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MAIN RESULTS OF THE SAMPLE SURVEY ON RICE CONSUMPTION IN THE EUROPEAN COMMUNITY

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KEY RESULTS OF THE SAMPLE SURVEY ON RICE CONSUMPTION IN THE EUROPEAN COMMUNITY

The main results of the sample survey on rice consumption in the European Community.

Since the common organization of markets in the rice sector first came into force, the special "rice" section of the Advisory Committee on Cereals has been concerned with the difficulty of finding markets for the Community's output of long-grained rice, which has been increasing considerably,

The first question to be considered was whether the type of long-grained rice grown in the EEC met consumers' requirements and how far extent it was necessary to switch production to cultivation of the harder long-grained, vitreous rice.

Producers took the view that various new European varieties would meet requirements and could be put on the market in the fairly near future. However, it was essential to define the nature of this demand more accurately.

With this end in view, and as part of the work carried out by the special "rice" section of the Advisory Committee on Cereals, the Ente nazionale Risi, the Office Interprofessionnel des Céréales (ONIC), the Association des Rizeries belges, the Syndicat de la Rizerie française, the Syndicat des Riziculteurs de France, the Unione italiana dell'Industria risiera, the Verein deutscher Reismühlen e.V., the Vereniging van Rijstpellers in Nederland, and the Directorate-General for Agriculture of the Commission of the European Communities requested the Institut pour l'Etude des Marchés en France et à l'Etranger (ETMAR) to carry out a sample survey among consumers in the Community to determine, firstly, their preferences regarding the qualities of the long-grained rice available, and secondly buying motivation and consumption patterns for rice.

This survey^{*} was completed in January 1971.

* *Informations internes sur l'agriculture, no. 76. juin 1971*

The survey falls into three parts:

- A. A survey conducted among the general public to determine patterns of rice consumption in the Community countries, in September and October 1969,
- B. A consumption trial covering four varieties of Italian rice - Anseatico, Arborio, Italpatna and Rosa Marchetti - carried out among housewives in Belgium, Germany and the Netherlands to decide which of these varieties should be tested in part C,
- C. A consumption test covering four varieties of rice - two Italian (Arborio and Ribe), one French (Inra 68 - 2),¹ and one American (Blue Bonnet) carried out among housewives and institutions such as schools and hospitals, in Belgium, France, Germany and the Netherlands, in September and October 1970.

It should be noted that part A of the survey was conducted both in homes where rice was consumed and in those where it was not, one of the aims being to determine the number of households where rice was consumed, whereas part C was carried out in homes or institutions etc. where rice was consumed at least once a month, the purpose of this part of the survey being to determine whether a preference existed for any specific variety of rice.

It is necessary, however, to make the usual reservations concerning the results achieved by surveys of this type which are carried out in a fairly limited context and should be interpreted with some caution.

Thus, it should always be borne in mind that the question of the quantities of rice consumed was not dealt with in this survey. What was involved was always the number of consumers or how frequently rice was consumed, but never quantities (weight) or expenditure (in monetary units).

I. RICE CONSUMPTION IN FAMILIES IN BELGIUM, FRANCE, GERMANY, ITALY AND THE NETHERLANDS

- Rice consumption varies appreciably from country to country, the greatest quantities being consumed in Italy and the smallest quantities in the Netherlands, but in no country does rice occupy any privileged position. Consumption of potatoes or vegetables and products made of Italian pasta (except in the Netherlands) considerably exceeds that of rice.

.../...

¹ Known by the trade name "Delta".

- In all five countries, the amount of rice consumed is proportionate to income levels or the socio-economic level; in all five countries, too, there are wide differences of consumption depending on the region concerned.
- Patterns of rice consumption vary according to the country and the way in which it is prepared; in Italy, preparation is rather different from the manner usual in the other Community countries. In all five countries, rice is seldom eaten as an hors-d'oeuvre and, except in Belgium, rarely as a dessert.
- In Italy, fewer than half the households stated that they kept stocks of rice, whereas in the other four countries four families out of five kept such stocks. The term "stocks" is fairly vaguely defined, and often small quantities (250 grams or less) are regarded as "stocks".

The wealthier classes and people living in areas where a great deal of rice is consumed, tend to hold bigger stocks of rice in their homes.

- Precooked and preprocessed varieties of rice are mainly purchased in Belgium and the Netherlands, and housewives state that they mainly buy long-grained rice, which - except in Belgium - has been confirmed by the samples.
- In Italy, importance is attached to the various factors determining which type of rice is chosen, whereas in France customers seem to buy rice on a more or less random basis.

