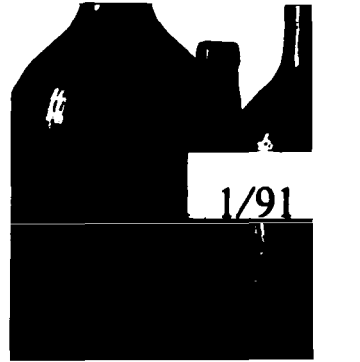
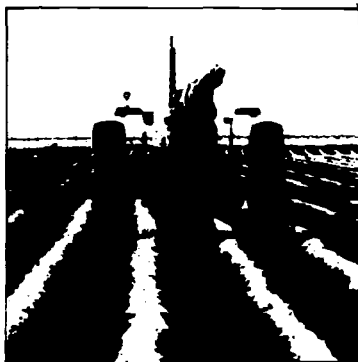
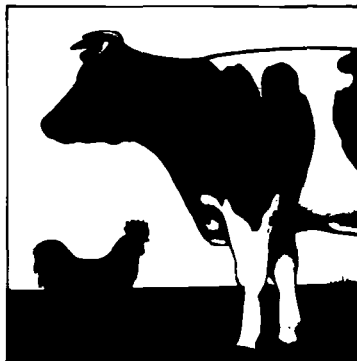
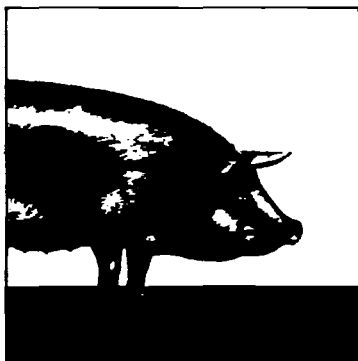
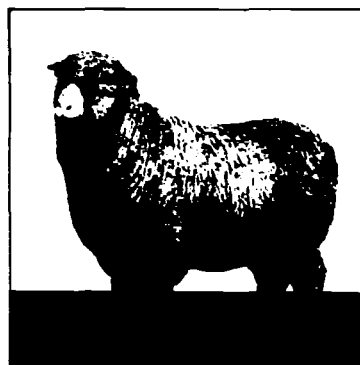
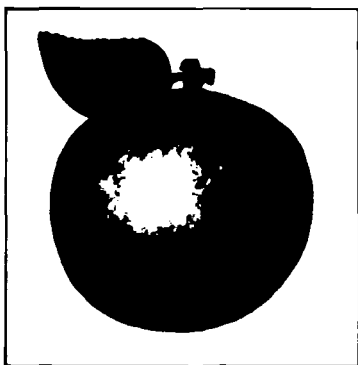




agricultural prices 1991/1992

Commission proposals



MARKET

AGRICULTURAL PRICES

1991/1992

Commission proposals

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N.B. This issue of Green Europe is based on Document COM(91) 72 final of 1st March 1991: "Commission proposals on the prices for agricultural products and on related measures (1991/92) - Volume I - Explanatory memoranda".

1. General considerations

In its communication (COM(91)100 final) of 1 February 1991 on the Development and Future of the Common Agricultural Policy the Commission analysed the present operation of the Policy and set out the objectives and guidelines that should govern its future development. This Reflections Paper has now launched a debate on the future direction of the policy. This debate can be expected to continue over the next few months, at the end of which the Commission will draw its conclusions and present specific proposals.

It is desirable that the debate should take place in conditions that will distract as little as possible from the fundamental issues raised by the Commission's Reflections Paper. Accordingly, the Commission considers that its price proposals for 1991/92 should not comprise measures that would prejudice the debate and should, as far as possible, seek to roll-over the present arrangements for a further year. This would allow the reform proposals to be discussed, adopted and implemented in the best possible conditions.

The present and foreseeable budgetary situation will not however allow for proposals that avoid any corrective action. In particular the Council Decision (88/377/EEC) concerning budgetary discipline requires that the necessary measures be taken to respect the guideline. While the Commission will use its management powers to help redress the present serious budgetary situation, it is clear that such actions on their own will not be sufficient to satisfy the budgetary discipline requirements. Accordingly the price proposals and associated measures for 1991/92 must include actions essential to meet the Community's obligations in this respect. In accordance with Article 6 of Council Decision (88/377/EEC) the Council is requested to act on these proposals within a period of two months.

2. Agricultural market situation and outlook

The sharp improvement in the agricultural situation experienced in 1989 in the Community has been largely offset by a serious deterioration of the markets in 1990 especially during the second half of the year. This reversal of the situation was certainly influenced by special events, such as the drought in some regions, the health problems in the animal sector, the Iraq embargo, German unification, the changes in Eastern Europe, etc. But the main reason was in fact the persistent structural imbalances on most markets, which were only temporarily reduced in the late 1980s. This conclusion seems to be confirmed not only by the depressed market situation in 1990 but also by the worrying short and medium-term outlook for the Community as well as for the world market.

This deterioration has been reflected in a sometimes very marked fall in producer prices, especially for animal products, after the relative improvement recorded in 1989.

Another sign of the growing market imbalances for most products is the recent growth in public stocks in the major sectors, after the sharp reduction in previous years. This increase in intervention stocks shows that we have again entered an era of oversupply putting considerable pressure not only on the Community budget but also on the markets and consequently on producer prices and farm incomes.

However, it is essential to look not at the current situation of the markets, but also at the medium-term prospects, which are not very promising.

Indeed, market forecasts carried out by the Commission and including estimates for the former GDR, indicate that the risk of imbalances is increasing. Production is expected to be in excess of possible outlets in the case of cereals, where increases in yields are boosting output, oils and fats, and sugar. The same applies to the markets in animal products, where there could be problems for milk, beef and sheepmeat.

The recovery of the world market for many agricultural products observed during the last few years was of short duration. After the increase in world prices in 1988, and the stabilization in 1989, world markets are again deteriorating even further and faster than expected. Apart from special factors such as the Gulf crisis, the changes in Eastern Europe, the drop in demand in some important importing countries, the main elements of this new situation are the sharp increase in world production for several commodities, in particular wheat, and the rebuilding of world stocks. As a result, export prices are now well below those prevailing at this time last year.

3. Budgetary context

The growing market imbalances outlined above lead to rapidly increasing pressures on the budget. According to latest estimates, EAGGF guarantee expenditure could increase by some MECU 7 900 in 1991 as compared to 1990 (+32%) if no corrective measures are taken. Without such measures another substantial increase is expected for 1992.

It is true that market imbalances are not the only factor explaining this spectacular increase. The budgetary situation is also affected by the devaluation of the dollar against the ECU and by the integration of the five new Länder into the Community. However, the underlying structural imbalances in the markets will play a predominant role in 1991, and their importance is expected to increase in 1992.

The 1991 budget provided for guarantee expenditure of MECU 31 516, i.e. MECU 995 below the agricultural guideline of MECU 32 511. This amount included already provisions for the integration of the five new German Länder, as well as for the second stage of accession of Portugal.

However, the market situation for certain products has continued to deteriorate, and budgetary needs have increased accordingly. If no corrective action is taken requirements could well reach some MECU 32 991, thereby exceeding the budgetary provisions by MECU 1 475 and the agricultural guideline by MECU 480.

