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THE COMMON AGRICULTURAL POLICY AND AGRICULTURAL TRADE WITH THE DEVELOPING COUNTRIES

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192

THE COMMON AGRICULTURAL POLICY AND AGRICULTURAL TRADE WITH THE DEVELOPING COUNTRIES

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The common agricultural policy and agricultural trade with the developing countries

The developing countries have always had important trade relations with the Community and agricultural products have played a major role in those relations. This result has been achieved via the application of numerous specific measures of commercial policy. The role played by the common agricultural policy in this respect therefore deserves special attention.

Tangible results

Imports into the Community

Before examining the specific effects on the developing countries, it should be pointed out that the Community is by far the world's top importer of agricultural products—it alone absorbs not less than 26% of total world agricultural imports—and that in its trade with other countries in agricultural products (1) it had a net deficit of the order of 23 000 million ECU in 1980.

As can be seen from the table on the following page, the Community's agricultural imports from the developing countries rose, during the period 1973-80, from 10 000 million ECU to 19 000 million ECU, an increase of about 90%, and it

(1) SITC: food and live animals, beverages and tobacco, hides, skins, furskins (undressed), oil seeds, nuts and kernels, natural rubber, wood, lumber, cork, natural textile fibres, crude animal and vegetable materials, animal and vegetable oils and fats, starch, inulin, gluten and gluten flour.

is interesting to note that those imports increased more rapidly than the Community's total imports of agricultural products, which, over the same period, rose by only 75%.

The EEC's agricultural trade with the developing countries

	1973	1975	1978	1980
The EEC's agricultural imports from the developing countries				
– in 1 000 million ECU	9.9	11.2	17.1	18.8
– as % of total agricultural imports from outside the EEC	41	46	47	45
EEC's exports to the developing countries				
– in 1 000 million ECU	2.4	4.1	5.9	9.2
– as % of total exports to non-EEC countries	33	43	44	47
% of agricultural exports from the developing countries (1) taken by the EEC	32	27	30	:
% of agricultural imports into the developing countries (1) supplied by the EEC	15	17	18	:

(1) *Not* excluding trade among the developing countries.

Almost half the Community's agricultural imports come from the developing countries (45% in 1980). The Community is therefore a very import market for exports of agricultural products from the developing countries. In 1980 the Community took approximately one-third of their total exports of agricultural products. Per head of population the Community imported USD 100 of agricultural products from the developing countries, about twice the corresponding figure for the USA (USD 49) or Japan (USD 56).

An analysis of the tariff arrangements applicable to agricultural imports from the developing countries shows that, in terms of their total value, 60% enter the Community duty-free, over 30% face only a relatively low level of duty and 7% are in fact subject to levies.

Since these trade arrangements are much more favourable than the national provisions of the Member States before the application of the CAP, one might have expected a considerable development of agricultural imports from the developing countries.

This has not been the case. It would seem that the introduction of the CAP machinery has in fact had little effect on the developing countries' share of the Community's agricultural imports. Indeed, the proportion of the EEC's imports of agricultural products coming from the developing countries was practically the same in 1980 (45%) as in 1962 (43%), the year the CAP came into being.

This phenomenon reflects a fundamental problem, namely insufficient expansion of agricultural production in the developing countries to keep pace with the growth in their demand. This is illustrated by the fact that between 1962 and 1979 their market share did indeed fluctuate but those fluctuations followed fairly closely the fluctuations in the developing countries' share of the world agricultural products market, which in turn reflected changes in the supply of these products from the developing countries rather than changes in the Community's import policy.

The trend has not been the same for the various groups of developing countries. Between 1963 and 1978 Africa's share of the world market in agricultural products fell from 9% to 6%, Latin America's rose from 15% to 16%, the Middle East's from 1% to 12%, and southern and south-east Asia's share remained constant. At the same time, those developing regions which succeeded in considerably increasing their total exports (Latin America and the Middle East) also increased their share of the Community market, to the detriment of other regions which had achieved little or no increase in their total agricultural exports (particularly Africa).

