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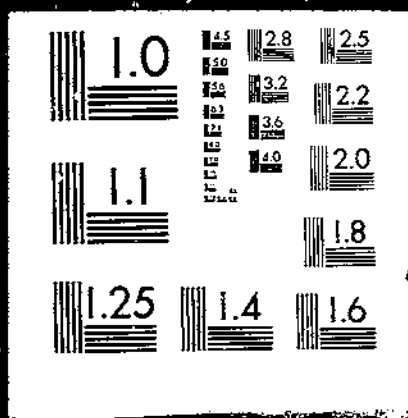
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The Agricultural Situation in Western Europe

Review of 1975 and Outlook for 1976



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Report No. 119

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THE AGRICULTURAL SITUATION IN WESTERN EUROPE: REVIEW OF 1975 AND OUTLOOK FOR 1976.
Developed Countries Program Area, Foreign Demand and Competition Division, Economic Research Service, U.S.
Department of Agriculture. Foreign Agricultural Economic Report No. 119.

ABSTRACT: Western Europe's agricultural output was down in 1975, mainly because of a poor grain harvest. Large grain carry-over stocks softened the impact of this production shortfall. Beef and dairy production, though essentially stable, was again in excess of demand. Crop production is expected to return to normal in 1976. A small decline may again occur in beef output; by year-end, beef supplies could be tight, and imports may pick up. Dairy surpluses will remain burdensome in the EC, which is trying to promote greater use of nonfat dry milk in animal rations to the disadvantage of imported protein feed. The EC is also striving to achieve a better market equilibrium for soft wheat and other surplus products. The Common Agricultural Policy of the EC has emerged stronger from a formal review carried out in 1975. U.S. farm exports to Western Europe in 1976 should benefit from the economic recovery underway throughout most of the continent.

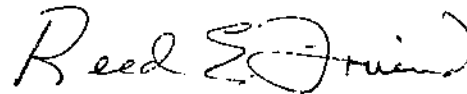
KEYWORDS: Agricultural production, European Community, policy, prices, trade, Western Europe.

FOREWORD

This report focuses on major agricultural, economic, and trade developments in Western Europe, the major homogeneous regional market for U.S. agricultural exports. The report was supervised, coordinated, and written in part by Omero Sabatini, Project Leader, West European Section, Developed Countries Program Area, Foreign Demand and Competition Division. Additional articles were written by Cynthia Breitenlohner, Marshall Cohen, James Lopes, and Harold McNitt, with the assistance of Pearl Williams and Sandra Burgess.

Acknowledgment is extended to the Foreign Agricultural Service, especially the agricultural attaches, who supplied much of the basic data and background information through comprehensive situation reports on each country and the EC. Previous issues of this publication also provided helpful background material.

This publication is one of seven regional reports, supplementing the *World Agricultural Situation*, published three times a year; the latest issue, WAS-9, was released in December 1975. Other regional reports are published for the Western Hemisphere, Africa and West Asia, Far East and Oceania, Eastern Europe, the USSR, the People's Republic of China, and other Communist Asian Countries. This report is based on information available as of March 19, 1976.



Reed E. Friend, Program Leader
Developed Countries Area
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CONTENTS

	<i>Page</i>
Foreword	ii
Summary	1
Agricultural Production	2
Agricultural Policy	5
General Economic Situation	8
Prices	10
Agricultural Trade	12
Appendix Tables	16

WEIGHTS AND MEASURES REFERENCES

The metric system of weights and measures is used in this report, unless otherwise indicated. The following are conversions to the U.S. system of weights and measures: 1 hectare is equal to 2.471 acres, 1 metric ton is equal to 2,204.6 pounds, and 1 kilogram is about 2.2 pounds.

TERMS AND ABBREVIATIONS

EC—European Community. Economic and customs union consisting of Belgium, Luxembourg, France, Italy, West Germany, the Netherlands, and as of January 1, 1973, Denmark, Ireland, and the United Kingdom.

EC-6—Refers to the original six members of the European Community.

EC-3—Refers to the new three members of the European Community.

EC-9—Emphasizes that the data or information given pertains to all nine member states.

CAP—Common Agricultural Policy of the European Community.

Unit of Account—The standard of value used by the EC for most financial transactions. Prior to the floating of the U.S. dollar in August 1971, 1 unit of account equaled 1 dollar. Based on par values in effect since the dollar devaluation of February 13, 1973, the unit of account now officially equals \$1.206. However, its value in terms of dollars varies weekly according to monetary market condi-

tions, and reflects the floating of European currencies against the dollar. A different unit of account, often called the European or "basket" unit of account, was introduced in 1975. Its value in relation to the dollar is announced daily. However, this unit of account is not yet used in agricultural transactions.

Green rate of exchange—The exchange rate used to convert units of account into national currencies (and vice versa) in all financial and commercial transactions covered by the CAP.

Green money, green currency (e.g., *green pound, green lira*, etc.)—indicates the use of green rates of exchange for CAP purposes.

Monetary Compensatory Amounts (MCA)—Border taxes or subsidies applied to offset the divergence between the green rate of exchange and the actual market rate of exchange. For countries whose currencies have appreciated, MCA's are a tax on imports and a subsidy on exports. For those countries whose currencies have depreciated, MCA's are subsidies on imports and taxes on exports.

THE AGRICULTURAL SITUATION IN WESTERN EUROPE: Review of 1975 and Outlook for 1976

SUMMARY

Western Europe's agricultural production declined 4 percentage points in 1975, mainly because of an 8-percent drop in the grain harvest. Livestock production was relatively stable, with red meat output slightly down and dairy products slightly up. Both beef and dairy production remained in excess of effective demand, resulting in large stocks and continued import restrictions.

The outlook for 1976 is for an upturn in crop production, and for a continuation of 1975 production trends for both beef and dairy products. Beef supplies may become tight by the end of 1976.

The impact of the smaller Western European 1975 grain crop on the world's total supply of grain was softened by large Western European carryover stocks available at the start of 1975/76. But Western Europe's 1975/76 total grain imports from the rest of the world are expected to be slightly larger than a year earlier, while exports and year-end stocks are expected to be smaller. The European Community (EC) became a net exporter of wheat for the first time in 1974/75, and its exports of wheat may again exceed imports (though by small amounts) in 1975/76. The area planted to corn appears to have leveled off in the EC, but an increasing area is being planted to new high-yielding varieties of soft wheat which are not fit for breadmaking.

Partly because of these developments, the EC will establish for the first time in 1976/77 a support price for utility wheat lower than the support price of bread wheat. Also, it will begin to narrow differences among the support prices for the various feed grains, with the aim of adopting a single support price for all feed grains in 1977/78. In the EC, this means raising the support price of corn to that of barley, as well as lowering the support price of feed wheat. Desired outcome of these moves is to: (1) discourage production of feed wheat, (2) stimulate production of corn, (3) improve the competitiveness of soft wheat and barley relative to corn as a feed ingredient, and (4) discourage corn imports, most of which come from the United States.

The support price alignment was one of the recom-

mendations that emerged from an extensive review of the Common Agricultural Policy (CAP)—the so-called stocktaking—conducted by the EC in 1975. This review was launched partly as a renewed effort to achieve a better market equilibrium for commodities in chronic surplus, such as soft wheat, dairy products, and wine.

In spite of these efforts, considerable imbalances are likely to persist. Problems of surplus disposal will probably remain acute for the EC dairy sector and could cause new international trade disputes with third countries, including the United States. The EC has adopted a scheme for the compulsory purchase of 400,000 tons of nonfat dry milk for incorporation into animal feed. This will cause displacement of imported soybeans and other protein feeds, most of which come from the United States. Enforcement of the EC regulation involves import deposits on oilseeds and other protein.

The imbalance in the EC beef sector, however, is temporary, not structural, and improvements may occur in this sector. The drop in EC beef production, forecast for 1976, is expected to be accompanied by an increase in consumption and some rebuilding of national herds. This should result in higher beef imports and bring some relief to the international beef market.

The anticipated developments in the EC beef sector, together with an economic upswing now getting underway in most of Western Europe and continued strong demand for poultry and hog feed, should give some stimulus to the import demand for our major farm exports to Western Europe—feed grains and soybeans and soybean products.

Total U.S. agricultural exports to Western Europe rose only 2 percent by value in 1975, partly because of the economic recession. They should pick up considerably in 1976 barring unfavorable movements in world prices of farm products. Western Europe continues to import roughly a third of our total farm exports, and thus remains our largest homogeneous regional market. But as a whole, Asia is a larger market for U.S. agricultural products than Western Europe.

AGRICULTURAL PRODUCTION

Western European agricultural production in 1975 was adversely affected by bad weather for the second year in a row. The harvested area of most crops did not change much, but heavy rains in some countries during the planting season and dry summers in others reduced many crop yields. The 1975 Western European index of total agricultural production (1961-65=100) dropped 4 percentage points to 123 (table 1), compared with an increase of about 2 percent in total 1975 world production, and a rather sharp rise in North America's farm output. Most of the decline in production occurred in the EC.

Western Europe's grain production in 1975 was about 12 million tons below the 1974 harvest, or roughly 131.5 million tons. The impact of this 8-percent drop on the world grain supplies—which could have been even more severe because of a concurrent 28-percent drop in the Soviet Union's grain crop—was softened substantially by the high levels of stocks available in Western Europe at the start of the 1975/76 marketing year. But total Western European grain exports in 1975/76 (excluding intra-EC trade) are expected to be about 1.5 million tons less than a year earlier, while imports could show a slight increase. A reduction in Western Europe's stocks of about 4.4 million tons is also anticipated.

Most of the decline in Western European grain production occurred in the EC, where total grain production dropped about 10 percent from 1974 to 98 million tons. In France, Western Europe's largest grain producer, poor climate cut the total grain crop by 5.6 million tons from 1974 to 35.7 million tons in 1975. Production was the smallest since 1965 in the United Kingdom, 2.6 million tons below 1974. By contrast, Italy's grain output rose slightly to 17 million tons.

In the non-EC countries, 1975 feed grain output was 2 percent above 1974, partly because of higher barley production in Spain.

Among individual grains, *wheat* was down in both the EC and non-EC countries. The EC wheat harvest slumped roughly 7 million tons to 38 million tons. France, Europe's largest wheat grower, experienced a decline of almost 22 percent. Although soft wheat production was hit hard, durum wheat was up by more than 800,000 tons to

4.3 million. For the non-EC countries as a whole, wheat production declined about 1 million tons. Sweden had the largest drop, while Portugal had a large increase.

The EC's production of *corn* was somewhat below the previous year. Italy's corn crop set a record of 5.3 million tons, and France's corn yields were low for 3 years out of the past 4, resulting in a drop of 8 percent to 8.1 million tons in the French corn crop.

The EC's total *barley* crop was also below 1974, down nearly 7 percent. West Germany's crop remained nearly equal to that of the previous year, but all other major EC producers harvested much less than in 1974.

Expectations of higher prices for *sugarbeets* induced producers throughout Western Europe to expand the planted area by nearly one-sixth. In the EC, the 1975 production was nearly 10 million tons more than in the previous year, totaling roughly 72 million tons. Ireland and Italy led this advance, with increases of 54 and 49 percent, respectively. In Italy, a favorable sugarbeet support price encouraged a switch from crops such as tomatoes and wheat. German farmers planted 14 percent more sugarbeets than in 1974, pushing production up 8 percent to a record of nearly 18 million tons. In France, the leading producer, output was up 8 percent to 22.4 million tons. Spain, the major producer among non-EC countries, had a record sugarbeet crop of 6 million tons, up 50 percent from the previous year.

Production of *potatoes* has trended rapidly downward in recent years in response to sliding food and feed uses. Western Europe's potato production for 1975 dropped 16 percent to an estimated 45.6 million tons, largely because an unusually wet spring and dry summer caused the EC potato crop to drop by 7.2 million tons. Outside the EC, the decline in output was particularly marked in Norway which had the lowest potato crop in 70 years.

An acute shortage of fresh potatoes resulted, but this has offered only limited export opportunities to outside suppliers, due in part to stringent EC certification requirements. The shortage of potatoes could, however, boost exports of feedstuffs to

Western Europe, since some countries still use relatively large amounts of potatoes for feed.

In the EC, the shortage will probably lead to swifter action in harmonizing member states' marketing regulations and in formulating a common agricultural policy for potatoes.

Preliminary data indicate an *olive oil* output of nearly 1.3 million tons in 1975, up 17 percent from 1974, with sharp increases in Spain and Italy, both main producers. Much of the increase in olive oil production is credited to better care of groves, resulting from favorable support prices for olive oil.

A buildup in Spanish olive oil stocks from the current level of 95,000 tons is likely to occur in the 1975/76 marketing year. A major factor contributing to this increase is the gradual consumer switch, particularly in Spain, from high-priced olive oil to lower priced seed oils.

A large olive oil surplus within the EC has slowed down progress with EC negotiations on global Mediterranean policy, because olive oil is an important product in some of the non-EC Mediterranean countries and the EC has found it difficult to grant special preferences to non-EC countries.

In 1975, the weather was generally unfavorable for deciduous *fruit*. However, *apple* production was up 19 percent; *pears* were down about one-tenth. The *citrus* crop was nearly equal to the previous year.

Wine prices were depressed in the EC during 1975, because inventories were large and the market was stagnant. This surplus of wine, especially the low-quality types, delayed Mediterranean negotiations. French wine production in 1975 dropped to 65 million hectoliters, compared with the high levels of 76 and 82 million during the 2 previous years. In Italy, production was 68 million hectoliters, down 11 percent.

In 1975, France put import restrictions on Italian wines, which according to the Italians and the EC Commission, was against the rules, or at least the spirit, of the CAP. The dispute between Italy and France over wine put severe strains on the operation of the CAP, causing some violent demonstrations by wine producers.

In March 1976, the EC instituted a program to distill some of the poorer quality wine into industrial alcohol, and decided on certain medium-term measures aimed at limiting the wine production. As a result, France agreed to remove its surtax on Italian wine imports. This and the reduction in the 1975 harvest should offer at least temporary relief, but long-term problems are likely to persist.

Western Europe *tobacco* production in 1975 was up significantly from the previous year primarily because of a dramatic 44-percent increase in production from Greece. Higher support prices encour-

aged Greek farmers to expand the tobacco area. Tobacco production was marginally up in Italy and France.

Combined 1975 livestock products, including poultry, declined marginally, compared with nearly a 10-percent increase the previous year. Red meat production declined slightly to 18.2 million tons, with small increases in beef as well as in mutton and lamb, which was offset by a decrease in pork.

Beef and veal production was up only 1 percent in 1975 to 8 million tons, compared with an 18-percent increase in 1974. Both the EC and non-EC countries showed slight rises in beef and veal production, as total slaughter increased, but average weights declined.

In the United Kingdom, beef and veal production rose to 1.2 million tons, or 14 percent above 1974 and 40 percent above 1973. Ireland's output was up 17 percent. Beef and veal production in France, the leading EC producer, was marked by relative stability, compared with a 22-percent increase in 1974. Reduced slaughter and lower carcass weights cut Germany's beef and veal production about 4 percent from 1974. In Italy, reduced slaughter, resulting mainly from a 13-percent drop in imported cattle—which account for much of that country's beef and veal production—caused a 5-percent decrease in production. Beef and veal also showed slight declines in other EC countries, but in Spain, where slaughter was heavy because of dry pasture conditions, production rose 7 percent.

Western Europe's cattle numbers continued to decrease. In the EC, cattle totaled 77.4 million head on January 1, 1976, compared with 79.3 million head a year earlier. The 1975 reduction in cattle numbers was partly a result of sharply lower imports of live animals for slaughter. Tight controls held cattle imports to about one-fifth of the 1974 level. However, EC herds could increase in 1976.

In the EC, and thus in most of Western Europe, 1975 beef production, though down from 1974, remained in excess of effective demand and added to the problems resulting from the glut in world beef trade. The EC entered 1976 with beef stocks of about 400,000 tons, bone-in basis or about the same as at the start of 1975. However, prospects of reduced EC slaughter combined with increased demand for beef (stemming from an improved economic outlook) could lead to a tight beef supply situation by the end of 1976.

