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# THE AGRICULTURAL ECONOMY AND TRADE OF FRANCE



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## SUMMARY

Western Europe's most important grain producer, France has made impressive gains in output of soft wheat, barley, and corn since 1955. France also leads the area in output of livestock products, potatoes, and wine. In recent years, French production of rapeseed and fruits and vegetables has also increased notably.

As producer, world trader, and member of Europe's Common Market, France ranks high in importance as an agricultural nation. In a country of considerable agricultural potential, the rapid increases in agricultural production and the growth of scientific farming of the 1960's augur well for France's agricultural future. However, continued expansion of agricultural output hinges on the agricultural pricing and production policies of the European Economic Community (EEC) and successful handling of such problems as overproduction of soft wheat and dairy products, a surplus and aging farm population, and a preponderance of farm units too small to economically adopt modern technology. Though agriculture's share of gross national product is on the downswing, value of farm output rose almost 50 percent between 1960 and 1967.

Well endowed for agricultural production, France claims over a fourth of Western Europe's agricultural land and almost a fourth of the region's arable land (1965 data). Over half of France's agricultural land is devoted to production of grain and livestock.

Beef and pork are the principal meats produced in France, with poultry meat gaining in importance; supplies of meat and meat preparations are insufficient to meet domestic

needs, however. Although mounting milk production is largely responsible for the surpluses of milk and butter in the EEC, conversion of some of France's numerous small dairy farmers to specialized producers of beef faces major structural difficulties. Along with beef, other commodities which must be imported to satisfy domestic requirements include citrus, durum wheat, rice, tobacco, cotton, and fats and oils.

French agricultural policy embraces problems of farm structure, marketing, and production, placing special emphasis on improvement of farm income. Problems are being met through increased agricultural investment, official encouragement of consolidation of farm holdings before resale and reduction of the farm labor force, and market stabilization through both domestic and EEC institutions.

A world leader in agricultural trade, France has oriented its trade to the West European market, particularly other EEC countries. In general, agricultural trade policy is determined by the Common Agricultural Policy (CAP) of the EEC. Imports from non-EEC countries are frequently subject either to quotas or variable levies. The United States is France's largest single supplier of agricultural products, and the Federal Republic of Germany its most important customer.

Given present EEC policy, in the next decade France can expect continued surpluses of milk and soft wheat and increased production of feed grains, pork, eggs, and poultry. France will continue to import durum wheat and vegetable oils but will probably boost exports of beef, apples, and pears.



# THE AGRICULTURAL ECONOMY AND TRADE OF FRANCE

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## INTRODUCTION TO FRENCH AGRICULTURE

France is both the largest country in Western Europe and the area's leading agricultural producer. Roughly the size of Montana and Wyoming combined, the Republic of France covers 212,918 square miles, extending from the English Channel and Atlantic Ocean to the Alps and the Mediterranean. The population is almost 50 million, but its density is less than in any other country in the European Economic Community (EEC)<sup>1</sup> and eighth lowest in Western Europe.

An important agricultural nation, France ranks first in Western Europe in arable land area (with 45 percent of the arable land in the EEC countries) and in agricultural production. In Western Europe, France is the leading producer of cereals (both wheat and feed grains), cattle, meat, milk, cheese, and sugar. France is second in production of potatoes, butter, and wine. France has surplus supplies of wheat, broilers, and dairy products, but lacks self-sufficiency in citrus fruit, beef, durum wheat, rice, tobacco, and fats and oils. France is totally reliant on imports for cotton, peanuts, and soybeans.

Agricultural production in 1967 was valued at an estimated \$11.4 billion (current prices), a gain of almost 50 percent over 1960. With better use of farm resources, France could expand agricultural output considerably. Problems of farm structure, surplus farm population, disposal of surpluses, and marketing are

impediments to agricultural development, however.

