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Supply and demand in agricultural products - Outlook to 1990

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The outlook of the supply of and demand for agricultural products in the Community to 1990

Introduction

The supply and demand for agricultural products are subject to many influences of natural, economic and political nature. The most important influences are taken into account by specific projections, while other factors are assumed to remain unchanged. The forecasts presented below are based on long-term trends in the agricultural sector, combined with some explicit hypotheses. By their nature, forecasts are not always accurate, but they are a necessary part of modern decision-making.

In recent years the Commission has underlined the need for the institutions of the Community to take a longer-term view of the development of the agricultural policy. (1) It is for this reason that the Commission includes each year in its price proposals an evaluation of the outlook of supply and demand for the main agricultural products in the Community, and the fixing of guarantee thresholds for different products is integrated into that framework.

The aim of this chapter is to give a brief account of the way in which forecasts are made at the Community level, and of the latest estimates for 1990. It must be emphasized that such forecasts by their nature are subject to continuous review and revision, and that in certain respects the evaluation given for 1990 in this chapter differs from that given in the Commission's

(1) 'Guidelines for European agriculture' COM(81)608 of 21 October 1981, paragraph 12.

price proposals for 1984/85,[1] prepared early in 1984; likewise the Commission reserves the right to revise its forecasts in the context of future price proposals to take account of the latest information and developments.

Another factor to be mentioned is enlargement of the Community. During the period concerned it is expected that Spain and Portugal will join the Community and that the agricultural policy will apply to 12 countries. This new enlargement will not only change the market situation for most agricultural products, but will require changes in the common agricultural policy itself. However, in order to set reasonable limits to the analysis, the present forecasts have been made principally on the basis of a Community of Ten.

The forecasting method

Estimating trends

The method used is that of estimating trends in time series data over a long period (normally 1960 to 1982, but a shorter base may only be available for some products), then projecting these trends into the future. The 'trend' method can be criticized, but the fact that these relationships persist in spite of great changes in economic conditions, technology, farm structure and exogenous influences gives this approach a certain amount of credibility. There is no guarantee that results from the various other methods available will be any more reliable in predicting the future. In addition, in a political context, the trend approach is easily understood and the implications more readily grasped. As will be seen, certain trends are rejected for entirely rational reasons, so the method is only an aid to estimation and not the last word on the future.

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(1) Commission proposals on the fixing of prices for agricultural products and related measures (1984/85): COM(84)20 of 20 January 1984.

Factors influencing the supply of and the demand for agricultural products

The elements which are taken into account in estimating the *supply* of agricultural products are those of land area and use, livestock numbers, yields per hectare or per animal and the prices of farm products. Analysis of changes taking place in these factors during the past two decades shows up the outstanding importance of yields per hectare and per animal in the overall development of supply. The important variables relating to individual products are discussed in the specific section concerned.

With regard to the *demand* for agricultural products, the principal elements are those of population, private consumption expenditure, the consumer price of different foods and the consumption per head of each food:

(i) The population of the Community grew by 0.8 % per year in the 1960s, by 0.4% per year in the 1970s and is forecast to grow by only 0.2% per year to 1990. The population of the Community of the Ten was 272 million in 1983 and is forecast to become 275 million in 1990. The addition of Spain and Portugal would raise these figures to 320 million in 1983 and 326 million in 1990, but would not change the forecast rate of increase.

(ii) Private consumption expenditure per head on the Community territory increased by about 4% per year in the 1960s, 3% per year in the 1970s, but is forecast to increase by only some 2% per year up to 1990.

(iii) In general food prices have evolved in a similar way to overall consumer prices. However, an examination of the evolution of consumer prices for specific food products shows up some considerable divergences. Such relative price changes explain to some extent the shifts in consumer demand for certain foods; this is seen especially in the substitution of one type of meat for another.

(iv) Eating habits vary widely between consumers in different Member States of the Community, so that average consumption per head of specific foods exhibits a very wide divergence from one country to another.

Assumptions on agricultural policy

In making estimates of future supply on the basis of past data, it is necessary to assume that no fundamental changes in agricultural policy will take place. This simplifying assumption avoids the need to work on a multiplicity of alternative policy scenarios and their associated probabilities. However, the conclusion from some projections is that policy changes are necessary and the decisions of the Council of Ministers on 31 March 1984 in the dairy sector was an example (introduction of quotas for milk deliveries). In this sector, projections from the past are no longer valid, and this will be examined in due course.

Similarly, when looking at demand, it is assumed that there will be no fundamental change in agricultural or other relevant policies which would disrupt the trends.

