treaty of Rome.

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I. A LOOK AT PORTUGUESE AGRICULTURE

A. Agricultural economy and general economy

Domestic product

In Portugal's gross domestic product, the share of gross agricultural product (GAP) amounts to 14 %, compared with approximately 4 % in the present EEC. The mean annual growth rate of the gross agricultural product is low and considerably below that of the rest of the economy. At constant prices, it was 1.0 % between 1960 and 1975 and it became negative between 1970 and 1977 (see graph 1 in the annex).

The importance of agriculture in relation to the Portuguese economy as a whole has thus declined considerably over the last twenty years (from 26 % in 1960 to 14 % in 1976).

Between 1960 and 1977, per capita GAP in Portugal fell from 31 % to 22 % of the mean per capita GAP in the Community, whereas for Greece this ratio rose from 26 % to 43 % and for Spain from 31 % to 47 %.

The working population

Portugal has a working population of 3.8 million. Some 28 % of the working population is employed in agriculture (8 % in the EEC at present). This means that there are approximately 1.2 million agricultural workers.

The inflow of this amount of agricultural labour, together with that of Spain (2.6 million) and that already added by Greece's entry, would bring the working population engaged in agriculture up to around 13 million in a 12 member Community, compared with some 8 million in the 9 member EEC (see also Table 1 in the annex).

	Share of gross agricultural product in total gross domestic product %	Share of the working population engaged in agriculture in the total working population %
Portugal	15	28
Spain	9	20
Greece	19	28
9 member EEC	4	8
By way of comparison :		
Italy	8	16
Ireland	18	23

Consumption

The population of Portugal - 9.2 million - would bring the total population of a 12 Member State Community up to some 314 million inhabitants. Thus, by its enlargement to include Spain and Portugal, the Community would further reinforce its position as the biggest consumer market in the world (10 member EEC : 270 million ; USSR : 261 million ; United States : 218 million).

The low per capita income of the Portuguese people is reflected in the proportion earmarked for expenditure on foodstuffs : around 50 % as compared with around 25 % in the 9 member EEC.

Domestic demand for agricultural and food products has risen sharply in recent years. The increase in disposable personal income has been coupled with a fall in emigration and an influx of refugees returning from the former colonies. This has led consumers to spend more on foodstuffs in general and high quality products in particular. There has been a shift away from direct consumption of vegetable products and towards consumption of processed and livestock products.

Per capita consumption of oils and fats - with the exception of margarine - of maize and of goat and sheep meat has fallen ; on the other hand, consumption of almost all other products has risen, and this has been particularly marked as regards dairy products, meat, beer, margarine and certain cereals.

Per capita consumption of rice, cereals other than wheat, potatoes, horticultural products, oil, fats and wine is higher in Portugal than in the 9 member EEC. Consumption of wheat, sugar, meat and dairy products, on the other hand, is lower (see Table 2 in the annex).

Foreign trade

Portugal traditionally imports and exports a considerable volume of agricultural products. In the past, these two items were generally in balance. This balance has now been seriously weakened, on account of the huge increase in import requirements which has aggravated the balance of payments difficulties. This quantitative change is illustrated by the following figures : in 1963/1964, Portuguese exports of agricultural products covered 100 % of agricultural imports ; in 1977, this ratio fell to 40 % and is still of the same order today.

This is due mainly to stagnation - or even decline in certain sectors - in domestic agricultural production accompanied by increased consumption.

Consequently, the main feature of the place of agricultural products in Portuguese foreign trade is a dual development :

a) the relative fall in agricultural exports, which fell from 26 % of total exports for the years 1962-1965 to 14 % in 1979 ;

b) the increase in agricultural imports : their share in total imports rose, over the same period, from 14 % to 17 %. (See Table 3 in the annex).

B. Agricultural production

The natural environment

The combination of climatic limitations, the relief and the composition of the soil mean that the natural Portuguese environment is not very conducive to agriculture. The proportion of mountainous terrain is low (15 % and 3.4 % respectively of the land area is situated above 600 and 900 m). But this terrain is mainly located in the northern part of the country, where the climatic and soil conditions are the best.

In the south of Portugal, on the other hand, the terrain is much less mountainous, but the climate is dry and arid and the soil is often very poor. Only just over a quarter of the land area has soil which is really suitable for agriculture.

The agricultural area

Portugal's utilised agricultural area amounts to just over 4 million hectares (1) equivalent to approximately 45 % of the total land area. This percentage is lower than that of the Community, which is 60 % (See Table 4 in the annex).

Compared with the Community, the Portuguese UAA is very different in make-up as regards the types of soil utilisation. The proportion of arable land is 81 % (50 % in the EEC), that of meadows and permanent pasture land 6 % (44 % in the Community), and that of permanent crops 13 % (6 % in the EEC). The high proportion of arable land and the low proportion of permanent pasture land are the result of low soil and labour productivity, which leads to marginal land being utilised as arable land, whereas it should be used as pasture land or even for forestry purposes. This inadequate use made of the UAA constitutes a barrier to increased livestock production, the development of which is not commensurate with demand. The consequences for Portuguese agricultural imports are important.

Irrigation

As in the other Mediterranean areas, the development and improvement of the irrigation network in Portugal are of great importance to the attainment of the objective of increasing and diversifying agricultural production.

At the present time, 668 000 hectares of land are being irrigated, which amounts to 15 % of Portuguese UAA. This percentage may appear to be a relatively high one, in comparison with Spain (10 %) in particular, but it does not show up the inadequacies, which are the main feature of the current state of the irrigation network :

(1) This refers to mainland Portugal, excluding therefore the Madeira and Azores archipelagoes, which are dealt with further on.

- barely 10 % of the 668 000 hectares of land are currently being irrigated by works (dams, canals etc) built since 1935 ; the other irrigated areas are covered by a network of the traditional type (wells, streams etc), which is not always capable of meeting the requirements of farmers during periods of drought. During August and September, there is sometimes a shortage of water.
- only 5 % of the land area which is irrigated in Portugal uses mechanised irrigation techniques (sprays, rotary sprinklers etc), 95 % being irrigated by gravity.
- The rate of construction of the irrigation network has slowed down considerably in recent years.
- As a result of often inadequate coordination and operation, the surface which is actually irrigated is between 50 % and 65 % of the area that is equipped for irrigation.
- The regional distribution of the UAA irrigated is not up to the mark; in fact, the percentage of the UAA irrigated, which is 15 % at national level, is below 10 % in the region south of Tage (Alentejo), where the water requirements are the greatest.

Many projects are being studied or carried out, some with the collaboration of foreign experts and partially financed by European (EIB), world (IBRD), or national (Switzerland, Federal Germany, Netherlands ...) institutions. It should be noted that these projects relate to new schemes, but also to the development of certain irrigated areas and also to increased irrigation by means of sprays.

The breakdown of irrigated land, according to crops, is as follows :
77 % annual crops
20 % permanent crops
3 % permanent meadows.

Irrigation has enabled there to be rapid development in rice and tomato crops in recent decades (See also Table 5 in the annex).

Yields

The physical yields of Portuguese agriculture are generally very low in comparison with the average yields achieved in the Community. The main exceptions to this situation are the rice and tomato crops, in respect of which the introduction of irrigation has played a considerable role. Among the factors influencing the low agricultural yields in Portugal, mention should be made of the inadequate use of modern production technology (selected seed, fertilizer, mechanisation etc), the structure of the farms and also the age and training of the farmers (See Table 6 in the annex).

Livestock

Portuguese livestock consists of some 1.1 million cattle, over 2 million pigs, 4.4 million sheep and goats and some 5 million poultry. In a 12 member Community, this amounts to only a tiny fraction.

The density per 100 hectares of agricultural land is low, apart from sheep and goats (See Table 7 in the annex).