Varieties of rice are chosen according to different criteria depending on the countries concerned, but, in all countries, very little importance is attached to the geographical origin of the rice.

II. TEST OF FOUR VARIETIES OF ITALIAN RICE

Four varieties of rice were tested in Belgium, Germany and the Netherlands - Anseatico, Arborio, Italpatna and Rosa Marchetti.

The "Anseatico" variety finds most favour with Belgian, German and Dutch housewives.

This choice, which was made clear after a series of trials on appearance, taste, and easy cooking as well as on the basis of the results obtained with each of the varieties tested, is only partly explained: a second variety "Italpatna" was awarded just as high a mark in some countries, such as Belgium, as far as results were concerned and it was even more favourably assessed

in all three countries as regards the appearance of the rice.

It would seem that the most superior feature of the "Anseatico" variety as compared with "Italpatna" is its taste. This criterion is extremely important, to judge by the reasons given spontaneously by housewives to justify their final choice. The reasons most often given are as follows, in order of importance:

1. Consistency
2. Taste
3. Appearance
4. Easy cooking.

The appearance of the rice comes only third among the criteria governing choice, so that it is not surprising that the superiority of the "Italpatna" variety in this respect exercises only a little influence on final assessment.

The importance of the taste factor in determining the variety chosen also explains why the "Arborio" variety, which is less favourably assessed in all countries as regards appearance, easy cooking and consistency after cooking, is nevertheless preferred to the other varieties by some housewives.

Finally, the "Rosa Marchetti" variety is fairly favourably and rather differently assessed depending on the country concerned, but on the whole lags behind the "Anseatico" and "Italpatna" varieties in popularity.

Summing up, it would not seem to be over-diagrammatic to make the following classification:

1. "Anseatico" rice
2. "Italpatna" rice
3. "Rosa Marchetti" rice
4. "Arborio" rice.

However, the Italian joint contracting parties decided that the "Arborio" variety should be the fourth variety to be tested in part C for the following reasons:

- the "Anseatico", "Italpatna", "Rosa Marchetti" and "Arborio" varieties were all four favourably assessed by consumers, particularly in Belgium and Germany;
- the "Anseatico" variety is at present an experimental variety;
- sufficient stocks of "Arborio" rice are available to satisfy any possible market demands;
- the "Arborio" variety is different from the other three varieties to be used in the final test, on account of its non-vitreous appearance.

.../...

III. TEST OF FOUR VARIETIES OF RICE IN BELGIUM, FRANCE, GERMANY, ITALY AND THE NETHERLANDS

Four varieties of rice were subjected to consumption tests:

- Ribe
- Arborio
- Inra 68 - 2
- Blue Bonnet.

The overall results in the four countries in which testing took place - Belgium, France, Germany and the Netherlands - show that the variety most favourably assessed was Blue Bonnet, followed by Inra 68 - 2, after which came Ribe and Arborio.

The same classification was made by housewives as by schools, hospitals, etc., although the latter were more clearly in favour of Blue Bonnet.

	The following percentage of first places were awarded to the various varieties	
	test housewives	test schools, hospitals, etc.
Blue Bonnet	39%	50%
Inra 68 - 2	29%	26%
Ribe	19%	10%
Arborio	13%	14%

Except in one case (Ribe preferred to Inra 68 - 2 by housewives in Germany), Blue Bonnet always took first place, followed by Inra 68 - 2.

The following percentage of first places was awarded to the various varieties by 100 families testing them	Germany	Belgium	France	Netherlands
Blue Bonnet	49	51	50	66
Inra 68 - 2	33	47	45	28
Ribe	39	20	21	27
Arborio	16	20	22	17

.../...

The following percentage of first places was awarded to the various varieties by 100 schools, hospitals, etc. testing them	Germany	Belgium	France	Netherlands
Blue Bonnet	82	50	55	77
Inra 68 - 2	35	41	35	36
Ribe	7	22	19	10
Arborio	11	22	32	13

However, the fact that housewives and institutions awarded first place to a specific variety, does not necessarily mean that they regarded the other varieties tested as unsatisfactory, as can be seen from the following tables.

Whether appearance, easy cooking, or preparation are considered, Ribe was usually preferred to Arborio, while Blue Bonnet most often took first place.

It was further noted that those responsible for institutional catering in Germany and the Netherlands adopted a more critical attitude towards the Arborio and the Ribe varieties, whereas housewives usually accepted all types of rice. None of the four varieties of rice was considered to be really poor, but, where housewives and those responsible for schools, hospitals, etc. had the choice, they preferred Blue Bonnet or Inra 68 - 2 to both Italian varieties.