The share of agricultural output in the gross domestic product (GDP) has declined steadily; it fell from approximately 14 percent in 1955 to about 10 percent in 1967. In 1967, agriculture was, nonetheless, France's third largest source of employment, following the manufacturing industry and services. The agricultural labor force numbered 3.1 million, roughly 16 percent of France's civilian labor force (19.8 million). Between 1955 and 1967, the total labor force increased about 5 percent and the agricultural labor force decreased almost 38 percent.

France is one of the world's leading trading nations, ranking fourth among importing as well as exporting countries. Total imports came to \$12.3 billion in 1967 and total exports to \$11.4 billion. In 1967, France was also the world's fifth largest importer of agricultural products and the value of French agricultural exports was exceeded only by the values of those of the United States and the Netherlands. France trades primarily with Western Europe, where over 70 percent of her agricultural exports are marketed. Over half of France's agricultural exports go to the EEC.

Formation of the EEC has greatly intensified intra-Community trade in agricultural as well as nonagricultural products. The Common Agricultural Policy (CAP) for numerous agricultural products has particularly

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<sup>1</sup>The EEC includes France, Italy, Belgium-Luxembourg, the Netherlands, and West Germany.

benefited French producers, since levies generally align prices of non-EEC agricultural imports with prices of domestic agricultural products. Principal French agricultural exports are cereals and cereal products, dairy

products, quality wines, fruits and vegetables, and meats and meat preparations. Major imports are citrus fruits, cotton, coffee and tea, lower quality wines, meat and edible offals, animal feed, oilseeds, and vegetables.

## PHYSICAL ENVIRONMENT

### Geography

Richly endowed for agricultural production, France has a varied terrain and an extensive network of rivers. Fertile rolling plains border the Atlantic in the southwest, stretch inland to the center of France, and extend northeast toward the North Sea. The Vosges, Alps, and Pyrenees form mountain frontiers with Switzerland, Italy, and Spain, and extend to the rim of a large south central plateau (Massif Central) and the Lorraine Scarpland. France's most important agricultural regions are the northern plain area--especially the Paris Basin and Brittany--and the Mediterranean area.

The lowlands are drained by three major river systems: the Seine, which empties into the English Channel, and the Loire and Garonne, which flow into the Atlantic. In the west of France, the Rhone-Saone system runs south through the Saone plain and Massif Central to the Mediterranean.

### Climate

Bounded by the Atlantic Ocean and the English Channel, and open to the moderating influence of the prevailing westerly winds, the northwestern area of France has a climate favorable to agricultural production. Winters are relatively mild and summers are warm.

In general, there is more precipitation and temperatures are more extreme in the southeastern region. Winters are rigorous in the mountain area and on the Massif Central, with 75 to 100 days of frost a year. The climate changes somewhat in the Rhone Valley, where summers are hot and dry and winters are warm. However, the valley is often chilled by the mistral, a cold, piercing wind that sweeps down from the Alps.

### Soils

French soils are primarily forest soils. The best soils for farming are found in the alluvial plains of the Paris Basin. When well limed and fertilized, these soils support production of most of France's cereal, forage, and root crops. Heavy soils suited mainly to grass in Normandy, Brittany, and the area bordering the Massif Central are utilized for livestock and some fruit and vegetable production. Light textured soil suited only to coniferous forest appears along the coast in the southwest and in the northeastern quarter extending below the Paris region. Infertile soils of an igneous origin predominate in the Massif Central and Alpine region, where there is limited livestock and fruit production. Along the Mediterranean coast and extending into the Rhone Valley is Mediterranean red soil, which is well adapted to the cultivation of fruit--especially grapes.

## LABOR AND LAND

### Labor Force

The portion of the labor force engaged in agriculture and forestry fell from 5.0 million in 1955 (over 26 percent) to 3.1 million in 1967 (roughly 16 percent). Despite this decline, there were more farmers than the

agricultural sector could adequately support, particularly in western France where there was a high man-land ratio and considerable underemployment. Surplus farm population impairs productivity per worker. Gross agricultural productivity per worker has improved markedly since the 1950's but remains about

half that in the United States and one-third the level in the Benelux countries--Belgium, Luxembourg, and the Netherlands.