Furthermore the dollar depreciated in comparison to the rate used for establishing the budget. This implies extra expenditure of which MECU 400 must be financed by the EAGGF-Guarantee Section (according to Article 13 of Council Decision 88/377/EEC regarding budgetary discipline). As a result, global budgetary needs will exceed the 1991 budget by MECU 1 875 and the agricultural guideline by MECU 880, if no corrective action is taken.

To cope with this situation the Commission intends to present a supplementary budget in due course increasing overall budgetary provisions to the level of the agricultural guideline (MECU 32 511).

However, once this supplementary budget is adopted there will nevertheless remain an amount of MECU 880 exceeding the increased budget and the guideline, if no corrective measures are taken.

This situation gives a special significance to the rules on budgetary discipline (Council Decision 88/377/EEC of 24 June 1988).

In addition, the Commission would recall the joint statement adopted by the Parliament, the Council and the Commission on the occasion of the revision of the financial perspectives carried out to accommodate German Unification. The three institutions agreed that if agricultural expenditure resulting directly from German Unification could not be fully financed within the limits of the guideline without affecting the smooth operation of the Common Agricultural Policy, and if the Commission therefore felt that additional appropriations should be raised beyond the present agricultural guideline, the Commission would put the necessary proposals (amendment to the Decision on budgetary discipline and revision of the financial perspective in accordance with the 1988 interinstitutional Agreement) before the Council and Parliament to enable the budgetary authority to examine them as quickly as possible.

The budgetary costs of unification are estimated at ECU 1 315 million in 1991 and some ECU 1 450 million in 1992. But the sharp increase in expenditure over recent months can be only partially attributed to German Unification. Its basic cause lies in the growth of structural surpluses across a range of commodities which will be reflected in significant increases in budgetary expenditure not just in 1991 and in 1992 but in succeeding years also. In these circumstances the process of restoring balance to the markets and bringing expenditure under control becomes the immediated priority. Accordingly, it is not considered opportune to propose an increase in the present agricultural guideline.

The Commission would draw attention also to the implications for budgetary expenditure and for the guideline of the policy changes outlined in its communication (COM(91) 100 final) referred to at the beginning of this document.

4. Price proposals and related measures

The analysis of the agricultural situation in the 1990/91 marketing year and the market outlook for the coming years clearly indicate that, after two years of relief and despite considerable efforts of adjustment over a number of years, market imbalances are growing again and that prospects for the foreseeable future are not encouraging. This new deterioration in the situation calls for an in-depth reform of the Common Agricultural Policy in order to tackle the problems at their roots.

Taking into account that in-depth reform of a number of common markets organisations is needed and that specific proposals to do so will be presented this year, the Commission would have preferred, at this stage, to propose a simple roll-over of present institutional prices for one year until the reform measures have been adopted and come into effect.

However, the considerable deterioration of the budgetary situation for 1991 and the worsening prospects for 1992 oblige the Commission, in the interest of budgetary discipline, to supplement its roll-over price proposals for the 1991/92 marketing year by a number of specific proposals designed to contain agricultural expenditure within the limits laid down by the budgetary guideline.

a) Common prices

The Commission considers that for the majority of products it is desirable to propose the continued application of 1990/91 prices subject, of course, to the effects of the application of the stabiliser mechanisms. Nevertheless, for certain sectors where a specific market situation applies or a major rise in budgetary expenditure occurs, the Commission considers that price reductions are necessary.

Thus, for durum wheat, the 7% reduction in the intervention price is based upon the progressive move towards the price of soft wheat. For rice, which is a sector subject neither to the stabiliser arrangements nor to the coresponsibility levy, a reduction of the intervention price of 3% is proposed in order to limit the rise in production. For sugar, the Commission proposes a linear reduction of 5% in institutional prices. For oil seeds and protein crops, taking into account that world market price levels have deteriorated in relation to the internal Community support, the Commission proposes that support prices should be reduced by 3%. The same reduction is proposed for hemp and flax. For tobacco, the increase of expenditure due notably to the excessive development in the production of certain varieties, calls for a radical change of the basic common organisation of the market. In the meantime the Commission proposes that prices and premiums for the various tobacco varieties are reduced by 10% on average. For wine no price change is proposed but a reduction is proposed in the price of support distillation. The Commission proposes a 2% price reduction for sheepmeat, offset in the case of the least-favoured regions by an increase in the ewe premium from ECU 4 to ECU 5.5.

b) Related measures

As already mentioned, in accordance with its Reflections Paper (COM(91) 100 final) the Commission intends to propose during the next few months important changes affecting several common market organisations. For this reason the related measures for 1991/92 are limited to those essential from the point of view of market balance and budgetary discipline.

In order to discourage excessive deliveries of beef into intervention arising from the automatic operation of the "safety net", the Commission proposes to merge the main features of the "safety net" and normal tender intervention systems. Under the new system, the provision for automatic purchases at 80% of the intervention price will disappear and at the same time the ceiling on the quantities which can be purchased by tender will be removed. This will allow for more selective action by the Community in situations where intervention is essential to market support.

Taking account of the increasing disequilibrium and sharp increase in projected budgetary expenditure in the cereals sector, the Commission considers that it is impossible to maintain the coresponsibility levy at 3% of the intervention price. While a very substantial increase could be justified by the likely evolution of markets and of the budget, the Commission proposes to fix the level of the coresponsibility levy at 6% for the 1991/92 marketing year.

In order to improve the effectiveness of the set-aside scheme and to fulfil the commitment taken by the Commission on the adoption of the agricultural prices for the current marketing year the Commission proposes the introduction of a special scheme to encourage temporary set-aside of land normally used for cereals or other supported crops.

This scheme will provide that producers who undertake to set aside 15% of the land which they sowed to cereals and other supported crops for the 1992 harvest will have the coresponsibility levy paid for 1991 reimbursed.

In the milk sector, a significant cut in the total guaranteed quantities would be necessary to bring the market into balance. However, it is proposed to limit the reduction in the total guaranteed quantities to 2% for 1991/92. It is proposed also to adjust the butter intervention system to avoid purchases at the full intervention price.

c) Agrimonetary measures

In July 1988, the principle was accepted to abolish all existing monetary gaps for stable currencies in four steps, the first step being applied for the 1988/89 marketing year. For the currencies not respecting the narrow band in the EMS, it was agreed that the Commission should apply an adequate system for abolishing the variable monetary gaps. The agrimonetary proposals for 1991/92 are mainly based on these principles:

- for Member States with fixed currencies, all the monetary gaps have already been dismantled, except for cereals in Germany and the Netherlands. In these cases, a complete dismantlement of the positive gaps (without application of MCAs) is proposed;
- for the United Kingdom and Spain, a dismantlement of one third of the monetary gaps is proposed;
- the Greek drachma, which is not kept within a margin of fluctuation with regard to the other currencies in the EMS, requires a more substantial dismantlement for 1991/92. It is proposed to do away with two thirds of the remainder of the present gap after the automatic dismantlement resulting from the monetary realignments of 1990;
- these dismantlements for floating currencies are slightly adjusted so as to reduce the number of green rates;
- no dismantlement is proposed for the Portuguese escudo as its present monetary gap is very small.