	Good or excellent preparation results			
	Housewives			
	Germany	Belgium	France	Netherlands
<u>Rice tested</u>	%	%	%	%
Blue Bonnet	71	79	74	83
Inra 68 - 2	71	81	78	57
Ribe	78	58	64	56
Arborio	54	48	55	41
	Schools, hospitals, etc.			
Blue Bonnet	95	67	79	82
Inra 68 - 2	73	68	75	61
Ribe	37	62	60	35
Arborio	47	53	65	28

The appearance of the rice is undoubtedly an important factor in determining the overall assessment, and this is more particularly the case in schools and hospitals than in private families. Certainly, there is a preference for a homogeneous, long-grained rice.

After the test, a higher mark was awarded for easy cooking, but appearance undoubtedly influenced the way taste, and easy preparation, were assessed.

	Out of 100 housewives who tested the variety, the percentage shown below awarded a mark between 7 and 10 for appearance before cooking			
	Germany	Belgium	France	Netherlands
	%	%	%	%
Blue Bonnet	68	76	85	78
Inra 68 - 2	68	87	75	82
Ribe	66	68	59	61
Arborio	35	32	30	23

	Out of 100 schools, hospitals, etc. which tested the variety, the percentage shown below awarded between 7 and 10 for appearance before cooking			
Blue Bonnet	82	78	65	87
Inra 68 - 2	63	75	78	59
Ribe	29	63	66	40
Arborio	25	46	35	23

	The following percentages of housewives and schools, hospitals, etc. respectively awarded a mark between 7 and 10 for easy preparation			
	Housewives			
	Germany	Belgium	France	Netherlands
	%	%	%	%
Out of 100 who had tested				
Blue Bonnet	72	85	74	84
Inra 68 - 2	71	88	79	77
Ribe	72	69	66	65
Arborio	48	62	62	47
	Schools, hospitals, etc.			
Blue Bonnet	93	77	72	82
Inra 68 - 2	70	82	72	66
Ribe	37	70	62	33
Arborio	40	70	66	29

So the European varieties, Inra 68 - 2 was the one assessed by housewives or taking part in the test as the closest to the assessment made of the American variety, Blue Bonnet. The Italian variety Ribe, and more particularly the Arborio variety, less frequently met with approval on the part of housewives or schools and hospitals, but judgements varied from one country to another, depending mainly on patterns of consumption.

Where rice was often eaten in the form of soup, or rice with milk, less importance was attached to outward appearance and cooking methods.

Publication of the recapitulative results of the basic survey on the structure of farms in the EEC

The Statistical Office of the European Communities announces the publication of the first of a series of thirteen volumes containing the recapitulative results of the Community survey carried out in 1966/67 on farm structures.

This volume is of special interest in several respects. In the first place, it is the first official EEC publication containing statistics on farm structures. Although the survey, whose results are summarized, is similar to an agricultural census in scope, it is different inasmuch as its organizers lay stress on the characteristic aspects of the farming world, i.e. a full description is given of farms, the means of production they use, and of the special features which even today distinguish the farming world from other spheres of economic life.

Linked as it is with cycles of biological growth, and widely influenced by meteorological factors, agriculture is both an economic activity and a way of life. These two aspects are often so closely connected that only by detailed analysis is it possible to distinguish one from the other.

The "recapitulative results" now sent to the printers, thus aim to satisfy a demand for general information as much as to serve as a framework for a study. The value of the information is guaranteed by the relative stability of farm structures, despite the time which has elapsed since the survey was carried out. The main aspects of this information are in fact very complex: it therefore arouses interest not on account of its topicality, but because the comprehensive statistics quoted give an overall picture of agriculture in the six Member States at a specific time in their existence.

The first volume is mainly composed of 19 tables and an appendix, each of these parts dealing with a specific subject, ranging from the legal status of farmers to the employment of labour, and from soil utilization to livestock, and so on.

The information thus collected is classified according to the size of the agricultural area occupied by the farm, up to 100 hectares and over. The information is repeated for each country, region or area covered by the survey, i.e. "Regierungsbezirk" in the case of Germany, "Département" in the case of France, "Provinces" in the case of Belgium and the Netherlands and altimetical zones in each region in the case of Italy. Luxembourg is regarded as a separate area for the purposes of the survey.

The remaining volumes of this publication, which supplies the reader with brief information on a subject of immense topical interest, will appear during the coming months.

Some data drawn from this survey are summarized in the following tables.