Production

The main feature of Portuguese agricultural production is a preponderance of vegetable products (59 % of total production) over livestock products (41 %), compared with 40 % and 60 % respectively in the Community.

The present distribution between vegetable and livestock products is the result of a development which has been most favourable to the latter. Indeed, in 1970, the proportion of livestock products was only 36 %. A big effort has been made to meet a rapid increase in demand for livestock products.

Portugal produces the whole range of products from temperate and Mediterranean regions : cereals, meat and dairy products, fruits and vegetables, olive oil and wines.

Two important points should be emphasised : the almost total lack of production of sugar and tobacco (which for historical reasons have always been grown in the former Portuguese colonies) and the importance of forestry products, of which Portugal is a net exporter. Exports of these products in 1978 amounted to 20 % of the country's total exports.

The production of meat is by far the largest-scale activity in Portugal (26 % of the total), the production of poultry predominating within this group. Vegetables, fruits, cereals, wines and milk are each roughly the same in extent i.e. of the order of 10 % (See Table 8 in the annex).

Portuguese agricultural production continues to show a big deficit. This is particularly the case with livestock products (except poultry), products for use as animal feed, inter alia cereals and oilseeds.

In relation to the agricultural production of a 12 member Community, Portuguese production is relatively large as regards rice (almost 7 %), olive oil (almost 4 %), wines (over 5 %), tomatoes (almost 9 %) and citrus fruits (See Table 9 in the annex).

Forests

The forestry sector has an important role to play in Portuguese agriculture. The forestry area covers almost 3 million hectares, i.e. around a third of the land area. Portugal is the only country in the future "12 member" Community with a trade surplus for the wood sector as a whole and the Portuguese forestry trade surplus is roughly equivalent to the deficit of the rest of its agricultural production.

Furthermore, exports of forestry products amount overall to 20 % of total Portuguese exports.

The main feature of the Portuguese forestry sector is the extent of cork oak, which covers 22 % of the forestry area and accounts for 1/3 of the total value of the exports in this sector (See also tables 10 and 11 in the annex).

C. Supplies and trade

Self-supply rate

Portugal is currently recording a deficit for almost all its agricultural products. In certain cases (milk, butter, beef and veal), the situation has been obtaining for a good many years ; in other cases, notably cereals, the situation has worsened markedly in recent decades owing to the growing imbalance between supply of and demand for these products.

The products for which the self-supply rate is lowest are butter, maize, beef and veal, raw sugar, tobacco, oils and fats and vegetable oils, with the exception of olive oil. On the other hand, the self-supply rate is 100 % or so for sheep and goat meat, poultry meat, fresh fruits and olive oil. Tomato concentrates and wines, which have traditionally been exported, stand out among products of which there is a surplus.

The self-supply situation of a 12 member Community, as compared with a 9 member Community, would remain relatively unchanged as far as a large number of agricultural products are concerned. There would be a surplus of wine (105 %). As regards citrus fruits and sheep and goat meat, the self-supply rate would substantially be increased, but a 12 member Community would still have not inconsiderable import requirements (See Table 12 in the annex).

Portuguese agricultural trade

The main features of Portugal's pattern of agricultural trade are :

- The increasing importance of imports of cereals and feedingstuffs (32 % of agricultural imports in 1977), of oilseeds (12 %) and of livestock products (8 %).

  Portuguese agriculture has been unable to meet the increased demand for cereals and protein products needed for the intensive production of livestock products. The result has been a very sharp rise in imports.

- The importance of tomato concentrates, wines, particularly port, and preserved fish in Portuguese exports.

- The imbalance in agricultural trade with the Community : 10 % of the agricultural products which Portugal imports come from the Community, to which it exports 54 % of its total agricultural exports ; the result is a large agricultural trade surplus for Portugal.

- The USA are Portugal's main agricultural supplier (39 % of Portuguese agricultural imports).
  This is especially true of cereals, approximately 90 % of the total of which come from the United States.

- The level of Portugal's agricultural imports is to a large extent the result of government decisions, which are closely tied up with the balance of payments situation and are the responsibility of the State marketing offices (See also Tables 13 and 14 and Graph 2 in the annex).

D. Agricultural production structure

Farms

The 1968 survey on the structure of farms - the latest one to be carried out - showed that there was a total of some 800 000 farms. The proportion of farms of less than 1 hectare was 39 %, as was that of 1 to 4 hectare farms. 78 % of Portuguese farms in all, therefore, had an area of less than 4 hectares at the time. They covered 15 % of the total area. On the other hand, less than 1 % of farms had an area of 100 hectares or over, but they covered 45 % of the total area (See Graph 3 in the annex).

But the structure of farms differs greatly depending on the regions. The north of Portugal is an area where the land is divided out into small farms, whereas in the south large farms predominate.

In the north, farms under 4 hectares constitute 79 % of the total and cover 46 % of the area ; those of over 100 hectares account for only 0.1 % of the total and cover 8 % of the total area. In the south, on the other hand, farms under 4 hectares constitute 57 % of the total, but cover less than 4 % of the area, whereas those of over 100 hectares (3.4 % of the total) cover 64 % of the area.

The average number of plots per farm is very high (6.4), especially in the north and in the centre.

In northern Portugal, the inadequate training of the farmers, the ageing of the working population engaged in agriculture and the poor sources of finance are all factors additional to the poor structure of the farms.

In the south, the situation greatly changed when land reform was implemented in 1975. Until then, the main feature of the structure of farms had been the predominance of large Latifundia, farmed in an extensive and often under-utilised fashion, making use, moreover, of a large number of agricultural workers, mostly seasonal.

Out of a total of 3.8 million hectares covering the "Land Reform intervention area", the land taken over between 1975 and 1976 amounted to just over a million hectares. Most of the old Latifundia remained at their initial size and the farming of a good many of them was taken over by "collective production units" (CPU) or cooperatives (over 500 in 1975).

Since then and under certain circumstances, some of the old farms have been returned to the former owners. On 31 October 1980, the area which had thus been handed back amounted to over 500 000 hectares (almost half the land taken over in 1975) and the number of CPUs and cooperatives fell by almost 30 % compared with 1975.

The method of farm management has thus changed in relation to the data in the 1968 survey (57 % owner occupied, 11 % tenancies, 2 % share farming and 30 % various forms, inter alia stock-farming associations).

The working population engaged in agriculture

The working population engaged in agriculture currently accounts for approximately 28 % of the total working population. In 1970, the breakdown into categories of workers was as follows (last general census) :

39 % farm managers

50 % working for an employer and

11 % family helpers

The number of persons employed in agriculture fell from 510 000 in 1970 to 240 000 in 1978. This still amounts to 10 % of the total number of employed persons.

Approximately a quarter of agricultural workers only work part time, i.e. their main occupation is outside agriculture. Almost 60 % have no other activity outside agriculture.

The main characteristic of the working population engaged in agriculture is the large number of elderly people. In 1968, 22 % of farmers were over 65 and almost 25 % were aged between 55 and 64. The relative importance of these age groups will probably have diminished in the meantime, on account of the slowing down of the emigration rate and of the repatriation of former colonials and of young people engaged in military service in the former African colonies. Some of them have turned to the agricultural sector.

The rural depopulation rate, which was at an annual average of 8 % between 1970 and 1974, has slowed down, reflecting these mass returns and on account of the increase in unemployment. The working population engaged in agriculture even went up, in absolute terms, between 1974 and 1977, but this phenomenon seems to have been reversed at present (See alson Tables 1 and 15 and Graph 4 in the annex).

The characteristic of the working population engaged in agriculture in Portugal is, too, the low level of training, which is markedly below the Community average.

According to the standing survey on employment, the percentage of illiterate farmers was 38 % in 1977.

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The Portuguese agricultural production structure suffers from a very low level of mechanisation and of use of fertilizers and also from the underdevelopment of the general infrastructure, on which the modernisation of agriculture is dependent (the road network and the electricity and water etc. distribution network), but also of the general education, vocational training and agricultural advisory services.