Production of *pork* in 1975 decreased by 2 percent in Western Europe, in contrast with a 4-percent increase in the previous year. In the United Kingdom, however, production dropped a fifth to 803,000 tons as sharply reduced hog numbers at the end of 1974 (resulting from high feed costs) cut heavily into hogs available for slaughter in 1975.

In some other EC members, such as West Germany and France, production increased.

Most countries outside the EC showed very little change in 1975 pork production, except for Spain, where output dropped 12 percent. Unprecedented carryover stocks, high feed prices, and decreased pork consumption discouraged Spain's hog raisers in 1975.

Mutton and lamb production in 1975 continued to trend upward, with the Community accounting for nearly two-thirds of total production, and Spain accounting for the bulk of production outside the EC.

Production of *poultry meat* continued to move upward to nearly 4 million tons, but leveling off occurred in the Community, reflecting a producer cost-price squeeze. Spain, the largest poultry meat producer outside the EC, continued to increase production rapidly to meet a sharply rising demand. Despite the cost-price squeeze, *egg* production in Western Europe was up 2 percent from 1974 to a record high of 4.7 million tons, but consumption was down.

The EC, though traditionally plagued by a surplus of milk and *dairy* products, continued to expand its milk output slightly in 1975 because of higher yields per cow. A significant increase occurred in the Netherlands and Ireland, while other EC members experienced either smaller increases or decreases.

The overall increase, though small, further aggravated EC difficulties in marketing dairy products, particularly butter and nonfat dry milk. This excess in production over consumption widened in 1975 partly as a result of retail price increases and drops in the amount of nonfat dry milk used for animal feed. As of February 1976, EC stocks of nonfat dry milk were 1.1 million tons, nearly 2.5 times as much as a year earlier.

Elsewhere in Western Europe, countries such as Spain and Portugal continued to wrestle with growing deficits in the dairy sector because of an upward trend in consumption and limited production increases.

Outlook for 1976

Favorable weather so far this year tends to brighten the 1976 outlook for most crops. In 1976, crop production could return to normal or reach new records. The improved economic situation should stimulate demand for livestock products and help reduce surplus for some of these products.

Crops—The EC forecasts a grain harvest recovery to 8-10 percent above the 1975 level. Winter wheat plantings in the United Kingdom and France are up significantly. High-yielding varieties of nonbread wheat will account for a

larger share of the EC total wheat area, especially in France. The expansion in nonbread wheat production has helped bring about major changes in EC grain pricing policies. (The impact of these developments on U.S. trade is discussed in the next section.) Prospects for corn depend largely on spring weather.

Spain, the largest producer outside the EC, is likely to have a smaller grain crop in 1976. Spain has sown more winter wheat but less barley to bring production more in line with market requirements. Despite higher support prices and greater input subsidies, Spain's corn production appears to be leveling off at about 2 million tons. Competition from sugarbeets for irrigated land is preventing increases in corn area, because any new corn must be planted on irrigated area. Some gains in grain production are expected for Greece, Austria, and Sweden.

Given favorable weather conditions, the EC rice harvest should be comparable to 1975. Thus, 250,000-300,000 tons of rice (husked) would be available for export. *Sugarbeet* production could be about the same as last year's high level. Sugar prices have fallen and consumption is expected to bounce back. Nonetheless, a surplus of sugar is in prospect for Western Europe in 1976. The total sugar supply from domestic production in the EC, and from quantities required to be imported by treaty obligations with the countries of the Lome Convention, will likely exceed internal consumption. EC sugar available for export has been estimated at 800,000-1.0 million tons. For the first time in Greece, sugar production is expected to exceed domestic requirements.

Unless adverse weather recurs, *potato* production should be up in 1976, as a result of increased plantings. Demand for processed potatoes should continue to rise. No appreciable change is expected in the production and consumption of fresh *vegetables*. With favorable weather, production of *deciduous fruit* should return to normal. *Citrus* production should increase slightly during 1976/77 because new trees in Spain and Greece are coming into full production, and because of projects launched in 1974 to aid the Italian citrus industry. It is reasonable to expect a slight expansion of *tobacco* production in Greece, a leading producer, particularly in view of satisfactory farmers' returns in 1975.

Livestock—EC *beef* production is expected to decline about 3-4 percent in 1976, and decline again in 1977. Beef consumption, as already noted, could rise because of improved economic conditions. This could result in further easing of import restrictions, thus reducing the glut in the world beef market. But EC imports should be well below the levels

reached before the 1974 embargo. In non-EC Western European countries, beef production should rise in 1976, but will probably fall short of domestic requirements in most countries.

According to the EC, pork supplies will increase and prices will drop, the egg market should sta-

bilize, and poultry meat will probably continue to expand. The dairy sector's problems of surplus disposal may be eased by the modifications in dairy policies introduced for the 1976/77 marketing year described in the next chapter, but surpluses will remain burdensome. (James Lopes)

AGRICULTURAL POLICY

EC Policy Developments in 1975

In 1975, farm policy positions and decisions were determined largely by renewed efforts to find ways to improve existing CAP structures and mechanisms. The principal aims of this ongoing search are: (1) to improve market equilibrium, not only for commodities in chronic surplus such as soft wheat, dairy products, and wine, but also for products, such as beef, with temporary market imbalances; (2) to reduce expenditures needed to finance production and disposal of all surplus commodities; and (3) to reconcile restraints on farm support policies with the need to ensure an adequate standard of living for the farmers.

The EC is also concerned with short-term measures for the disposal of existing surpluses, but in 1975, the most pervasive policy was to find long-term solutions to the problems arising from the CAP. Short-term attempts to cope with surpluses last year included continued restrictions on certain imports, such as beef. These attempts also caused trade disputes, both within the EC, as in the case of the Franco-Italian "wine war," and with third countries, as in controversies with the United States involving EC export subsidies on cheese and ham. New U.S.-EC trade problems are emerging from the EC decision to promote greater use of nonfat dry milk (NFD) in animal rations by displacing vegetable protein feed.

Stocktaking of the CAP

The search for long-term solutions was carried out through a formal and extensive review of the CAP by several EC institutions and farm organizations, as well as representatives of consumer and industrial interests.

The CAP has emerged stronger from this review process, or stocktaking. The major points that emerged from these discussions are contained in a document released by the EC Ministers of Agriculture November 1975 for consideration by the EC Heads of Government at their December 1975 meeting. However, because the Heads of Government did not discuss agricultural matters at that meet-

ing, the Ministers' position should still be regarded as a revised assessment of the CAP rather than some sort of new "charter" for it.

Stocktaking was initiated mainly because of the concern of nonfarm sectors over the high cost of the CAP. This concern was, and remains, particularly strong in West Germany and the United Kingdom. A complete review of the CAP was one of the conditions imposed by West Germany in return for its agreement to an unprecedented mid-year increase in the EC support prices for the 1974/75 marketing year. It was agreed that the EC Commission would submit a report on the stocktaking by February 1975, and there would be a thorough debate on the Commission's conclusions.

During the debate, however, the focus of the discussion shifted from concern over high support costs to efforts to improve existing CAP structures. In their November document, the Ministers of Agriculture stated that a ceiling on expenditures is incompatible with the operation of the CAP. However, the Ministers also acknowledged the need for links between agricultural and budgetary policies, and the need to improve market equilibrium. It should also be noted that although the stocktaking was started primarily to placate the nonfarm sectors, and despite some involvement by representatives of consumer groups and industry, most of the stocktaking discussions were held among representatives of farm interests. It is conceivable that the final decisions to emerge from the stocktaking process, or any new policies which might eventually be traced back to it, could differ from the November recommendations by the Ministers of Agriculture.

This document implies that the price support policy, rather than the use of direct subsidies to the farmers will continue as the principal instrument to sustain farm incomes. However, the document also suggests the possibility of gearing the price policy to modern (i.e., efficient) farm holdings, and indicates that granting direct aid could constitute a useful adjunct where the price policy alone cannot achieve the desired aims.

In addition to the price policy, a number of long-term measures should be considered to achieve

market equilibrium in the following areas: stocks, consumer, and export policies; food aid; producer participation in market risks; and actions to improve productivity. Obviously, development of new programs or modifications of existing ones within each of these areas would take quite some time, especially in view of the need to reconcile the often conflicting interests of the nine member states. However, the EC is already active in areas such as export policy (particularly export subsidies), food aid, storage subsidies, and improvement of productivity. In these cases, action will probably focus on expanding existing programs or reassessing priorities.

The Ministers have also set medium-term targets for grains, beef, dairy products, and wine. The aim for grains is to improve the price relationships among the various types of grain and to gear the price of nonbread wheat to that of other feed grains. Beef surpluses, as well as shortages, must be avoided through adjustments in the support system. The market balance must be restored in the dairy sector, and excessive stock buildup must be avoided, either through improved market management and sales promotion or through the adoption of new measures for the stabilization of production, such as a pricing policy less likely to generate surpluses, producer participation in market risks, and cutting back on production capacity.

Finally, the Ministers referred to the need for the removal of internal obstacles and barriers to unify the market.

CAP Extended to More Products

Actions were taken in 1975 to extend the CAP to cover some of the few commodities still regulated by the member states. Common rules now apply to import certificates, similar to licenses, for tomato concentrates and other tomato products, as well as canned peaches, mushrooms, pears, peas, French beans, and raspberries. Tomato concentrates are also subject to a minimum import price. Plans include a common policy on virtually all processed fruits and vegetables by the end of 1977.

A common policy for imports of ornamentals, flowers, and related products was effective January 1, 1976.

A 1975 bill on a common policy for mutton and lamb would phase out French restrictions on intra-EC trade and British payments to sheep raisers. However, the proposed legislation would not affect existing regulations on imports from non-EC countries, and would allow France to retain its restrictions on non-EC imports.

Draft legislation has also been introduced for a CAP on fresh potatoes. It proposes free trade

within the EC, except for quality and health restrictions, but advocates protection from non-EC imports.

EC 1976/77 Prices

In line with the ideas introduced during the stocktaking discussions, the EC's 1976/77 price policy contains a number of significant modifications in commodity sectors suffering from market imbalance and changes in member states' green rates. The new rates will further reduce the importance of Monetary Compensatory Amounts (MCA) in EC trade, and will move the Community closer to its goal of eliminating monetary barriers and subsidies in intra-EC trade. (These have been in effect since 1969, as a result of disruptions in the international monetary system.)

The average increase in support prices approved for 1976/77 is about 7.5 percent, compared with an average of 10 percent in 1975/76, and a two-step 15-percent increase a year earlier. However, because of the proposed changes in green exchange rates, support price increases expressed in national currencies will be as follows: Germany, 4.8 percent; France, 6.2 percent; Luxembourg, 6.9 percent; Netherlands and Belgium, 7.1 percent; Denmark, 7.8 percent; United Kingdom, 7.9 percent; Ireland, 9.9 percent; and Italy, 12.9 percent.

The EC will begin to eliminate the differences among the support prices for the various feed grains, and will establish for the first time different support prices for feed and bread wheat. The support price for bread wheat will be higher than the 1975/76 common support price for soft wheat, but the support price of feed wheat will be lowered from 125.93 units of account per ton in 1975/76 to 116.00 units of account in 1976/77.

The support price of barley will also be set at 116.00 units of account, but in this case, the new price will be 4.5 percent higher than in 1975/76. The support price of corn will be raised 8.5 percent to 112.20 units of account per ton. The difference between the 1975/76 barley and corn support prices is about 7.5 units of account.

The new grain prices will be more indicative of the nutritional value of the various grains, and will bring the grain policy closer to the Commission's position that the EC should set the same support price for all feed grains, including nonbread wheat, and let the market determine their true relative levels. A single support price for all feed grains is planned for 1977/78.

The increase in the support price of corn with the concurrent change in its relationship to other feed grain prices should stimulate EC corn produc-

tion, as well as improve the competitiveness of feed wheat and barley relative to corn among EC feeders. This development will adversely affect U.S. grain exports, but there may be less EC wheat available for export to third country markets.

In spite of surplus disposal problems, a two-step increase in the target price of milk has been approved. The support price of NFDM and butter will be determined on the basis of the increases in the target price of milk. However, the resulting figure for NFDM will be slightly reduced. Financial deterrents to over-production of whole milk, such as levies on excess quantities delivered to dairies, are planned for 1977/78. Among the measures taken to help relieve the present surplus of NFDM is the adoption of a scheme for the compulsory purchase of 400,000 tons of NFDM (nearly one-third of the EC surplus in early 1976) for incorporation into animal feed. This will cause displacement of imported soybeans and other protein feed, most of which comes from the United States. Enforcement of this regulation involves import deposits on oilseeds and other protein.

Decisions for the beef sector have been affected by the expectation of relatively high market prices and the desire to reduce intervention buying. Intervention arrangements will be more flexible in 1976/77. If a regional price stays at 95 percent or more of the orientation price for a period yet to be determined, the EC may suspend or limit intervention buying in that region. The Commission had recommended phasing out slaughtering premiums, but they will be retained, with modifications, in 1976/77, largely at the insistence of the United Kingdom. These premiums are not paid on animals sold into intervention. The Commission will report to the Council of Ministers on the respective merits of the intervention and premium arrangements by November 1, 1976.

EC Trade Policy Actions and Preferential Arrangements

EC insistence on separate negotiations for agriculture has been partly responsible for the slow progress at the Geneva Multilateral Trade Negotiations (MTN). The EC maintains that the principles and mechanisms of the CAP are non-negotiable, but the United States wants to negotiate for genuine liberalization of farm trade, and feels that discussions on certain CAP mechanisms, such as variable levies and minimum import deposits, are appropriate. The thrust of the EC negotiating strategy has been a call for international commodity price agreements on grain, rice, sugar, and certain dairy products. The EC's proposal for grains is based on minimum and maximum prices and nationally held stocks managed by importers and exporters on the basis of set rules.

The Lome Convention, signed in February 1975 by the EC and about 50 African, Caribbean, and Pacific (ACP) countries, is expected to become effective this spring. Among its provisions are an import stabilization scheme for a number of ACP agricultural products, a sugar agreement with minimum guaranteed prices, and a financial assistance program. Tariff cuts and reduced variable levies on ACP products were granted unilaterally by the EC in July 1975. Some of the commodities involved are corn, other feed grains, rice, beef, and processed fruits and vegetables.

As part of the EC global Mediterranean policy to harmonize preferential arrangements with countries in that region, a new agreement was reached with Israel in 1975. It included EC concessions for citrus fruit, wine, potatoes, and processed fruits and vegetables. Negotiations on new agreements have been concluded with Algeria, Morocco, Tunisia, and Malta, and started with Egypt, Jordan, and Syria. These agreements, actual or proposed, require some EC concessions on crops typical of Mediterranean agriculture, including olive oil. However, the margin of concession and the products covered in each case vary. Most of the recent EC trade concessions to developing countries, including those to the ACP nations, do not require reciprocity, but in some cases, preferences could be granted to the EC later.

In 1976, the EC will grant a 10-percent duty reduction to nearly all processed farm products eligible for the EC's Generalized System of Preferences (GSP). This will lower the duty on some of these products to less than half of the non-preferential rate.

Policy Developments in Other Western European Countries

Austria. The Austrian government is seeking some modifications of the country's basic agricultural regulations. It wants to deprive the grain, milk, and meat marketing boards of their authority to regulate foreign trade in order to prevent representatives of farm interests from vetoing imports.

Finland. Because of the changed world food situation, Finland's concern over its surplus production has declined. A soil bank system, effective since 1969, was ended in 1975. The program affected nearly 9 percent of the agricultural land, much of it marginal. By May 1975, the land set-aside program had caused a 4-percent drop in crop production and a 2-percent decline in dairy output.

Greece. The EC Council of Ministers has accepted Greece's request for full membership, but it may take 2 or 3 years to complete the necessary negotiations. Greece already is an associate member of the EC.