Table 1 - Price proposals in ecus for individual agricultural products

Product and type of price or amount (Period of application)	1990/91 Decisions		Propositions 1991/92		Spain			Portugal		
	Amounts ecus/t(1)	% change (2)	Amounts ecus/t	% change	Amounts 1990/91(1)	in ecus/t 1991/92	% change	Amounts 90/91 (1)	in ecus/t 1991/92	% change
	2	3	4	5	6	7	8	9	10	11
Common wheat 1. 7.91-30. 6.92										
- Target price	234,22	- 2,68	233,26	- 0,41	234,22	233,26	- 0,41	234,22	233,26	- 0,41
- Intervention price breadmaking wheat (3)	168,55	- 3,00	168,55	0,00	168,55	168,55	0,00	210,80	210,80	0,00
- (Intervention price feed wheat)	160,13	- 3,00	160,13	0,00	160,13	160,13	0,00	200,26	200,26	0,00
Barley 1. 7.91-30. 6.92										
- Target price	213,29	- 2,65	212,33	- 0,45	213,29	212,33	- 0,45	213,29	212,33	- 0,45
- Intervention price	160,13	- 3,00	160,13	0,00	160,13	160,13	0,00	160,13	160,13	0,00
Maize 1. 7.91-30. 6.92										
- Target price	213,29	- 2,65	212,33	- 0,45	213,29	212,33	- 0,45	213,29	212,33	- 0,45
- Intervention price	168,55	- 3,00	168,55	0,00	160,55	168,55	0,00	168,55	168,55	0,00
- Aid for flint maize	124,79	-19,35	100,00	-19,87	124,79	100,00	-19,87	124,79	100,00	-19,87
Sorghum 1. 7.91-30. 6.92										
- Target price	213,29	- 2,65	212,33	- 0,45	213,29	212,33	- 0,45	213,29	212,33	- 0,45
- Intervention price	160,13	- 3,00	160,13	0,00	160,13	160,13	0,00	160,13	160,13	0,00
Rye 1. 7.91-30. 6.92										
- Target price	213,29	- 2,65	212,33	- 0,45	213,29	212,33	- 0,45	213,29	212,33	- 0,45
- Intervention price	160,13	- 3,00	160,13	0,00	160,13	160,13	0,00	160,13	160,13	0,00
Durum wheat 1. 7.91-30. 6.92										
- Target price	287,38	- 6,13	268,01	- 6,74	287,38	268,01	- 6,74	287,38	268,01	- 6,74
- Intervention price	235,96	- 6,87	219,44	- 7,00	212,71	208,63	- 1,92	235,96	219,44	- 7,00
- Aid (ECU/ha)	171,14	+ 7,83	187,66	+ 9,65	110,79	148,23	+34,70	-	187,66	-
Rice 1. 9.91-31. 8.92										
- Target price - husked rice	546,13	0	533,08	- 2,39	546,13	533,08	- 2,39	546,13	533,08	- 2,39
- Intervention price - paddy rice	313,65	0	304,24	- 3,00	313,65	304,24	- 3,00	344,57	328,98	- 4,52
- Aid for indica (ECU/ha)	250,00	-16,67	200,00	-20,00	250,00	200,00	-20,00	250,00	200,00	-20,00
Sugar 1. 7.91-30. 6.92										
- Basic price for sugar beet	40,00	0,00	38,00	- 5,00	47,09	45,49	- 3,40	42,83	40,83	- 4,70
- Intervention price for white sugar (*)	53,01	0,00	50,36	- 5,00	61,61	58,64	- 4,80	52,47	50,70	- 3,40

(*) ECU/g.

(1) Including the effect of applying the stabilizers (Reg. 1487/90), and the agrimonetary reduction following the realignment on 5.1.1990.

(2) Without the agrimonetary effect.

(3) For the 1990/91 marketing year, this price was increased by ECU 3.47 per tonne for a higher quality. A premium of ECU 3.37 per tonne is proposed for 1991/92 (-3.00%).

Price proposals in ecus for individual agricultural products (cont'd)

Product and type of price or amount (Period of application)	1990/91 Decisions		Proposals 1991/92		Spain			Portugal		
	Amounts ecus/t	% change	Amounts ecus/t	% change	Amounts 1990/91	in ecus/t 1991/92	% change	Amounts 1990/91	in ecus/t 1991/92	% change
	2	3	4	5	6	7	8	9	10	11
Olive oil 1.11.91-31.10.92										
- Production target price	3.220,1	0	3.220,1	0	3.220,1	3.220,1	0	3.220,1	3.220,1	0
- Intervention price	2.158,7	0	2.158,7	0	1.751,2	1.853,1	5,8	2.075,8	2.096,5	1
- Production aid	708,3	0	708,3	0	398,1	458,5	15,8	354,6	425,3	19,9
Rapeseed 1. 7.91-30. 6.92										
- Target price	449,4	0	435,9	- 3	420,3	413,3	- 1,7	449,4	435,9	- 3
- Intervention price	408,9	0	394,7	- 3	377,8	372,1	- 1,5	408,9	394,7	- 3
Sunflower seed 1. 8.91-30. 6.92										
- Target price	582,5	0	565,0	- 3	497,1	498,8	+ 0,3	582,5	565,0	- 3
- Intervention price	533,8	0	517,8	- 3	448,4	451,8	+ 0,7	533,8	517,8	- 3
Soya beans 1. 9.91-30. 6.92										
- Guide price	557,5	0	540,8	- 3	478,2	477,7	+ 0,3	557,5	540,8	- 3
- Minimum price	488,6	0	473,9	- 3	407,3	410,8	+ 0,9	488,6	473,9	- 3
Dried fodder - Guide price (1) 1. 5.91-30. 4.92	178,81	0	178,81	0	169,99	174,3	+ 2,5	178,81	178,81	0
Peas and field beans 1. 7.91-30. 6.92										
- Activating price	448,8	0	433,4	- 3	448,8	433,4	- 3,0	448,8	433,4	- 3
- Guide price	294,7	0	285,9	- 3	294,7	285,9	- 3,0	294,7	285,9	- 3
- Minimum price - peas	257,3	0	249,6	- 3	257,3	249,6	- 3,0	257,3	249,6	- 3
- field beans	238,3	0	231,2	- 3	238,3	231,2	- 3,0	238,3	231,2	- 3
Lupins 1. 7.91-30. 6.92										
- Activating price	429,8	0	416,9	- 3	429,8	416,9	- 3,0	429,8	416,9	- 3
- Minimum price	288,5	0	279,8	- 3	288,5	279,8	- 3,0	288,5	279,8	- 3
Flax 1. 8.91-31. 7.92										
- Guide price (seed)	553,20	0	536,60	- 3	505,50	499,60	- 1,2	553,20	536,6	- 3,0
- Fixed-rate aid (fibre) (per ha)	374,36	0	363,13	- 3	263,38	313,26	+18,9	263,38	313,26	+18,9
Hemp 1. 8.91-31. 7.92										
- Fixed-rate aid (per ha)	339,42	0	329,24	- 3	238,91	284,08	+18,9	238,91	284,08	+18,9
- Aid (seed)	249,60	0	242,10	- 3	249,60	242,10	- 3,0	249,60	242,1	- 3,0
Silkworms 1. 4.91-31. 3.92										
- Aid per box	111,81	0	111,81	0	79,78	95,80	+20,1	79,78	95,80	+20,1

(1) A 20% reduction in the aid is proposed.