As from 1974, the structure policy became more dynamic. The creation of a Ministry of Agriculture (replacing a State Secretariat attached to the Ministry of Economic Affairs) and the setting up of the FISDAF (Financial Institute to Support the Development of Agriculture and Fisheries - responsible for guiding and coordinating agricultural credit) introduced the instruments necessary to the tangible shaping of a development policy for the agricultural sector.

E. The structure for processing and marketing agricultural products

The network for marketing and processing agricultural products in Portugal is underdeveloped. For certain products (cereals in particular), there are State monopolies.

There are 661 agricultural cooperatives in existence at present (excluding rural workers cooperatives in the Land Reform intervention area). The cooperative sector is expanding (there were 514 cooperatives at the end of 1975), as a result of backing from the State and from trade associations.

The cooperatives mainly operate in certain specific sectors, such as wine, apples and pears.

The Portuguese distribution network suffers from great fragmentation. In 1975, there was one retail stockist to every 65 inhabitants. Almost 90 % of the retail shops and stores belonged to traders with only one place of business, 10 % to traders with two or three places of business and 0.5 % to traders operating more than four places of business.

As regards the wholesale trade, the situation is a little more favourable, but the unwieldy way in which it operates has a negative effect on prices.

The policy being followed at the present time is directed towards developing and modernising the main processing and marketing infrastructures (slaughtering network, cold network, harbour storage facilities, conservation and marketing of fruits and vegetables etc), and also the rationalisation and unification of the various bodies already in existence.

The FISDAF has set up a far-reaching programme of action to promote the food and beverages industries and the marketing network for livestock products, wine and fruits.

F. Market organisation and price levels

In Portugal, agricultural products come under one of the following two schemes :

a) products subjects to regulation, for which institutional prices, intervention measures and aid are provided on a permanent basis,

b) free products, for which, nevertheless, short-term intervention may where necessary be decided.

The basic objective of the market organisation system consists of guaranteeing the producer prices of a number of basic products, while at the same time keeping consumer prices at a relatively low level. The main instruments of this policy are guaranteed producer prices, consumer price controls, aid, which in certain market organisations is applied at various stages in production and processing, market stabilisation through the purchasing of surpluses by the State, State control of imports and exports (for certain products the State has a monopoly) and the fixing of consumer prices.

Approximately half of Portuguese agricultural production is covered by a system of institutional prices. The main products concerned are cereals, meat, wine, milk, olive oil, tomatoes and potatoes. But the mechanisms vary, depending on the types of products to which they apply.

For products of which there is a surplus, such as wine and potatoes, for instance, the system is of the "intervention" type.

For products of which there is a shortfall, such as maize and grain sorghum, for instance, the system is based on purchases at a fixed price for a public body and selling off of the amounts at a lower price to the agri-foodstuffs industries, the public body bearing the cost of the deficit.

For wheat, there is a marketing monopoly which is state-controlled.

Fruits and most vegetables (with the notable exception of tomatoes and potatoes) are the only important products in Portuguese agricultural production which are not covered by an institutional prices system.

For almost all products which are subject to regulation, the State intervenes via public bodies (Juntas and Institutes) on both the domestic market and in foreign trade.

Almost all agricultural imports into Portugal come under a State monopoly scheme. The various sectoral organisations concerned fix the amounts to be imported in value and in volume, in cooperation with the competent ministries. Furthermore, the State determines the consumer prices of a number of products which are considered to be staple commodities; a supply fund (Fundo de Abastecimento) has the task of subsidising agricultural products which come under this scheme.

As a general rule, an export licence is required for all exports, with a view in particular to preventing products in which Portugal is not self-sufficient from being exported.

Producer price levels

Through a lack of adequate and sufficiently accurate data, it is difficult to supply information about agricultural producer prices in Portugal and extremely delicate to make comparisons with the prices ruling in the EEC.

For guidance, however, a distinction may be drawn between products where Portuguese prices, compared with EEC prices, are :

- considerably lower : olive oil, butter, apples, tomato concentrate,

- lower : durum wheat, tomatoes,

- higher : wine, milk powder, hops, cauliflowers.

For other products, it may be considered that price levels are similar to those in the EEC.

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G. <u>The agricultural sector in Madeira and the Azores</u>

<u>General features</u>

The Azores and Madeira archipelagoes have an area of almost 300 000 hectares and a population of approximately 500 000, i.e. ± 3.5 % of the area of Portugal and 5.0 % of the total population.

Their geographical location, their climate and their relief have led to great differentiation as regards the importance and the features of the agricultural sector.

Thus, the main agricultural goods produced in Madeira are bananas, wine and sugar cane, while in the Azores, the main agricultural sector is stock-farming and related industries, together with a few vegetable crops, including pineapples.

<u>Main features of the agricultural sector in the Azores</u>

The working population engaged in agriculture in the Azores archipelago, which consists of 9 islands, amounts to 39 % of the total working population. The agricultural sector makes a 47 % contribution to the gross domestic product of the region.

The utilised agricultural area in the Azores covers 65 % of the archipelago's land area (2 239 km2). Pasture land forms a large part of this area (44 %). The forestry area amounts to 13 % of the UAA.

Stock-farming (milk and beef and veal) is the predominant activity. The significant crops are beetroot, tobacco, chicory, and, among fruits, mainly pineapple.

It will thus be noted that there is a far larger proportion of permanent pasture land in the Azores than in the mainland part of Portugal (6 %) and that it is similar to that of the 9 member EEC (44 %). This means that 14 % of the total number of Portuguese cattle and 25 % of dairy cows are located in the Azores. The Azores produce 25 % of the milk consumed in Portugal. Only 2 % of cattle are slaughtered in the archipelago, the rest being exported to the mainland. This is a good illustration of the scantiness of the infrastructures (means of transports, abattoirs, cold storage plants).

The stock-farming sector is also adversely affected by poor structural conditions for production. 52 % of the farms in the Azores cover an area of less than 1 hectare, a situation which leads many farmers to live at subsistence level.

Family type farms account for 80 % of all farms and owner-occupied land is the dominant feature. Despite obvious natural potential in the field of fodder and livestock production, the present general structure constitutes a serious handicap to the development of agriculture and the rationalisation of production systems in the Azores.

Main features of the agricultural sector in Madeira

The utilised agricultural area in the Madeira archipelago amounts to only 28 % of the total area of the archipelago (737 km2). The working population engaged in agriculture amounts to 33 % of the total working population.

Agriculture is highly specialised in Madeira. An almost total lack of permanent pasture land and a relatively high proportion of permament crops are to be noted.

Production consists mainly of fruits (bananas and other tropical fruits), tubers (potatoes), horticultural products, vines and sugar cane.

Vines, bananas and sugar cane account respectively for 16 %, 9 % and 6 % of the total of permanent crops. These are the main agricultural products which are exported, but the sweet potato should also be added. Nevertheless, their importance in relation to Portugal as a whole is fairly limited ; thus exports of Madeira wine amount to 2 % of the archipelago's total exports, but production of this wine does not even add up to 1 % of total national wine production.

Other agricultural products are mainly for domestic consumption on the archipelago, but they are inadequate to meet demand ; a large proportion of the agricultural products consumed in Madeira have therefore to be imported.

From the structural viewpoint, 89 % of farms are less than one hectare in area. The main feature of the land structure is the number of small properties. The scantiness of the agricultural area, the high percentage of the working population engaged in agriculture, the structure of the farms and the high percentage of old and illiterate farmers, are all constraints which are at present limiting the possibilities for Madeira's agricultural development.