In anticipation of full EC membership, the Greek Government has set the following guidelines for some of the principal crops: encourage corn, barley, durum wheat, and exportable oriental tobacco; discourage rice, oranges, tangerines, processing tomatoes, and wine grapes; stabilize, at present levels, soft wheat, sugarbeets, and olive oil.

Some observers feel that Greek membership may have an impact on EC institutions. Important EC decisions can be taken by (weighted) majority vote, but in fact, the EC has avoided this practice in favor of unanimity. With the addition of a new member, it may become increasingly difficult to opt for unanimity.

Norway. In 1975, the Government issued an ambitious food supply and nutrition program, which may be debated by Parliament this spring. The program aim is to increase food self-sufficiency from the present 39 percent to 52 percent by 1990, partly by adding nearly 500,000 acres to the cropland. It is also proposed to halt the expansion of imported feedstuffs and to increase production of hay. Consumption of pork, butter, and whole milk is to be discouraged in favor of beef, lamb, fish, and skimmed milk through better distribution of information on nutrition. Prices of fruits and vegetables are to be kept moderate to boost consumption. Expansion of grain storage facilities is underway, both at ports and inland.

Portugal. Land reform, initiated in 1974, gained momentum during the first half of 1975 with the enactment of laws for breaking up large estates, and then stabilized at the end of the year. In all, some 2.5 million acres have been affected, either through legal expropriation or through seizure. Most of these estates have been turned into farm cooperatives or Government-owned enterprises. Changes in land ownership and management pat-

terns could affect productivity, but it is difficult to determine the impact of land reform on total agricultural output. Numerous measures have been introduced as part of Portugal's new economic and social policy, including higher farm support prices, controls over retail food prices, and establishment of a Government monopoly over imports of grain, beef, pork, oilseeds, vegetable oils, and oilseed meal.

Spain. Agricultural policy measures did not differ appreciably in 1975 from those effective in 1974, but farm support prices were generally much higher than a year earlier. Since the transfer of political power from Generalissimo Franco to King Juan Carlos, Spain is making a renewed effort to gain membership in the EC. Spain's farm price policy for major crops and livestock products is similar to that of the EC.

Sweden. Although Swedish farm prices are expected to remain relatively high during the next decade, Sweden, in 1975, reversed its earlier policy which had sought to eliminate chronic surpluses of products such as grains, pork, butter, and oilseeds and bring the overall level of food self-sufficiency down from 95 to about 80 percent. Sweden now plans to keep grain production above domestic requirements, although export subsidies may be necessary to dispose of excess output, and to hold output of products such as pork and butter around the same level as anticipated domestic needs.

Switzerland. The increase in 1975/76 support prices has been kept generally low in relation to the increase in production costs to minimize the impact of food prices on the cost of living. Percent increases granted to crops are generally higher than those for livestock products. Subsidies for withholding milk from the market have been increased. (Omero Sabatini)

GENERAL ECONOMIC SITUATION

Summary — The 1975 economic recession in Western Europe may have been partly responsible for a substantial slowdown in the rate of increase of U.S. farm exports to that area. U.S. agricultural exports to Western Europe rose 2 percent by value in 1975, compared with 26 percent a year earlier. The economic recovery, now underway throughout most of the area, should result in a higher import demand and benefit U.S. farm exports in 1976.

Western Europe, led by West Germany, is slowly emerging from its worst post-World War II recession, and most countries are expected to achieve some real economic growth this year. Inflation, still a major problem, should abate somewhat from the double-digit highs of the past 2

years, but unemployment is actually increasing in several countries.

Although recovery is underway, opinions differ concerning its strength. Consumer and business willingness to spend and invest is of critical importance. The extent to which this confidence will develop is difficult to predict, and much will be determined by how the U.S. economy fares this year. The behavior of the U.S. market, a huge outlet for Western European exports, is traditionally a key determinant of the area's economic growth. Economic conditions in Japan will also affect the pace of Western Europe's recovery, as Japan has become another major market for Western European production. However, the

strength of West Germany's recovery will be the key factor in Western Europe's upswing.

The Organization for Economic Cooperation and Development (OECD) forecasts an overall real growth rate of about 2 percent for Western Europe's gross domestic product (GDP) in 1976, compared with last year's real decline of 2.5 percent. The 1976 European growth rate forecast by the OECD compares unfavorably with that anticipated for the United States (the OECD forecasts a growth of 5.75 percent; the U.S. Government expects an increase of 6-6.5 percent) and Japan (the OECD forecasts 4.25 percent). However, many European economic experts consider the OECD forecasts for Western Europe somewhat pessimistic (table 3).

Wide Variations in Growth Expected

West Germany and, to a lesser extent, France are in the vanguard of the current recovery with Denmark and Norway. Two major countries, the United Kingdom and Italy, are still experiencing serious difficulties and probably will attain little real growth this year.

West Germany's worst post-World War II recession hit rock bottom in mid-1975. The record decline in output followed a steep drop in demand for German products at home and abroad, but since mid-1975 the economy has improved steadily. Business confidence and export orders are on the upswing.

The strength and durability of West Germany's recovery will depend considerably on the further growth of export demand. Forecasts for real GDP growth range from the OECD's first forecast of 3.25 percent to official German estimates of up to 6 percent. Because of West Germany's key economic position, the extent of its recovery will have a major impact on other Western European economies.

France and Norway are also expected to achieve significant growth rates this year. The real growth in France's GDP in 1976 should range from 3 percent (preliminary OECD forecast) to 4.5 percent (French Government estimate), compared with a 2-percent decline last year. The recovery from France's recession began in mid-1975, and a package of expansionary measures, including government spending and relaxation of credit terms, aided recovery early in the fall. To offset further inflationary perils, these policies will be curtailed this year. Norway's relatively high growth rate (estimated at 5 percent this year) is based chiefly on the booming North Sea oil industry.

The United Kingdom's (U.K.) economy remains in the doldrums. Falling demand for British prod-

ucts at home and abroad brought a sharp drop in industrial production last year. The decline has leveled off at a point far below capacity. Neither industrial investment nor consumer spending is expected to revive soon, although a small boost may be provided by increased residential construction. The U.K.'s GDP should remain unchanged this year, after a 2.2-percent drop last year.

Italy continues to experience a serious recession despite the Government's expansionary budget policies last year. The depressed economic conditions have discouraged further business investment and consumer spending. However, some improvement is expected during 1976, with a real GDP growth of at least 1.5 percent.

Inflationary Trends Abate

Although inflation is still a critical problem throughout Western Europe, a moderate decline is expected in the rate of wage and price increases this year.

Considering the area as a whole, consumer prices may rise 9-10 percent this year. However, there will be wide differences among the rates of inflation in the various countries, particularly among member countries of the EC, despite their ultimate aim of a monetary union. Rates of increase in the consumer price index (CPI) from November 1974 to November 1975 varied from 5.4 percent in West Germany to 25.2 percent in the United Kingdom (table 4). These wide variations are not expected to last through the year.

West Germany is expected to achieve the lowest inflation rate in Western Europe, but consumer prices are expected to rise nearly 5 percent.

The United Kingdom's CPI may again have the highest Western European inflation rate this year—over 15 percent. A voluntary pay restraint package, agreed upon by the labor unions and the Government last year, could bring the CPI rate down to 10 percent or less by the last quarter of 1976.

The French Government, as already noted, is tightening its budgetary and monetary policies. It hopes to hold consumer prices under 11 percent this year. Italy's rate of inflation was abating in late 1975, but may pick up again in 1976.

Wage and price increases this year are expected to be significantly lower than last year in Ireland, Finland, Norway, Austria, Denmark, Switzerland, and the Netherlands.

Food price movements in most Western European countries last year did not diverge sharply from trends in consumer prices. Countries where food prices rose more slowly than the CPI include West Germany, the Netherlands, the United King-

dom, and Switzerland. In Norway and Sweden food prices rose substantially more rapidly than general consumer prices. Swedish food price increases were hefty despite the Government's food subsidy program and a price freeze on certain products.

In some Western European countries, the percentage of total consumer expenditures going into food may have increased temporarily. This is contrary to the long-term trend toward a decreasing share of household expenditures for food in the industrialized countries. Sustained consumer expenditures for food, in preference to outlays for lesser necessities, might help explain why 1975 farm imports continued to show a modest increase in many European countries, even in the midst of an economic recession.

More detail on consumer price indexes, food prices, and wages, as well as on expenditures for food (including beverages and tobacco) as a percent of private consumption expenditures, is provided in table 4.

Unemployment Remains Serious

Despite this year's anticipated economic recovery in most Western European countries, unemployment remains a serious problem. In fact, joblessness may increase in several of the larger countries, primarily because the labor force is expected to expand more rapidly than job openings. In West Germany, the current unemployment rate of about 5 percent may rise during the early part of this year and not decline before the end of the year. France, also confronted with an expanding labor force, is likely to experience unemployment in the neighborhood of 5.5 percent by the end of 1976. Although special measures have been implemented to alleviate joblessness in the United Kingdom, unemployment figures may reach 1.5 million by the end of the year, for a post-World War II record of 6.5 percent. With few exceptions, other Western European countries will achieve little improvement in the employment sector this year.

Payments Balances Improve

Last year's general recession resulted in an improved balance of payments situation throughout most of Western Europe (table 5). The United Kingdom, whose payments deficits have been the area's largest in recent years, reduced its current account deficit last year by more than half. France moved from a current account deficit of \$6 billion in 1974 to a small deficit in 1975, and final data may even show a marginal surplus. Exceptions to the improved payments performance last year were Finland, Norway, Portugal, Sweden, and Greece. West Germany's surplus was more than halved in 1975, but this may have been a favorable development, as West Germany's surpluses have been exceptionally large.

Balance of payments problems could recur this year as Europe increases its imports of fuel, raw materials, and other goods. West Germany is once again expected to reduce its surplus in the current account balance to \$2 billion from \$4.5 billion in 1975. Other countries expected to experience a weakening payments position include France, whose current account deficit may reach \$2.5 billion, Austria, Denmark, Ireland, and Portugal. The United Kingdom, however, should show a further improvement this year.

U.S. Farm Sales Should Benefit

Western European recovery is expected to generate an increased demand for U.S. farm commodities. West Germany and the Netherlands are the two largest U.S. agricultural markets in Western Europe. Both countries may well increase their purchases as the upswing begins to gain momentum. The third and fourth largest U.S. markets, Italy and Spain, are also expected to increase imports of several major commodities. Sales to the United Kingdom, the fifth largest U.S. market, should also rise later during the year provided that the economy begins to recover. France, one of the leaders of the recovery, is expected to increase imports of several U.S. commodities, including soybeans and cotton. (Harold A. McNitt)

PRICES

World farm commodity prices reached record levels in 1973 and 1974, but began to recede in the fourth quarter of 1974 and trended down throughout 1975. By December 1975, the Dow Jones Commodity Spot Index, a composite of key internationally traded farm commodities, was 293, compared with 391 a year earlier (July 1950=100).

The decline was largely the result of lower world prices for grains, oilseeds, and sugar.

In 1975, Western European import prices generally paralleled world market prices. As indicated in table 6, Rotterdam prices for the principal grains and oilseeds declined significantly from 1974, mainly because of plentiful supplies from the major

exporting countries. The lower 1975/76 import prices also helped reduce input costs for Western European livestock producers.

Western European sugar import prices fell below their 1974 peak, but wholesale sugar prices rose sharply in 1975, particularly in the United Kingdom, as an aftermath of the 1974 increase in import prices. The U.K.'s wholesale price index was 172 percent higher in June 1975 than a year earlier. Higher U.K. sugar prices were caused by a February 1975 agreement between the U.K. and the African, Caribbean, and Pacific (ACP) producers. The United Kingdom agreed to purchase ACP raw sugar at approximately \$567 per ton during 1975, nearly \$225 more per ton than the EC guaranteed price for ACP sugar.

The Danish export price of bacon strengthened in 1975, with average prices for A-1 bacon cuts rising 7 percent to \$1,763 per ton. Export prices rose to this near-record level because of relatively tight supplies and a strong demand from Denmark's EC partners and Japan.

Danish butter export prices also firmed up in 1975, because a large percentage of Denmark's manufacturing milk was processed into cheese. Although Western Europe still faces a serious butter surplus problem, butter prices could steady in 1976 partly because of a 1975 EC-New Zealand agreement for an 18-percent hike in the import price of New Zealand butter.

Higher import prices for U.S. flue-cured tobacco were noted in Western Europe in 1975.

EC's beef import restrictions during 1975 contributed to a rise in EC cattle prices, but market prices for cattle were still below the EC intervention price, necessitating large purchases by price support agencies. EC import restrictions also created marketing problems, both within and outside the EC. For example, Austria's traditional exports to Italy were cut off, causing Austrian beef slaughter-stock prices to drop until late in 1975. Italy, which has a relatively large beef deficit, experienced upward pressures from the import ban on the retail price of beef and certain categories of feeder cattle. Since the end of 1975, retail beef prices have increased throughout Western Europe and are expected to continue to strengthen throughout 1976.

The decline in import feed prices throughout Western Europe contributed to reversing the rising trend in input costs in 1975. Although input prices continued to rise for certain countries, the increase was lower than in 1974. According to the EC, the estimated rate of increase in 1975 slowed to 10.5 percent for France, compared with 31.4 percent in 1974 and 13.2 percent for the U.K., down from 30.2 percent.

Producer and wholesale prices of most agricultural products rose in 1975 (table 7), reflecting the direct effects of inflation, national policies seeking to encourage output of certain commodities, and annual increases in EC support prices.

Portugal's producer prices for both corn and olive oil were increased sharply, 47 and 62 percent, respectively, to encourage output of these key commodities, but these sharp rises also reflected an unusually high inflationary situation.

In the United Kingdom, where inflation peaked at a record of more than 25 percent in 1975, dairy producers felt a severe price-cost squeeze. Special arrangements were enacted to raise farm prices and slow down slaughter of dairy cows, which had resulted in shortages of manufacturing milk. One method employed to increase U.K. farm prices was an EC decision to devalue the "green pound" twice in 1975, by 5 and 5.8 percent, respectively. This automatically raised farm prices expressed in British pounds relative to the EC unit of account. (Since EC prices are expressed in units of account, devaluation of British green currency requires more pounds to be paid out under the revised exchange rates.)

Potato prices reportedly quadrupled in some areas of the EC during late 1975 and early 1976 because of a severe production shortfall, rather than Government policy. Belgium imposed a ceiling on the retail price of potatoes, effective January 13, 1976. Since potatoes are the only vegetable in Belgium's official national price index, a sharp rise in their price could trigger an increase in the index and lead to automatic salary increases. Potato export restrictions by both Belgium and France were announced in October 1975, but France has since lifted these restrictions. An export tax on certain kinds of potatoes to non-member countries was also imposed by the EC.

The relationship between farm prices and the cost of living has been widely discussed in Western Europe. The EC Commission has estimated that if farm prices are increased 10 percent, the cost of living increases by 1.9 percent. However, the Commission's agricultural price review team indicates that the impact on the overall cost of living may be lower than the Commission's estimate. The average 7.5-percent increase on 1976/77 farm prices is expected to result in a 1-percent increase in retail prices.

Both the EC and other Western European countries have applied consumer subsidies on various commodities, which distorts measuring direct price relationships from the farmer to the consumer.

One example is Sweden where the traditional approach for supporting farm prices has been via

high consumer prices. Between 1973 and 1975, however, the Government imposed a freeze on the retail price of certain livestock products to hold down inflation, and paid direct subsidies to support

farm prices. Nevertheless, the index of producer prices in Sweden increased 12 percent in 1975 over 1974, and the index of food prices rose 13 percent. (Marshall H. Cohen)

AGRICULTURAL TRADE¹

Western European agricultural trade in 1975 was influenced by several factors including a smaller grain crop, a worldwide recession, a decrease in major commodity prices, and a continuation of the EC import restrictions on beef, veal, and live cattle. Net imports of grain by Western Europe in 1975/76 are expected to be somewhat larger than a year earlier. Western European imports of U.S. grain should also rise. Intra-EC meat and livestock trade was strengthened in 1975 by the import restriction resulting from the critical beef surplus.