Price proposals in ecus for individual agricultural products (cont'd)

Product and type of price or amount (Period of application)	1990/91 Decisions		Proposals 1991/92		Spain			Portugal			
	Amounts ecus/t	% change	Amounts ecus/t	% change	Amounts 1990/91	in ecus/t 1991/92	% change	Amounts 1990/91	in ecus/t 1991/92	% change	
	1	2	3	4	5	6	7	8	9	10	11
Cotton	1. 9.91-31. 8.92										
- Guide price	958,6	0	958,6	0	958,6	958,6	0	958,6	958,6	0	
- Minimum price	910,7	0	910,7	0	910,7	910,7	0	910,7	910,7	0	
Milk	1. 4.91-31. 3.92										
- Target price	268,1	- 3,50	268,1	0	268,1	268,1	0	268,1	268,1	0	
Butter											
- Intervention price	2.927,8	0	2.927,8	0	3.082,5	3.024,9	- 1,9	2.839,9	2.927,8	+ 3,1	
Skimmed-milk powder											
- Intervention price	1.724,3	0	1.724,3	0	2.105,5	2.026,7	- 3,7	2.100,0(1)	2.026,7	- 3,5	
Grana padano cheese 30-60 days											
- Intervention price	3.796,7	- 2,20	3.796,7	0							
Grana padano cheese 6 months											
- Intervention price	4.704,3	- 1,90	4.704,3	0							
Parmigiano-reggiano cheese 6 months											
- Intervention price	5.192,1	- 1,70	5.192,1	0							
Beef/veal	2. 4.91-31. 3.92										
- Guide price for adult bovine animals (2)	2.000	- 2,45	2.000	0	2.000	2.000	0	2.000	2.000	0	
- Intervention price quality R 3 cat. A	3.430	0	3.430	0	3.430	3.430	0	3.430	3.430	0	
- Intervention price quality R 3 cat. C	3.430	0	3.430	0	3.430	3.430	0	3.430	3.430	0	
		1991		1992							
Sheepmeat	7. 1.91- 6. 1.92										
- Basic price (carcase weight)	4.315,8	0	4.229,5	- 2	4.315,8	4.229,5	- 2	4.315,8	4.229,5	- 2	
Pigmeat	1. 7.91-30. 8.92										
- Basic price (carcase weight)	1.897	- 8,6	1.897	0	1.897	1.897	0	1.897	1.897	0	

(1) For the Azores the 1990/91 intervention price for skimmed milk powder is ECU 3/100 kg less than the price indicated, which is applicable on the mainland.

(2) Price per tonne (liveweight).

Price proposals in ecus for individual agricultural products

Product and type of price or amount (Period of application)	1990/91 Decisions		Proposals 1991/92		Spain (1)			Portugal (2)		
	Amounts ecus/t	% (3) change	Amounts ecus/t	% (3) change	Amounts 1990/91	In ecus/t 1991/92	% (3) change	Amounts 1990/91	In ecus/t 1991/92	% (3) change
	2	3	4	5	6	7	8	9	10	11
Fruits and vegetables - Basic price										
- Cauliflowers	1. 5.91-30. 4.92	- 1) 0	-	0	-	-	+ 5,2	-	-	+ 3,5
- Tomatoes	11. 6.91-30.11.91	- 1) 0	-	0	-	-	+16,0	-	-	+ 5,8
- Peaches	1. 6.91-30. 9.91	- 1) 0	-	0	-	-	+ 0,8	-	-	0
- Lemons	1. 6.91-31. 5.92	- 1) - 3,0	-	0	-	-	+10,8	-	-	+ 9,9
- Pears	1. 7.91-30. 4.92	- 1) 0	-	0	-	-	+ 8,5	-	-	+ 9,4
- Table grapes	1. 8.91-20.11.91	- 1) 0	-	0	-	-	0	-	-	+ 5,7
- Apples	1. 8.91-31. 5.92	- 1) 0	-	0	-	-	+ 8,1	-	-	+ 5,3
- Mandarins	16.11.91-29. 2.92	- 1) - 7,5	-	0	-	-	+ 5,9	-	-	0
- Sweet oranges	1.12.91-31. 5.92	- 1) - 7,5	-	0	-	-	+ 1,8	-	-	+ 4,7
- Apricots	1. 6.91-31. 7.92	- 1) 0	-	0	-	-	+ 8,9	-	-	+ 6,7
- Aubergines	1. 7.91-31.10.91	- 1) 0	-	0	-	-	+19,1	-	-	+ 6,1
- Clementines	1.12.91-15. 2.92	- 1) - 3,0	-	0	-	-	0	-	-	0
- Satsumas	16.10.91-15. 1.92	- 1) - 3,0	-	0	-	-	0	-	-	0
- Nectarines	1. 6.91-31. 8.91	- 1) 0	-	0	-	-	0	-	-	0

(1) Including price alignment (2nd alignment).

(2) Including price alignment (1st alignment).

(3) Without the effect of intervention thresholds and, for 1990/91, the monetary realignment.

Table wine (1)	1. 9.91-31. 8.92									
- Guide price Type R I	3,21	- 1,5	3,21	0	2,81	3,01	+ 7,1	-	3,21	-
- Guide price Type R II	3,21	- 1,5	3,21	0	2,81	3,01	+ 7,1	-	3,21	-
- Guide price Type R III	52,14	0	52,14	0	45,48	48,81	+ 7,3	-	52,14	-
- Guide price Type A I	3,21	+ 1,6	3,21	0	2,81	3,01	+ 7,1	-	3,21	-
- Guide price Type A II	69,48	0	69,48	0	69,59	65,04	+ 7,3	-	69,48	-
- Guide price Type A III	79,35	0	79,35	0	69,20	74,28	+ 7,3	-	79,35	-

(1) R I, R II et A I expressed in ECU/%/hl.

R III, A II et A III expressed in ECU/hl.