II. HOW CAN PORTUGUESE AGRICULTURE BE INTEGRATED INTO THE COMMUNITY ?

A. The major problems which arise ...

The main features of Portugal's agricultural situation at the same time indicate the major problems which will arise when it is integrated into that of the Community :

a) very inadequate agricultural production structure ;

b) an agricultural prices structure which fixes producer prices at levels designed to be sufficiently remunerative, while at the same time maintaining consumer prices at much lower levels ;

c) duality in market organisation. The main products are governed by a centralised monopoly including the control of imports and the fixing of prices at all levels, whereas other products are only subject to quite local and unstructured agreements ;

d) a big range of aids, including big consumer subsidies which are incorporated into the final price of the basic foodstuff ;

e) heavy reliance on imports, notably of cereals, sugar, vegetable oils, and meats, which enter Portugal at world market prices.

Contrary to what will happen in the case of Spain, the integration of Portuguese agriculture into a 12 member Community will not, for most products, add proportionally large quantities to the Ten's existing output, and the potential for expansion too is relatively moderate. In certain sectors, however, Portugal's share of production in a 12 member Community will be far from insignificant : tomatoes (particularly concentrates), certain other vegetables, wines, rice, citrus fruits, sheep meat and poultry.

This does not necessarily mean that Portugal's accession will lead to problems in the sectors in question. Portugal imports half of its rice requirements, for instance. With regard to sheep meat, the large-scale Portuguese production is all used to cover domestic requirements. This is also the case with poultry. Portugal is a big wine exporter, but over half are liqueur wines, more than 2/3 of which are already at present for export to the EEC.

With regard to most basic products, it is to be expected that Portugal's accession will have a neutral effect or that it will result in an improvement in the ratio between supply and demand in the enlarged Community, since Portugal's import requirements lie mainly in sectors where there is a surplus in the Community.

The principal exceptions are, for imports, cereals and vegetable proteins, and for exports, tomato concentrate.

<u>Cereals and vegetable proteins</u>

The effect of Portugal's import requirements will be to improve, in the enlarged Community, the ratio between supply of and demand for common wheat, of which the present Community currently produces a surplus. They will have the opposite effect on durum wheat, maize, sorghum and oilcakes, as the sharp demand of Portuguese imports of these products will add to the Community's current deficit (the quantities concerned are on the following scale for 1979/80 : approximately 100 000 tonnes for durum wheat ; 2 030 000 tonnes for maize ; 134 000 tonnes for sorghum ; 209 000 tonnes of direct imports for oilcakes, plus a similar quantity produced locally using imported seeds).

It follows that when applying the "acquis communautaire" to Portugal, it will be necessary in this sector to seek solutions for the transitional period which will have a positive effect on Portuguese production, without however, causing there to be too sharp an impact on consumers.

Tomato concentrate : Portugal is a big exporter, although its role has greatly diminished since the beginning of the seventies. In 1979, exports totalled 76 500 tonnes, only 21 400 tonnes of which went to the Community.

Total Portuguese production of processed tomatoes only amounts to approximately 7 % of that of the Ten member Community. However, the Portuguese tomato concentrate industry is considered to be important both for the Portuguese domestic economy and for the improvement of its trade balance and its balance of payments. For these reasons, it should be able to regain the place which it occupied on the export market until recently.

B. ... and how to deal with them

As was the case on the occasion of previous EEC enlargements, the starting point is the adoption by Portugal, from its accession date, of the "acquis communautaire",

- the provisions of the common agricultural policy, both those laid down by the Treaty of Rome and those provided for in the framework of market organisation, and Regulations and Directives applying to agriculture in general ;
- common price and aid levels fixed in the common agricultural policy ;
- the achievement of a customs union between Portugal and the Community ;
- the abolition by Portugal of quantitative restrictions on trade and measures having equivalent effect with third countries ;
- the application by Portugal of Community preferential systems vis-à-vis third countries.

A transitional period lasting between 7 and 10 years

The Community's agricultural machinery will, in principle and without prejudice to special justified cases, have to be fully applied by Portugal as soon as it joins. This seems necessary to enable the new member country to be integrated from that date into the Community's common agricultural policy management process.

Only if the transitional period is sufficiently long will it be possible for the differences between the Portuguese economy and that of the Community to be ironed out smoothly.

The transitional period should in principle cover all agricultural products and last the same length of time for products as a whole, except in the case of products for which the factors present lead to the assumption that the application of a shorter period would be conducive to the objectives pursued.

A fairly lengthy period will be needed to implement the necessary transitional measures and minimise the tensions of the adjustment. In the light of all the points emerging from analysis of Portuguese agriculture and considering both the efforts to be made in the field of structures and the differences in the domestic market and the trading system, the Commission felt that the transitional period should not be shorter than 7 years, but should not exceed 10 years.

During the transitional period, agricultural prices should progressively be aligned. In order, during this period, to avoid any distortion or disturbance which might arise out of differences in the respective price levels, a system of "accession" compensatory amounts would be applied in order progressively to remove the price differences. A safeguard clause would also apply, on a reciprocal basis, during this period.

Such progressiveness should also be used for the adoption by Portugal of the system of Community aid and also with regard to the establishment of the customs union.

Nevertheless, on accession the national aid currently used in Portugal will have to be abolished, whenever it is incompatible with Community legislation, as will quantitative restrictions and the other non-tariff barriers to trade.

Structure policy

Questions connected with the application to Portugal of the policy for improving agricultural structure are fundamental. Portuguese agriculture, the structural development of which is, in the main, well below the Community level, seems unlikely to reap every benefit from the current Community provisions.

It is, however, difficult to conceive of the possibility of lowering the criteria fixed for eligibility for benefit from these provisions to such an extent as to enable a large number of Portuguese farmers to reap benefits from them, without debasing the concept of the potential viability of a farming unit, as understood in the Community at the present time.

The current Community Directives on structural improvements should not, therefore, be made less stringent, event on a temporary basis, in order to meet Portugal's needs. On the contrary, the Commission feels that it would be worthwhile embarking upon the implementation of a special plan which might enable the less favoured regions in Portugal to become caught up in the dynamics of structural improvements, without driving country people away from the land at such a rate that they are unable to find alternative employment elsewhere.

What would be better is a new approach, perhaps regional, more gradual in scope, starting from the present base line, which is much lower in Portugal, and devised in such a way as to help the farmers concerned to deal with the situation on their own, rather than catapulting them into a level of technology which is beyond their financial and occupational capacities.

The question of the application to Portugal of the Directive on the less favoured regions and of the Community forestry programme is significant in this connection. It is obvious that the introduction of these measures into Portugal could make a big contribution to solving the problems raised.

*

*   *

Portugal's accession would mean that another agricultural economy of the Mediterranean type would be added to the Community. The low volume of Portuguese production in relation to the enlarged Community's total production means that no major problems would arise for the Community in the basic agricultural products sector. The main problem would be that of harmonising in time the current Portuguese system of State monopoly, control and aid with the "acquis communautaire".

The modernisation of the structure of Portuguese agriculture, which would be essential to enable it to face agricultural production within an enlarged Community on an equal footing and in conditions of free competition, would pose a major problem. Solving this problem will require a great deal of time, financial resources and imaginative efforts.