The forecasts for individual products for the Community of the Ten

Cereals

The total area of cereals in the Community has been stable at around 27 million hectares for many years. Within the total area, that of individual cereal types has shown considerable change, with wheat, barley and maize increasing, while rye and oats have decreased. Projections of these trends have little meaning, as the two latter products tend to insignificant areas, although a certain demand for those products will continue. Estimated areas in 1990 have therefore to be arrived at by informed judgment and those assumed are 12.7 million ha of common wheat, 2.3 million ha of hard wheat, 0.5 million ha of rye, 8 million ha of barley, 1.5 million ha of oats and

3 million ha of grain maize. Using the best forecasts of yields per hectare, namely 6.10 tonnes/ha for common wheat, 2.40 tonnes/ha for hard wheat, 4.25 tonnes/ha for rye, 5.00 tonnes/ha for barley, 4.00 tonnes/ha for oats and 7.80 tonnes/ha for grain maize, the total cereal production of the Community becomes 154.5 million tonnes in 1990.

Demand for cereals for human consumption represents one quarter of all consumption and is 90% wheat. Consumption per head of wheat is stable at about 76 kg per head net; combined with the population forecast for 1990, wheat demand for humans would be the equivalent of 32 million tonnes gross. Use of cereals for animal feed (60% of total usage) is subject to several influences; the level of animal production, the competitivity of cereals against other products which substitute for cereals, and now the economics of using cereals for producing milk when the marginal revenue from that milk could be drastically reduced if it exceeds delivery quotas. On balance, it seems that the most likely outcome will be an animal feed demand increase of some 4 million tonnes to 74 million tonnes in 1990. With other uses relatively stable (seed 4.3 million tonnes, losses 1.7 million, industry and processing 10 million tonnes) it could be concluded that total usage will be around 122 million tonnes, leaving a quantity of cereals available for export of nearly 33 million tonnes. There is, however, a possibility that industrial use of cereals for a whole range of derived products could expand substantially, if certain regulatory difficulties could be overcome. At present only about 5% of cereals are used by industry in the Community. On present trends in Europe (and these are probably too low) an increase of 30% in industrial use could be expected by 1990, to give around 7%.

Sugar

The area of sugar beet increased steadily from 1.3 million ha in 1960 to 2.0 million ha in 1981, and fell back under new regulations to 1.7 million ha in 1983 and 1984. It is expected that the area sown will stabilize, but it should be noted that the quota is on the quantity of sugar produced and not on the area sown. Yields of sugarbeet have increased and are expected to continue to do so by about 1% per year; yields of sugar per hectare have increased by some 1.5% per year. It could be concluded that the area sown should tend to decline under the quotas; there is a possibility that in future, a certain quantity of sugar will be used for industrial purposes as a raw material, on condition that certain regulatory difficulties can be resolved.

Production in 1990 can be expected to be of the order of 11 to 12 million tonnes, on the hypotheses of current quotas continuing after July 1986, and low prices on world markets. Human consumption of sugar per head has been stable for many years at about 35 to 36 kg per year; this is likely to decline slightly, but as the population is increasing gradually it could be concluded that total human consumption will remain stable at about 9.4 million tonnes. There is, however, a complication in this situation in the form of the rapid development of synthetic sweeteners. This development is likely to increase in its influence on consumption, but has not so far been quantified.

Potatoes

The area of potatoes grown has declined steadily from about 3 million ha in 1960 to some 1.1 million in 1983; a projection of this trend would result in potatoes almost disappearing, which is clearly illogical. Over the same period, yields per hectare have increased by 50% or 1.8% per year, to reach 30.4 t/ha in 1982; this trend is likely to continue. Demand for potatoes exhibits differing evolution in the various Member States, but falling substantially in Germany, France and Belgium while being stable in Italy, the Netherlands, Ireland and Denmark, and recently increasing in the UK and Greece. Overall, the Community trend of consumption per head is downwards, and with a rising population, human demand in 1990 is likely to be of about 19.5 million tonnes: of this quantity, probably about 55% will be of fresh potatoes and 35% of processed products. Production of potatoes exceeds this amount quite considerably, as a significant proportion goes for seed (8%), animal feed (10 to 15%), losses in store (4%), and processing into starch, alcohol and so on (13% in 1981/82). This latter category will certainly increase in future. The production in 1990 will therefore probably be of the order of 35 million tonnes, to cover all needs, and self-sufficiency maintained at 100%.