Grain

Excluding intra-EC trade and rice, Western Europe's exports of grain in 1975/76 are expected to be 8 percent of the world's total exports, down 2 percent from 1974/75. Imports are expected to decline from 26 percent of the world's total imports in 1974/75 to 23 percent in 1975/76.

The EC was a net exporter of wheat for the first time in the 1974/75 marketing year and is expected to be a small net exporter in 1975/76.

France, the major Western European grain exporter, experienced a disastrous year in 1974/75, when French grain exports plunged to 14.2 million tons, down 22 percent from the 18.2 million tons in 1973/74. Declines occurred in both corn and barley exports, partly because of increased competition from United States corn. Production of barley and corn also dropped in 1974/75, but lower export sales contributed to a buildup in corn and barley stocks. Barley exports were down 40 percent in 1974/75 to 2.7 million tons, and corn exports dropped 42 percent to 2.8 million tons. Nearly all French barley and corn exports are shipped to other EC countries.

At the end of 1974 and early in 1975, an expected shortage of corn in the EC contributed to an increase in the world price of corn. Because of the high world price of corn, the EC variable levy was at low or zero rates. Imports of corn into the EC at this time faced small or no protective barriers. Because the levy had been pre-fixed at low levels, the levy on corn shipments remained low when the prices dropped. Pre-fixation of the levy on corn into 1975 improved the competitive position of the

U.S. product in the EC. Also, French sales were adversely affected by the rather poor quality of the French crop. In order to protect EC corn and barley producers, levy pre-fixing on corn and barley was suspended in February 1975. The ban on pre-fixing was lifted in January 1976 since corn prices had again strengthened.

French exports of wheat and flour wheat equivalent declined 4 percent in 1974/75 to 8.5 million tons, primarily because of a 45-percent drop in exports to other EC countries. By contrast, French export sales of wheat to non-EC members rose approximately 85 percent. A larger share of this went to the Middle East, North Africa, and South Asia, all of which are becoming important outlets for French wheat.

The United Kingdom, a major importer of wheat, increased wheat imports by 23 percent in 1975 (January-November) to 3.2 million tons; this was still 10 percent below the 1973 figure. This increase occurred primarily because of the small size and low quality of the 1975 domestic crop.

Italy imported 910,000 tons of durum wheat in 1974/75, a 9-percent increase over 1973/74. The United States supplied 330,000 tons, and increased its share of the market to 36 percent.

The Netherlands imported a record volume of 5.5 million tons of feed grain during the 1974/75 season, up 34 percent from 1973/74. However, net imports were actually down 10 percent from the year before, because about 932,000 tons were re-exported, primarily to the United Kingdom and West Germany. Net imports of feed grain declined in 1974/75 because of lower use of grains in compound animal feeds, which was a result of the high grain price relative to alternate feed ingredients.

Spanish corn imports during calendar year 1975 reached a record high of 4.2 million tons. The surge in corn imports was caused by poor grassland conditions and a shortage of domestic feed grains resulting from a drought during most of 1975. Measures to curb corn imports were announced in February 1976.

¹Because 1975 trade statistics were incomplete, discussions in this chapter are based primarily on marketing year data for grain and calendar year for other products.

Livestock Products

A major influence on trade in the livestock and meat sector continued to be the EC-wide restrictions on imports of beef, veal, and cattle from third countries.

The virtual ban instituted in 1974 was eased twice in 1975, and modified again in January 1976. Under the present system, import licenses can be issued for beef and veal, certain other types of meat, and slaughter cattle weighing more than 300 kilograms, subject to the purchase by the importer of bone-in table cuts beef from EC intervention stocks. There is no quantity ratio specified regarding imports and purchases from intervention, but the EC Commission will exercise control through tenders for the sale of intervention beef. The system is aimed at encouraging imports of frozen manufacturing beef.

France benefited substantially in 1975 from the EC import restriction on beef, and continued to be an important supplier of beef to other EC members. France is the fifth largest world exporter of beef. French economic planners are beginning to explore ways to expand these exports.

Irish cattle and beef exports were also aided by the EC third country restrictions on beef and veal. Irish sales benefited from special EC monetary policies designed to encourage larger Irish shipments to other EC countries.

Irish live cattle exports increased from 447,000 head in 1974 to 642,000 head in 1975, the highest level since 1967. The United Kingdom imported 477,000 head in 1975 (January-November), a 34-percent increase over the previous year.

Irish beef exports reached a record 230,000 tons in 1975, up 15 percent over 1974, but most shipments went into intervention stocks in other EC countries. Commercial exports were down from a year earlier. German traders turned to Ireland for supplies of boned beef formerly imported from Argentina. The relatively high imports from Ireland also caused some displacement of French beef in West Germany.

Italy, the largest importer of live cattle in Western Europe, registered a 13-percent decline in imports, to about 1.6 million head of cattle (preliminary), reflecting EC-imposed restrictions.

Austria's agricultural trade balance with the EC has deteriorated severely during the past 2 years, primarily because of the EC's restrictions on beef and cattle imports. These restrictions caused a troublesome surplus of cattle in Austria during 1974, especially during the fall. However, the surplus has now nearly disappeared. The EC's restrictions on cattle imports do not apply to certain categories of breeding stock, and in 1975, EC imports of this kind of Austrian cattle zoomed, with Italy and West Germany as the major buyers.

Danish beef and veal exports rose 16 percent in 1975 to 122,000 tons. Sales to Italy and West Germany increased, but sales to the United Kingdom slipped.

For the second consecutive year, there was a sharp drop in the U.K.'s 1975 (January-November) imports of beef, down 23 percent below the January-November 1974 amount to 177,000 tons, and 30 percent below the 1973 total. The drop in beef imports was largely offset by increased domestic slaughter and larger imports of slaughter cattle.

U.K. imports of mutton and lamb, primarily from New Zealand, increased over 14 percent from 1974's slump to 226,000 tons. The recovery occurred despite rising import duties, required under EC rules, and increased U.K. production.

During the first half of 1975, the EC increased its dependence on pork imports from third countries. Live hog imports rose threefold over the first half of 1974, while exports to third countries fell. The pattern of intra-EC pork trade shows a clear division between importing countries (U.K., West Germany, France, and Italy) and exporting countries (Denmark, the Netherlands, Belgium, and Ireland). Among the exporters, Denmark is the leading pork supplier in intra-EC trade, and the major exporter to third countries. The United States is one of Denmark's most important non-EC outlets.

Belgian exports of hogs in January-October 1975 were 827,000 head, down 6 percent from the same period in 1974; pork exports were 131,892 tons, down 17 percent.

Danish bacon exports during 1975 totaled 140,000 tons, almost unchanged from 1974. Near-record prices were obtained throughout the year. Danish exports of fresh pork jumped 30 percent to 120,000 tons, primarily because of 25,000 tons in sales to Japan. But the export value of canned hams, a large share of which goes to the United States, declined, partly because of relatively low U.S. prices. Danish exports of all canned and prepared meat products declined about 20 percent to 155,000 tons in 1975, and exports to the U.S. dropped 25 percent to 45,000 tons.

U.K. butter imports rose significantly in January-November 1975, reaching 441,000 tons, up 14 percent from 1974, and 42 percent from 1973. The U.K.'s high import demand for butter in 1975 was boosted by a consumer subsidy and by declining domestic production.

Other Commodities

U.K. imports of refined sugar during the first 11 months of 1975, at 557,000 tons, were more than double the level during the same period in 1974. These unusually large imports occurred primarily

during the early part of 1975 and came from EC member countries. The imports from the EC helped fill the gap created in 1974 when traditional supplies of raw sugar from the Commonwealth's developing countries were low, and imports from Australia dropped because of EC arrangements. After the Lome Convention was signed, imports of raw sugar from the African, Caribbean, and Pacific (ACP) countries rose. (See previous section on Prices). Under the terms of the Lome Convention the EC agreed to import 1.4 million tons of sugar annually from the ACP countries. The United Kingdom, only 25 percent self-sufficient in sugar, will be the major recipient.

U.S. Exports to Western Europe

U.S. agricultural exports to Western Europe (not adjusted for transshipments) increased 2 percent in value during 1975 to \$7.2 billion, compared with a hike of 26 percent in 1974 (tables 8 and 11). Unit values were generally lower in 1975 than in 1974. Western Europe continues to import about one-

third of total U.S. farm exports (see fig. 1), and remains the largest homogeneous regional market for farm exports. But as a whole, Asia is a larger market than Western Europe.

U.S. sales of wheat to Western Europe nearly doubled in calendar 1975 after a sharp drop in 1974. Exports to West Germany and the Netherlands accounted for much of this increase, but transshipments to other regions, especially Eastern Europe, are partly responsible for the rise.

Total U.S. feed grain exports to Western Europe surged by 29 percent in calendar 1975 to 18.9 million tons. Corn exports, accounting for over 90 percent of all feed grains, jumped 28 percent to 17.3 million tons. Barley and sorghum exports rose 82 and 59 percent, respectively. This large increase in feed grain exports, especially corn, can be explained by: (1) the competitive price of U.S. corn; (2) the replenishing of Western European stocks in anticipation of expanded livestock numbers in 1976; and (3) transshipments to Eastern Europe via EC countries.

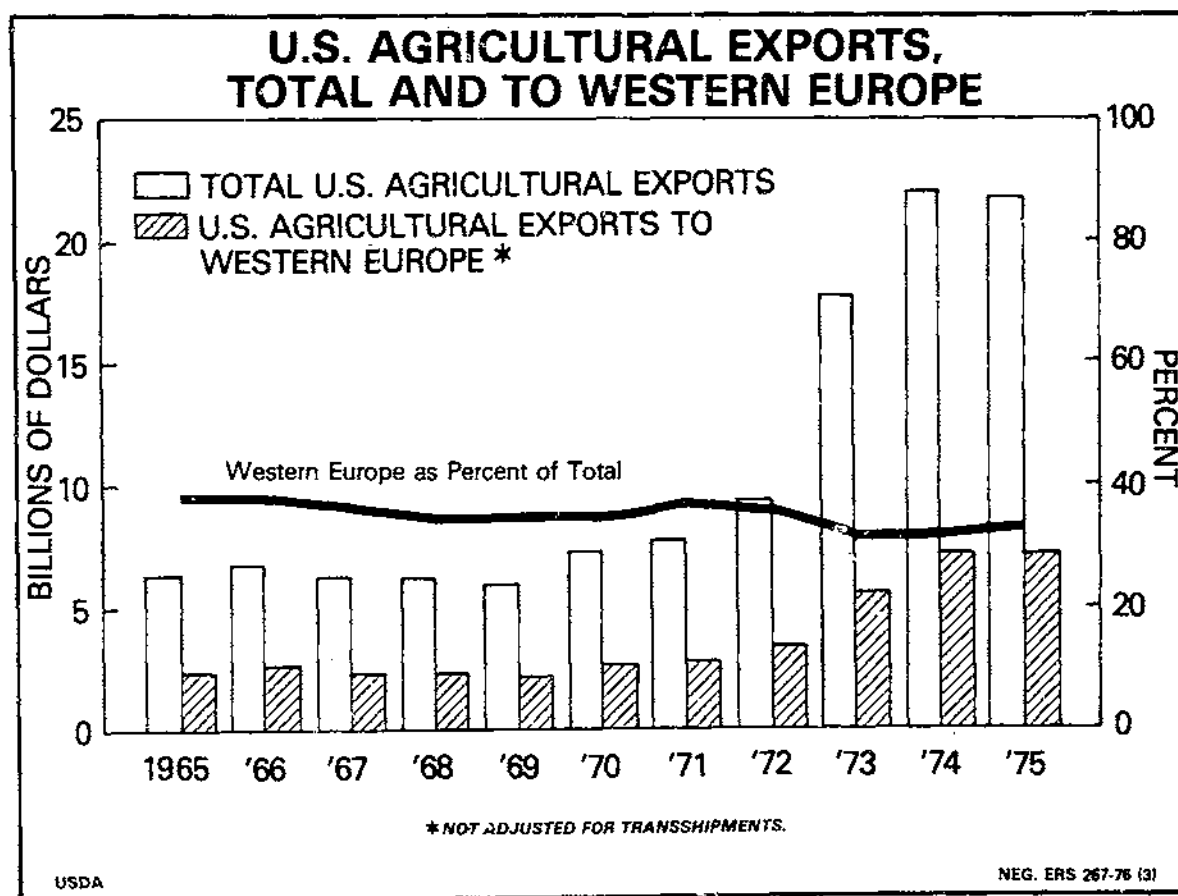


Figure 1

Soybean exports dropped 11 percent in volume, and soybean oilcake and meal dropped 18 percent during 1975. Soybean exports to West Germany dropped almost 40 percent in volume, but exports to the Netherlands increased 8 percent. West Germany and the Netherlands are the two major U.S. markets in Western Europe not only for oilseeds and their products, but also for total agricultural exports.

U.S. soybeans have been facing increasing competition from Brazil. The U.S. accounted for 83 percent of total West German soybean imports during 1973, but its share of that market declined to 76 percent in 1974, and 65 percent in 1975.

Exports of U.S. meat to Western Europe consist primarily of beef tongue, pork livers, beef livers, and other edible offals. These products are not subject to the EC restrictions on meat imports. A 12-percent increase in the value of total U.S. meat exports to Western Europe occurred in 1975. A dramatic rise in poultry exports to the Community resulted during 1975.

U.S. tobacco exports to Western Europe dropped 6 percent in volume to 160,000 tons, but the value rose 10 percent. Until 1975, the U.K. had been the largest foreign market for U.S. tobacco, but West Germany became our largest importer in 1975, importing 41,556 tons, although this was a 7-percent drop from 1974. Tobacco exports to the U.K. in 1975 plunged 17 percent to 35,764 tons.

U.S. cotton exports to Western Europe fell 38 percent in volume and 40 percent in value during 1975, partly because U.S. cotton prices were often higher than those of its competitors.

Outlook

The outlook for U.S. agricultural exports to Western Europe in 1976 is for increased meat, grains, feedstuffs, and horticultural product sales. As Western European economies recover from the 1975 recession, consumer spending should increase and, in turn, promote higher demand for meat and out-of-season fruits and vegetables.

The anticipated 1976 increase in livestock numbers in Western Europe and the 1975 shortfall in grain production should stimulate imports of feed grains, at least through the remainder of the current crop year. Total oilseed demand in Western Europe is also likely to increase, although competition in the soybean market is expected to continue strong, and the EC's regulation on nonfat dry milk will have a dampening effect on the import demand for protein feed.

The EC is expected to import approximately 200,000 tons of beef in 1976 from the world market as import restrictions are eased. (Cynthia A. Breitenlohner)

Table 1--Indexes of agricultural production in Western Europe, 1971-75 ^{1/}
(1961-65=100)

Country	1971	1972	1973	1974	1975 Prelim.
European Community.	120	119	121	125	121
Belgium-Luxembourg.	126	127	133	138	127
Denmark	107	108	106	112	106
France.	123	128	133	134	127
Germany, West	114	113	113	118	114
Ireland	124	120	122	125	132
Italy	125	117	120	123	127
Netherlands	131	129	134	140	138
United Kingdom.	116	116	117	120	112
Other Western Europe.	125	122	123	132	132
Austria	119	115	120	124	120
Finland	128	123	117	120	128
Greece.	126	132	132	147	149
Norway.	107	107	112	123	106
Portugal.	112	105	107	106	110
Spain	142	135	139	148	156
Sweden.	107	107	102	124	107
Switzerland	118	118	120	125	120
Total Western Europe.	121	120	122	127	123

^{1/} Only those commodities of considerable significance in their respective countries, or 12-18 crops and livestock products, are included. Thus, these indexes may differ from those calculated by the individual countries or other organizations.