STATISTICAL ANNEXES

TABLE 1 - POPULATION

1977

	Portu-gal	EUR 9	Greece	Spain	EUR 12	% Portugal / EUR 12
- Total population (millions)	9,2	259,2	9,3	36,6	314,2	3,1
- Civilian employment (millions)	3,8	101,7	3,2	12,4	121,1	3,1
- Civilian employment as % of total population	41 %	39 %	34 %	34 %	39 %	-
- Working population in agriculture (m)	1,2	8,3	0,9	2,6	13,0	9,4
- Working population in agriculture as % total civilian employment	32 %	8 %	28 %	20 %	11 %	-
- No. inhabitants per km2	100	170	70	73	139	-

Graph 1 — *Trend of gross domestic product by sector from 1964 to 1977 at 1963 prices*

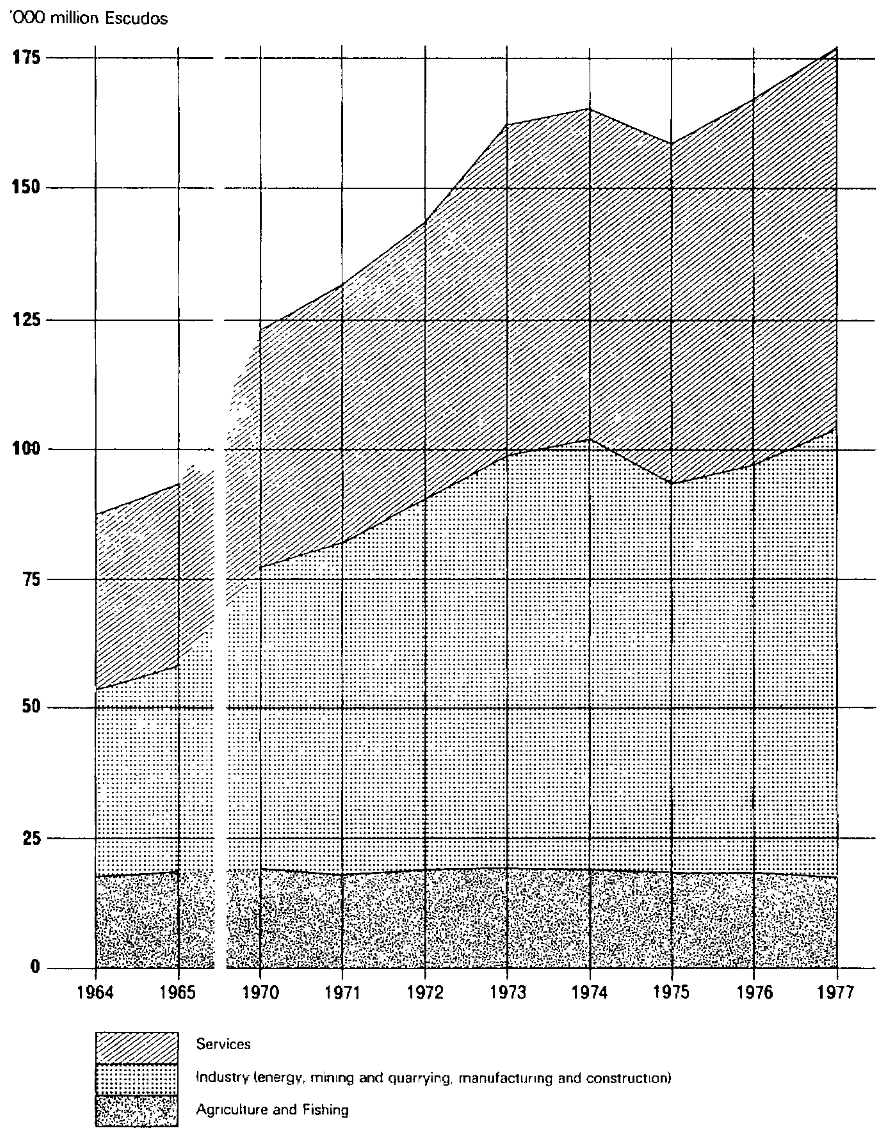


Table 2 : PER CAPITA CONSUMPTION OF CERTAIN AGRICULTURAL PRODUCTS

kg/per capita/annum

	PORTUGAL	EUR 9	Highest and lowest national consumption in EUR 9	GREECE	SPAIN
Wheat	n.a.	74	120 - 41	n.a.	75
Potatoes	93	75	118 - 36	52	116
Sugar	26	37	48 - 28	22	31
Fresh fruits (except citrus)	70	(1) 59	(1) 85 - 27	120	70
Fresh citrus fruits	n.a.	24	46 - 11	21	24
Fresh vegetables: (except tomatoes)	122	77	118 - 37	176	89
Fresh tomatoes	n.a.	20	35 - 9		32
Wine/litre/per capita/annum	97	50	103 - 2	40	61
Fresh dairy products (not cream)	52	102	213 - 75	94	96
Butter	1	6 (2)	11 - 2 (2)	1	0,5
Eggs	4	14	17 - 11	n.a.	17
Total meat	38 (3)	77 (3)	92 - 64 (3)	59	64
Total oils and fats	26 (4)	19 (4)	25 - 9 (4)	n.a.	24
Olive oil	5,2	2,6 (5)	11,5 - 0	15	8,4

EUR "9" : mean 1975-76-77
GREECE : miscellaneous
PORTUGAL : 1976
SPAIN : 1976

(1) including preserved fruit and juices
(2) mean 1974-75-76
(3) excluding offal
(4) excluding butter
(5) estimate

Source : national statistics

Table 3 : PORTUGAL'S FOREIGN TRADE (1)

1978

Million ECU

	With all countries	With EEC "9"	% EEC "9": all countries
IMPORTS			
All products	4 109,9	1 885,1	45,9
Agricultural products	674,9	81,2	12,0
Agricultural products as % all products	16,4	4,3	-
EXPORTS			
All products	1 901,1	1 066,9	56,1
Agricultural products	299,7	147,6	49,2
Agricultural products as % all products	15,8	13,8	-
TRADE BALANCE			
All products	- 2 208,8	- 818,2	-
Agricultural products	375,2	66,4	-

(1) Mainland, Azores and Madeira

Table 4 : AGRICULTURAL AREA

1977

	Portugal	EUR 9	Greece	Spain	EUR 12	% Portugal / EUR 12
- Land area (million ha)	9,2	152,6	13,2	50,5	225,4	4,1 %
- Utilised agricultural area (UAA)	4,1	93,6	9,2*	27,6*	134,5	0,03 %
- Utilised agricultural area as % of total area	45 %	60 %	69 %	55 %	60 %	
- Wooded area (million ha)	3,6	32,0	2,6	15,5	53,7	6,7 %
- Wooded area as % of total area	39 %	21 %	20 %	31 %	24 %	
- Arable land (million ha)	3,0	46,4	3,1	10,3**	52,8	4,7 %
- Permanent crops (million ha)	0,6	4,9	1,0	5,0	11,5	5,2 %
- Meadows and permanent pasture land (million ha)	0,5	41,6	5,3	7,0	54,4	0,9 %
- Soil utilisation as % of total UAA						
. arable land	73	50	33	37	47	
. permanent crops	14	6	10	18	9	
. meadows and permanent pasture land	13	44	57	25	40	

* : excluding poor pasture land; but including fallow land

** : excluding fallow land

Table 5

DISTRIBUTION OF THE IRRIGATED AGRICULTURAL AREA IN PORTUGAL (1)

	%
Orchards	
- citrus fruits	1,1
- other species	4,1
Miscellaneous fruit trees	1,4
Vines	6,6
Nurseries	0,02
Open-grown crops	
- without trees	72,0
- in combination with trees	5,4
Horticultural crops	
- without trees	4,9
- in combination with trees	1,9
Permanent pasture land :	
- without trees	2,5
- in combination with trees	0,1
TOTAL	100

(1) This distribution relates to the 668 237 hectares of irrigated land (i.e. 15% of the UAA) in the mainland part of Portugal.

