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THE AGRICULTURAL SITUATION IN THE EUROPEAN  
ECONOMIC COMMUNITY

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INTRODUCTION - THE GENERAL ECONOMIC SITUATION AND THE POSITION OF AGRICULTURE  
WITHIN THE ECONOMY IN 1971

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THE POSITION OF AGRICULTURE WITHIN THE EUROPEAN  
ECONOMIC COMMUNITY (1)

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INTRODUCTION - THE GENERAL ECONOMIC SITUATION AND THE POSITION OF AGRICULTURE  
WITHIN THE ECONOMY IN 1971

The year 1971 was characterised by a continuing inflationary movement which, at the Community level, produced a general increase in prices of 6,5 % to 7 % and an increase in wages of some 12%. This inflationary impetus did not fail to have an economic effect upon agriculture, especially by means of increased production costs. On a country basis, the price rise was steepest in Germany (7,7 %) and the Netherlands (7,5 %) while the least important increases took place in Luxembourg (1,5 %) and Belgium (5,8 %).

At the same time the Community recorded an increase in the volume of gross domestic product of 3,7 % per inhabitant, a figure considerably lower than that for 1970 (4,7 %). However, this drop in growth rate was not uniform in all Member States. According to the provisional figures the annual growth rate fell to 0,7 % in Luxembourg, 1,4 % in Italy, 2,8 % in Germany, 4,2% in Belgium and 4 % in the Netherlands. Only in France was this growth rate in g.n.p. per inhabitant maintained at a relatively high level (5 %).

In addition, the tendency towards a drop in the figures for "agriculture, forestry and fisheries" within economic activities as a whole, was confirmed during 1971, as in previous years. Within the Community the part played by this branch within the overall g.n.p. fell to 5,8 % in 1970, an average percentage higher than that for Germany (3,1 %) of Belgium (3,9 %) but lower than that for Italy (8,9 %), France (5,9 %) and the Netherlands (some 6,2 %).

In the same way, the relative importance of total agricultural employment continued to recede strongly (12,9 %) in 1970 as against 13,8 % in 1969 ) differing from country to country : 19,5 % in Italy, 14,2 % in France, 11,1 % in Luxembourg, 4,8 % in Belgium, 7,3 % in the Netherlands and 9 % in Germany. ( See tables A/2.1 and A/2.2 ).

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(1) See the Agricultural Report by the Commission of European Communities published on the 12 th September, 1972.

## I. AGRICULTURAL PRODUCTION ( see table A/4.4 )

This evolution of the economy in general and the part played by agriculture in economic activities have had important repercussions on agricultural production, both with regard to volume and value.

### a) Agricultural production by volume

In 1968 and 1969 there was a tendency for final agricultural production at 1963 prices to slow down in growth rate. In 1970, however, this tendency seems to have disappeared and there was a volume increase in the Community as a whole of 3 % during that year. This growth rate varied considerably from country to country, although it was positive in each of them: the highest figure was that for the Netherlands with 6,5 % and Belgium with 6,2 %, the lowest being Germany and Italy with 0,5 %.

In order to understand the tendencies on a medium term basis, while eliminating accidents due to each harvest ( especially those caused by climatic conditions ) an average rate of annual variation of final agricultural production by volume was calculated for the period 1965 to 1969 (1). A clear trend towards an increase of 3,5 % per annum can be observed within the Community; in Member States the average annual variation rate has differed considerably; we have figures of + 4,8 % for the Netherlands and Belgium, 3,8 % in Germany, 3,2 % in France, 2,9 % in Italy and 1 % in Luxembourg.

It is clear that this increase in final agricultural production by volume, added to a reduction in agricultural manpower, can only have been obtained thanks to high productivity. Thus, thanks to the addition of these two elements, the annual average growth rate throughout the period 1965 to 1969 was 8,1 % calculated on the basis of the volume of final production, or 7,5 % calculated on the basis of gross added value at constant prices. According to these different methods of calculation, the annual rates are respectively 8,0 % and 8,8 % in Germany, 7,3 % and 6,3 % in France, 8,2% and 7,7 % in Italy, 8,3 % and 7,8 % in the Netherlands, 10,0 % and 8,5 % in Belgium and 4,7 % and 2,8 % in Luxembourg.