Price proposals in ecus for individual agricultural products (cont'd)

Product, group and variety	Decisions EUR-12 1990	1991 harvest - Proposals
	Price/premium/% change compared with 1989	Price/premium/% change compared with 1990
1	2	3
Tobacco	1) Price 0	Price -10% on average
	1) Average premium - 3,0	Premium -10% on average

Table 2. Agrimonetary proposals for the 1991/92 marketing year

MEMBER STATE	PREVIOUS SITUATION			1991/92 CONSEQUENCES			NEW SITUATION			CONSEQUENCES(2)	
	GREEN RATE	REAL GAP	APPLIED GAP	of automatic dismant. GREEN RATE	REAL GAP	DISMANTLEMENT	GREEN RATE	REAL GAP	APPLIED GAP	DEVALUATION	EFFECT PRICES
Product Group	ecu—nc	point	point	ecu—nc	point	point	ecu—nc	point	point	%	%
GREECE	GREEN MARKET RATE(1) = 250.780										
pigmeat	248.319	-1.811	0.0			-1.811	250.780	0.000	0.0	-1.779	1.811
sheepmeat	231.754	-8.210	-	238.250	-8.190	-4.100	245.742	-2.050	-	-3.883	4.018
poultry	212.503	-18.012	-3.8	232.541	-7.843	-5.140	244.179	-2.703	0.0	-4.788	5.005
fish	208.395	-21.505	-	229.864	-9.099	-5.907	243.022	-3.192	-	-5.414	5.724
cereals, sugar, wine,											
tobacco	230.472	-8.811	-7.3	238.250	-8.190	-4.100	245.742	-2.050	-1.0	-3.883	4.018
olive oil	232.153	-8.024	0.0	238.250	-8.190	-4.100	245.742	-2.050	0.0	-3.883	4.018
grain legumes	204.710	-22.505	-	228.862	-9.577	-8.674	244.179	-2.703	-	-8.273	8.893
cucumber, tomato,											
courgette, aubergine	231.988	-8.110	-			(3) -5.407	244.179	-2.703	-	-5.001	5.284
other crop pr.	222.905	-12.505	-	231.968	-8.110	-5.407	244.179	-2.703	-	-5.001	5.284
structure	230.337	-8.875	-	238.250	-8.190	-4.100	245.742	-2.050	-	-3.883	4.018
others	204.710	-22.505	-21.0	228.862	-9.577	-8.385	243.022	-3.192	-1.7	-5.827	6.187
SPAIN	GREEN MARKET RATE (1) = 147.294										
pigmeat	147.287	-0.005	0.0			-0.005	147.294	0.000	0.0	-0.005	0.005
sheepmeat	152.758	3.758	-			1.133	150.982	2.443	-	1.175	-1.181
beef	155.788	5.451	4.0			1.817	152.848	3.634	2.1	1.922	-1.885
sug. tob. seed, peas	153.498	4.042	2.5			1.599	150.982	2.443	1.0	1.888	-1.839
rice, oil ad, fr.veg	152.896	3.884	-			1.221	150.982	2.443	-	1.288	-1.252
cereals, cotton	154.213	4.487	3.0			1.257	152.210	3.230	1.7	1.318	-1.299
grain legumes	154.794	4.845	-			1.815	152.210	3.230	-	1.898	-1.889
other crop pr.	151.927	3.049	0.0			1.018	150.350	2.033	0.0	1.048	-1.038
others	154.794	4.845	3.3			1.815	152.210	3.230	1.7	1.898	-1.889
PORTUGAL	GREEN MARKET RATE (1) = 207.837										
all products	208.878	0.402	0.0			0.000	208.878	0.402	0.0	0.000	0.000
UNITED KINGDOM	GREEN MARKET RATE (1) = 0.801872										
pigmeat	0.800520	-0.144	0.0			-0.144	0.801872	0.000	0.0	-0.144	0.144
sheepmeat	0.778553	-2.837	-			-0.948	0.788791	-1.891	-	-0.920	0.928
beef	0.785232	-0.810	0.0			-0.810	0.801872	0.000	0.0	-0.803	0.810
crop products	0.778553	-2.837	-1.3			-0.948	0.788791	-1.891	0.0	-0.920	0.928
others	0.758185	-5.738	-4.2			-1.912	0.772145	-3.824	-2.3	-1.808	1.841

(2) From the packet price dismantlement

(1) Coefficient: 1.145109 week of reference: 8.02.91 - 12.02.91 (mca's applicable on 18.02.91)

(3) Applicable at the beginning of the campaign for milk

Agrimonetary proposals for the 1991/92 marketing year (cont'd)

MEMBER STATE	PREVIOUS SITUATION				DISMANT- LEMENT	NEW SITUATION			CONSEQUENCES	
	GREEN RATE	REAL GAP	APPLIED GAP			GREEN RATE	REAL GAP	APPLIED GAP	DEVALU- ATION	EFFECT PRICES
Product Group	ecu—nc	point	point	point	ecu—nc	point	point	%	%	
GERMANY	GREEN MARKET RATE ⁽¹⁾				= 2.35418					
cereals	2.37300	0.818	0.0	0.818		2.35418	0.000	0.0	0.825	-0.818
others	2.35418	0.000	0.0	0.000		2.35418	0.000	0.0	0.000	0.000
NETHERLANDS	GREEN MARKET RATE (1)				= 2.65256					
cereals	2.66000	0.313	0.0	0.313		2.65256	0.000	0.0	0.314	-0.313
others	2.65256	0.000	0.0	0.000		2.65256	0.000	0.0	0.000	0.000
BLEU	GREEN MARKET RATE (1)				= 48.5563					
all products	48.5563	0.000	0.0	0.000		48.5563	0.000	0.0	0.000	0.000
FRANCE	GREEN MARKET RATE (1)				= 7.89563					
all products	7.89563	0.000	0.0	0.000		7.89563	0.000	0.0	0.000	0.000
DENMARK	GREEN MARKET RATE (1)				= 8.97989					
all products	8.97989	0.000	0.0	0.000		8.97989	0.000	0.0	0.000	0.000
IRELAND	GREEN MARKET RATE (1)				= 0.878778					
all products	0.878778	0.000	0.0	0.000		0.878778	0.000	0.0	0.000	0.000
ITALY	GREEN MARKET RATE (1)				= 1781.45					
all products	1781.45	0.000	0.0	0.000		1781.45	0.000	0.0	0.000	0.000

(1) Coefficient: 1.145109

Table 3

Effect of Commission proposals on support prices for agricultural products expressed in ecus and in national currency

	% change in prices (1)	
	in ecus (2)	in national currency (2) (3)
Belgium	- 0,3	- 0,3
Denmark	- 0,3	- 0,3
Germany	- 0,3	- 0,4
Greece	- 1,4	3,1
Spain (4)	1,5	0,3
France	- 0,4	- 0,4
Ireland	- 0,1	- 0,1
Italy	- 0,8	- 0,8
Luxembourg	0	0
Netherlands	- 0,2	- 0,2
Portugal (4)	0,4	0,4
United Kingdom	- 0,2	0,9
EUR 12 (4)	- 0,2	- 0,1

- (1) Percentage variation between proposed support prices for 1991/92 and the support prices for 1990/91.
- (2) Support price (intervention or equivalent), weighted according to the share of the various products in the value of agricultural production covered by common prices.
- (3) Common prices in ecus, converted at green rates in this proposal. For the currencies not respecting the narrow band in the EMS calculation were done using the rates of the week ending on 12.02.91.
- (4) Including effect of alignment of Spanish and Portuguese prices on common prices under accession arrangements.