Table 2--EC target and support prices for selected commodities, marketing years 1973/74-1976/77 ^{1/}

Commodity	1973/74	1974/75		1975/76	1976/77	Increase from 1975/76 to 1976/77
		Through 10/6/74	From 10/7/74 through end of marketing year			
		Units of account per metric ton				Percent
Soft wheat						
target price.	114.94	121.84	127.93	139.44	152.00	9.0
support price for all soft wheat.	105.80	110.03	115.53	125.93	---	---
support price for quality wheat .	---	---	---	---	131.00	---
support price for feed wheat. . .	---	---	---	---	116.00	---
Barley						
target price.	105.29	110.55	116.08	126.99	137.80	8.5
support price	96.66	96.60	101.43	110.96	116.00	4.5
Corn						
target price.	102.77	109.45	114.92	126.41	137.80	9.0
support price	84.08	89.55	94.03	103.43	112.20	8.5
Rice						
target price--husked.	213.25	226.00	237.20	261.03	284.52	9.0
support price--paddy.	131.30	136.55	143.40	154.87	164.16	6.0
Sugar, white						
target price.	248.00	265.50	278.80	320.50	348.70	8.2
support price	235.70	252.20	264.80	304.50	331.40	8.0
Rapeseed						
target price.	210.60	219.00	230.00	255.30	275.70	8.0
support price	204.50	212.70	223.30	247.90	267.70	8.0
Milk						
target price--3/15/76-9/15/76 . .	124.20	134.10	140.80	3/149.20	162.90	9.2
9/16/76-2/28/77	---	---	---	3/155.90	167.60	7.5
Nonfat dry milk						
support price--3/15/76-9/15/76 . .	660.00	790.00	827.00	3/887.00	4/	---
9/16/76-2/28/77	---	---	---	887.00	4/	---
Butter						
support price--3/15/76-9/15/76 . .	1,760.00	1,760.00	1,835.80	3/1,946.30	4/	---
9/16/76-2/28/77	---	---	---	3/2,095.80	4/	---
Cattle, live weight, orientation price 2/.	862.00	965.00	1,013.30	1,099.40	1,187.40	8.0
Hogs, carcass weight, basic price 2/	860.00	930.00	976.50	1,060.00	1,144.80	8.0

--- = not applicable.

^{1/} The target price represents the level the EC wants the market price to approximate. Threshold, or minimum import prices, are derived from target prices by subtracting transportation and other costs incurred between the point of entry and the area for which the target price is fixed. The target price for milk is the average amount that EC wishes the farmer to receive for whole milk delivered to the dairy. Support purchases, however, are made only for nonfat dry milk and butter (as well as some types of Italian cheese). Support prices, termed intervention prices by the EC, are the level at which the EC makes purchases to provide price protection to farmers. Marketing year for dairy products and livestock begins Mar. 15; it begins July 1 for sugar and rapeseed; Aug. 1 for grain; and Sept. 1 for rice.

^{2/} The guide or orientation price for beef is used to determine the levels at which support measures will be taken. The basic price for pork is also used for this purpose.

^{3/} The period of application during 1975/76 varied by a few days from the corresponding period in 1976/77.

^{4/} Undetermined as of mid-March 1976 (see text).

Table 3--Gross Domestic Product, West European countries, 1972-1976

Country	1972	1973	1974	1975 <u>1/</u>	1976 <u>2/</u>	Change from previous year			
						1975 <u>1/</u>		1976 <u>2/</u>	
						Real	Current prices	Real	Current prices
	<u>Billion dollars 3/</u>					<u>Percent 4/</u>			
European Community	839.6	1,056.8	1,158.3	1,278.4	1,414.4	-3.0	10.6	2.0	11.7
Belgium	35.4	45.3	52.0	59.3	66.2	-2.5	11.4	0.5	12.6
France	196.9	255.9	274.0	330.0	371.2	-2.0	9.8	3.0	13.8
Germany, West.	259.2	347.9	385.7	400.9	424.7	-3.75	4.0	3.25	7.4
Italy	117.4	137.9	149.0	163.0	186.1	-4.5	13.6	1.5	14.2
Luxembourg	1.4	1.8	2.1	<u>5/2.3</u>	<u>5/2.6</u>	<u>5/-2.5</u>	<u>5/10.7</u>	<u>5/0.5</u>	<u>5/12.1</u>
Netherlands.	46.3	60.3	70.1	76.5	82.2	-2.0	8.8	1.75	10.4
Denmark.	21.1	27.8	30.9	34.1	37.4	-1.5	8.4	4.0	11.3
Ireland.	5.5	6.5	6.8	7.2	8.3	-3.75	23.2	.25	16.3
United Kingdom	156.4	173.4	186.8	205.1	235.7	-2.25	23.4	0	16.3
Other Western Europe	186.1	241.2	281.9	314.5	350.3	-1.3	13.7	1.5	13.8
Austria.	20.4	26.7	32.3	35.7	38.6	-3.0	6.0	1.0	8.1
Finland.	13.4	17.3	21.2	24.9	28.4	-1.0	16.8	0	14.0
Greece	12.2	16.0	19.3	18.4	21.2	0.75	13.8	2.5	12.8
Norway	15.2	19.5	23.3	26.6	31.0	4.0	13.9	5.0	15.0
Portugal	8.6	11.3	11.6	13.3	<u>5/15.2</u>	-15.0	2.0	<u>5/-5.0</u>	<u>5/14.0</u>
Spain.	45.3	60.7	73.6	81.9	95.2	-1.0	14.8	1.0	16.2
Sweden	41.3	49.9	55.5	62.0	66.5	0	10.0	.25	8.3
Switzerland.	29.7	39.8	45.1	51.7	54.2	-4.0	2.2	1.0	5.5

1/ Preliminary.2/ Forecast.

3/ U.S. dollar equivalent values for 1972, 1973, and 1974 were computed by the Organization for Economic Cooperation and Development (OECD). Values for 1975 and 1976 were determined by converting available GDP estimates (expressed in local currencies) into dollars as follows: the average exchange rates for January-November 1975, published by the International Monetary Fund (IMF) were used for 1975; the November 1975 spot rates were used for 1976.

4/ All percentage growth rates are computed from amounts expressed in local currencies.5/ ERS estimate.

Source: OECD, IMF, U.S. Department of State, and Foreign Agricultural Service (FAS) of USDA.

Table 4--Index of West European countries' consumer prices, food prices, and wages, 1973-75, and expenditures for food as percentage of private consumption expenditures, 1973

Country	Consumer prices			12-month rate of change 1/	Food prices			12-month rate of change 1/	Wages			12-month rate of change	Expenditures on food, beverages, and tobacco as percentage of total private consumption expenditures, 1973
	1973	1974	1975		1973	1974	1975		1973	1974	1975 1/		
	1970=100	1970=100	1970=100		1970=100	1970=100	1970=100		1970=100	1970=100	1970=100		
European Community				Percent				Percent				Percent	Percent
Belgium	118	133	156	11.2	117	128	150	12.3	147	178	(Sept.) 216	17.4	29.0
Luxembourg	117	128	147	11.1	118	129	151	12.9	n.a.	n.a.	n.a.	n.a.	29.5
France	120	136	157	9.9	125	141	163	11.2	142	169	(Oct.) 205	16.0	3/25.5
Germany, West.	119	127	137	5.4	118	124	131	4.9	135	151	(3d Q) 166	8.4	28.5
Italy	123	146	178	11.3	125	150	2/185	13.7	156	191	(Oct.) 249	25.8	41.0
Netherlands	125	137	156	9.4	120	129	144	7.6	143	168	(Oct.) 199	14.2	25.7
Denmark	123	142	155	4.6	130	145	160	5.9	152	187	(Oct.) 233	17.5	29.0
Ireland	132	154	192	16.8	140	160	201	16.1	159	191	(2d Q) 241	27.9	44.2
United Kingdom	128	148	197	25.2	140	165	220	24.7	145	169	(Oct.) 229	26.0	31.3
Other Western Europe													
Austria	120	131	145	7.0	118	128	139	6.1	138	156	(Oct.) 189	18.3	4/33.1
Finland	126	148	182	17.2	128	149	190	19.2	133	188	(1st Q) 210	24.9	37.6
Greece	124	158	189	15.4	133	169	198	13.4	138	174	(3d Q) 220	23.7	40.3
Norway	122	134	155	11.8	122	132	160	17.7	135	159	(3d Q) 192	16.2	30.4
Portugal	140	175	2/208	13.1	131	173	2/220	14.3	n.a.	n.a.	n.a.	n.a.	49.2
Spain	131	151	2/183	16.1	133	151	2/183	16.6	157	210	(1st Q) 258	35.1	5/44.0
Sweden	121	134	153	8.8	126	134	157	13.0	134	149	(Oct.) 182	19.0	29.0
Switzerland	124	136	147	3.7	120	133	140	0.5	130	144	(Sept.) 155	6.8	6/28.7

n.a. = not available; Q = quarter.

1/ 1975 data are for latest month available (November, unless indicated otherwise). Data for 1973 and 1974 are yearly averages.

2/ October.

3/ As percent of final household expenditures on consumption. Excludes tobacco.

4/ 1972.

5/ 1971.

6/ As percent of disposable income, 1969.

Sources: OECD and IMF.

Table 5--International reserves and balance of payments on current account,
West European countries, 1972-76

Country	International reserves ^{1/}					Balance of payments on current account				
	1972	1973	1974	1975 ^{1/ 2/}		1972	1973	1974	1975 ^{2/}	1976 ^{3/}
	- - - Million dollars - - -					- - - Million dollars - - -				
European Community										
Belgium-Luxembourg	3,900	5,132	5,379	5,807		1,300	1,400	700	1,250	1,500
France	10,015	8,529	8,852	12,219		280	-680	-6,000	-250	-2,500
Germany, West	23,785	33,171	32,398	31,316		1,041	4,540	9,600	4,500	2,000
Italy	6,085	6,436	6,941	5,241		2,550	-2,420	-7,800	250	250
Netherlands	4,875	6,547	6,957	7,049		1,050	1,750	1,600	1,750	2,250
Denmark	855	1,324	935	884		-66	-496	-994	-200	-850
Ireland	1,126	1,025	1,267	1,345		-139	-214	-700	-175	-225
United Kingdom	5,647	6,476	6,939	5,630		220	-2,280	-8,800	-4,000	-3,250
Other Western Europe										
Austria	2,718	2,873	3,430	4,093		-168	-354	-498	-350	-500
Finland	727	619	634	498		-117	-428	-1,212	-2,300	-1,750
Greece	1,032	1,047	936	943		-404	-1,188	-1,238	-1,350	-1,350
Norway	1,325	1,575	1,929	2,154		-63	-347	-1,007	-2,950	-2,500
Portugal	2,312	2,839	2,354	1,633		427	547	-829	-1,350	-1,650
Spain	5,014	6,772	6,485	6,300		572	558	-3,146	-2,700	-2,000
Sweden	1,575	2,529	1,736	2,958		255	1,133	-1,000	-2,150	-1,850
Switzerland	7,557	8,520	9,011	8,282		220	279	171	2,000	1,950

^{1/} Includes foreign exchange, special drawing rights, gold, and reserve position in the International Monetary Fund at the end of the year. For 1975, data are as of November except for Portugal and Spain, which are as of October.

^{2/} Preliminary.

^{3/} Forecast.

Sources: OECD, IMF.

Table 6--West European import prices of selected agricultural products, 1970-75

Commodity	Description	1970	1971	1972	1973	1974	1975 1/
Dollars per metric ton							
Wheat.	U.S. No. 2 hard winter, ordinary, c.i.f., Rotterdam	64	66	76	143	200	150
Corn	U.S. No. 3 yellow, c.i.f., Rotterdam	67	63	63	106	147	134
Soybeans	U.S. No. 2, c.i.f., Rotterdam	117	126	140	290	277	230
Soybean meal . .	U.S. 44 percent, c.i.f., Rotterdam	103	102	129	307	184	154
Cotton	U.S. SM 1-1/16, c.i.f., North European ports	628	774	785	1,393	1,377	1,279
Sugar, raw . . .	U.K. contract price to Commonwealth sugar producing countries, U.K. ports	229	234	269	267	655	2/567
Coffee	Ivory Coast Robusta, ex-warehouse, Le Havre	920	904	1,004	1,132	1,205	1,229
Cocoa beans. . .	Ghana, c.i.f., North Sea ports	716	559	665	1,382	2,226	1,580
Bacon.	Danish A-1, London exchange	884	905	980	1,452	1,644	1,763
Cheese	Cheddar, New Zealand, wholesale, London	599	785	1,160	1,106	1,308	1,529
Butter	Danish salted, London exchange	900	1,266	1,218	1,086	1,386	1,889
Tobacco.	Total U.S. unmanufactured leaf, c.i.f., West German ports	2,120	2,417	2,368	2,384	2,697	2,928

1/ January-September; January-November for tobacco and cheese.

2/ U.K. guaranteed price to the African, Caribbean, and Pacific countries of the Lome Convention. (Includes the EC guaranteed price plus a U.K. supplement.)

Sources: IMF, Food and Agriculture Organization of the United Nations (FAO), and EAS.

Table 7--Changes in selected West European producer and wholesale prices,
December, 1974-1975

Product and country	Price level	December 1974	December 1975	Change from December 1974 to December 1975
		Dollars per metric ton		Percent
Soft wheat				
France	wholesale price	165.25	198.22	+20
West Germany	do.	187.21	217.03	+16
Italy	do.	174.17	212.04	+22
Spain	producer price	<u>1/154.00</u>	<u>1/142.00</u>	<u>1/-8</u>
Barley				
France	wholesale price	163.43	181.67	+11
West Germany	do.	182.24	198.55	+9
United Kingdom	do.	143.85	144.81	0
Corn				
France	wholesale price	170.81	186.59	+9
Italy	do.	178.93	192.77	+8
Portugal	producer price	<u>1/132.00</u>	<u>1/194.00</u>	<u>1/+47</u>
Greece	do.	155.00	159.00	+3
Potatoes				
West Germany	producer price	40.37	143.18	+255
United Kingdom	do.	65.92	259.48	+294
Sweden	wholesale price	114.00	208.38	+83
Steers (live weight)				
Denmark	wholesale price	1,051.00	1,341.00	+28
West Germany	do.	1,484.00	1,786.00	+20
United Kingdom	do.	802.00	1,072.00	+34
Hogs (live weight)				
West Germany	wholesale price	1,128.00	1,484.00	+32
Netherlands	do.	1,271.00	1,379.00	+8
Denmark	do.	1,066.00	1,244.00	+17
United Kingdom	do.	966.00	1,289.00	+33
Broilers (live weight)				
West Germany	producer price	642.00	721.00	+12
Italy	do.	758.00	995.00	+31
United Kingdom	wholesale price	689.00	737.00	+7
Butter				
West Germany	wholesale price	2,877.00	3,402.00	+18
Netherlands	do.	2,665.00	3,156.00	+18
United Kingdom	do.	1,585.00	2,290.00	+44
Denmark	do.	2,624.00	3,101.00	+18

1/ Annual averages and annual rate of change.

Sources: Agra-Europe, FAS, and national statistics.