### b) Agricultural production by value

The general index of agricultural prices at the production level ( VAT excluded ) for the year 1971, calculated for the Community as a whole, is at the same level as in the previous year, i.e. 105.5 ( 1966 = 100 ). However, this figure is the result of two opposing tendencies. The price index for vegetable products has

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(1) 1965 : average for 1964, 1965, 1966  
1969 : average for 1968, 1969, 1970

undergone a considerable increase (7,5 %), whilst the price of animal products has increased by 5,4 %.

Here again agricultural production prices vary, France being the only country with a sharp increase (4,4 % compared with 5,9 % in the previous year), this being essentially due to the adaptation of French farm prices to Community farm prices as a result of the devaluation of the French Franc in 1969. The Luxembourg index only showed a very slight rise of 0,2 %. However, in certain other Member States (1), a considerable drop was recorded (- 6,2 % in Germany, -2,3 % in Belgium). In the Netherlands the index stayed at the same level as in 1970.

c) Cost of production factors ( see table A/ 3.5 b )

The inflationary tendencies observed in the general economy have not failed to have their impact on agriculture through agricultural wages and the cost of the production methods used in agriculture.

Agricultural wages

The 1971 figures are still lacking, except for Belgium. However, it is known that, in 1970, the indices showed a steep rise in all Member States ranging from 8,7 % for Belgium to 17,5 % for Italy.

The cost of production methods (2)

Here again national figures are lacking because there is no general Community index under this heading. However, the data from France and Germany show a continued trend towards accelerated price rises for production factors. In France these prices increased by 7,2 % as compared with 1970, whereas in 1970 they only increased by 6,2 % as compared with 1969. In Germany the index for the 1970/71 season, as compared with that of 1970/69, went up by 4,9 %; on the other hand, in Belgium, the production cost figures remained at the same level for the two years in question.

It appears therefore that the paradox arising from the deterioration of the terms of trade in agricultural commodities, despite a considerable increase in productivity, continued during 1971 ( see table A/3.6 ). This phenomenon was particularly apparent in Germany where, taking 1966-67 as base 100, the ratio of prices received over prices paid by farmers fell from 98,7 in 1969/70, to 88,3 in 1970/71. In Belgium, this regression was from 92,1 in 1970 to 90,5 in 1971 and in France from 99,0 in 1970 to 96,4 in 1971. Figures are still lacking

(1) The figures for Italy for 1971 have still not been communicated.

(2) This concerns the prices paid by farmers for fertilizer, power, machinery, buildings, seeds and plants, stock for raising and fattening, as well as general overhead expenses.

for the other Community countries.

When we consider that the terms of trade are an important element in the evolution of agricultural incomes, this degradation is a cause for concern.

## II. THE MARKET SITUATION AND TRADE IN AGRICULTURAL PRODUCE

### a) The market situation

The abundant harvests of 1971 involved a considerable increase in the steps to be taken for stabilising markets.

It can be foreseen that, as a result of the favourable progress of sugar prices on the world market, the financial burden on the Community for absorbing sugar surpluses during the 1971-1972 harvest - which was higher than in previous years - can probably be entirely borne by the trade itself.

With regard to dairy produce, after a favourable situation during 1970 and 1971, new marketing difficulties have appeared, causing a rapid increase in stocks of butter. Dairy production has increased, especially on account of higher yields per milk-cow and also because the ratio between the price of milk and that of cattlecake has continued to improve.

On the other hand, 1972 has been noteworthy for a certain shortage of beef accompanied by considerable increases in the price of this commodity.

In 1971/72, movements in the prices of apples, pears, peaches and tomatoes made it necessary to intervene; however, these interventions were always lower than those of 1970/71 for apples and pears although they were higher in the case of peaches and tomatoes.

Although the 1971 wine harvest gave results similar to averages for previous years, the size of already existing stocks had its effect on the prices at which wine could be sold.

### b) Trade in agricultural produce ( see table C/1.5 )

#### 1. Trade with third countries

##### Imports

The value of overall imports of agricultural and food products in 1971

amounted to 13.027 million units of account representing an increase of some 4,1 % as against the previous year. This increase was mainly due to greater imports of food stuffs, oil seeds and fats and oils.