According to the 1963 census, farm operators and their families continued to account for nearly four-fifths of the farm labor force (17, 1965, No. 5).<sup>2</sup> The number of family members working on farms dropped 34 percent between 1954 and 1963. There was a 30-percent drop in the number of women actively engaged in agriculture. Female family workers still accounted for one-fourth of the total farmworkers. Since French farming was still basically a family operation, the percentage of hired labor was low. About 22 percent of farm laborers were hired workers. These workers were concentrated in more prosperous agricultural regions--north of Paris, along the Mediterranean coast, and to a lesser extent in north-central France. Logically, unpaid family workers were more numerous in the less prosperous farming areas. An average of 118,000 foreign laborers, mainly seasonal workers, were employed each year between 1960 and 1966.

The 1963 census suggests that France's farm population is not only large, but aging (23 and 17, 1964, No. 4). Many older, less efficient farmers remain on the land, while younger farmers, lacking land and capital, are seeking employment in other sectors. In 1963, nearly 50 percent of the farm managers were over 55, and nearly 30 percent were over 65. Comparable figures for farm operators in the United States for 1964 were 41 percent and 17 percent. Age of farm population can exert a strong influence on the rate of adoption of technology.

### Farm Income

Average return per farm holding in 1962 was \$2,633 (supplementary incomes not taken into consideration). The value of production per head of the active population averaged \$1,722 in agriculture and \$3,362 in the whole economy. As noted by the Organization for

<sup>2</sup> Underscored numbers in parentheses refer to Bibliography, p. 20.

Economic Cooperation and Development (OECD), "farm incomes have generally grown in line with the national income, [but] the disparity between agricultural and nonagricultural incomes has not been lessened." Low incomes in agriculture stem from both a disproportionate distribution of farm population in terms of resources available and problems of farm structure. Population density varies considerably from region to region. The mountain areas have been particularly handicapped by "lack of local economic development and . . . distance to the main consuming areas." Absence of local employment opportunities has resulted in population exodus to other areas and a serious decline in the number of young farmers. On the other hand, surplus farm population has been found in Brittany, Alsace, and the Aquitaine Basin. Structural problems affecting farm income arise primarily on two types of farms, those too small to provide an adequate income and those which are excessively fragmented. (12, pp. 170-191).

### Land Use

Agricultural land constituted 91 percent of total land area in France in 1967. Of this, about 33 percent (or roughly 18 million hectares) was considered arable. Almost half the arable land area in the EEC is in France. The distribution of land according to major uses is as follows (§):

	<u>Percent</u>
Arable land	33
Permanent grassland	24
Woods and forest	22
Vineyards	3
Fallow or wasteland	7
Nonagricultural land	9

Grain is raised on about half the arable land (roughly 9.2 million hectares in 1966). When grasslands and acreage in forage crops are taken into consideration, over 55 percent of agricultural land is devoted to livestock production.

Land use since 1955 has shown little change. Arable land area through 1966 declined. Area planted to grains and forage gained at the expense of other crops in the rotations, especially root crops. Vineyards and uncultivated land declined, while area in grassland and woods and forests increased slightly (14, p. 2-2 and 5, pp. 225-230).

### Size and Tenure of Farms

The average French farm is the "least small" in Western Europe. Though larger than elsewhere in the region, according to the 1963 census, over half of France's 1,805 million farms were under 10 hectares (1 hectare = 2.471 acres) in size and over 70 percent were under 20 hectares.<sup>3</sup> Average farm size was almost 18 hectares in 1963--a 20-percent gain over 1955 (17, 1966, No. 10). A Ministry of Agriculture survey in 1968 showed a continuing downward trend in the number of farms (1.690 million in 1967/68). This was a 26-percent drop from 1955. Farms converted to nonfarm uses or consolidated with large units have generally been small, so the impact of declines in farm numbers on average farm size has been minimal (2).