Table 6 : YIELDS PER HECTARE

100 kg/ha
1976

Products	Portugal 1977	Mean EEC "9"	Highest and lowest national levels in EEC "9"		Greece	Spain
Total wheat	8,7	35,0	54,4 -	17,8	26,2	16,0
Rye and meslin	5,4	30,4	31,8 -	18,2	18,0	9,6
Barley	5,9	33,6	43,7 -	19,5	24,4	16,7
Oats	4,1	26,3	40,7 -	12,3	16,0	11,6
Maize	12,3	8,0	58,6 -	30,0	39,5	35,8
Rice	29,6	38,0	38,8 -	32,0	36,3	63,4
Wine (hl/ha)	n.a.	60,9	143,0 -	55,3	49,0	16,3
Potatoes	96,0	210,0	297,0 -	125,0	156,6	145,0
Tomatoes for industry	376,0	343,4	1 930,0 -	240,0	469,0	294,0

Sources : National statistics, FAO

Table 7 : COMPOSITION OF LIVESTOCK AND DENSITY

Number of head (x 1 000)

	Cattle	Dairy cows	Sheep	Goats	Pigs	Poultry
EUR "9"	77 552	25 078	44 803	2 045	72 130	316 505
PORTUGAL	1 269	374	2 422	756	2 046	4 895
Mainland	1 069	267	2 399	728	1 969	4 712
Azores	178	94	5	14	54	72
Madeira	23	12	15	13	28	111

Number of head per 100 ha UAA

	Cattle	Dairy cows	Sheep	Goats	Pigs	Poultry
EUR "9"	83	27	48	2	77	339
PORTUGAL	25	7	48	15	40	96
Mainland	21	5	48	15	40	94
Azores	198	104	6	16	60	80
Madeira	288	150	188	163	350	1 388

Sources : Agricultural statistics (1977)

Table 8

PROPORTION OF THE PRODUCTION OF VARIOUS AGRICULTURAL PRODUCTS IN OVERALL AGRICULTURAL PRODUCTION (AS %)

Products	Portugal	EUR "9"	Greece	Spain
1. Meat	26,0	35,7	18,0	24,6
2. Horticultural products (1)	12,8	7,1	9,0	13,3
3. Vegetables and tubers (1)	11,5			
4. Cereals	10,4	11,3	13,5	9,6
5. Fruits	10,3	4,4	4,4	9,9
6. Wines and spirits	10,0	4,6	2,3	4,0
7. Milk	8,9	19,6	8,2	8,6
8. Olive oil and olives	3,6	1,0	7,5 (2)	3,2 (3)
9. Eggs	2,7	3,9	2,7	4,0
10. Other products	3,8	12,4	34,3	22,8
	100 %	100 %	100 %	100 %

(1) For EUR "9", Greece and Spain, vegetables only

(2) Takes account of olive oil only

(3) All vegetable oils

Source : EUROSTAT, national statistics, FAO

Table 9

VOLUME OF THE MAIN AGRICULTURAL GOODS PRODUCED IN PORTUGAL AND THEIR IMPORTANCE IN A 12 MEMBER COMMUNITY Mean 1975/76/77

Vegetable products	Portugal 1 000 t	EUR"9" 1 000 t	Greece 1 000 t	Spain 1 000 t	EUR"12" 1 000 t	Portugal /EUR"12
Cereals (total)	1 383	98 367	3 625	14 637	118 012	1,2
incl.: wheat	504	38 304	2 087	4 267	45 162	1,1
rye	138	2 742	7	228	3 115	4,4
barley	82	32 422	841	6 322	39 666	0,2
oats	102	7 524	98	518	8 242	1,2
maize	424	14 071	496	1 744	16 735	2,5
rice	108	1 057	88	388	1 641	6,6
Olive oil	47	540	255 (1)	412	1 254	3,7
Wines (1000 hl)(2)	10 179	149 295	5 277 (1)	33 100	197 851	5,1
Citrus fruits (total) incl.:	153	2 955	810	2 845	6 763	2,3
oranges & mandarins	131	2 091	609	2 546	5 377	2,4
lemons	20	861	194	276	1 351	1,5
grapefruit	1	2	2 (3)	8	13	7,7
Peaches	58	2 024	358	319	2 759	2,1
Apricots	6	161	78	138	383	1,6
Pears	57	2 428	128	389	3 002	1,9
Tomatoes	787	4 637	1 304	2 308	9 036	8,7
Potatoes	1 044	33 549	989	5 626	41 208	2,5
Grapes	32	23 498	222	4 317	28 069	0,1
Cherries	16	448	30	66	560	2,9
Apples	130	8 669	251	939	9 989	1,3
Green beans	30	622	67	211	930	3,2
Onions	71	1 281	186	959	2 497	2,8
Livestock products						
Pork	82	7 943	111	662	8 798	0,9
Beef and veal	84	6 513	123	434	7 154	1,2
Sheep and goat meat	22	586	120 (1)	146	824	2,7
Poultry	116	3 189	118	687	4 110	2,8
Eggs	47	3 750	112	610	4 519	1,0
Cow's milk (whole fresh)	534	99 726	700	5 183	106 143	0,5
Butter	2	1 764	6	16	1 808	0,1

(1) Mean 1976/1977
(2) Mean 1975/76/77/78/79
(3) 1977

Sources : FAO, Eurostat, Greek national statistics

Table 10

AREA COVERED BY FORESTS IN PORTUGAL (MAINLAND)

	1 000 ha	as %
Total geographical area	9 160	100
Area covered by forests	2 954	32
Area covered by forests	2 954	100
INCLUDING :		
1. Coniferous species	1 364	47
Deciduous species	1 562	53
2. Maritime pine	1 293	44
Cork oak	653	22
Holm oak	534	18
Eucalyptus	214	7
Other	260	9

Table 11

PRODUCTION OF AND FOREIGN TRADE IN FORESTRY PRODUCTS

1978

	Quantity (t)	Value (1 000 esc)
I. Wood		
- production 1 000 m^3	10 368	
- exports (1)	857 923	3 224 854
- imports (1)	237 940	1 494 556
II. Cork		
- production	145 206	
- exports (2)	54 096	1 199 898
- imports (2)	2 107	86 250
III. Resin		
- production	96 284	996 731 (3)
- exports (4)	111 152	1 883 358
- imports (4)	166	10 534

(1) wood and articles of wood

(2) cork and articles of cork

(3) value of the resin on entry into factories

(4) chemical industry products : resin essence.

Table 12

SELF-SUPPLY RATE IN THE PRINCIPAL AGRICULTURAL PRODUCTS

Mean 1975/76/77

	Portugal	EUR"9"	Greece	Spain	EUR "12"
Cereals total	42	87	91	87	86
including: wheat total	59	104	111	104	104
rye	99	98	100	101	98
barley	92	102	97	116	104
oats	95	97	100	105	97
maize	27	53	33	32	47
rice	57	93	108	121	95
Sugar(raw equivalent)	4	113	120	94	109
Olive oil	104	84	107	147	104
Wines (1)	122	100	120	125	105
Citrus fruits total	100	51	156	235	89
incl.oranges+mandarins	100	47	156	243	89
lemons	100	94	174	198	114
Pears	82	101	101	101	101
Tomatoes	100	94	100	110	99
Potatoes	94	99	107	102	100
Apples	100	99	104	103	99
Porkmeat	92	99	99	94	98
Beef and veal	70	101	63	89	99
Sheep and goat meat	100	66	66	99	74
Poultry meat	100	102	100	99	102
Eggs	100	101	101	103	101
Cow's milk(whole fresh)	99	100	100	99	100
Butter	52	100	79	89	99