Table 8--Selected U.S. agricultural exports to Western Europe by quantity and value, 1974 and 1975

SITC code	Commodity	Unit	Quantity		Percentage change	Value		Percentage change	Unit value		Percentage change
			1974	1975		1974	1975		1974	1975	
			--- 1,000 ---			- Million dollars -			--- Dollars ---		
00	Live animals. . .	No.	1,164	1,093	-6	20.8	14.8	-29	18	14	-22
01	Meat.	M.T.	139	156	+12	145.0	165.1	+14	1,043	1,058	+1
041	Wheat.	do.	1,537	2,869	+87	305.2	521.7	+71	198	182	-8
042	Rice.	do.	183	181	-1	92.4	70.3	-24	505	389	-23
043	Barley.	do.	49	89	+82	5.5	10.9	+98	111	122	+10
044	Corn.	do.	13,497	17,309	+28	1,717.2	2,248.6	+31	127	130	+2
045.1	Rye.	do.	44	8	-82	5.2	0.9	-83	119	118	-1
045.2	Oats.	do.	186	78	-58	17.1	7.8	-54	92	100	+9
045.9	Sorghum.	do.	866	1,376	+59	107.6	161.5	+50	124	117	-6
	Total feedgrain		14,642	18,860	+29	1,852.6	2,429.7	+31	127	129	+2
051	Fresh fruit and										
	nuts.	do.	211	337	+60	133.6	165.2	+24	633	490	-23
052	Dried fruit. . .	do.	54	69	+28	54.7	58.5	+7	1,014	819	-16
054	Vegetables. . .	do.	123	174	+9	67.3	61.3	-9	547	458	-16
081	Animal feed. . .	do.	4,464	4,451	+1	781.5	650.6	-17	175	145	-17
081.3	Soybean oilcake										
	and meal. . . .	do.	3,518	2,897	-18	659.9	484.7	-27	188	167	-11
121	Tobacco.	do.	171	160	-6	461.5	507.7	+10	2,699	3,173	+18
221.4	Soybeans. . . .	do.	8,077	7,220	-11	2,063.8	1,653.5	-20	256	229	-11
263	Cotton, raw and										
	linters	Rn. Bl. 1/	754	471	-38	197.1	118.7	-40	261	252	-3
411.3	Inedible tallow	M.T.	300	162	-46	125.9	53.3	-58	420	328	-22
	Subtotal. . . .	---	---	---	---	6,301.4	6,470.4	+3	---	---	---
	Other.	---	---	---	---	774.3	753.5	-3	---	---	---
	Total Western										
	Europe.	---	---	---	---	7,075.7	7,223.9	+2	---	---	---

--- = not available.

Note: Data not adjusted for transshipments. See note at bottom of table 11. Compiled from U.S. Bureau of Census data as processed by USDA's FPCD/SEA computer runs.

1/ Running bales; 1 Rn. Bl. = approximately 480 pounds.

Table 9--Production and area of selected crops.

Country and year	Grains											
	Area						Production					
	Feed grains						Feed grains					
	Wheat	Rye 2/	Barley	Oats	Corn	Total 2/ 3/	Wheat	Rye 2/	Barley	Oats	Corn	Total 2/ 3/
	1,000 hectares						1,000 tons					
Belgium-Luxembourg												
1960-64	226	49	131	140	1	285	560	842	144	478	455	2 976
1970-74	211	21	172	79	4	268	500	951	76	687	275	2 1,032
1973	214	18	173	74	4	264	496	1,049	67	776	287	2 1,141
1974	211	15	166	72	5	256	482	1,038	53	750	258	2 1,084
1975	187	10	144	84	3	257	454	699	33	474	256	36 818
France												
1960-64	4,233	251	2,284	1,321	902	4,708	31	9,223	11,746	373	6,261	2,628 2,624 11,873
1970-74	3,956	126	2,760	752	1,772	5,561	18	9,661	16,692	311	9,668	2,278 8,843 21,663
1973	3,957	122	2,788	693	1,952	5,718	17	9,814	17,792	327	10,844	2,203 10,620 24,632
1974	4,143	116	2,713	670	1,907	5,560	14	9,811	19,141	315	10,037	2,081 8,884 21,818
1975	3,869	111	2,778	641	1,984	5,707	10	9,697	15,641	300	9,336	1,898 8,143 20,311
Germany, West												
1960-64	1,398	1,176	1,107	762	12	2,163	---	4,927	4,731	3,225	3,433	2,211 29 7,076
1970-74	1,579	804	1,573	838	109	2,866	---	5,249	6,861	2,750	6,039	2,987 552 10,863
1973	1,601	739	1,671	821	106	2,943	---	5,285	7,134	2,576	6,522	3,045 573 11,465
1974	1,621	708	1,665	851	108	2,960	---	5,299	7,761	2,559	7,048	3,482 521 12,333
1975	1,571	650	1,769	896	96	3,087	---	5,308	7,012	2,188	7,030	3,363 496 12,500
Italy												
1960-64	4,651	59	209	406	1,140	1,761	121	6,392	8,261	89	266	525 3,732 4,535
1970-74	3,839	23	195	261	927	1,788	182	5,432	9,555	67	418	462 4,829 5,719
1973	3,590	18	201	238	891	1,335	150	5,131	8,899	38	458	419 5,088 5,975
1974	3,713	17	224	236	890	1,354	188	5,272	9,695	37	559	462 5,043 6,076
1975	3,553	14	248	235	912	1,395	185	5,167	9,620	37	648	506 5,300 6,465
Netherlands												
1960-64	132	118	92	116	---	252	---	502	583	354	374	425 --- 946
1970-74	142	45	80	79	2	171	---	358	699	143	349	169 10 678
1973	138	31	90	30	2	123	---	292	725	105	383	134 11 530
1974	130	22	73	32	2	163	---	260	746	78	315	163 10 490
1975	107	18	84	35	1	121	---	246	510	62	334	256 7 501
Total EC-6												
1960-64	10,430	1,653	3,823	2,745	2,055	9,369	152	21,604	26,163	4,185	10,812	6,244 6,397 25,406
1970-74	9,727	1,019	4,790	1,461	2,814	10,254	209	21,200	34,758	3,327	17,161	6,171 14,254 39,955
1973	9,592	928	4,925	1,856	2,955	10,383	207	21,020	35,599	3,113	19,083	6,088 16,319 43,743
1974	9,828	878	4,841	1,861	2,912	10,238	202	21,144	38,381	3,062	18,709	6,446 14,482 41,601
1975	9,287	807	5,023	1,892	2,996	10,567	195	20,845	38,882	2,620	17,822	6,179 13,982 40,155
Denmark												
1960-64	121	165	855	191	---	1,167	---	1,533	487	418	3,241	693 --- 4,631
1970-74	121	43	1,400	157	---	1,582	---	1,746	565	149	5,448	577 --- 5,125
1973	123	42	1,445	129	---	1,597	---	1,762	562	140	5,432	464 --- 5,651
1974	110	46	1,437	122	---	1,577	---	1,733	592	168	5,967	472 --- 6,501
1975	105	51	1,448	112	---	1,576	---	1,732	538	167	5,179	370 --- 5,599
Ireland												
1960-64	119	1	140	142	---	302	---	422	351	2	502	366 --- 868
1970-74	73	---	238	55	---	293	---	366	293	1	931	179 --- 1,110
1973	58	---	243	50	---	293	---	351	225	1	890	160 --- 1,050
1974	55	---	246	44	---	290	---	345	215	1	1,022	145 --- 1,167
1975	49	---	235	53	---	288	---	337	197	1	900	195 --- 1,095
United Kingdom												
1960-64	835	8	1,694	619	---	2,366	---	3,209	3,293	20	5,391	1,705 --- 7,752
1970-74	1,123	5	2,260	317	---	2,627	---	3,755	4,976	16	8,684	1,178 --- 10,014
1973	1,146	5	2,268	281	---	2,680	---	3,751	5,002	16	9,007	1,080 --- 10,279
1974	1,233	4	2,214	253	---	2,509	---	3,766	6,130	14	9,111	955 --- 10,235
1975	1,017	6	2,358	235	---	2,629	---	3,672	4,440	19	8,440	800 --- 9,366
Total EC-3												
1960-64	1,075	154	2,709	952	---	3,935	---	5,164	4,131	440	9,634	2,764 --- 13,251
1970-74	1,317	48	3,898	529	---	4,502	---	5,867	5,834	166	15,065	1,934 --- 17,249
1973	1,327	47	3,956	460	---	4,490	---	5,864	5,769	157	15,329	1,684 --- 17,280
1974	1,398	50	3,897	419	---	4,376	---	5,824	6,937	183	16,171	1,572 --- 17,903
1975	1,191	57	4,041	409	---	4,493	---	5,741	5,175	187	14,519	1,365 --- 16,060
Total EC-9												
1960-64	11,505	1,807	6,532	1,697	2,055	11,104	152	26,768	30,294	4,625	20,446	9,008 6,397 38,657
1970-74	11,044	1,067	8,688	2,490	2,814	14,756	209	27,067	40,592	3,493	32,226	8,105 14,254 57,104
1973	10,829	975	8,881	2,316	3,955	14,873	207	26,884	41,368	3,270	34,432	7,772 16,319 61,023
1974	11,226	928	8,738	2,280	2,912	14,614	202	26,970	45,318	3,225	34,831	8,018 14,482 59,704
1975	10,478	860	9,064	2,291	2,996	15,060	195	26,501	38,057	2,807	32,341	7,544 13,982 56,215

See footnotes at the end of table.

averages 1960-64 and 1970-74, annual 1973-75 1/

Grains-Cont.											
Other crops											
Production-Cont.											
Area											
Production											
Rice (paddy)	Total grains	Potatoes	Sugar beets	Cotton	Tobacco	Potatoes	Sugar beets	Cotton	Tobacco	Olive oil	Fruits
											Apples 4/5 Pears 4/5 Citrus
1,000 tons		1,000 hectares							1,000 tons		
1,962	75	61	---	1	1,870	2,607	---	3	---	160	59
2,059	48	99	---	1	1,592	4,533	---	2	---	245	61
2,257	52	104	---	1	1,475	5,136	---	2	---	243	0
2,175	42	105	---	1	1,518	4,465	---	2	---	209	88
1,550	37	120	---	1	1,428	4,917	---	2	---	220	44
121	24,111	825	367	---	22	13,915	14,803	---	41	1	854
66	38,732	352	451	---	20	8,237	19,147	---	49	2	1,825
67	42,814	326	489	---	21	7,400	20,490	---	51	3	2,060
47	41,321	314	510	---	20	7,450	20,700	---	52	2	1,619
46	35,698	311	560	---	21	7,220	22,400	---	56	2	2,000
---	15,032	951	294	---	4	23,515	11,292	---	10	---	1,623
---	20,474	520	334	---	4	14,938	15,080	---	10	---	1,459
---	21,175	481	352	---	4	13,676	16,448	---	12	---	2,016
---	22,653	467	369	---	4	14,548	16,449	---	10	---	1,282
---	21,260	411	422	---	4	10,850	17,779	---	10	---	1,882
635	13,520	375	232	19	48	3,904	7,542	5	59	385	2,180
900	16,221	223	248	6	40	3,145	9,285	1	85	469	1,912
1,043	15,955	182	235	5	51	2,937	9,203	1	64	480	2,030
997	16,805	181	196	5	49	2,903	7,711	1	93	460	1,886
961	17,053	178	257	5	51	3,035	11,500	1	96	560	2,121
---	1,883	124	89	---	---	3,766	3,606	---	---	---	735
---	1,520	155	109	---	---	5,769	5,045	---	---	---	441
---	1,360	157	117	---	---	5,771	5,592	---	---	---	450
---	1,314	155	109	---	---	6,095	4,911	---	---	---	385
---	1,073	151	138	---	---	5,212	6,000	---	---	---	430
756	56,510	2,350	1,063	19	75	46,970	39,851	5	113	386	5,152
966	79,006	1,298	1,241	6	65	33,591	53,090	1	146	471	6,082
1,106	83,561	1,196	1,288	5	77	31,259	56,869	1	159	483	6,799
1,044	84,268	1,159	1,289	5	74	32,514	54,236	1	157	462	5,381
1,007	76,664	1,088	1,497	5	77	27,745	62,596	1	164	562	6,656
---	5,536	69	58	---	---	1,432	2,164	---	---	---	84
---	6,839	33	56	---	---	828	2,214	---	---	---	75
---	6,633	32	63	---	---	748	2,521	---	---	---	80
---	7,261	33	67	---	---	903	2,691	---	---	---	72
---	6,304	31	83	---	---	650	2,850	---	---	---	83
---	1,221	85	32	---	---	1,935	924	---	---	---	7
---	1,404	48	29	---	---	1,298	1,110	---	---	---	7
---	1,276	48	30	---	---	1,332	1,316	---	---	---	9
---	1,383	40	26	---	---	1,111	923	---	---	---	10
---	1,243	40	33	---	---	1,000	1,422	---	---	---	---
---	11,065	209	174	---	---	6,829	6,083	---	---	---	518
---	15,006	241	191	---	---	7,000	6,502	---	---	---	419
---	15,297	225	194	---	---	6,807	7,427	---	---	---	456
---	16,179	215	135	---	---	6,790	4,587	---	---	---	340
---	13,825	204	197	---	---	4,730	5,309	---	---	---	345
---	17,822	363	264	---	---	10,196	9,171	---	---	---	602
---	23,249	322	276	---	---	9,126	9,866	---	---	---	501
---	23,206	305	287	---	---	8,887	11,264	---	---	---	543
---	25,023	288	288	---	---	8,804	8,201	---	---	---	421
---	21,422	275	313	---	---	6,380	9,581	---	---	---	438
756	74,332	2,713	1,327	19	75	57,166	49,022	5	113	386	5,754
966	102,255	1,620	1,517	6	65	42,717	62,956	1	146	471	6,583
1,106	106,767	1,501	1,575	5	77	40,146	68,123	1	159	483	7,342
1,044	109,291	1,447	1,577	5	74	42,318	62,437	1	157	462	5,602
1,007	98,096	1,363	1,810	5	77	34,125	72,177	1	164	562	7,094

Continued --

Table 9--Production and area of selected crops.