French farms are still too small to be economically efficient in light of modern technology. In addition, widespread fragmentation results in loss of land, time, and benefits from mechanization, and contributes to France's low rate of increase in agricultural productivity per worker. Small farms are located in the hilly regions in western France and in the Mediterranean area. Large farms are located in the plains extending north from the Loire Valley through the Paris Basin to the Belgian border.

Between 1955 and 1963, the pattern of land tenure changed considerably. By 1963, "mixed tenure" had superseded "owner-operator" as the prevailing category. Thirty-five percent of French farms covering 42 percent of the farm area were under mixed tenure, and about 44 percent of farms and 31 percent of farmland were owner operated. Cash tenants operated 19 percent of farms and 24 percent of the land area. Sharecropping was practiced on only 2 percent of French farms and 3 percent of French farmland. Owner-operated farms averaged about 14 hectares in size. The average farm operated by cash tenants, share tenants, or under mixed tenure was at least 9 hectares larger than the average owner-operated farm (17, 1964, No. 4).

## AGRICULTURAL PRODUCTION

### Crop Production

Cereals.--France is the major grain-producing country in Western Europe. Grain output has been increasing steadily due to higher yields, and in 1967 accounted for 46 percent of total EEC grain production. Area sown to cereals remains stable but production has shifted from oats and rye to corn and barley.

Soft wheat has long been France's most important cereal product. Since 1955 acreage has fluctuated downward, dropping to 3.8 million hectares in 1967; however, yields

have increased notably. Production of 14 million tons<sup>4</sup> in 1967 was about 3.6 million tons above 1955 output and 1.1 million tons above the 1963-67 average. Increased use of fertilizers and pesticides, specialization, better management, mechanization, and the CAP for grains all help explain the rise in output. However, France continues to report lower yields than its Western European neighbors (except Italy). Since 1962/63 (marketing year beginning July 1), French exports of soft wheat have ranged from 2.8 to 4.8 million tons

<sup>3</sup> Figures exclude farms under 1 hectare.

<sup>4</sup> All data in tons refer to metric tons.

annually. France lacks self-sufficiency in durum wheat, which constitutes the bulk of its wheat imports (653,000 tons in 1963/64, 314,000 tons in 1967/68). Durum wheat production is expanding rapidly, however. Between 1962 and 1967, output tripled to 203,000 tons.

In recent years, production of feed grains, particularly barley and corn, has jumped considerably--from 7.6 million tons in 1955 to 17.4 million tons in 1967. Increased yields for each grain, plus the shift to barley and corn from lower yielding rye and oats and from root crops, go far to explain the boost in output. The rapid rise in barley prices relative to wheat prices under the Common Agricultural Policy of the EEC and the decline in oat production linked to decreased use of horses have stimulated output of barley--France's second most important grain crop in 1967. Barley acreage, 2.8 million hectares in 1967, was more than twice the 1955 acreage. Production approached 10 million tons in 1967. Corn production, which has benefited from the introduction of hybrids, more than tripled between 1955 and 1967, and reached 4.1 million tons in 1967. During this time, area planted almost doubled, and surpassed 1 million hectares in 1967.

The common market for grains was established on July 1, 1967, when common prices went into effect and levies on trade among member countries were abolished. EEC producers have a virtually guaranteed market. In each country, official intervention agencies must purchase homegrown grain if domestic prices fall below the high EEC support levels. Trade with nonmember countries is subject to variable levies on imports and a system of uniform subsidies on EEC exports enables exporters to sell EEC grain at world prices.