(1) Mean 1974 to 1979 inclusive

Table 13

PORTUGUESE EXPORTS OF THE MAIN AGRICULTURAL PRODUCTS

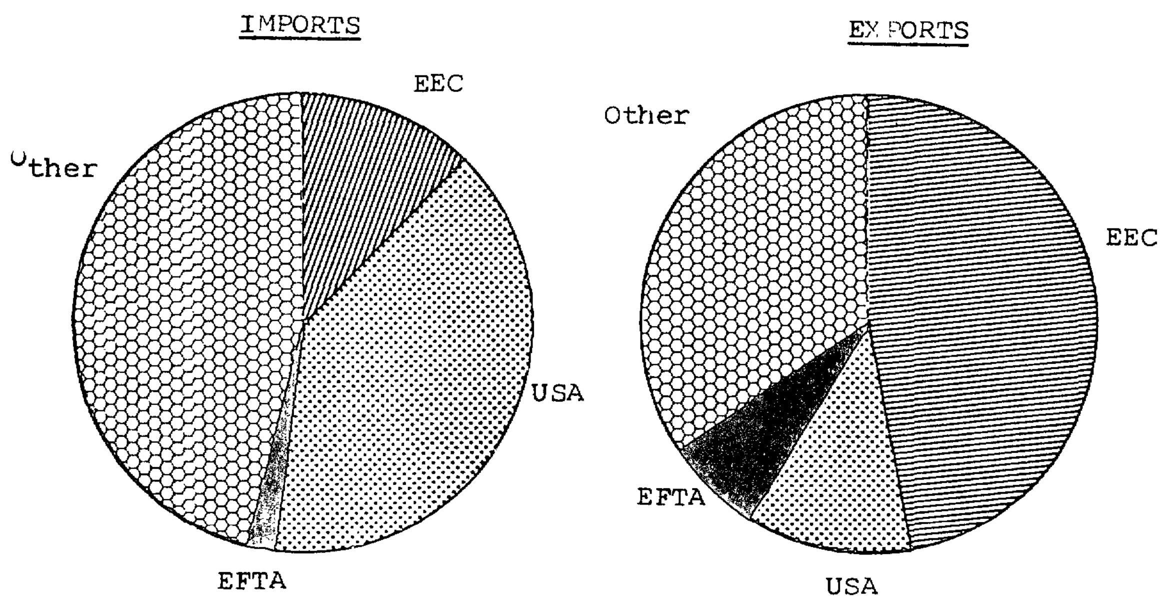
1978

Order	Products	Total exports million ECU	Total exports %	Exports to EEC "9" million ECU	Exports to EEC "9" as% total exports %
	Total agricultural products	300	100	147	49
1.	Wine of fresh grapes	126	42	78	62
2.	Fish preparations and preserves	58	19	35	60
3.	Vegetable preparations	39	13	8	20
4.	Nuts	11	3,7	6	54
5.	Vegetables and food crops	10	3,2	2,3	24
6.	Vegetable oil	8	2,7	0,3	3,3
7.	Fish, shellfish and molluscs	8	2,7	2,3	29
8.	Animal guts, bladders and stomachs	7	2,3	5,4	76
9.	Cork	6	2,0	2,8	47
10.	Green or dried carob	3	1,2	1,4	39
		276	92	141,2	-

GRAPH 2

PORTUGAL

IMPORTS AND EXPORTS DESTINATION AND ORIGIN
OF AGRICULTURAL PRODUCTS (AS % OF TOTAL)
1977



	AGRICULTURAL IMPORTS	AGRICULTURAL EXPORTS
EEC	12,2	47,0
USA	39,9	12,1
EFTA	1,8	6,7
Other	46,1	34,2
TOTAL	100	100

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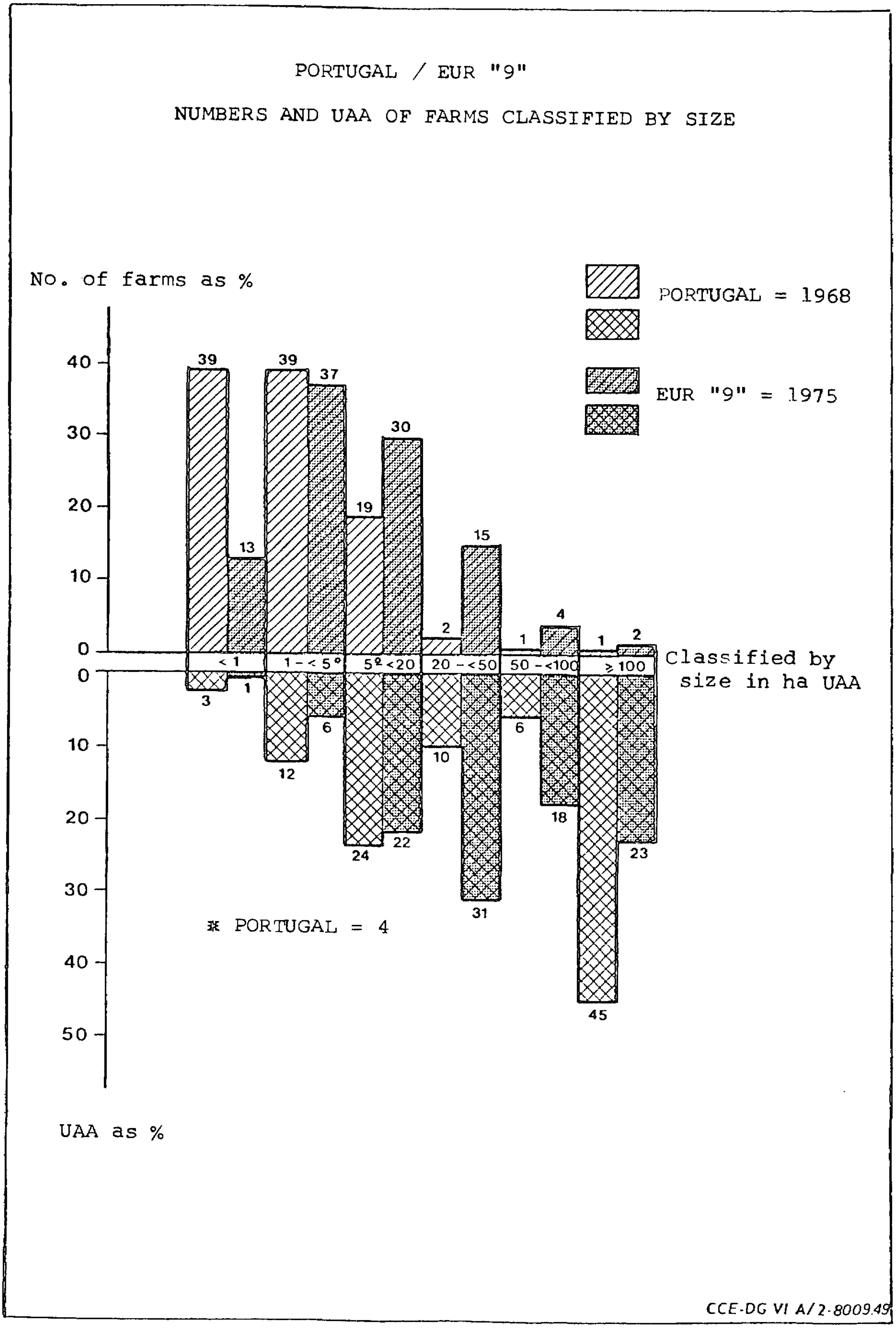
Table 14

PORTUGUESE IMPORTS OF THE MAIN AGRICULTURAL PRODUCTS

1978

Order	Products	Total imports million ECU	Total imports %	Imports from EEC"9" million ECU	Imports from EEC "9" as% total imports %
	Total agricultural products	680	100	81,2	12
1.	Maize	157	23	0,3	0,2
2.	Oil seeds and oleaginous fruit	114	17	0,2	0,2
3.	Wheat and meslin	75	11	9,1	12,1
4.	Fish	45	7	0,4	0,8
5.	Sugar	41	6	5,3	14,2
6.	Oil cakes, olive-oil cakes etc	35	5	0,7	2,1
7.	Grain sorghum	27	4,0	0	0
8.	Coffee	24	3,5	0,3	1,4
9.	Beef and veal	18	2,6	1,0	5,8
10.	Vegetable oils	16	2,3	0,9	5,7
11.	Feed preparations molassed or sugared	13	1,9	7,0	53,5
12.	Tobaccos	13	1,9	1,2	9,0
13.	Rice	13	1,9	0	0
14.	Spirits, liqueurs and whisky	12	1,8	12,0	99,5
15.	Vegetables and food crops	9	1,3	6,4	70
16.	Dairy products	7	1,1	5,6	77
		619	91 %	50,4	-