Country and year	Grains																												
	Area							Production																					
	Wheat	Rye 2/	Feed grains				Rice	Total grains	Wheat	Rye 2/	Feed grains																		
			Barley	Oats	Corn	Total 2/ 3/					Barley	Oats	Corn	Total 2/ 3/															
1,000 hectares															1,000 tons														
Other Western Europe:																													
Austria																													
1960-64	276	183	209	153	53	437	---	896	712	401	576	336	202	1,167															
1970-74	271	134	304	96	135	560	---	965	938	406	1,046	277	776	2,149															
1973	266	123	318	94	147	592	---	981	939	400	1,087	284	966	2,448															
1974	269	123	319	92	149	595	---	987	1,102	415	1,238	290	857	2,498															
1975	268	122	320	90	147	591	---	981	945	347	1,006	306	981	2,412															
Finland																													
1960-64	242	98	227	467	---	723	---	1,063	422	140	387	846	---	1,281															
1970-74	187	62	436	528	---	995	---	1,244	474	128	1,016	1,256	---	2,322															
1973	188	52	458	528	---	1,098	---	1,248	462	124	992	1,169	---	2,209															
1974	217	71	443	550	---	1,016	---	1,306	593	134	963	1,113	---	2,123															
1975	218	37	454	572	---	1,058	---	1,313	554	69	1,155	1,423	---	2,625															
Greece																													
1960-64	1,089	23	184	126	187	509	20	1,641	1,722	24	248	150	284	693															
1970-74	917	5	393	78	139	640	17	1,579	1,941	7	853	111	573	1,547															
1973	865	5	411	74	166	656	17	1,543	1,738	6	857	102	650	1,812															
1974	935	4	419	79	178	641	20	1,600	2,374	6	983	116	539	1,643															
1975	910	4	406	71	136	618	19	1,551	2,078	6	924	106	537	1,570															
Norway																													
1960-64	9	1	165	55	---	221	---	271	22	3	423	139	---	566															
1970-74	6	2	177	88	---	265	---	273	23	7	571	306	---	877															
1973	5	2	172	100	---	272	---	279	20	7	535	349	---	884															
1974	14	3	170	103	---	273	---	290	62	11	649	404	---	1,053															
1975	16	1	180	103	---	283	---	300	50	4	451	265	---	716															
Portugal																													
1960-64	710	302	123	279	489	892	37	1,941	525	162	56	79	562	699															
1970-74	494	216	87	162	382	631	40	1,381	613	133	66	92	524	682															
1973	474	207	81	157	372	610	39	1,330	584	134	57	79	509	645															
1974	505	194	86	167	372	625	33	1,357	534	143	74	99	486	659															
1975	493	184	95	175	383	653	31	1,361	646	155	90	122	495	707															
Spain																													
1960-64	4,148	465	1,431	545	461	2,432	63	7,128	4,120	393	1,893	459	1,075	3,456															
1970-74	3,459	279	2,569	467	526	3,602	61	7,404	4,498	259	4,409	480	1,961	7,000															
1973	3,151	268	2,773	471	523	3,810	61	7,290	3,966	252	4,402	423	2,038	7,029															
1974	3,163	249	2,027	475	501	4,040	61	7,513	4,444	254	5,404	559	1,962	8,082															
1975	2,863	235	1,080	459	492	4,068	62	7,228	4,354	247	6,877	619	1,848	9,492															
Sweden																													
1960-64	276	65	378	502	---	1,073	---	1,414	866	154	1,050	1,272	---	2,812															
1970-74	281	94	598	490	---	1,156	---	1,531	1,254	331	1,996	1,615	---	3,805															
1973	290	95	599	474	---	1,144	---	1,529	1,335	324	1,768	1,709	---	3,139															
1974	338	110	595	436	---	1,102	---	1,550	1,826	440	2,399	1,686	---	4,333															
1975	303	95	596	462	---	1,122	---	1,520	1,377	327	1,878	1,320	---	3,361															
Switzerland																													
1960-64	104	15	30	13	2	58	---	177	343	52	99	43	11	191															
1970-74	87	11	42	9	16	68	---	166	357	49	171	40	97	310															
1973	86	11	44	14	20	75	---	172	326	45	176	39	138	355															
1974	84	10	46	11	22	80	---	174	379	46	212	53	128	395															
1975	85	8	46	11	21	79	---	172	332	32	184	44	126	356															
Total other Western Europe:																													
1960-64	6,034	1,152	2,747	2,140	1,192	6,365	120	14,491	9,733	1,329	4,732	3,324	2,134	10,865															
1970-74	5,702	803	4,606	1,919	1,218	7,917	118	14,569	10,098	1,340	10,128	4,177	3,931	18,692															
1973	5,325	763	4,856	1,908	1,228	8,167	117	14,372	9,370	1,292	9,874	3,656	4,301	18,321															
1974	5,525	766	5,105	1,913	1,182	8,172	114	14,777	11,214	1,449	11,921	4,322	3,972	20,786															
1975	5,156	686	5,187	1,943	1,179	8,472	112	14,426	10,341	1,187	12,565	4,205	3,987	21,239															
Total Western Europe:																													
1960-64	18,350	2,959	9,279	5,837	3,267	19,669	272	41,259	30,027	5,954	25,178	12,332	8,531	49,522															
1970-74	16,746	1,870	13,294	4,409	4,072	22,673	318	41,607	50,690	4,833	42,354	12,282	18,185	75,896															
1973	16,154	1,738	13,737	4,224	4,183	23,449	324	41,254	50,738	4,562	44,286	11,428	20,620	79,344															
1974	16,751	1,694	13,843	4,193	4,094	22,986	316	41,747	56,532	4,674	46,752	12,340	18,454	80,490															
1975	15,634	1,546	14,251	4,234	4,175	23,532	307	41,018	48,398	3,994	44,906	11,749	17,969	77,454															

--- = none or negligible

1/ Data for 1975 are preliminary

2/ Rye has traditionally been a bread grain in many parts of Western Europe. However, for the region as a whole, about half of the crop is used for feed.

3/ Includes other grains.

4/ Dessert and cooking only.

averages 1960-64 and 1970-74, annual 1971-75 1/-- Continued

Grains-Cont.		Other crops												
Production-Cont.		Area					Production							
Rice (paddy)	Total grains	Potatoes	Sugar beets	Cotton	Tobacco	Potatoes	Sugar beets	Cotton	Tobacco	Olive oil	Fruits			
											Apples <i>4/</i>	Pears <i>4/</i>	Citrus	
1,000 tons		1,000 hectares					1,000 tons							
---	2,280	168	47	---	---	3,471	1,799	---	1	---	279	69	---	
---	3,493	96	47	---	---	2,375	2,053	---	1	---	170	47	---	
---	3,787	84	51	---	---	2,117	2,220	---	1	---	187	54	---	
---	4,015	82	54	---	---	1,996	2,355	---	1	---	205	51	---	
---	3,704	69	59	---	---	1,579	3,057	---	1	---	213	53	---	
---	1,843	77	18	---	---	1,159	424	---	---	---	---	---	---	
---	2,924	50	19	---	---	770	563	---	---	---	---	---	---	
---	2,795	46	21	---	---	669	607	---	---	---	---	---	---	
---	2,850	47	23	---	---	525	620	---	---	---	---	---	---	
---	3,253	48	24	---	---	784	670	---	---	---	---	---	---	
80	2,519	44	7	193	122	527	223	82	99	144	130	41	329	
84	3,579	53	25	146	89	773	1,341	122	87	212	210	107	620	
90	2,446	55	25	147	83	797	1,380	138	91	192	233	120	582	
103	4,026	56	27	154	82	813	1,490	108	81	237	200	88	794	
103	3,757	57	30	135	98	820	2,000	115	117	220	250	124	754	
---	591	52	---	---	---	1,082	---	---	---	---	62	9	---	
---	907	31	---	---	---	744	---	---	---	---	49	10	---	
---	911	29	---	---	---	672	---	---	---	---	36	5	---	
---	1,126	30	---	---	---	947	---	---	---	---	59	13	---	
---	770	25	---	---	---	437	---	---	---	---	44	9	---	
170	1,557	104	---	---	---	1,056	---	---	---	79	91	50	130	
164	1,612	111	---	---	---	1,122	---	---	---	48	117	49	167	
166	1,531	109	---	---	---	1,086	---	---	---	42	143	60	169	
129	1,465	112	---	---	---	1,114	---	---	---	38	100	41	174	
121	1,629	107	---	---	---	923	---	---	---	45	120	47	170	
397	8,366	399	146	275	19	4,604	3,532	92	31	378	290	132	1,799	
368	12,125	406	194	49	16	5,250	5,269	51	25	416	777	413	2,617	
386	11,631	409	190	92	16	5,578	5,501	45	26	438	1,015	471	2,928	
367	13,147	407	142	107	16	5,693	3,984	58	22	374	1,038	482	2,709	
384	14,477	376	190	74	15	5,272	5,998	53	22	425	1,055	421	2,874	
---	3,832	53	46	---	---	1,636	1,832	---	---	---	123	14	---	
---	5,390	49	42	---	---	1,206	1,794	---	---	---	114	16	---	
---	4,798	46	41	---	---	905	1,781	---	---	---	118	10	---	
---	6,599	47	47	---	---	1,257	2,160	---	---	---	101	21	---	
---	5,065	41	52	---	---	818	1,973	---	---	---	120	12	---	
---	586	49	6	---	1	1,222	256	---	2	---	194	38	---	
---	716	26	10	---	1	1,236	461	---	---	---	97	19	---	
---	726	26	10	---	1	1,025	540	---	2	---	112	26	---	
---	820	23	10	---	1	890	518	---	2	---	78	10	---	
---	720	23	12	---	1	840	480	---	2	---	105	26	---	
647	21,574	946	270	468	142	14,757	8,066	174	131	601	1,169	353	2,258	
616	30,746	822	337	245	106	13,476	11,481	173	113	676	1,514	661	3,404	
644	29,627	904	338	239	100	12,849	12,029	183	120	672	1,844	746	3,679	
599	34,048	904	303	261	99	13,135	11,107	166	106	609	1,781	706	3,677	
608	33,375	746	367	209	114	11,473	14,178	168	142	690	1,907	692	3,798	
1,403	95,906	3,659	1,597	487	217	71,923	57,088	179	246	987	6,923	2,247	3,740	
1,582	133,001	2,442	1,854	251	171	56,193	74,437	174	259	1,147	8,117	3,445	5,999	
1,750	136,394	2,307	1,913	244	177	52,995	80,162	184	279	1,155	9,186	3,357	6,291	
1,643	143,339	2,251	1,880	266	171	54,453	73,544	167	263	1,071	7,583	3,260	6,578	
1,615	131,461	2,109	2,177	214	191	45,598	86,355	169	306	1,252	9,001	3,005	6,519	

Table 10--Production of principal livestock products, average 1960-64 and 1970-74, annual 1973-75 1/

Country and year	Principal red meats				Poultry meat 3/	Cow's milk 4/	Eggs
	Beef and veal	Mutton, lamb, and goat meat	Pork 2/	Total			
1,000 tons							
European Community							
Belgium-Luxembourg							
1960-64	221	2	246	469	77	4,120	173
1970-74	281	3	539	823	108	3,954	231
1973	271	3	587	861	110	3,850	219
1974	318	3	629	950	105	3,989	221
1975	297	3	592	892	102	3,845	212
France							
1960-64	1,439	108	953	2,500	372	24,338	527
1970-74	1,613	129	1,341	3,083	686	28,504	687
1973	1,546	128	1,351	3,025	809	29,290	714
1974	1,887	133	1,374	3,394	833	29,470	720
1975	1,860	132	1,410	3,402	816	29,500	763
Germany, West							
1960-64	1,138	14	2,051	3,203	117	20,190	530
1970-74	1,277	11	2,492	3,780	272	21,458	898
1973	1,164	11	2,185	3,360	281	21,270	916
1974	1,327	12	2,297	3,636	266	21,508	894
1975	1,277	14	2,320	3,611	281	21,550	914
Italy							
1960-64	651	41	414	1,106	316	9,349	414
1970-74	1,019	50	650	1,719	706	9,474	589
1973	1,062	50	689	1,801	806	9,549	623
1974	1,098	47	729	1,874	838	9,650	644
1975	1,043	46	770	1,859	860	9,600	625
Netherlands							
1960-64	262	8	404	674	99	6,989	320
1970-74	311	11	753	1,075	325	8,904	264
1973	279	10	768	1,057	334	9,354	269
1974	362	14	822	1,198	315	9,464	276
1975	355	15	823	1,193	306	9,850	302
Total EC-6							
1960-64	3,711	173	4,068	7,952	981	64,986	1,964
1970-74	4,501	204	5,775	10,480	2,097	72,294	2,669
1973	4,322	202	5,580	10,104	2,340	73,313	2,741
1974	4,992	209	5,851	11,052	2,357	74,081	2,755
1975	4,832	210	5,915	10,957	2,365	74,345	2,816
Denmark							
1960-64	162	1	633	796	64	5,319	117
1970-74	195	1	753	949	86	4,706	76
1973	184	1	774	959	90	4,729	73
1974	237	1	744	982	95	4,818	73
1975	235	1	740	976	88	4,900	75
Ireland							
1960-64	126	44	111	281	19	2,842	45
1970-74	233	44	146	423	37	3,891	39
1973	210	43	43	396	41	4,153	34
1974	300	44	131	475	38	4,040	39
1975	350	40	143	533	37	4,207	40
United Kingdom							
1960-64	893	250	762	1,905	350	11,100	815
1970-74	952	232	1,001	2,185	623	13,212	813
1973	876	235	1,007	2,118	573	13,865	800
1974	1,073	249	1,004	2,326	655	13,483	773
1975	1,225	257	803	2,285	650	13,425	752
Total EC-3							
1960-64	1,181	295	1,506	2,982	433	19,261	977
1970-74	1,380	277	1,900	3,557	746	21,809	928
1973	1,270	279	1,924	3,473	804	22,747	907
1974	1,610	294	1,879	3,783	789	22,341	885
1975	1,810	298	1,686	3,794	775	22,532	867
Total EC-9							
1960-64	4,892	468	5,574	10,934	1,414	84,247	2,941
1970-74	5,881	481	7,675	14,037	2,843	94,103	3,597
1973	5,592	481	7,504	13,577	3,144	96,060	3,648
1974	6,602	503	7,730	14,835	3,146	96,422	3,640
1975	6,642	508	7,601	14,751	3,140	96,877	3,683

Continued--

Table 10--Production of principal livestock products, averages 1960-64 and 1970-74, annual 1973-75 1/--Continued

Country and year	Principal red meats				Poultry meat 3/	Cow's milk 4/	Eggs
	Beef and veal	Mutton, lamb, and goat meat	Pork 2/	Total			
	1,000 tons						
Other Western Europe							
Austria							
1960-64.	137	1	240	378	26	2,985	80
1970-74.	167	1	289	457	48	3,290	87
1973	166	1	288	455	50	3,277	87
1974	195	1	298	494	47	3,283	83
1975	200	1	310	511	50	3,250	87
Finland							
1960-64.	84	1	63	148	2	3,668	45
1970-74.	107	3	131	241	6	3,155	74
1973	98	1	125	224	8	3,107	77
1974	118	1	125	244	9	3,056	77
1975	118	1	125	244	10	3,060	77
Greece							
1960-64.	40	77	37	154	22	385	67
1970-74.	93	69	76	238	78	611	108
1973	91	66	88	245	83	654	103
1974	110	70	103	283	90	687	108
1975	109	72	101	282	83	763	105
Norway							
1960-64.	54	15	55	124	3	1,648	32
1970-74.	58	16	73	147	8	1,732	39
1973	60	16	76	152	9	1,749	39
1974	66	16	77	159	9	1,746	41
1975	71	16	77	164	8	1,744	38
Portugal							
1960-64.	45	22	91	158	30	354	32
1970-74.	78	24	105	207	67	460	40
1973	82	24	112	218	69	462	42
1974	84	25	115	224	73	484	44
1975	90	25	116	231	60	490	46
Spain							
1960-64.	180	119	286	585	95	2,255	248
1970-74.	344	143	545	1,032	360	3,914	391
1973	371	144	588	1,103	345	4,131	424
1974	416	155	710	1,281	490	4,280	458
1975	445	150	625	1,220	550	4,400	499
Sweden							
1960-64.	149	2	212	363	18	3,905	95
1970-74.	145	3	258	406	30	3,031	102
1973	127	2	265	394	28	2,986	107
1974	144	4	279	427	37	2,072	106
1975	144	4	285	433	36	3,070	106
Switzerland							
1960-64.	108	3	139	250	7	3,079	29
1970-74.	133	3	218	354	18	3,238	40
1973	126	3	231	360	19	3,274	41
1974	145	2	233	380	21	3,340	39
1975	136	2	226	364	20	3,345	41
Total other Western Europe							
1960-64.	797	240	1,123	2,160	203	18,279	628
1970-74.	1,125	262	1,695	3,082	615	19,431	881
1973	1,121	257	1,773	3,151	611	19,640	920
1974	1,278	274	1,940	3,492	776	19,948	956
1975	1,313	271	1,865	3,449	817	20,122	999
Total Western Europe							
1960-64.	5,689	708	6,697	13,094	1,617	102,526	3,569
1970-74.	7,006	743	9,370	17,119	3,458	113,534	4,478
1973	6,713	738	9,277	16,728	3,755	115,700	4,568
1974	7,880	777	9,670	18,327	3,922	116,370	4,596
1975	7,955	779	9,466	18,200	3,957	116,999	4,682

1/ Data for 1975 are preliminary.

2/ Excludes commercial lard.

3/ On ready-to-cook basis.

4/ As reported; it does not always include amounts fed to young animals.