Root crops.--Potatoes are grown on farms throughout France, but commercial production centers are in the north, the Paris region, and the west-central area. Early potatoes come from Brittany and southern France, regions with mild climates. Potato production is declining, with the 1955 and 1967 levels at 13 and 10 million tons, respectively. Consumption of potatoes also ap-

pears to be declining as green vegetables replace potatoes in the diet and substitutes for potatoes are found for livestock rations. Roughly, one-fourth of the domestic crop is exported, making potatoes France's major vegetable export. In general, over a third of the supply available for domestic use is consumed as food and about 31 percent as feed. About 12 percent is used for seed, and most of the remainder is lost through waste.

Sugarbeets are raised primarily in northern France. In 1967, over 313,000 hectares were planted to sugarbeets, a decline from the 1963-67 average of 359,000 hectares. Production in 1967 dipped to 12.8 million tons but reached an estimated 17 million tons in 1968 and could show further increases under the stimulus of the CAP.

Production of beet sugar has been rigidly controlled. In the past, the Government attempted to restrict total output to domestic requirements, although some surpluses occurred. High subsidies generally precipitated sharp declines in production quotas for the following crop year. Under the EEC sugar regulation, effective July 1, 1968, through mid-1975, each Member State receives a basic share in total Community production. In turn, each individual government allocates a "base quota" to each domestic factory.

Oilseeds.--Output of oilseeds is limited to small quantities of sunflowerseed and flaxseed. Increasing quantities of rapeseed are being grown, frequently as a rotation crop. Annual production during the 1960-65 period averaged about 225,000 tons and increased to approximately 471,000 tons in 1967 due to expanded rapeseed production. Oilseed acreage in 1967 reached 315,000 hectares. Domestic oilseed supply covers only 25 percent of domestic requirements.

Rapeseed, which has traditionally furnished the bulk of France's total oilseed crop, accounted for roughly 85 percent in 1967. Rapeseed production increased from 83,000 tons in 1960 to 338,000 tons in 1965 and to over 428,000 tons in 1967. Production has been stimulated by price levels established in 1967 under the CAP for fats and oils.

Tobacco.--The area planted to tobacco, a minor crop in France in terms of area, has been declining steadily; it dropped from 28,000 hectares in 1955 to 20,000 in 1967. Higher yields have helped maintain production, however; output in 1955 was 56,000 tons and in 1967, 47,000 tons. Domestic production, which is strictly controlled by a Government tobacco monopoly, supplies 40 to 45 percent of domestic needs. In the EEC as a whole, however, supply covers only 35 percent of demand for tobacco. As of 1968, a CAP for tobacco was being formulated. Higher prices would be expected to stimulate domestic production. Another feature of the tobacco CAP will be the inauguration of a free market system which will require common taxation of tobacco products and modification of the monopoly.

Wine.--France produces over one-fourth of the world's supply of wine. Lower grade wines are produced along the Mediterranean coast, and quality wines in Bordeaux, the Bourgogne region, and along the Rhone and Loire Rivers. The area in vineyards has been declining slowly; it was an estimated 1.3 million hectares in 1966/67 (crop year September-August). Higher yields raised production from an average of 58 million hectoliters in 1952/53-1956/57 to 62.8 million hectoliters in 1962/63-1966/67. Quality wines are marketed under Government approved labels which guarantee high production standards. Although France has been exporting from 3 to 4 million hectoliters of wine since 1954 (1957/58 and 1958/59 excepted), the country is a net wine importer, largely of lower quality wines.

Fruits and Vegetables.--The French shopper can choose from a wide array of domestically produced fruits and vegetables. Principal growing areas are the Mediterranean coastline and the regions along the Loire, the Rhone, and the Garonne Rivers.