Table 4 - Stabilizers and production thresholds

	1990/91			1991/92
	Quotas or MQQ applicable	Market situation	Overrun	Quota or quantity applicable/proposed
Cereals	MQQ : 160 million t	Estimated production: 159.7 million t	No overrun	The same as for 1990/91
Sugar (white sugar eq.)	Quota A : 11,187 m t Quota B : 2,488 m t	Production (including carryovers) in m t Quota A : 10,833 Quota B : 2,419 Sucre C : 3,148 Total : 16,498		The same as for 1990/91
Isoglucose	Quota A : 240,743 t Quota B : 50,342 t	Estimated production within quotas		
Rape	MQQ EUR-10 : 4,500,000 t Spain : 12,800 t Portugal : 1,300 t	Estimated production: EUR-10 : 5,842,000 t Spain : 28,000 Portugal : -	EUR-10 : overrun of 29.8% resulting in a reduction of 6.97 ECU/100 kg (- 15.5%) in the target price Spain : -1.75 ECU/100kg in the target price (-4.2%) Portugal : no overrun	MQQ : the same as for 1990/91
Sunflower	MQQ EUR-10 : 2,000,000 t Spain : 1,411,800 t Portugal : 90,000 t	Estimated production: EUR-10 : 2,585,000 t Spain : 1,307,000 t Portugal : 56,000 t	EUR-10 : overrun of 29.8 % resulting in a reduction of 12.24 ECU/100 kg (- 21 %) in the target price Spain : no overrun Portugal : no overrun	MQQ : the same as for 1990/91
Soya	MQQ EUR-12 : 1,300,000 t	Estimated production: EUR-12 : 1,843,000 t	Overrun of 43.8 % resulting in a reduction of 16.733 ECU/100kg in the guide price for the Community of Ten (- 30.0 %) and 14.147 ECU/100kg for Spain (- 29.7 %)	MQQ : the same as for 1990/91
Peas, field beans and sweet lupins	MQQ EUR-12 : 3,500,000 t	Estimated production: EUR-12 : 4,833,000 t	Overrun of 38 % resulting in a reduction of 8.9 ECU/100 kg in the guide price for peas and field beans (-20%), 6.52 ECU/100 kg for sweet lupins	MQQ : the same as for 1990/91
Olive oil	O.M.G. EUR-12 : 1,350,000 t	Production will be estimated in March 1991	No overrun foreseen	MQQ : the same as for 1990/91
Wine	Optional distillation has a limit per producer. Compulsory distillation : unlimited volume. Price based on the quantity covered by the compulsory distillation scheme, as follows : 50 % of the guide price for the equivalent of 10 % of the volume used (a 9 million hl); 7.5 % of that price for the remainder.	Quantity covered by the compulsory distillation scheme: 17,950,000 hl	Yes : average price reduction for compulsory distillation of 27.55%	

	1990/91			1991/92
	Quote or MGO applicable	Market situation	Overrun	Quote or quantity applicable/proposed
Tobacco	Overall MGO EUR-12 : 389,700 t of leaf tobacco. Allocated by variety	Anticipated overall production : EUR-12 : 4412,000 t	Overrun in the case of cer- tain varieties	Overall MGO : EUR-12:389,700 t allocated by variety and group of varieties
Cotton	MGO : 782,000 t (EUR-12)	Estimated production: EUR-12 : 1,038,278 t	Overrun of 37.7 % Reduction of aid by 23,985 ECU/100 kg	MGO : EUR-12: to be fixed
Fresh tomatoes	Intervention threshold EUR-12 : 599,300 t	Withdrawals : 119,101 t (provisional)	No overrun	Intervention thresholds : the same as for 1990/91
Cauli- flowers	Intervention threshold EUR-12 : 57,300 t	Withdrawals : 98,903 t (provisional)	Overrun anticipated	3% of the average quantity produced for consumption, not including pro- ducts for proces- sing, in the last five years
Nectar- lines	Intervention threshold EUR-12 : 53,900 t	Withdrawals : 128,191 t (provisional)	Overrun anticipated.	10 % of average quantity produced same basis as for cauliflowers
Peaches	Intervention threshold EUR-12 : 336,900 t	Withdrawals : 501,578 t (provisional)	Overrun anticipated.	12 % of average quantity produced same basis as for cauliflowers
Apples	Intervention threshold EUR-12 : 318,500 t	Marketing year under way	Overrun anticipated	3 % of average quantity produced same basis as for cauliflowers
Oranges	Intervention threshold EUR-12 : 1,243,900 t	Marketing year under way		10 % of average quantity produced in the last five years plus 752,392 t
Lemons	Intervention threshold EUR-12 : 390,400 t	Marketing year under way		10 % of average quantity produced in the last five years plus 250,893 t
Satsumas	Intervention threshold EUR-12 : 32,000 t	Marketing year under way		10 % of average quantity produced in the last five years
Clémen- tines	Intervention threshold EUR-12 : 99,700 t	Marketing year under way		10 % of average quantity produced in the last five years
Mandari- nes	Intervention threshold EUR-12 : 71,800 t	Marketing year under way		10 % of average quantity produced in the last five years

	1990/91			Campaign 1991/92
	Quota or MGOs applicable	Market situation	Overrun	Quota or quantity applicable/proposed
Processed tomatoes	<p>Guarantee thresholds</p> <p>Concentrate : EUR-11 : 3,400,694 t Portugal : 747,945 t</p> <p> Peeled : EUR-11 : 1,502,628 t Portugal : 14,600 t</p> <p> Other : EUR-11 : 663,728 t Portugal : 32,192 t</p>	<p>Production :</p> <p>4,270,666 t with aid and 543,097 t without aid</p> <p>1,303,636 t with aid and 28,560 t without aid</p> <p>711,188 t with aid 142,496 t without aid</p>	<p>Overrun expected for Italy, Spain, Greece and Portugal</p> <p>Overrun for Italy and Greece</p>	<p>Concentrate : EUR 12 : 4,317,339 t</p> <p> Peeled : EUR 12 : 1,843,228 t</p> <p> Other : EUR 12 : 736,220 t</p>
Dried grapes	<p>Guarantee threshold</p> <p>Corrente : 68,000 t Sultane : 83,000 t Moscatel : 4,000 t</p>	<p>Production :</p> <p>42,000 t 34,000 t 3,500 t</p>	<p>No overrun</p>	<p>Some thresholds as in 1990/91</p>
Williams pears	<p>Guarantee threshold</p> <p>EUR-12 : 102,805 t</p>	<p>Production :</p> <p>76,072 t</p>	<p>No overrun</p>	<p>Some thresholds as in 1990/91</p>
Peaches in syrup	<p>Guarantee threshold</p> <p>EUR-12 : 582,000 t</p>	<p>Production:</p> <p>389,344 t</p>	<p>No overrun</p>	<p>Some thresholds as in 1990/91</p>
Milk	<p>Overall guaranteed quantity (including Community reserve and temporary suspension of 4.5 %)</p> <p>EUR-12 : 104,115,942 t (including Portugal and ex-DDR)</p>	<p>Deliveries forecast as 1989/90</p>	<p>No overrun expected</p>	<p>Reduction of 2%</p>
Sheepmeat	<p>Maximum guaranteed level for ewe flock</p> <p>63,400,000 head 18,100,000 for Great Britain and 45,300,000 for EUR-11 and Northern Ireland</p>	<p>Estimated 1990 flock:</p> <p>43,302,000 head for EUR-11 and Northern Ireland and 19,480,000 for Great Britain</p>	<p>Estimated overrun of 6.63% for EUR-11 and Northern Ireland and 7.62 % for Great Britain.</p>	<p>Same level as in 1990/91</p> <p>Expected overrun of 8.10 % for Great Britain and 6.45 % for EUR-11 and Northern Ireland</p>