The CAP does not seem to have had any significant effect on the breakdown of agricultural imports from the developing countries. Those products for which the developing countries are net exporters and which are imported into the EEC subject to rules adopted under the CAP (above all bovine meat and sugar) account for some 17% of their agricultural exports to the Community. This figure does not differ greatly from the proportion of exports to the world market as a whole accounted for by the same products (21%). If these two percentages are compared, it is to be seen that there is practically no difference between these countries' situation *vis-à-vis* the EEC and their situation *vis-à-vis* the rest of the world.

Community exports

The EEC is the world's second largest exporter of agricultural products (the USA holding first position) and the developing countries' second largest supplier of agricultural products. In 1980, it exported almost 20 000 million ECU of agricultural products world-wide, including 9 000 million ECU to the developing countries, (1) representing in 1979 10% of world agricultural imports and 16% of the developing countries' agricultural imports. By comparison, the products supplied by the USA accounted for 20% of world agricultural imports and 23% of developing countries' imports.

Just as the Community is an important market for the developing countries, they are an important market for the Community, taking 47% of its agricultural exports. This percentage is on the increase, even though the EEC's share in world trade has remained constant, at around 10%, after a slight increase when the CAP machinery was set up.

In analysing the increase in the developing countries' relative share of Community agricultural exports two separate periods can be distinguished: firstly, from 1963 to 1972, when the increase was the result of increased Community supply and affected all the developing countries; and secondly, from 1972 to 1978, when the increase resulted from greater demand in certain developing countries, particularly in the Middle East.

This increase in the developing countries' relative share of Community exports can be explained by:

(i) the increase in the developing countries' total agricultural imports. It is worthwhile noting that this increase was fairly sharp in 1973 and 1974 as a result of the food crisis at that time and the rise in the agricultural imports of oil-exporting developing countries;

(ii) a proportionally more rapid increase in their imports from the EEC, or, from another viewpoint, the strengthening of the Community's position as an exporter of agricultural products to the developing countries.

Most of the agricultural products exported by the EEC are subject to the CAP (90%) and the developing countries are net importers of most of these products. It can therefore be said that the development of Community agriculture has enabled the Community to meet an ever-increasing demand from the developing countries for foodstuffs, in particular for cereals and milk products, and to contribute in this way to world food security.

Although in the case of cereals the EEC occupies a relatively minor position (6.7% in 1981) on a world market dominated by the North American exporters, it has

(1) See table on p. 2

always occupied a dominant position in the world trade in milk products (72% of the world market in 1979).

In this context, a brief account should be given of the major contribution made by the Community in the sphere of food aid, [1] as the second largest donor after the USA. Under the 1980 Food Aid Convention, the Community undertook to provide an annual contribution of 1 650 000 tonnes of cereals, including 75% in the form of wheat or flour. In terms of a normal harvest in the Community, this means that out of 40 sacks of wheat produced, one sack is reserved as food aid for the developing countries. In the case of milk products, the present programmes provide for annual aid amounting to 150 000 tonnes of skimmed-milk powder and 45 000 tonnes of butteroil. These quantities represent 100% of total world food aid in the form of butteroil and 75% of the aid in the form of milk powder. The Community thus contributes in this way to the developing countries' security of supply and this role assumes particular significance in the light of the alarming forecasts concerning the world's food shortfall.

There are cases, however, where Community exports do compete with developing countries' exports. Some 20% of the EEC's agricultural exports to the world comprise products, largely sugar and beef and veal, of which the developing countries, taken as a whole, are net exporters, and present trends suggest that, in the medium term, ACP sugar is likely to be faced with ever-increasing competition—on the world and EEC markets alike—from beet sugar and isoglucose. It should not be forgotten, however, that the EEC's share of the world market in these two products is relatively small: 6% for beef and veal and 12% for sugar. Attention should also be drawn to the considerable efforts made by the Community to facilitate the disposal of these two products on the world and Community markets.

If, in any event, the situation regarding the developing countries' trade is looked at in a wider economic context, the disquieting gap between the slow expansion of their exports and the rapid increase in their imports can be seen to stem from trends on their domestic markets. By far the most important factor determining this situation is the slow rate at which agricultural production is progressing in the developing countries in relation to the growth in demand. There is also the fact that consumer habits in the developing countries have changed and that this has brought about an increase in imports of products which are in many cases difficult to produce locally (wheat, certain types of meat, milk products).