Taking the overall value of imports of agricultural produce and food stuffs from third countries during 1971, those coming from the four acceding countries accounted for 5,8 %, a percentage considerably lower than that for imports of products of all kinds from these same countries ( 12,4 %). On the other hand, the situation is exactly the contrary with regard to exports.

Exports

Exports of agricultural produce and food stuffs to third countries have continued to increase in the course of the past four years. In 1971, in particular, this increase was considerable, and reached an absolute value of 4.134 million UA in 1970 or an increase of 12 %. This increase was mainly due to increased exports of food products, which rose from 2.493 million UA in 1970 to 2.815 million UA in 1971, an increase of 13%; to beverages and tobacco (+ 15 %); and to oils and fats (+ 50 %).

In 1971 exports to the acceding countries played an important part (19,5 %) in exports of agricultural and food products towards third countries. This percentage should be compared with that of 14% for "all products ".

2. Intra-Community Trade

In 1971 the value of intra-Community trade continued to grow both for products subject to regulation (21,7 %) and also for products not subject to such regulation (15 %).

In the case of products subject to regulation, development of trade was apparent in all sectors except that of linen (-16,9 %). The main sectors of growth were wine (+47,9 %), rice (+ 35,1% ), oils and fats (38,2 %) and flax (+ 33,0 %). Germany (+ 22,5 % ) and Italy ( + 33,6 % ) were the countries which contributed in a major fashion of increased imports from other Member States.

In 1970, intra-Community imports for agricultural produce as a whole represented roughly half (52 %) of the corresponding extra Community imports. By 1971, this figure had risen to 60 %.

The movement in imports of each Member State with regard to intra-Community imports as a whole was as follows for the agricultural countries of the Community.

	1970	1971
Germany	41,1%	41,8%
France	15,0%	14,5%
Italy	17,7%	19,3%
Netherlands	11,4%	10,4%
B.L.E.U.	14,8%	14,1%
	<hr/> 100,0%	<hr/> 100,0%

c) Self-sufficiency rate ( see table C/3.1 )

The self-sufficiency rate is an accountancy device which enables us to express the extent which countries may meet their needs for one or several products from their own production. As regards the Community, the main agricultural products can be classified as follows with respect to their self-sufficiency rate (1) :

- products to which the EEC was the exporter during 1968/69, 1969/70 and 1970/71 : soft wheat (102%), sugar (106% without the overseas departments of France), butter (104%), cheese (102%), powdered milk (148 %) and condensed milk (154%);
- products for which the EEC was more or less self-sufficient in 1968/69, 1969/70 and 1970/71 : fresh vegetables, pig meat, poultry meat, eggs, whole milk, skimmed milk;
- products for which the self-sufficiency rate of the EEC underwent fluctuations round the figure of 100% : rye (104% in 1968/69 and 94% in 1970/71), barley (91% in 1970/71 and 107% in 1968/69), rice (91% in 1968/69 and 134% in 1970/71 not counting brokens ), wine (95% in 1968/69 and 104% in 1970/71);
- products for which the EEC was a definite importer for 1968/69, 1969/70, 1970/71 : durum wheat (75%), oats (88%), maize (65%), "other cereals" (2) (15%), fresh fruit (88%), citrus fruit (52%), fish (89% in 1969/70), vegetable oil and fats (40% in 1969/70) slaughter house fats (81% in 1969/70), oils and fats of marine animals (7% in 1969/70), beef (88%).

III. PUBLIC EXPENDITURE OF NATIONAL AND COMMUNITY AGRICULTURAL POLICIES (graph 7)

In 1971, total national public expenditures for the Community of national and Community agricultural policies ( subsidies, tax free loans, transfers of social expenditures, expenditures financed by professional sources through para-fiscal levies ) was estimated at 7,5 thousand million UA (3). Of the credit value for agriculture

(1) Unless otherwise stated the figures in brackets concern the year 1970/71 only