Table 5

TRENDS IN ECONOMIC INDICES FROM 1980 TO 1989 IN REAL TERMS

(EUR-12)

Years	Expenditures EAGGF-Guarantee (1)	GNP total (2)	Final agricult. output (2)	Employm. in agric. in AWU	Final agric. output per pers. empl. (2)	NVA agric. (1)	NVA per AWU (1)
1980	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1981	89.0	100.1	99.2	95.6	103.8	98.2	102.7
1982	91.7	101.0	104.4	92.7	112.7	106.3	114.7
1983	110.5	102.5	104.9	92.1	113.9	101.6	110.3
1984	120.4	104.9	107.9	89.5	120.5	103.4	115.5
1985	125.8	107.4	107.8	87.1	123.8	97.3	111.7
1986	135.3	110.2	109.3	84.9	128.7	95.6	112.6
1987	(5) 133.9	113.1	110.5	82.2	134.4	92.0	111.9
1988	(6) 149.6	117.3	111.7	80.0	139.6	90.6	113.3
1989	(7) 132.6	121.3	112.1	77.5	144.7	98.2	124.1

- (1) In real terms (CNP deflator).
 (2) In constant prices.
 (3) Weighted average, for products with common prices, of support prices (intervention price or equivalent); in national currency real terms (CNP deflator). 1980/81 = 100.
 (4) Weighted average of all products and intermediate consumption in ecu, EUR 10.
 (5) "1987" Budget : from 1 January to 31 October 1987.
 (6) "1988" Budget : from 1 November 1987 to 15 October 1988.
 (7) "1989" Budget : from 16 October 1988 to 15 October 1989.
 (8) Deflated by the consumer price index.

GNP : Gross National Product at market prices.

NVA : Net Value Added at factor cost.

AWU : Annual Work Unit.

Sources : Eurostat - DG VI.

Table 6

Public stocks at year-end

(Volume)

('1000 t)

Product	30.11.1985	30.11.1986	30.9.1987	30.9.1988	30.9.1989	30.9.1990
Common wheat bread making variety	3.890	2.475	3.406	2.382	2.386	5.220
Common wheat feed wheat	8.012	6.085	3.417	1.756	264	150
Barley	4.651	3.793	4.326	3.572	3.211	3.700
Rye	1.108	1.148	1.055	876	1.068	1.520
Durum wheat	986	1.023	1.530	2.336	1.231	1.140
Maize	-	190	23	18	780	250
Sorghum	-	3	8	11	3	10
Sugar	-	16	-	-	-	-
Olive oil	75	283	325	408	191	70
Rape	-	-	-	38	-	-
Sunflower	-	28	-	147	8	8
Alcohol ('000 hl) Art.39	501	666	1.092	2.892	3.382	2.640
Leaf tobacco	7	27	3	1	8	-
Processed tobacco	4	7	20	6	3	-
Baled tobacco	4	6	5	40	66	66
Skimmed-milk powder	514	847	722	14	5	340
Butter	1.018	1.297	1.058	221	32	190
Beef carcasses	589	452	484	559	127	200
Boned beef	214	220	207	164	24	120
Pigmeat	26	-	-	-	-	-

Annex

Related measures accompanying the price proposals for 1991/92

Cereals

- Abolition of the special premium for breadmaking rye.
- Increase in the basic levy from 3 to 6%.
- Basic levy for 1991/92 reimbursed to growers who withdraw 15% of their arable land used to grow subsidized crops at the sowings for 1992.
- Adjustment of the aid for small producers to offset the increase in the levy.
- Aid for flint maize cut from ECU 125 to ECU 100/ha.

Rice

- Aid for indica rice cut from ECU 250 to ECU 200/t.

Olive oil

- Continuation of the current MGQ (1 350 000 t) for 1991/92 to 1993/94.

Oilseeds and protein crops

- Continuation of the current MGQs until end 1991/92.
- Change in the dates of estimating the harvest (October for rapeseed and sunflower seed, January for soya).
- Intervention for rapeseed and sunflower seed open from 1 November.
- 1991/92 marketing year to end on 30 June 1992 for all oilseeds.
- Support for rapeseed in Spain as for the other Member States.
- Development of the role of first buyer for soya.
- Possibility of calculating aid for soya in the same way as for rapeseed and sunflower seed.
- Abolition of the quality bonus for peas and field beans.
- Abolition of the monthly increases in the minimum price for peas and field beans.
- Abolition of the premium for switching to double-low rape.
- Aid for dried fodder reduced by 20%.

Textile fibres

- Maximum guaranteed quantity for cotton set at the same level as for the previous marketing year (752 000 t).

Wine

- Postponement of deadline for the submission of certain reports with proposals for a review of several essential aspects of wine market management (enrichment, compulsory distillation, demarcation of wine-growing areas, maximum sulphur dioxide contents of wine).
- Technical adjustments to facilitate market management and the implementation of voluntary abandonment measures (definition of wine-growing year, adjustment of the duration of long-term storage contracts for must).

Fruit and vegetables

- Change in restructuring aid for nuts and locust beans.

Milk

- Overall guaranteed quantities reduced by 2% for 1991/92.
- Abolition of the obligation to buy in butter at 100% of the intervention price if the market price is below a certain level (90 or 92%). Buying-in by tender if the market price is less than 92% of the intervention price.
- Co-responsibility levy kept at present level.

Beef

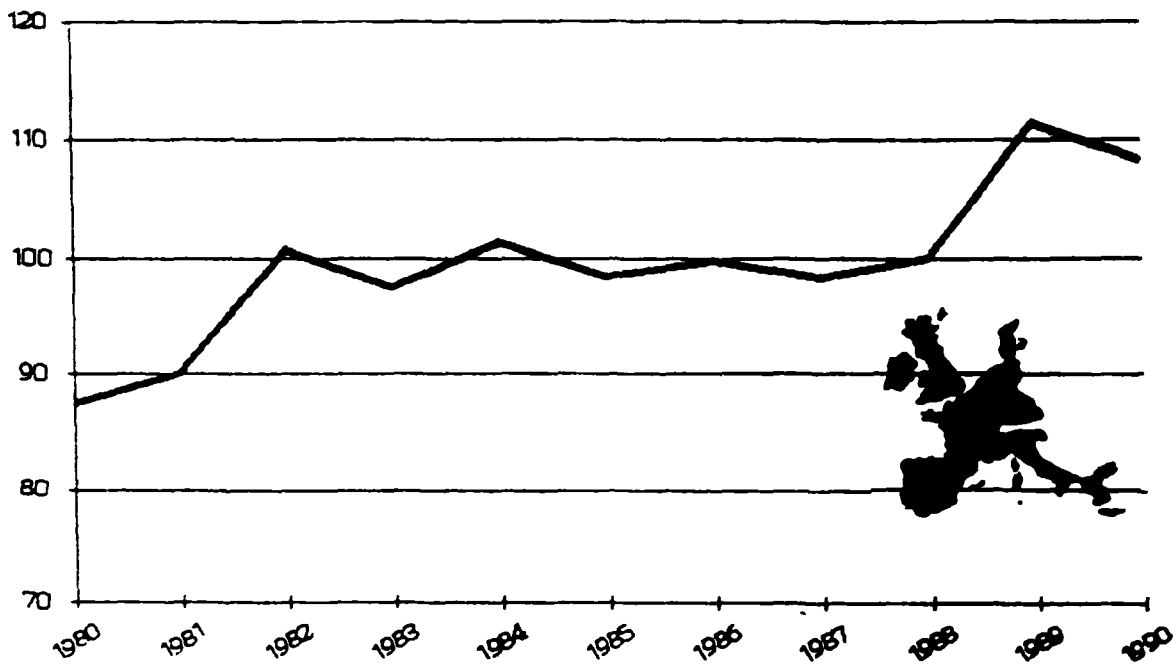
- Abolition of the 235 000 t ceiling on buying-in by tender. Abolition of the "safety net" mechanism providing for unlimited buying-in at 80% of the intervention price. All buying-in to be by tender. Intervention by tender will be triggered when the average Community market price falls below 80% of the intervention price and it will apply in regions where the prices are less than 76% of the intervention price.