The supply of table apples and pears, raisins, peaches, quinces, raspberries, and strawberries is increasingly plentiful. French production of table fruits (excluding cider

apples and pears) increased from 1.4 million tons in 1955 to 2.8 million tons in 1967. Since area in fruit production has declined, growth in output can be attributed to increased yields. Improved technology and production practices, and especially the introduction of new fruit varieties (primarily the American Golden Delicious apple), explain France's expanded fruit supply. Between 1955 and 1967, table apple production rose from 437,000 tons to 1.4 million tons. In the same period, output of peaches jumped from 156,000 tons to 385,000 tons, and table pear production increased from 188,000 tons to 317,000 tons. France will soon be self-sufficient in all table fruits except citrus, which are unsuited to the French climate and will continue to be a major import item. Production of cider apples and pears generally exceeds production of table fruits. Production in 1965 was 3.4 million tons, but output is subject to wide fluctuations.

Total market production of vegetables in France doubled between 1955 and 1967; output in 1967 totaled 5.3 million tons. Vegetables raised and consumed on the farm accounted for an estimated 25 percent of total output in 1967, compared with about 44 percent 12 years earlier. The principal vegetables cultivated for marketing and their shares of the total quantity of vegetables marketed (1963-67 average) were carrots (11 percent), tomatoes (10 percent), cabbage (6 percent), salad greens (8 percent), leeks (8 percent), and cauliflower (6 percent). Onions, tomatoes, artichokes, and string beans were the principal vegetable imports.

Since January 1967, quality standards have been applied to the most important fruit and vegetable products grown and marketed in EEC member countries. Various support measures have been implemented by producer associations. Unlike those for other crops, fruit and vegetable supports are designed to provide a floor which prevents serious declines in price levels, rather than to guarantee a price to growers. A compensatory tax is levied on numerous fruit and vegetable imports from third countries into Member countries if the c.i.f. price for such products falls below the applicable EEC reference price.

## Livestock Numbers and Distribution

Cattle.--In 1967, there were 21.4 million cattle on approximately 1.2 million farms, an average of 17.8 head per farm. This is an increase over the 10.7-head average of 1955 when the total herd was approximately 17.4 million head. The 1964 census on the structure of livestock holdings shows that the number of herds of less than 10 cattle fell from 1.1 million in 1955 to 603,000 in 1965; the number of herds of 10 to 19 rose to 24 percent; and the number with 20 or more cattle doubled. These changes reflect increases in both farm size and cattle numbers. However, as one study pointed out, the 1964 survey sample indicated that despite a movement toward concentration during the past 10 years, there were still large numbers of herds but their average size was small. Only 61,300 farms had herds of more than 30 cows and heifers (15, p. 42).

Herds in France consist mainly of dual-purpose breeds, used primarily for milk production but also the source of France's supply of beef. The bulk of French herds are located on medium small to very small farms where milk sales are the major source of regular cash income. Lack of land, high milk support prices, and the oversupply of labor often keep small dairy farmers from becoming full-time producers of beef. Dairy herds are frequently expanded to increase milk output and income, and the supply of cattle for meat has been increasing proportionately.

The most common dairy breed is the Normandy, raised throughout northern, western, and west-central France. Also of importance are the high-yielding French Friesian and the dual-purpose Eastern Red and White. Beef breeds constitute only 15 percent of all cattle. The principal beef variety in France is the Charolais, raised mainly in the southeastern area.

Hogs.--Hog production increased about 12 percent from 1955 to 1967 when the total herd numbered 9.7 million. In 1967, an estimated 17.7 million hogs were slaughtered for market. Although hogs are raised throughout

the country, production is most heavily concentrated in Brittany and the area adjacent to Spain. Production units are generally small--3.5 adult sows per farm having sows and 6.8 hogs per farm having hogs. Over half the farms in France have at least one hog.

Sheep.--After showing declines in the mid-1960's, sheep numbers increased to a level of 9.2 million in 1967. Sheep are raised primarily in central and southeastern France.

Poultry.--Reliable, comprehensive data on poultry production are not available. Estimates put 1967 poultry units at 112 million head, compared with about 100 million 12 years earlier. Poultry raising is divided between two types of production units: traditional farms with small flocks, and specialized farms using modern production techniques and deriving a large share of income from receipts from poultry raising. Traditional production seems to be declining, and production in modern facilities is increasing. Modern production is integrated by private feed manufacturers and farmer cooperatives, particularly in Brittany.