(2) Especially millet and sorghum

(3) The figures taken from the budgets of the six Member States, the Länder, the autonomous regions of Italy, the Italian Green Plan, the Cassa per il Mezzogiorno and the FEOGA accounts, do not pretend to be absolutely precise from an accountancy viewpoint. In particular, they do not include transfers or movements in the course of a given year nor sum carried over from one year to another. The operating expenses of ministries and local authorities, expenditures on agricultural teaching and extension work and those for agricultural research, have not been taken into consideration either. Conversion into UA has been made on the basis of official parities. The data for 1969 concerning Germany do not take into account the revaluation of the DM in 1969; on the other hand those for France do take account of the devaluation of the FF in 1969.

during the period 1967/69 shows a considerable falling off in public expenditure (not including "social" expenditure) for agriculture during 1969/71. The increase was only some 5% as opposed to 32% between 1967 and 1969. As for total expenditures (including social costs), the increase was 106.8 between 1969 and 1971 as against 137.9 between 1967 and 1969.

An analysis of overall sums has, however, a limited value because it conceals differences of movement within each chapter of expenditure.

a) Market support expenditures

This category of expenditure has fallen off steeply. The sums available in 1969 and 1971 for market support were 2,441 million and 2,073 million UA respectively.

This decrease is mainly due to a lower cost of intervention in respect of cereals and dairy products, and the cessation, since 1971, of Community payments of compensatory amounts to Germany, Italy and Luxembourg under regulation 742/67 EEC of the 24th October, 1967.

However, this reduction has been largely offset by the appearance of a new type of expenditure in Germany : this is due to the large sum of 465 million UA allocated by the German Federal Republic to farmers as compensation for loss of income caused by the revaluation of the DM (FEOGA participation : 90 million UA ).

b) Social expenditures ( 2263 million UA ).

A study of social expenditures (1) shows a considerable increase in these expenditures between 1967 and 1969 (154,2%) and a slowing down of this movement between 1969 and 1971, during which period the rate was 110,9%. This chapter concerns transfers to farmers within the framework of measures taken by the public authorities in order to maintain farm incomes.

c) Structural expenditures

An increase of public spending on structures was smaller in 1971 than in previous years : 8,8% between 1969 and 1971 as against 14,3% between 1967 and 1969.

The respective share of each Member State in a total expenditure of 2093.6 million UA for 1971 was as follows :

Germany . . . . .	34,3 %
France . . . . .	30,7 %
Italy . . . . .	26,2 %
Netherlands . . . . .	6,2 %
Belgium . . . . .	2,3 %
Luxembourg . . . . .	0,3 %

(1) old age pensions, family allowances, sickness benefit, accident insurance for heads of families and persons assisting families ( subsidies, transfers, commitment of funds ).



Taken by category, expenditures for the mobility of agricultural labourers showed the greatest increase (+ 95%), moving from 86 to 164 million UA. Expenditures for market structures also increased considerably (+ 19%) moving from 248 to 296 million UA.

As for the improvement of agricultural structures, infrastructure expenses continued to take a large share (26,2% of the whole ) this being a slight increase as against previous years. On the other hand reserves for the improvement of production structures remained stable (355 million UA as against 351 million UA in the previous year ).

Consequently, to sum up, movements of expenditures by category reveal three trends :

- a reduction in expenditure for market supports,
- a stabilisation of structural expenditures,
- a reduced rate of social expenditure.

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Table A/2.1 - Share of the branch " agriculture, forestry and fisheries " in the gross national product at market prices ( current prices ), in overall employment, in the gross total formation of fixed capital ( at current prices ) and in the value of exports

(1963-1971)

( in % )

Chapter heading	Year	Germany	France	Italy	Netherlands	Belgium	Luxembourg	EEC
<u>Gross national product at current prices</u>	1968	3,8	6,5	9,6	7,0(2)	4,6	5,3(2)	6,0
	1969	3,7	5,9	9,6	6,8(2)	4,6	4,9(2)	5,8
	1970	3,1	5,9	8,9	6,2(2)	3,9	..	5,3
	1971	.	.	.	.	.	.	.
<u>Employment</u>	1968	10,1	15,8	22,6	7,9	5,5	12,2	14,6
	1969	9,6	14,9	21,5	7,6	5,2	11,4	13,8
	1970	9,0	14,2	19,6	7,3	4,8	11,1	12,9
	1971	.	13,5	19,5	.	.	11,1	.
<u>Gross fixed capital formation at current prices</u>	1968	.	5,0	8,4	3,8	2,9	.	.
	1969	.	5,0	7,3	4,1	2,8	.	.
	1970	.	4,6	6,9	4,2	2,5	.	.
	1971	.	.	.	.	.	.	.
<u>Exports</u>	1968	3,8	19,6	9,6	29,2		10,4	8,6
	1969	3,9	20,0	9,6	28,0		10,1	8,1
	1970	4,1	17,9	9,4	27,9		10,0	8,2
	1971	.	.	.	.		.	.