Sheepmeat

- Private storage to be initiated without consulting the Management Committee.
- Increase of ECU 1,5 per head in the ewe premium under rural society measures and applying in less-favoured, mountain and hill regions.

Net value added (1) per person employed in agriculture (2)

"1985" (3) = 100



(1) At factor cost in real terms, adjusted on the basis of the GDP deflator.

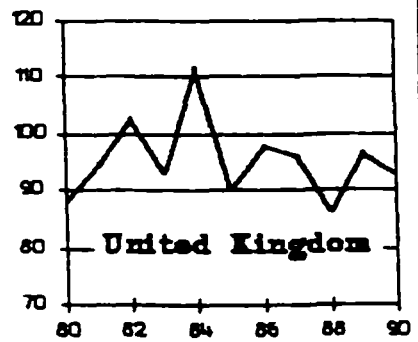
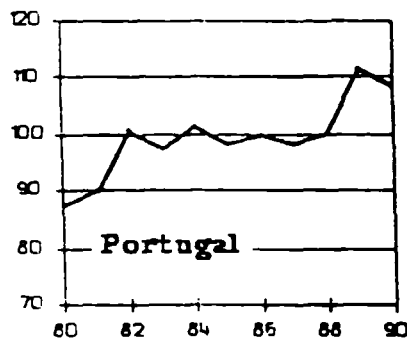
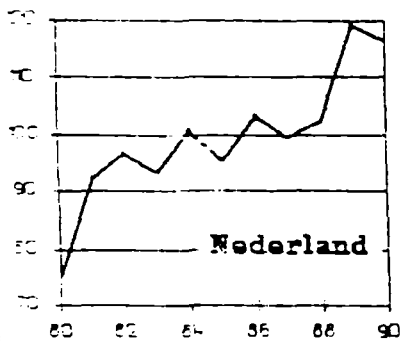
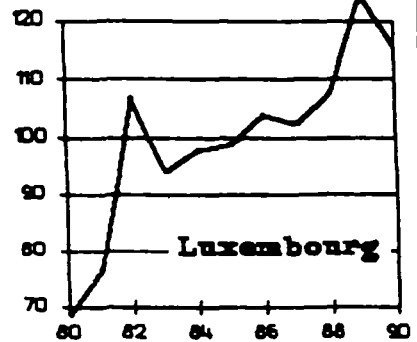
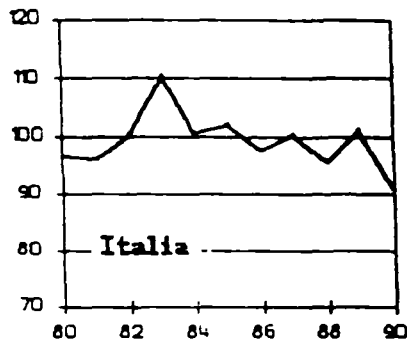
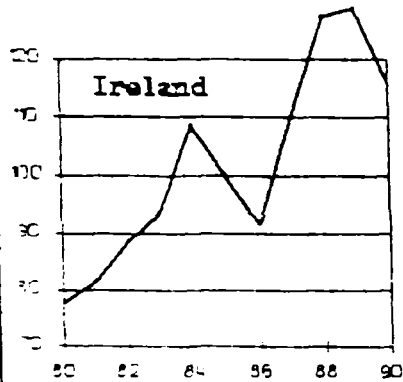
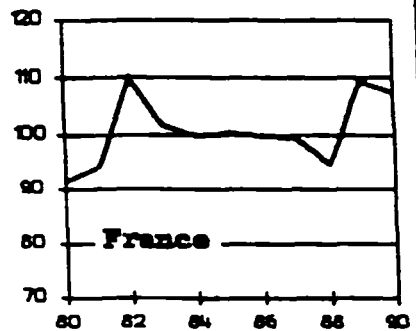
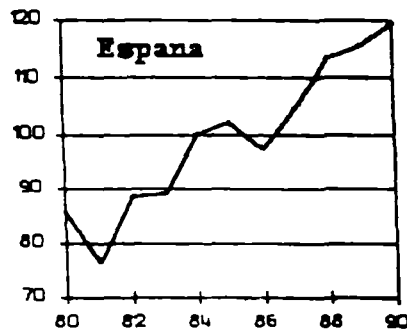
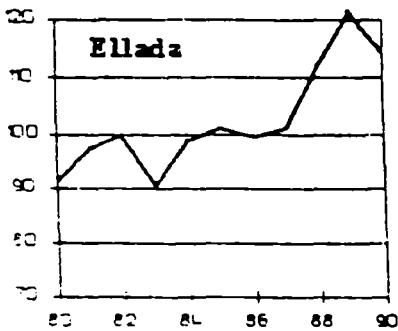
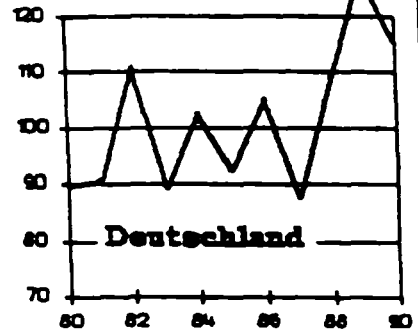
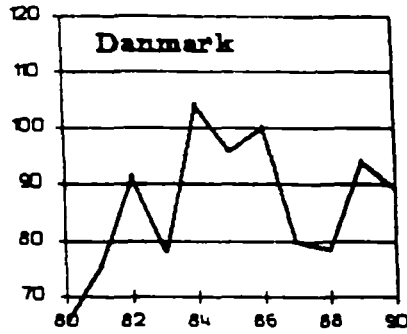
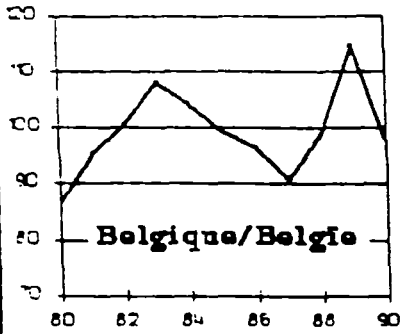
(2) Based on the number of work units.

(3) Average 1984, 1985, 1986.

Source : EUROSTAT - sectoral income index

Net value added per person employed in agriculture

"1985" = 100



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