Beef

The quantity of beef produced is principally dependent upon the number of breeding cows in the herd, along with other elements such as average carcass weight, viability of calves and so on. In fact, the ratio of beef production to the number of cows, when combined with the prices of certain other farm products, gives a reasonable means of forecasting beef production. Clearly, it is first necessary to forecast the number of cows, and until 1984, it could have been assumed that the population was more or less stable, as it has been for many, many years. However, the application of milk quotas in the dairy sector (where 80% of the cows are found) has disturbed this stability. Different estimates are available of the number of dairy cows which will be slaughtered, the number of replacement heifers which become beef, and the increase (if any) in the beef breeding herd. On balance, it seems reasonable to conclude that:

(i) There will be an initial increase in slaughterings of cows in 1984 and 1985. This will be less in percentage of the population than the percentage reduction in deliveries required by the quotas, as less intensive feeding of concentrates will reduce individual yields.

(ii) With yields increasing less rapidly than in the past (due partly to the above factor) there will nevertheless be some requirement to reduce the dairy herd, in order not to exceed the quota. This can be estimated at 1.5% per year.

(iii) There will be a limited increase in the beef breeding herd as some producers switch from dairy to beef production — especially in less favoured areas.

(iv) There is considerable uncertainty as to whether or not average carcass weights will continue to follow the increasing trend of recent years; it is here assumed that this *will* be so.

The conclusion from these elements is that between 1984 and 1987 beef production will increase, due principally to a temporary increase in slaughterings of adult animals, but by 1990 the total breeding herd will be reduced to some 30 million head, producing around 7.2 million tonnes of beef and veal.

Demand for beef is subject to the usual influences of population growth and changes in private expenditure, but is also particularly sensitive to the relative consumer price of beef and other competing meats; in this regard the situation of beef is expected to deteriorate as the prices of pork and poultrymeat continue to be lower and to fall even further while that of beef has tended to increase in real terms. A level of demand of 7.0 million tonnes can probably be expected by 1990.

Sheepmeat

The supply of sheepmeat, which reached its lowest point in 1969 at 523 000 tonnes, was following a trend of gradual increase reaching a peak in 1980 (720 000 tonnes). It was in 1980, in October, that the common organization of the market came into force and this new regime is likely to stimulate increases in sheepmeat production within the Community. On this basis, the forecast of sheepmeat supply in 1990 is of just over 800 000 tonnes.

On the demand side, average consumption per head has fluctuated around a mean over the last decade of 3.5 kg/year; this disguises increasing consumption trends in Germany, France, Italy and the Netherlands and decreasing trends in the UK and Ireland. Future consumption trends are difficult to estimate as it is uncertain if the present market support system will reverse the downward trend in the UK. The lower growth rate of consumer's expenditure, the relatively high price of sheepmeat and the fact that consumers will substitute cheaper meats for more expensive ones tends to indicate that average consumption may remain at 3.7 kg/head or even fall in the future. This being so, consumption in 1990 could be about 1.0 million tonnes.

Pigmeat

The expansion of pigmeat production in the Community from 1960 to 1982 was very rapid, increasing by more than 2.5% per year on average over that time. A simple extrapolation of that trend would result in some 12.1 million tonnes of pigmeat in 1990 but this is unlikely to happen. At present, the pigmeat market is limited to internal demand and a certain quantity exported. Consumption per head has increased considerably, favoured by the very competitive price of pigmeat compared with beef and sheepmeat, and also by the more limited increase in the purchasing power of consumers. These influences will persist and consumption per head, which was 37.7 kg/head in 1982, can be expected to be 41 kg in 1990. To the resulting internal demand of 11.3 million tonnes, can be added 100 000 to 200 000 tonnes which is the net quantity which will probably be exported in 1990, giving a total supply of 11.4 to 11.5 million tonnes.

Poultrymeat

Production of poultrymeat expanded rapidly, in a similar way to pigmeat, at a rate of almost 6% per year from 1960 to 1982. Once again, an extrapolation of this trend is not realistic, as the market is contrained to internal demand and a certain limited export potential. As with pigmeat, the demand for poultrymeat is favoured by its very competitive price, especially in times of relative economic stringency, when substitution with higher priced meats occurs to a greater degree. Thus consumption, which was 14.6 kg per head per year in 1982, is expected to reach 16 kg per head in 1990; this represents a total internal demand of 4.4 million tonnes. To this can be added some 350 000 tonnes which, on the basis of present net export figures, will be exported, giving a total of about 4.75 million tonnes supply in 1990.

Total meat

In addition to beef and veal, sheepmeat, pigmeat and poultrymeat, there is a consumption of horsemeat, game, rabbit etc. and offals, which in 1982 gave of total consumption of all meats of 88.6 kg per head per year. The consumption of horsemeat has declined in recent years, that of offals increased, while game and other meats remain fairly constant. The total projected consumption of traditional meats is about 86 kg per head. Adding the other meat and meat by-products, leads to the conclusion that total meat consumption in 1990 will be about 95 kg per head per year in that year, or

26 million tonnes in total. Total supply of all meats should be at about the same level.