Other.--Horse numbers have declined sharply because of mechanization. The demand for riding horses is increasing, however. The number of goats had declined to 942,000 by 1967. Herds are concentrated in central, west central, and southeastern France.

## Livestock Products

Beef.--Beef and pork are the major components of France's meat supply. During 1963-67, beef and veal accounted for 39 percent and pork for 27 percent of total meat production. Beef output in 1967 rose to 1.2 million tons, a 24-percent gain over 1954, and veal production increased over 14 percent in the same period. Beef production can be expected to continue the present upward trend as farm leaders work toward their goal of stemming the EEC beef deficit. Further increases in average slaughter weight and in numbers of calves saved, and more widespread adoption of grain feeding also portend expansion of output.

Pork.--France is the second largest pork producer in the EEC, and production is increasing. Output in 1967 was 1.1 million tons, 60 percent more than in 1954. France is not quite self-sufficient in pork, and imports from 96,000 to 135,000 tons annually.

Mutton.--Mutton and lamb production in 1967 was 118,000 tons, a 13-percent gain over 1954. After recovering from a fall in 1963, mutton and lamb production has gained considerably; and goat meat output has somewhat declined. About 80 percent of the total income from sheep comes from sale of mutton and lamb. Wool production reaches about 13,000 tons a year, clean basis.

Poultry and Eggs.--Poultry meat production increased rapidly--from 290,000 tons in 1954 to 394,000 tons in 1960 and to 640,000 tons in 1967. These gains were the result of the rapid development of the broiler industry and the vertical integration of the poultry industry. As of early 1968, the French broiler industry was concentrating on meeting domestic demand and breaking into non-EEC markets. Attempts to develop an export market in the EEC have been discouraged by declines in broiler export prices, higher feed costs,

rising output in West Germany, and competition from the Netherlands. In 1967, egg output reached 10 billion, an increase of more than 40 percent over 1954. Egg production increased but number of hens remained fairly stable. Output per hen, which was an estimated 143 eggs per year in 1967, is expected to continue to improve.

Dairy Products.--France witnessed a rapid expansion of milk output between 1954 and 1967--from 18.5 million tons to 29.4 million tons. After 1962, this rise could be attributed to increased output per cow, technology, and high milk support prices. Increased French milk production accounts in large part for the surplus milk and butter problem in the EEC. Increasing quantities of French milk have been diverted into production of butter and cheese, and have added to the vast store of EEC-held butter stocks. In 1966, French butter production reached 492,000 tons, a 28-percent gain over 1960, and cheese production, 651,000 tons, a 41-percent gain over 1960. The upward trend in milk production will probably continue. Since about 50 percent of French farmers produce milk and 60 percent of the population consists of small farmers, a lower milk price is politically unacceptable.

## AGRICULTURAL INPUTS

Despite impressive gains since 1950, France lags her northern European neighbors in agricultural development. French agriculture remains deficient in fertilizer and tractor use and modern farming practices, but has considerable potential to expand production as technological advances are applied. Only in and north of the Paris Basin have modern farming techniques comparable to those of northern Europe been adopted.

French consumption of nitrogen, phosphate, and potash fertilizers per hectare of

arable land and permanent cropland tripled since 1960/61 to approximately 50 kg., 69 kg., and 51 kg., respectively, in 1966/67. Consumption is still second lowest in the EEC. In the mid-1960's about 43 percent as much fertilizer was used in France as in Germany, about 32 percent as much as in Belgium, and about 27 percent as much as in the Netherlands. Phosphates are the most heavily used of the commercial fertilizers, constituting over 40 percent of total consumption. Liming is necessary on most French soils--about 1.9 million tons were used in 1964.