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ANCE

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms* where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/year units
		is not employed outside the farm	is employed outside the farm for half his working hours or less	is employed outside the farm for more than half his working hours	Farms	hectares		
hectares	1	2	3	4	5	6	7	8
0	3 019	1 565	155	1 299	.		117 242	3 127
0-< 1	129 721	72 380	2 344	54 997	129 721	67 607	142 594	72 710
1-< 2	127 488	75 485	3 626	43 377	127 488	182 836	185 239	90 822
2-< 5	247 357	164 287	10 866	72 204	247 357	831 860	679 102	253 856
5-< 10	306 924	246 976	15 911	44 037	306 924	2 260 956	1 922 487	477 014
10-< 20	413 148	374 770	15 953	22 425	413 148	5 959 440	5 176 362	833 665
20-< 50	371 938	349 006	12 279	10 653	371 938	11 275 442	8 422 197	908 359
50-< 100	84 913	78 956	3 107	2 850	84 913	5 660 996	3 175 027	264 303
≥100	24 199	22 059	993	1 147	24 199	3 876 031	1 400 519	128 395
Total	1 708 707	1 385 484	65 234	257 989	1 705 688	30 115 168	21 220 769	3 032 251
≥1	1 575 967	1 311 539	62 735	201 693	1 575 967	30 047 561	20 960 933	2 956 414

* including farms where the head of the farm forms part of the labour employed outside the family.

BELGIUM

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms ^{**} where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/y units
		is not employed outside the farm	is employed outside the farm		Farms	hectares		
	for half his working hours or less	for more than half his working hours						
hectares	1	2	3	4	5	6	7	8
0	2 934	925	242	1 767			56 696	2 0
>0-< 1	60 713	27 857	4 947	27 909	60 713	32 446	158 028	34 6
1-< 2	18 725	9 703	1 357	7 665	18 725	26 865	109 145	14 8
2-< 5	38 391	25 635	3 493	9 263	38 391	129 759	318 470	43 5
5-< 10	41 458	32 477	5 452	3 525	41 458	302 052	726 611	65 9
10-< 20	34 923	29 145	4 596	1 182	34 923	489 660	897 838	67 5
20-< 50	15 327	13 149	1 837	340	15 327	433 138	551 086	35 1
50-< 100	2 028	1 703	281	44	2 028	135 973	112 658	5 9
≥100	335	268	49	17	335	43 188	21 486	1 4
Total	214 834	140 862	22 254	51 712	211 900	1 593 081	2 952 018	271 1
≥1	151 187	112 080	17 065	22 036	151 187	1 560 635	2 737 294	234 4

^{**}Not including farms where the head of the farm forms part of the labour employed outside the family.

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NETHERLANDS

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms ²² where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/ye units
		is not employed outside the farm	is employed outside the farm for half his working hours or less	is employed outside the farm for more than half his working hours	Farms	hectares		
hectares	1	2	3	4	5	6	7	8
0	4 931	2 046	210	2 668			64 304	2 964
>0-< 1	38 776	18 888	1 386	18 502	38 776	17 256	146 930	31 000
1-< 2	29 102	16 332	1 247	11 516	29 102	40 890	121 081	27 914
2-< 5	41 429	26 132	3 215	12 054	41 429	135 578	353 207	43 999
5-< 10	49 204	42 049	2 724	4 410	49 204	364 201	1 000 421	70 729
10-< 20	55 393	52 530	1 568	1 281	55 393	774 568	1 639 218	96 486
20-< 50	26 017	24 663	798	503	26 017	741 822	850 382	59 460
50-< 100	1 999	1 749	144	83	1 999	124 828	47 552	7 432
≥100	183	143	27	16	183	33 319	5 839	1 668
Total	247 039	184 532	11 319	51 033	242 108	2 232 464	4 228 934	341 650
≥1	207 332	163 598	9 723	29 863	203 332	2 215 206	4 017 700	307 684

²²Not including farms where the head of the farm forms part of the labour employed outside the family.

GERMANY

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms ⁸ where the head of the farm			Agricultural area		Total unit number of livestock	Total labour units
		is not employed outside the farm	is employed outside the farm		Farms	hectares		
hectares	1	2	3	4			5	6
0	12 241	4 788	336	7 114			115 717	6
>0- < 1	98 164	47 097	2 700	48 279	98 164	46 673	116 202	75
1- < 2	138 868	58 159	5 140	75 540	138 888	201 028	248 214	120
2- < 5	277 113	114 562	27 694	134 782	277 113	932 535	1 154 644	371
5- < 10	270 891	166 089	44 970	59 753	270 891	1 974 626	2 547 714	536
10- < 20	291 321	257 375	23 609	10 222	291 321	4 134 092	5 350 419	722
20- < 50	140 084	134 967	3 509	1 509	140 084	3 983 842	4 751 671	403
50- < 100	14 512	13 802	313	322	14 512	935 330	957 860	63
100	2 808	2 581	72	78	2 808	470 075	377 685	30
Total	1 246 022	799 420	108 343	337 599	1 233 781	12 678 201	15 620 126	2 329
IV 1	1 135 617	747 535	105 307	282 206	1 135 617	12 631 528	15 338 207	2 248

⁸ Not including farms where the head of the farm forms part of the labour employed outside the family.