Eggs

Production of eggs expanded very rapidly in the 1960s (+3% per year) and has now slowed down to a rate of increase imposed by the very gradual expansion of the market. Consumption per head of 14.2 kg per year in 1982 is expected to increase to between 14.5 and 14.6 kg by 1990, representing an internal human demand of 4.0 million tonnes. To this should be added 0.3 million tonnes of eggs for replacement stock and 0.12 million tonnes for net export, giving total supply of about 4.4 million tonnes in 1990.

Milk and milk products

On 31 March 1984, the Council decided to apply quotas to deliveries of milk of 99 024 000 tonnes (1) in 1984/85 and of 98 152 000 tonnes (1) from 1985/86 to 1988/89. The regime of production control has thus been decided for 5 years; the future will depend upon the attitude of producers and the evolution of the market. It could be that control measures will still be in existence. It may be assumed that initially average yields will decline as use of concentrated feed, at least for marginal production, is reduced. A certain number of cows and heifers will be fattened and slaughtered, and the proportion of milk produced which is delivered to dairies will also decline slightly. Thereafter, average yields will increase due to continuing genetic improvement and better management, but at a rate more in line with the long-term trend, since intensive feeding will be less prevalent than before. To respect the quotas, the dairy herd may need to decline at a rate equivalent to the long-term increase in yields (1.5%), and deliveries will be at or about the quota quantity (98.2 million tonnes).

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(1) These figures do not include the reserve of 335 000 tonnes agreed by the Council in its decision.

On the demand side, a continuing increase in demand for cheese and cream (highly correlated with consumer expenditure) contrasts with a decline in demand for butter. For fresh milk products a long term decline seems to have reversed in 1981, and the outlook is uncertain, and liquid milk itself seems to be increasing in consumption per head.

Taken all together, with demographic and economic forecasts, consumption in 1990 will be of about 87 million tonnes in milk equivalent.

Fruit and vegetables

A complete economic analysis of the fruit and vegetable sector is a complex and demanding exercise due to the number of products involved and the frequently imperfect data available. The estimates are based on trends seen in the data available at Community level, (i.e. limited to products for which consumption data exists) and are summarized in the table below.

Fruit and vegetables: supply and demand 1982 and 1990, according to trends for the Community of the Ten

	Consumption per head (kg)		Total consumption million tonnes		Production million tonnes	
	1982	1990	1982	1990	1982	1990
Apples	18.0	22.0	4.9	6.1	4.4	6.9 (3)
Pears	7.0	7.0	1.9	1.9	2.0	2.0 (3)
Peaches (1)	6.4	7.3	1.7	2.0	2.4	2.4
Total fresh fruit	54.9	60.0	14.9	16.6	13.7	16.8
Oranges, clementines, etc.	17.5	18.5	4.8	5.1	2.3	3.4 (3)
All citrus fruit	29.2	32.1	7.9	8.8	4.0	4.3 (2)
Tomatoes of which:	11.4	11.9	3.1	3.3	7.3	(9.9) (3)
processed tomatoes	10.5	13.3	2.9	3.6	4.6	(6.9) (3)
Cauliflowers	5.1	(4.7)	1.4	1.3	1.4	1.4 (3)
All vegetables	103.1	113	28.0	31.2	31.8	36.1

(1) As fresh fruit and processed fruit.
(2) From trend of harvested production.
(3) From trend of market balances.
N.B. Figures in brackets, resulting from trends, are considered unlikely to be realized; for tomatoes, restrictive measures will limit production.

Wine

Although the wine harvest varies greatly from one year to another, there is a tendency for production to increase (annual trend since 1971/72 of +1.0% for all wine, and of +0.29% for table wine).

On the assumption that the measures decided in 1982, and those adopted at the beginning of 1984, were applied, for the 1990 horizon a slight reduction in table wine production could be forecast (to around 117 million hl) and a slight increase in the production of other wines (reaching about 45 million hl). Thus the total quantity of wine produced would be around 160 million hl.

Unlike production, internal utilization of wine shows a clear tendency to decline, at an annual rate of −0.75%. If one extrapolates this trend up to the 1990/91 marketing year, one arrives at an internal use of 130 million hl (compared with 136.2 million hl in 1981/82). This figure is confirmed when consumption per head and population change are taken into account, but could be slightly higher when income change is included in the estimation.