Graph 3



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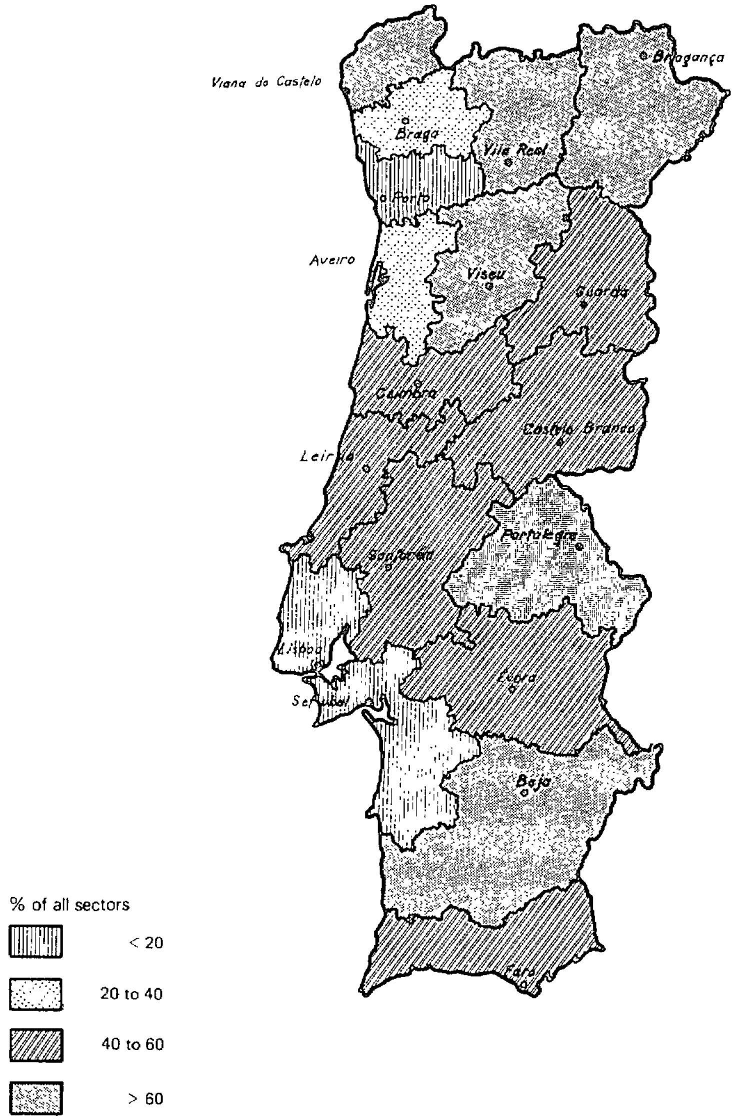
Map — *Working population in agriculture — 1975*



Graph 4

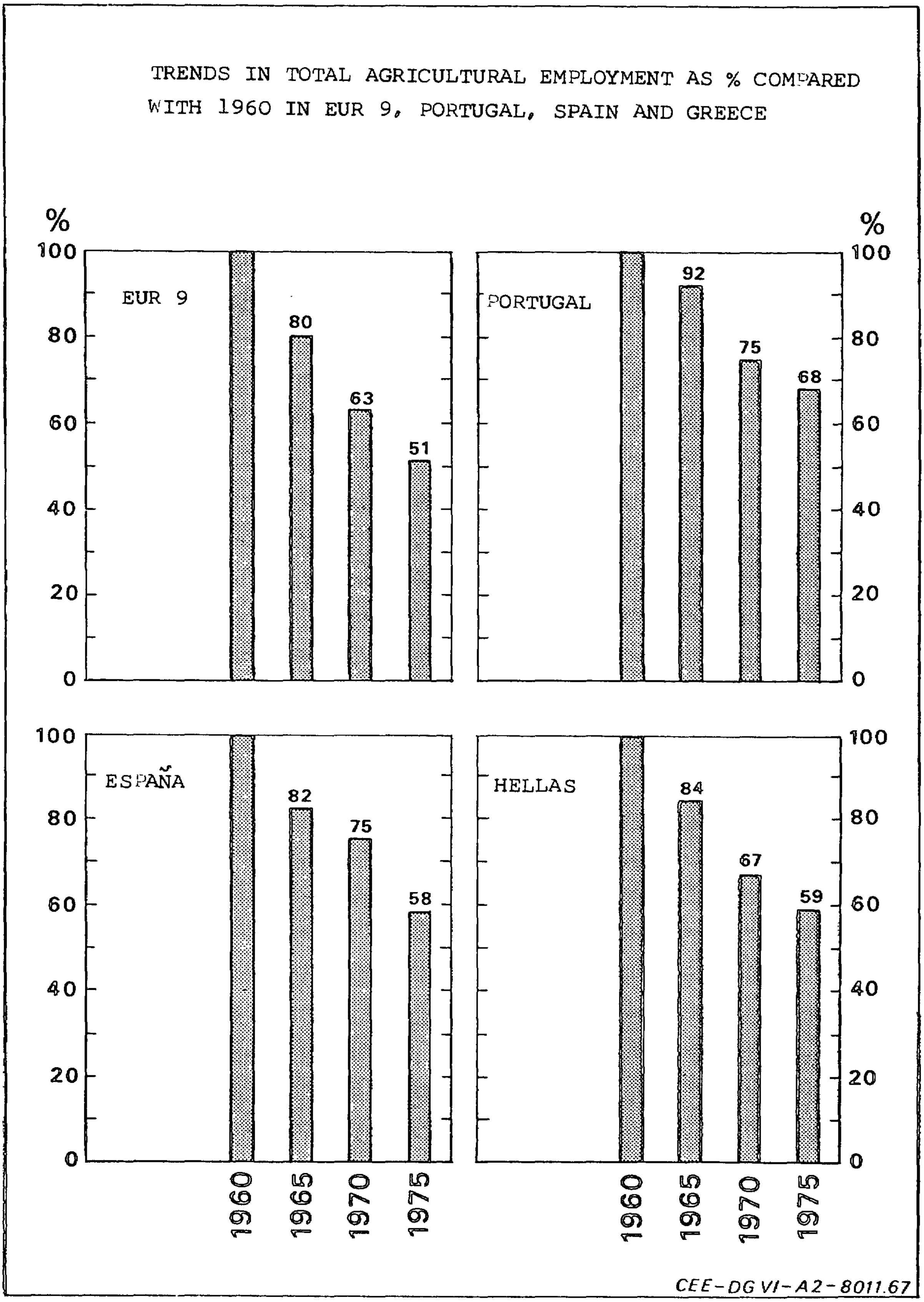

TRENDS IN TOTAL AGRICULTURAL EMPLOYMENT AS % COMPARED WITH 1960 IN EUR 9, PORTUGAL, SPAIN AND GREECE
%
100
80
60
40
20
0
EUR 9
80
63
51
PORTUGAL
92
75
68
ESPAÑA
82
75
58
HELLAS
84
67
59
1960
1965
1970
1975
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Table 15

TRENDS IN THE NUMBER OF WORKERS EMPLOYED IN AGRICULTURE IN PORTUGAL

in thousands

Years	Agricultural employees (1)	Total number of employees	Agricultural employees/total no. of employees %
1970	511	2 364	21,6
1974	378	2 484	15,2
1975	348	2 453	14,2
1976	307	2 474	12,7
1977	263	2 417	10,9
1978	241	2 461	9,8

(1) "Agriculture, forestry and fisheries" sector

Source : Eurostat

Green Europe - Newsletter on the common agricultural policy

No.		Linguage :
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"	DA, DE, EN, FR, IT, NL
178	The enlargement of the Community	DA, DE, EN, FR, IT, NL
179	The Community's agricultural and food exports	DA, DE, EN, FR, IT, NL
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

N°		Linguage :
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
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