Table 11--U.S. agricultural exports to the European Community and other Western Europe, 1973-75

Commodity and year	SITC Number		European Community										
	Major headings	Sub-headings 1/	EC-6						EC-3				
			Belgium-Luxembourg	France	West Germany	Italy	Netherlands	Total EC-6	Denmark	Ireland	United Kingdom	Total EC-3	Total EC-9
Million dollars													
Live animals	1973	00	0.1	8.7	0.4	6.1	0.2	15.5	---	6.1	10.6	16.7	32.2
	1974		.2	6.6	.1	1.4	.3	8.6	0.1	2.3	8.1	10.5	19.1
	1975		.2	4.9	.9	1.0	.3	7.3	---	1.3	3.7	5.0	12.3
Meat	1973	01	16.4	55.6	26.5	2.0	18.5	119.0	.3	0.1	29.3	29.7	148.7
	1974		19.0	55.6	16.9	2.0	23.5	117.0	.5	---	21.7	22.2	139.2
	1975		27.0	56.7	16.6	3.7	24.6	128.6	.7	---	29.0	29.7	158.3
Wheat	1973	041	12.4	15.5	33.7	52.2	75.0	188.8	---	---	25.0	25.0	213.8
	1974		12.7	22.9	25.8	29.6	94.8	185.8	---	---	55.8	55.8	241.6
	1975		23.6	20.4	136.7	74.5	129.1	384.3	---	---	59.9	59.9	444.2
Rice	1973	042	5.0	5.4	18.4	---	8.5	37.3	.6	.1	13.2	13.9	51.2
	1974		11.9	5.5	34.1	---	11.5	63.0	1.0	.1	11.5	12.6	75.6
	1975		4.8	6.2	24.0	1.8	11.8	48.6	.2	.1	10.9	11.2	59.8
Barley	1973	043	---	---	12.6	8.4	---	21.0	---	---	1.9	1.9	22.9
	1974		---	---	5.0	---	---	5.0	---	---	---	---	5.0
	1975		---	---	6.6	4.2	---	10.8	---	---	---	---	10.8
Corn	1973	044	20.8	2.6	195.6	248.8	297.2	765.0	.1	.2	124.2	124.5	889.5
	1974		22.1	4.2	394.1	262.3	442.8	1,125.5	.1	---	120.0	120.1	1,245.6
	1975		55.4	7.4	539.7	328.3	542.1	1,472.9	.2	---	98.7	98.9	1,571.8
Rye	1973	045.1	---	---	.4	---	.7	1.1	---	---	---	---	1.1
	1974		---	---	---	---	3.8	3.8	---	---	---	---	3.8
	1975		---	---	.4	---	.5	0.9	---	---	---	---	0.9
Oats	1973	045.2	.5	---	29.9	6.4	3.6	40.4	---	---	---	---	40.4
	1974		.5	---	10.4	1.5	2.0	14.4	---	---	---	---	14.4
	1975		.1	---	2.8	4.0	.4	7.3	---	---	---	---	7.3
Sorghum	1973	045.9	2.3	.7	6.8	0.2	16.1	26.1	---	1.1	0.4	1.5	27.6
	1974		5.2	.5	17.5	.3	52.0	75.5	---	---	3.1	3.1	78.6
	1975		60.8	.6	6.1	.2	64.2	131.9	---	---	.7	0.7	132.6
Total feed grains	1973		23.6	3.3	245.3	263.8	317.6	853.6	.1	1.3	126.5	127.9	981.5
	1974		27.8	4.7	427.0	264.1	500.6	1,224.2	.1	---	123.1	123.2	1,347.4
	1975		116.3	8.0	555.6	336.7	607.2	1,623.8	.2	---	99.4	99.6	1,723.4
Fresh fruit and nuts	1973	051	1.0	16.1	28.2	2.0	15.7	63.0	3.0	.2	12.1	15.3	78.3
	1974		1.3	20.0	49.1	1.7	15.4	87.5	2.2	.1	16.4	18.7	106.2
	1975		2.0	24.6	52.2	5.3	26.5	110.6	3.4	.7	17.2	21.3	131.9
Dried fruit	1973	052	2.6	6.5	6.7	5.6	2.2	23.6	4.5	.3	7.4	12.2	35.8
	1974		2.7	2.1	5.9	3.3	2.5	16.5	5.0	.3	11.7	17.0	33.5
	1975		2.4	10.8	5.0	3.9	3.1	25.2	4.7	.4	7.7	12.8	38.0

See footnotes at end of table.

Continued--

Table 11--U.S. agricultural exports to the European Community and other Western Europe, 1973-75--Continued

Commodity and year		SITC Number		Other Western Europe										Total other Western Europe	Total Western Europe
		Major head-ings	Sub-head-ings 1/	Austria	Finland	Greece	Norway	Portugal	Spain	Sweden	Switzer-land	Other 2/			
Million dollars															
Live animals	1973	00		0.1	---	2.2	---	---	1.4	0.1	---	---	3.8	36.0	
	1974			.2	---	0.5	---	---	0.6	.2	---	0.2	1.7	20.8	
	1975			---	0.1	.2	---	---	1.3	.7	0.1	.1	2.5	14.8	
Meat	1973	01		1.4	.1	1.9	0.4	0.1	.3	.3	4.6	.2	9.3	158.0	
	1974			.3	---	.7	.3	.1	.5	.2	3.4	.3	5.8	145.0	
	1975			.9	---	.3	.4	.1	.3	.4	4.3	.1	6.8	165.1	
Wheat	1973	041-		2.4	1.4	18.1	10.1	16.5	---	.5	10.7	3.4	63.1	276.9	
	1974			---	---	5.2	3.6	38.9	---	---	15.8	.1	63.6	305.2	
	1975			---	---	---	2.2	47.7	6.2	---	16.1	5.3	77.5	521.7	
Rice	1973	042		.7	.3	6.5	.2	.6	---	2.4	4.7	.1	15.5	66.7	
	1974			.7	.8	.4	.6	.2	---	4.7	9.0	.4	16.8	92.4	
	1975			.8	.5	.1	.4	---	---	3.2	5.4	.1	10.5	70.3	
Barley	1973	043		---	---	10.5	---	---	---	---	---	---	10.5	33.4	
	1974			---	---	.5	---	---	---	---	---	---	.5	5.5	
	1975			---	---	---	---	---	---	---	---	.1	.1	10.9	
Corn	1973	044		1.5	.1	79.2	7.2	45.8	163.5	.5	3.8	1.0	302.6	1,192.1	
	1974			.1	6.1	80.5	16.0	85.2	279.9	.5	.5	2.8	471.6	1,717.2	
	1975			.1	9.3	106.4	8.9	136.0	404.7	.6	8.9	1.9	676.8	2,248.6	
Rye	1973	045.1		---	---	---	2.8	.9	---	---	---	---	3.7	4.8	
	1974			---	---	---	1.4	---	---	---	---	---	1.4	5.2	
	1975			---	---	---	---	---	---	---	---	---	---	0.9	
Oats	1973	045.2		---	---	---	---	---	---	---	3.6	---	3.6	44.0	
	1974			---	---	---	---	---	---	---	2.7	---	2.7	17.1	
	1975			---	---	---	---	---	---	---	.5	---	.5	7.8	
Sorghum	1973	045.9		---	---	---	5.5	5.5	1.4	---	---	.4	12.8	40.4	
	1974			---	---	---	14.8	14.1	.1	---	---	---	29.0	107.6	
	1975			---	---	---	16.5	8.0	4.2	---	.2	---	28.9	161.5	
Total feed grains	1973			1.5	.1	89.7	15.5	52.2	164.9	.5	7.4	1.4	333.2	1,314.7	
	1974			.1	6.1	81.0	32.2	99.3	280.0	.5	3.2	2.8	505.2	1,852.6	
	1975			.1	9.3	106.4	25.4	144.0	408.9	.6	9.6	2.0	706.3	2,429.7	
Fresh fruit and nuts	1973	051		.2	1.7	---	4.4	---	2.7	9.0	2.0	.4	20.4	98.7	
	1974			.7	1.4	---	5.1	---	3.8	10.7	5.2	.5	27.4	133.6	
	1975			.7	1.4	.1	5.6	---	9.0	11.1	5.2	.2	33.3	165.2	
Dried fruit	1973	052		.5	4.5	.1	3.1	---	.7	6.9	2.7	.1	18.6	54.4	
	1974			.3	5.9	---	4.0	---	.9	7.9	1.9	.3	21.2	54.7	
	1975			.3	6.2	---	3.3	---	1.3	7.3	1.8	.3	20.5	58.5	

Continued--

See footnotes at end of table.

Table 11--U.S. agricultural exports to the European Community and other Western Europe, 1973-75--Continued

Commodity and year		SITC Number		European Community										
		Major head-ings	Sub-head-ings 1/	EC-6					EC-3					
				Belgium-Luxem-bourg	France	West Germany	Italy	Nether-lands	Total EC-6	Denmark	Ireland	United Kingdom	Total EC-3	Total EC-9
Million dollars														
Vegetables	1973	:	054	1.3	3.9	10.3	3.0	6.4	24.9	0.6	1.2	31.3	33.1	58.0
	1974	:	:	1.0	9.3	7.6	6.8	7.7	32.4	.5	2.4	23.0	25.9	58.3
	1975	:	:	0.9	6.2	4.5	7.8	5.0	25.0	.2	1.2	22.7	24.1	49.1
Animal feed	1973	:	081	43.5	117.2	230.3	82.5	180.3	653.6	23.1	15.4	17.6	56.1	709.7
	1974	:	:	37.1	154.4	236.4	110.8	141.2	679.9	10.0	8.4	29.0	47.4	727.3
	1975	:	:	59.2	125.6	190.8	55.3	144.4	575.3	3.8	4.1	20.9	32.8	608.1
Soybean oilcake and meal	1973	:	081.3	39.7	114.3	199.4	79.7	59.6	492.7	19.0	15.1	8.4	42.7	535.4
	1974	:	:	32.8	151.8	215.9	110.0	70.0	580.5	9.4	8.3	16.8	34.5	615.0
	1975	:	:	42.5	123.5	161.4	54.7	42.3	424.4	3.5	8.1	13.7	25.3	449.7
Tobacco	1973	121	:	16.5	4.0	104.6	22.7	31.3	179.1	33.7	10.4	147.4	191.5	370.6
	1974	:	:	15.9	6.5	110.1	31.1	38.1	201.7	14.5	12.9	136.9	164.3	366.0
	1975	:	:	10.7	8.8	127.7	51.2	40.2	238.6	22.2	11.1	124.2	157.5	396.1
Soybeans	1973	:	221.4	62.2	72.3	326.6	158.3	453.7	1,073.1	88.0	---	47.8	135.8	1,208.9
	1974	:	:	63.6	96.4	498.8	211.0	437.6	1,507.4	66.8	---	54.9	121.7	1,629.1
	1975	:	:	59.0	55.6	290.0	182.5	614.1	1,201.2	62.8	---	62.0	124.8	1,326.0
Cotton, raw and linters	1973	:	263	7.7	20.3	30.5	28.4	6.7	93.6	.2	0.1	17.3	17.6	111.2
	1974	:	:	15.6	23.1	26.6	38.5	7.4	111.2	.3	.6	15.5	16.4	127.6
	1975	:	:	5.9	11.5	8.6	20.9	2.6	49.5	---	1.0	6.2	7.2	56.7
Inedible tallow	1973	:	411.3	7.6	5.2	11.3	10.0	33.1	67.2	---	.3	7.1	7.4	74.6
	1974	:	:	3.3	8.2	14.1	22.8	30.0	78.4	---	---	19.5	19.5	97.9
	1975	:	:	2.6	1.2	6.0	9.6	8.0	27.4	---	---	8.2	8.2	35.6
Other	1973	:	:	22.9	56.4	107.8	37.6	91.6	316.3	8.4	3.1	123.3	134.8	451.1
	1974	:	:	47.0	76.9	135.6	40.1	93.8	393.4	10.8	2.5	128.0	141.3	534.7
	1975	:	:	32.5	71.4	146.2	44.0	104.0	398.7	13.2	2.7	116.5	132.4	531.1
Total exports	1973	:	:	222.6	390.4	1,180.6	674.2	1,240.8	3,708.6	162.5	38.6	615.9	817.0	4,525.6
	1974	:	:	259.1	492.2	1,588.1	763.2	1,604.4	4,707.0	111.8	29.6	655.1	796.5	5,503.5
	1975	:	:	347.1	411.9	1,564.8	798.2	1,722.1	4,844.1	111.4	26.6	588.5	726.5	5,570.6

See footnotes at end of table.

Continued--

Table 11--U.S. agricultural exports to the European Community and other Western Europe, 1973-1975--Continued

Commodity and year	SITC Number		Other Western Europe										Total other Western Europe	Total Western Europe
	Major headings	Sub-headings 1/	Austria	Finland	Greece	Norway	Portugal	Spain	Sweden	Switzerland	Other 2/			
Million dollars														
Vegetables	1973	054	0.1	0.1	3.5	0.3	---	1.3	2.2	0.7	0.1	8.3	66.3	
	1974		.1	.1	1.1	.6	---	3.8	2.0	1.0	.3	9.0	67.3	
	1975		.2	.1	3.1	.4	.1	4.1	3.2	.9	.1	12.2	61.3	
Animal feed	1973	081	---	---	10.8	.3	12.7	48.0	1.1	17.4	.3	90.6	800.3	
	1974		.1	.1	13.9	1.1	16.5	9.0	3.8	8.5	1.2	54.2	781.5	
	1975		.1	.1	7.2	1.5	1.1	21.2	1.3	7.5	2.5	42.5	650.6	
Soybean oilcake and meal	1973	081.3	---	---	6.9	.2	12.5	46.1	0.7	16.2	1.5	84.1	619.5	
	1974		---	.1	8.1	.9	16.2	8.2	2.7	7.5	1.2	44.9	659.9	
	1975		.1	.1	3.6	1.5	.9	20.6	.6	5.6	2.0	35.0	484.7	
Tobacco	1973	121	4.3	8.3	0.4	5.9	2.6	3.9	15.6	32.7	21.1	94.8	465.4	
	1974		5.3	7.2	.7	6.4	3.6	13.4	16.6	42.3	---	95.5	461.5	
	1975		7.5	14.9	.8	8.0	1.0	16.0	23.0	40.3	.1	111.6	507.7	
Soybeans	1973	221.4	---	---	---	44.8	3.2	181.9	---	1.5	---	231.4	1,440.3	
	1974		---	---	1.1	70.7	13.4	338.1	---	11.4	---	434.7	2,063.8	
	1975		---	---	3.7	41.6	23.9	253.3	---	4.8	.2	327.5	1,653.5	
Cotton, raw and linters	1973	263	.1	1.2	2.9	1.6	4.1	18.1	5.9	17.6	.4	51.9	163.1	
	1974		.1	7.5	10.2	2.5	10.3	10.0	8.7	19.7	.5	69.5	197.1	
	1975		.5	2.3	11.2	1.6	13.9	14.1	8.2	10.0	.2	62.0	118.7	
Inedible tallow	1973	411.3	---	---	1.1	1.5	2.1	13.8	.9	.8	2.5	22.7	97.3	
	1974		---	---	1.2	1.7	6.6	15.0	.1	5.4	---	28.0	125.9	
	1975		---	---	.3	.9	3.3	12.1	.1	.9	.1	17.7	53.3	
Other	1973		5.2	5.6	4.9	4.1	13.9	24.5	24.7	53.5	---	136.4	587.5	
	1974		5.6	7.7	4.8	5.9	20.8	36.0	39.0	119.8	---	239.6	774.3	
	1975		6.5	6.7	8.0	5.7	25.7	28.1	30.5	111.2	---	222.4	753.5	
Total	1973		16.5	23.3	142.1	92.2	108.0	461.5	70.1	153.3	30.0	1,100.0	5,625.6	
	1974		13.5	36.8	120.8	134.7	209.7	711.1	94.4	244.6	6.6	1,572.2	7,075.7	
	1975		17.6	41.6	141.4	97.0	260.8	775.9	89.6	218.1	11.3	1,653.3	7,223.9	

--- = none or negligible.

Note: Data not adjusted for transshipments. In 1973, goods valued at \$301.1 million were transshipped into Western Europe through Canada, while \$4.7 million worth of products were transshipped out of the region through the Netherlands and \$3.6 million through Belgium. In 1974, transshipments were \$376.1 million through Canada and \$11.8 million through the Netherlands, for a net value of \$364.3 million; there were no transshipments through Belgium. Complete data for 1975 are not yet available. In 1974, the net value of each of the products transshipped into Western Europe was as follows: wheat, \$135.1 million; barley, \$7.1 million; corn, \$104.8 million; rye, \$2.0 million; oats, \$9.8 million; soybeans, \$105.4 million; and oilcake and meal, \$0.1 million.

1/ These are components of major headings.

2/ Iceland, Malta, Azores, and Gibraltar.

Source: Compiled from U.S. Bureau of Census data, as processed by USDA's FDCD/SPA computer run.

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