Tobacco

If there is no change in the policy applied in the tobacco sector, it is estimated that the total area planted to tobacco (currently 175 000 ha in the Community, particularly in France, Greece and Italy) will stay the same. However, as a result of increases in yields, tobacco production could still increase, and by 1990 the harvest could be of the order of 313 000 tonnes of baled tobacco (annual rate of increase since 1972: +1.2%).

Consumption of cigarettes is in decline, so that total consumption of tobacco is following a negative trend. It is probable that internal demand for tobacco will continue to decline in future (from 568 400 tonnes in 1981/82 to 500 000 tonnes by 1990). At present, only about 34% of total production is of the 'light air cured' and 'flue cured varieties' and represent quantities for which there is an internal market demand. These varieties will increase in their importance and the rate of self-sufficiency will increase from 48% to 63%.

Self-supply of the Community

The degree of self-supply, defined as domestic production as a percentage of total domestic use, has exhibited varying degrees of change in recent years, according to the product in question.

With several products, there is a chronic tendency for production to increase much faster than demand. Such products are beef, milk, sugar, wine and cereals. The adoption of quotas on milk deliveries has limited the increase in production but not resolved a position of supply exceeding internal demand. That decision has also had consequences for beef production creating a considerable short-term increase in supply, but an improved balance in the longer term. Present trends, if they continue to the end of the decade, will result in excesses of production over Community demand of:

11 million tonnes of milk,
1.5 million tonnes (or more) of sugar,
30 million hl of wine,
33 million tonnes of cereals,
0.2 million tonnes of beef.

Degree of self-supply (%) of major agricultural products

EUR 10

	1973	1982	1990
Total cereals	90	105	127
Potatoes	101	101	100
Sugar	92	154	122
Wine	90	94	123
Total meat	92	100	100
Total beef and veal	85	102	103
Pigmeat	101	101	101
Sheep and goatmeat	61	72	89
Poultrymeat	103	112	108
Milk products	108	118	113
Eggs	99	103	102
Tobacco	:	48	63

In the context of this analysis, it should be noted that the demand being examined is that within the European Community; there is also a demand for EC agricultural products in countries outside the Community, but this export demand is influenced by such factors as world harvests (especially that in the USSR), volatile market prices, exchange rates, export policies of major producers, terms of credit and so on. These things are extremely difficult to predict and the resulting forecasts are less reliable than those for internal Community demand.

World population is rising to a forecast 5 300 million in 1990, of which 4 000 million will be in 90 developing countries. [1] The GDP growth of these countries was expected to rise at a much higher rate than that of developed countries. In view of recent developments in the indebtedness of developing countries and adverse shifts in the terms of trade, [2] the less optimistic scenario assumed by the FAO forecasts seems more likely.

There will nevertheless be an increase in GDP and in demand in developing countries. Demand for food in these countries is expected to exceed supply and the resulting net import trade in 1990 is forecast as 67.3 million tonnes of cereals and 16.7 million tonnes of milk and dairy products, which, along with other imports, represents a total of USD 11 400 million (1975 dollar value). With regard to cereals, other forecasts indicate that the deficit of developing countries could be above the level cited by FAO.

The International Wheat Council [3] has predicted rates of change in production, use and trade, which imply that by 1990 developing countries' needs could be in excess of 100 million tonnes of cereals, of which 60% could be wheat.

In addition to developing countries, important markets for cereals are found in the USSR and other centrally planned economies. IWC forecasts for the

(1) *Agriculture: Toward 2000*, FAO 1981.

(2) *Commodity review and outlook*, FAO 1984.

(3) *Long-term grain outlook*, International Wheat Council, 1983.

USSR, Eastern Europe and Cuba show a forecast decline in imports of these countries, but imply a continuing deficit in 1990 of 38 million tonnes of cereals. Asian centrally planned economies would require 19 million tonnes of cereals in the same year. Total world trade in grains is increasing and would be of the order of 235 million tonnes by 1990 (compared with 209 million tonnes in 1979-81).

The Community will continue to supply its share of the world market in agricultural products and expects to increase its exports in line with international trade.

Conclusions

The foregoing analysis of trends, both in the Community and on world markets, indicates that while for some products supply and demand are developing in harmony, for others a certain disequilibrium is continuing.

Faced with such a situation, the Community will pursue its efforts to adapt the common agricultural policy to this evolution. The pursuit of the rationalization of the CAP should ensure the participation of the Community in world markets on a sound basis, that is to say, with increasing competitiveness and a lower cost.

This policy does not imply the abandonment of the principles of the CAP and its achievements. On the contrary, it will provide, for the future, the realization of the fundamental objectives of the CAP in a manner compatible with the economic realities of the 1980.

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