- (1) EEC percentages concern exports to third countries. All these figures concern the ratio between the value of exports of agricultural and food products ( food products, beverages, tobacco, hides and furs, cereals, nuts, oil bearing seeds, rubber, wood and cork, natural textile fibres, animal and vegetable matter, fatty substances, fats and oils of animal or vegetable origin ) on the one hand and the export value of all products ( section CST 0 to 9 ) on the other hand.)
- (2) Agreed data based on factorial cost

Source : For headings A-C.: OSCE, national accounts; for heading B : OSCE, social statistics : estimates provided by national statistical departments; for heading D : OSCE, monthly foreign trade statistics.

Table A/2.2 - Annual fluctuation rate for employment in agriculture  
(forestry and fisheries included)

(in %)

Year	Germany	France	Italy	Netherlands	Belgium	Luxembourg	EEC
1968	-4,1	-3,9	-6,6	-3,8	-3,8	-4,0	-5,0
1969	-3,7	-3,2	-5,5	-3,4	-5,0	-3,0	-4,3
1970	-5,0	-3,7	-8,4	-2,9	-5,2	-4,3	-5,9
1971	.	-3,8	-0,8	.	.	-4,0	.

Source : OSCE - for 1971, national

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Table A/4.4 - Indices by volume of final production, final vegetable production, final animal production and their annual growth rate "1965" - "1969"(1)  
(1968-1970)  
(1963 = 100)

Production	1968	1969	1970	Annual growth rate in %	
				1969-1970	"1965" - "1969"
<b>A. Final total production</b>					
Germany	117,5(2)	118,1(2)	118,7(2)	0,5	3,8
France	121,8	117,7	124,4	5,7	3,2
Italy	120,8(3)	125,2(3)	125,8(3)	0,5	2,9
Netherlands	128,4	133,6	142,3	6,5	4,8
Belgium	122,5	126,5	134,3	6,2	4,8
Luxembourg	100,1	98,8	102,4	3,7	1,0
E.E.C.	120,8	121,3	124,9	3,0	3,5
<b>B. Final vegetable production</b>					
Germany	111,6(4)	106,7(4)	109,6(4)	2,7	4,4
France	129,5	122,1	136,1	11,5	4,0
Italy	112,2(5)	117,2(5)	116,4(5)	- 0,7	2,2
Netherlands	133,2	134,1	140,5	4,8	3,8
Belgium	121,5	123,2	122,6	- 0,5	3,1
Luxembourg	81,9	80,5	94,6	17,5	1,1
E.E.C.	118,9	117,8	122,7	4,2	3,3
<b>C. Final animal production</b>					
Germany	117,5(4)	120,8(4)	123,5(4)	2,2	3,2
France	117,2	115,0	117,3	2,0	2,8
Italy	136,8(5)	140,1(5)	143,4(5)	2,4	4,1
Netherlands	125,7	133,3	143,3	7,5	5,3
Belgium	123,0	126,2	140,6	9,6	5,8
Luxembourg	107,6	128,2	105,6	- 0,6	0,9
E.E.C.	121,4	123,0	126,7	3,0	3,5

- (1) "1965" is an average of 1964, 1965, 1966 - "1969" -an average of 1968, 1969, 1970  
 (2) After deduction of all subsidies  
 (3) Including indirect taxation  
 (4) The data given exclude some element of subsidy  
 (5) Excluding indirect taxation

Source : OSCE : Agricultural economic accounts

Table A/3.5 -b- General index of agricultural production prices (excluding VAT)  
within the Community (1968-1971)

(1966 = 100)