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[1] For further details, see 1981 Agricultural Report, pp. 7-18.

The growth in the EEC's exports in particular is in any case geared mainly to those developing countries whose domestic demand has outstripped production.

To conclude, the agricultural trade balance between the Community and the developing countries is very definitely in the latter's favour (9 600 million ECU in 1980).

The common agricultural policy and special commercial policy measures for the benefit of the developing countries

This brief analysis of the development of agricultural trade testifies to the openness of the Community to the world market in agricultural products and in particular to imports from the developing countries. It is obvious that such a result as regards these countries would not have been possible without the implementation of a whole series of specific measures adopted for their benefit. Before outlining these special measures, we should briefly situate the problem of agricultural trade in the wider context of European integration and the Community's commercial policy.

For the Community, the immediate effect of its creation was a very marked increase in the liberalization of intra and extra-Community trade. Furthermore, when establishing the Common Customs Tariff—which, it should be pointed out, was set at levels well below the simple arithmetic mean of the national tariffs—the EEC very soon set about taking other countries' interests into consideration.

The arrangements governing external trade laid down by the various common market organizations, which eliminated all the quantitative import restrictions applied by the Member States before the establishment of the CAP, were designed in such a way as to honour the international commitments previously entered into by the Member States, whether bilateral agreements with non-member countries or rules on trade laid down multilaterally. The Community itself has actively developed its international relations, by negotiating a large number of preferential agreements, through active participation in the various rounds of multilateral trade negotiations, and by adopting unilateral trade measures.

These commitments include a large number of measures relating more especially to the developing countries:

The Lomé Convention

After the overseas countries and territories referred to in Part Four of the Treaty of Rome had become independent, a number of association conventions were negotiated and applied, first of all with a group of 18 African States plus Madagascar (AASM) and then, in 1975, with 46 African, Caribbean and Pacific (ACP) countries. The second Lomé Convention, which covers 61 developing countries, entered into force on 1 January 1981.

From the point of view of trade, with which this study is solely concerned, the main characteristics of the new arrangements gradually introduced by these various conventions are as follows:

(i) removal or easing of tariff barriers;

(ii) derogations with regard to the levies on imports of agricultural products into the Community;

(iii) a mutual purchase and supply commitment (sugar);

(iv) the establishment of the Stabex system.

The Convention has made possible the general removal of the tariff barriers between the EEC and the ACP States, with the sole exception of agricultural products subject to a common market organization or to specific rules adopted pursuant to the CAP (processed agricultural products). [1] The Community has undertaken to grant the ACP more favourable treatment than it grants to other non-member countries for these products.

The first Convention guaranteed most ACP products duty-free access to the EEC, but the second Convention further improved the system by facilitating the importation of agricultural products from the ACP countries (in particular fresh and preserved fruit and vegetables) and by extending the import arrangements for bovine meat.

Agricultural products from the ACP States therefore qualify for particularly liberal arrangements. Almost all these imports—which in 1980 represented a trade volume of 5 900 million ECU—enter the Community completely duty-free. Bovine

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[1] Products for which no specific measure other than customs duty is laid down under the CAP qualify for completely duty-free treatment.

meat and sugar are two noteworthy examples of specific measures adopted to help agricultural products.

Within the limits of an annual quota of 30 000 tonnes, meat is imported duty-free, with a 90% reduction in the Community levy; this reduction is offset by an export tax levied by the exporting country, which means that the Community price level is safeguarded and at the same time a better income is obtained for the supplier countries.

Protocol 3 annexed to the Lomé Convention contains a mutual undertaking on the purchase and supply of sugar within an annual limit fixed in white sugar equivalent, at a guaranteed price negotiated annually with the ACP countries within the range of prices accorded to Community producers.

This Protocol (1) relates to a total quantity of some 1.3 million tonnes and is an ingenious solution, not involving any counter-concession, guaranteeing prices and outlets for developing countries whose sugar is often their main source of foreign currency earnings.