ITALY

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour	
		Farms ^x where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/ye units	
		is not employed outside the farm	is employed outside the farm		Farms	hectares			
hectares	1	2	3	4			5	6	7
0	16 815	12 157	1 234	3 418			677 428	24 20	
>0-<	1	397 058	212 171	25 835	159 052	397 058	243 631	340 359	267 0
1-<	2	788 686	456 052	49 408	273 206	788 686	1 111 464	722 784	614 0
2-<	5	978 073	716 205	65 436	196 411	978 073	3 072 024	2 058 411	1 229 8
5-<	10	463 759	394 009	21 853	47 863	463 759	3 195 584	2 132 745	892 0
10-<	20	213 888	188 474	7 346	18 011	213 888	2 895 230	1 869 176	563 0
20-<	50	86 805	74 539	3 115	9 112	86 805	2 556 195	1 371 015	299 0
50-<	100	22 151	18 468	876	2 790	22 151	1 516 046	683 920	114 0
≥100		13 254	10 488	557	2 194	13 254	3 338 098	701 703	119 0
Total	2 980 489	2 092 563	175 660	712 057	2 963 674	17 928 272	10 557 541	4 127 2	
≥1	2 566 616	1 868 235	143 591	549 587	2 566 616	17 684 641	9 539 754	3 835 0	

^x Not including farms where the head of the farm forms part of the labour employed outside the family.

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms [#] where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/ye. units
		is not employed outside the farm	is employed outside the farm for half his working hours or less	for more than half his working hours	Farms	hectares		
hectares	1	2	3	4	5	6	7	8
0								
>0-< 1	665	455	7	203	665	398	1 175	880
1-< 2	560	448		112	560	841	1 277	580
2-< 5	1 358	973		385	1 358	4 586	8 288	1 665
5-< 10	1 307	1 001		306	1 307	9 798	13 225	2 177
10-< 20	2 028	1 915	11	102	2 028	30 271	35 167	4 226
20-< 50	2 467	2 411	6	50	2 467	73 876	86 901	6 704
50-< 100	212	211		1	212	12 934	15 151	762
≥ 100	9	9			9	1 243	1 494	46
Total	8 606	7 423	24	1 159	8 606	133 947	162 678	17 040
≥ 1	7 941	6 968	17	956	7 941	133 549	161 503	16 160

[#] Not including farms where the head of the farm forms part of the labour employed outside the family.

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COMMUNITY

Size of agricultural area	Total number of farms	Professional activity outside farming			Soil utilization		Number of livestock	Labour
		Farms ^{**} where the head of the farm			Agricultural area		Total unit number of livestock	Total labour/ye. units
		is not employed outside the farm	is employed outside the farm for half his working hours or less	is employed outside the farm for more than half his working hours	Farms	hectares		
Hectares	1	2	3	4	5	6	7	8
0	39 940	21 481	2 177	16 266			1 031 387	38 50
>0-< 1	725 097	378 848	37 219	308 942	725 097	408 013	905 288	482 83
1-< 2	1 103 449	626 179	60 778	416 416	1 103 449	1 563 924	1 387 740	869 52
2-< 5	1 583 721	1 047 794	110 704	425 099	1 583 721	5 106 342	4 572 122	1 944 28
5-< 10	1 133 543	882 601	90 910	159 894	1 133 543	8 107 217	8 343 203	2 045 00
10-< 20	1 010 701	904 209	53 083	53 223	1 010 701	14 283 261	14 968 180	2 288 01
20-< 50	642 638	598 735	21 544	22 167	642 633	19 064 315	16 033 252	1 713 16
50-< 100	125 815	114 889	4 721	6 090	125 815	8 386 107	4 992 168	456 41
≥ 100	40 793	35 548	1 698	3 452	40 793	7 761 954	2 508 726	281 51
Total	6 405 697	4 610 284	382 834	1 411 549	6 365 757	64 681 133	54 742 066	10 119 25
≥ 1	5 640 660	4 209 955	343 438	1 086 341	5 640 660	64 273 120	52 805 391	9 597 92

^{**} Not including farms where the head of the farm forms part of the labour employed outside the family.