Year	E.E.C.		
	General Index	Vegetable products	Animal products
1968	95,4	93,6	97,2
1969	102,8	102,8	102,8
1970	105,5	110,1	102,8
1971 (prov.)	105,5	101,8	108,3
4th quarter 1970	103,1	103,4	104,0
4th quarter 1971 (prov.)	111,0	103,4	115,7
1971 January	104,6	102,8	106,5
February	102,8	101,8	104,6
March	103,7	102,8	105,6
April	102,8	100,9	104,6
May	104,6	108,3	103,7
June	102,8	99,1	105,6
July	102,8	100,0	105,6
August	104,6	99,1	107,4
September	107,3	100,9	112,0
October	109,2	102,8	113,0
November	111,0	103,7	115,7
December	112,8	103,7	118,5

Source : OSCE

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Table A/3.6 - Ratio ( $\frac{a}{b}$ ) between agricultural price indices at production level (a) and price indices of production factors (b) (1)

(1968 - 1971)

(1966/67 or 1966 = 100)

Year	Germany	France	Italy	Netherlands	Belgium	Luxembourg
1968	97,1	97,4	92,0	97,4	92,7	.
1969	98,7	99,3	99,3	103,5	96,1	.
1970	88,3	99,0	96,5	98,7	92,1	.
1971	.	96,4	.	.	90,5	.
4th quarter 1970	88,2	97,0	.	.	.	.
4th quarter 1971	91,1	99,5	.	.	.	.

(1) Calculated on the basis of the data provided in tables A/3.2 and 3.5

Source : OSCE

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Table C/1.5 - External Trade of the EEC with Third countries including the four acceding countries  
(1963 - 1971)

(in millions UA)

Original or Destination	1963	1968	1969	1970	1971
<b>A. Imports</b>					
a) all products					
total of third countries	24.653	33.542	39.245	45.629	49.130
total of the "4"	3.312	4.107	4.970	5.639	6.098
% of the "4" over total of third countries	13,4	12,2	12,7	12,4	12,4
b) agricultural and food products					
total of third countries	9.438	10.343	11.478	12.515	13.027
total of the "4"	649	614	669	722	751
% of the "4" over total of third countries	6,9	5,9	5,8	5,8	5,8
<b>B. Exports</b>					
a) all products					
total of third countries	21.629	35.290	39.227	45.209	50.643
total of the "4"	3.338	4.971	5.579	6.150	7.080
% of the "4" over total of third countries	15,4	14,0	14,2	13,6	14,0
b) agricultural and food products					
total of third countries	2.464	3.039	3.176	3.684	4.124
total of the "4" :	571	659	670	721	808
% of the "4" over total of third countries	23,2	21,7	21,1	19,6	19,5

Source : OSCE

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Table C/3.1 - Recapitulation showing the degree of independence from imports in agricultural products of Community countries

(1968-69 - 1970-71)

( in % )

Product	1968/69	1969/70	1970/71
A. All cereals	94	91	86
soft wheat	120	105	102
durum wheat	60	75	74
rye	104	98	94
barley	107	104	91
oats	96	95	88
maize	55	61	66
other cereals	30	38	16
B. <u>Rice</u> ( not including broken ) ( prov. )	91	149	134
C. <u>Sugar</u> ( excluding French Overseas Departments )	103	110	106
D. <u>Wine</u>	95	92	104
E. <u>Total oils and fats</u>	39	40	40
vegetable oils and fats	23	25	23
slaughter house fats	84	81	84
oils and fats from marine animals	6	7	5
raw olive oil	82	80	68
F. <u>Eggs</u>	98	100	100
G. <u>Meat</u>			
beef	89	88	88
pork	99	100	101
poultry	98	100	101
H. <u>Dairy products</u>			
whole milk	100	100	100
skimmed milk	100	100	100
butter	113	107	105
cheese	102	102	102
powdered milk ( skimmed or unskimmed )	148	125	135
condensed milk	156	156	154
I. <u>Fruit and vegetables</u>			
fresh vegetables ( including preserved vegetables )	100	99	99
fresh fruit ( including preserved fruit and fruit juices )	87	88	88
citrus fruits ( including preserved fruit and fruit juices )	58	53	52
J. <u>Fresh fish</u>	89	88,5	.

Source : OSCE

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