Lastly, mention must be made of the fact that under the Lomé Convention the Community also undertook to guarantee the associated countries that their export earnings from a whole range of commodities, including some 40 agricultural products, would be stabilized (Stabex system). This system, the idea behind which incontestably represents a major innovation in international economic relations, has a budget of some 560 million ECU for the lifetime of the present Convention.

The Mediterranean approach

The problem of competition between imported and Community agricultural products assumed greater proportions in the discussions with those Mediterranean countries which have traditionally maintained trade relations with the Community.

(1) There is also an agreement with India framed on similar lines.

At the beginning, random solutions to the problem of these relations were adopte in the light of certain economic requirements and political situations in the Med terranean. In 1962-63 the Community concluded association agreements with view to accession with Greece and Turkey, and then at the end of the 1960 association agreements of another kind with Cyprus, Malta, Morocco and Tunisi: In the early 1970s, agreements relating solely to trade were signed with Israe Egypt, Lebanon and Spain. It then became necessary, largely owing to the prospe of the first enlargement of the Community, to seek a wider context for the Con munity's relations with Mediterranean countries. Consequently, in 1972, at th same time as the trade agreement with Portugal, the overall Mediterranean ap proach was formulated, and this gave rise to a type of agreement, described as cooperation agreement, which places the general trade aspect in a wider conte covering aid in the financial and technical spheres and, in some cases, in the soci: sphere. Agreements of this type have been concluded with Israel, the three Maghre countries (Tunisia, Algeria, Morocco) and the four Mashreq countries (Egypt, Syri: Jordan, Lebanon).

The generalized preferences system (GSP)

In line with its policy of opening up its market to the developing countrie: the Community was the first to implement, in 1971, a scheme of generalized pre erences under which preferential tariffs are also granted for many agricultural pro ducts from those countries. The agricultural part of the Community scheme take the form of reductions in or total exemption from, customs duties.

The tariff reduction is granted without any quantitative limit, except in the case o six sensitive products to separate rules: soluble coffee, cocoa butter, two types o preserved pineapples and two types of raw tobacco.

This system has constantly been improved and in 1980 covered over 300 processe agricultural products, involving imports estimated at almost 1 500 million ECU.

New arrangements were introduced in January 1981 (for a 10-year period based on two new objectives:

(i) simplification and modulation of the arrangements according to beneficiar country;

(ii) in the case of agricultural products, the margin of preference has been extended for 36 products already covered. More products have been added for the benefit of the least developed countries alone.

In the context of the Tokyo Round of multilateral trade negotiations, the Community stepped up its efforts, in the spirit of the Tokyo Declaration, to help the least developed countries. On 1 January 1979 it introduced special arrangements under which all agricultural products contained in the GSP list and coming from these countries could be imported completely free of duty.

The multilateral trade negotiations (Tokyo Round)

The Community has also contributed, with reference to agricultural products, to the various negotiations held under GATT. It adopted a number of measures in this area during the Kennedy Round, and, more recently, during the Tokyo Round.

This latest round of negotiations, which required no fewer than five years of discussions, resulted in the initialling, in April 1979, of an important set of agreements. Without going into details, these agreements can be said to cover the following main areas:

(i) the reciprocal exchange of tariff and non-tariff concessions;

(ii) the non-reciprocal application of major tariff reductions for tropical products;

(iii) the conclusion of international arrangements for meat and dairy products (milk powder and butteroil);

(iv) the implementation of general codes or arrangements which also cover the agricultural sector, such as those on subsidies and countervailing duties, quantitative restrictions, customs value, technical barriers to trade, etc. in order to make import and export practices more disciplined and at the same time ensure the application on an equal basis by all the major countries of the obligations arising from the GATT.

These negotiations have enabled some progress to be made towards stabilizing world markets in certain agricultural products and there is no doubt that—independently of the implementation of the offer concerning tropical products—the tariff and non-tariff concessions which the Community has negotiated with certain industrialized partners also involve substantial benefits for the developing countries.

Other instruments of commercial policy

In order to take as full account as possible of the particular products of individual supplier countries and reap maximum benefit from any complementary aspects, while at the same time safeguarding the vital interests of is own agriculture, the Community has also implemented a number of specific, mainly tariff, concessions. Most of these measures were adopted by common accord with the countries concerned.

This range of instruments, which was developed gradually and on a pragmatic basis as the common agricultural policy was being established, also includes measures of more particular value to the developing countries.

Apart from sugar, already mentioned above, there are the provisions governing imports of olive oil from certain Mediterranean countries (Algeria, Tunisia and Turkey). The agreements concluded with these countries provide for a major reduction in the levy normally applicable, provided the countries in question levy a tax of an equivalent amount on their olive-oil exports. As has been shown, this machinery enables Community prices and the balance of the Community market to be safeguarded, and at the same time enables the countries concerned to reap an economic benefit.

A similar arrangement exists for rice from Egypt, while in the case of durum wheat from certain Mediterranean countries the Community rules simply provide for a reduction in the levy.

Under the system of reference prices introduced for fruit and vegetables and also for wine, the Community refrains from levying countervailing charges on imports from those countries which observe the reference prices.

Sheepmeat agreements were recently concluded with a dozen or so non-member countries. These agreements involve a voluntary restraint undertaking by countries exporting to the Community. In return, the Community has agreed to limit the import charges to 10% *ad valorem* for the products in question. These agreements also cover a number of developing countries, particularly in Latin America.

It is in this context also that a brief mention should be made of the problems involving substitute products for feed grain, and in particular the problem of manioc. Because of the much more liberal arrangements to which they are subject, imports of these products have increased to the point of creating an imbalance on the Community cereals market. From 1974 to 1980, these imports rose from 6.2 million tonnes to 14.4 million tonnes, and, within this total, manioc imports rose from 2 million tonnes to 6.7 million tonnes in 1981. This increase has had a destabilizing effect not only at domestic level but also internationally, in that it creates a shift in production patterns and compels the Community to export ever-increasing quantities of products, and in particular animal products and cereals, to the world market.

Voluntary restraint agreements were concluded with Thailand and Indonesia in order to alleviate the difficulties caused. The agreement with Thailand, which is not a member of GATT, is a cooperation agreement covering the production and marketing of, and trade in, manioc. The agreement between the EEC and Indonesia governs imports of manioc from Indonesia and other supplier countries, which are members of GATT, and provides for the replacement of the previous arrangements by a system comprising a tariff quota and a levy with a 6% *ad valorem* ceiling. For 1982, the overall quota resulting from these agreements is some 6 million tonnes, of which 5 million tonnes are allocated to Thailand, which is by far the Community's largest supplier. If the quota were exceeded, a levy corresponding to the levy normally applicable to cereals would be charged on the surplus quantities.

Conclusions

The above analysis, (1) shows that the common agricultural policy has not had the effect of reducing imports of agricultural products from the developing countries. Indeed, the measures under the CAP which hit imports cover only a very limited proportion of the agricultural products exported by the developing countries, given the large number of derogation provisions enjoyed by those countries.

The effects on the developing countries of the CAP from the viewpoint of the Community's exports are twofold. Firstly, the CAP has put Community agriculture in a position where it can help to offset the growing food deficit of the

(1) This analysis is based on a detailed study drawn up by the Commission (Document SEC(82)1223 of 14 July 1982).

developing countries as a whole. Secondly, the stimulus the CAP has provided for the Community's agricultural exports has contributed towards increased competition on the world market for certain agricultural products which the developing countries also export. However, this competition involves only two major products—bovine meat and sugar—products of which the Community is not a dominant exporter.

Although there is no doubt that the developed countries can make an important contribution to the development of the developing countries by establishing favourable import arrangements for their agricultural exports, the facts reported above show that even the most liberal policy on imports is not sufficient to resolve the main problem currently facing the developing countries, namely the insufficient level of their own food production in relation to the increase in their demand.

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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

Nº		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
189	Mechanisms of the common organization of agricultural markets - Crop products	DA, DE, EN, FR, IT, NL
190	The agricultural aspects of enlargement of the European Community Portugal	DA, DE, EN, FR, IT, NL
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