Since the end of World War II, farm machinery available to French farmers has both increased in quantity and improved in quality. The number of tractors per thousand hectares of arable land increased from 17 in 1955 to 56 in 1965. Farmers of Germany and Luxembourg, with 147 and 106 tractors per thousand hectares, respectively, have a considerable lead over their French counterparts. Combines numbered about 110,000 in 1964 and were used to harvest about three-fourths of the grain and oilseed crops in that year. Use of balers, garden tractors, and milking machines has also increased; number

of reaper-binders and threshers has declined.

Pests cause substantial crop losses in France--nearly one-fifth of crop output according to estimates for the early 1950's. Efforts to extend the use of pesticides among farmers have steadily intensified since World War II. Though data on the consumption of pesticides are lacking, their increased use is partly reflected by the increased number of tractor sprayers, which rose from 116,000 in 1954 to 153,000 in 1960 and to over 228,000 in 1965.

## AGRICULTURAL AND TRADE POLICIES

### Agricultural Policy

The broad framework for agricultural policy in France is set forth in two pieces of legislation: the Agricultural Guidance Act (Loi d'Orientation Agricole) of 1960 and the Complementary Act (Loi Complementaire), passed in 1962. The Agricultural Guidance Act is designed to achieve parity for agriculture with other economic sectors. The Act requires that agricultural policy furnish the means to improve living standards on the farm by: (1) increasing productivity and fostering the rational development of production; (2) expanding domestic and foreign market outlets; and (3) modernizing farm structure, particularly under family farm operation. The Complementary Act broadens the role of the producer in the marketing process by legalizing new forms of organization which help adjust production to outlets and demand. Overall, the establishment of family farms as viable economic units which utilize land and capital efficiently and provide a decent standard of living is an important Government priority.

Enabling measures for implementing the two Acts are specified periodically in Government plans for economic and social development. The Fifth Plan (1966-70) places special emphasis on: (1) modernization of farm structures, and (2) orientation of production to

meet changing demand more effectively and thereby improve farm income. Provision is made in the Fifth Plan for a Government investment of \$12.6 billion in agriculture, an increase of over \$10 billion from the previous plan.

To alleviate problems of farm size and age and distribution of farm population, the Government has devised a comprehensive program for farm restructuring. Farm Improvement and Development Agencies (SAFER) are charged with supervising the sale of farmland. They are empowered to purchase small farms and plots and consolidate them for resale, as well as authorize changes in farm size above or below certain limits. Standards for judging farm efficiency determine SAFER's selection of farms to be bought or enlarged.

Changes in the composition of the farm labor force are promoted by the Fund of Social Action for Agricultural Structures (FASASA). The Fund encourages older farmers to leave agriculture by making additional pensions (called Departure Life Indemnities) available to farmers whose voluntary retirement would favor land reform. FASASA grants settlement subsidies to farmers moving from overpopulated agricultural regions to underpopulated regions or from marginal to efficient farms.

Recent increases in wages and social insurance payments, as well as the rising cost of goods and services purchased by the agricultural sector, will probably hasten structural change as less efficient farmers are induced to leave agriculture.

The second point of emphasis of the Fifth Plan is improvement of farm income. The Plan proposes a 4.8-percent increase in agricultural income compared with a 3.3-percent increase in the industrial sector. Improvement in income is linked with adapting production to meet demand, in harmony with EEC directives. Primary goals are increasing output of beef (in deficit in the EEC), quality wheat, and coarse grains (especially rye and barley), and promoting cost reductions in the transformation of grains into animal products (eggs, poultry, hogs).

Responsibility for market stabilization and export subsidization is given to the Agricultural Market Stabilization and Guidance Fund (FORMA). FORMA resources are channeled into price supports for most of France's farm commodities and measures to help orient production and improve marketing. FORMA actions are frequently implemented by private bodies, such as the Meat and Livestock Association (SIBEV) and the Milk and Milk Products Association (INTERLAIT). Separate agencies exist for regulation of the sugar market (Export Bank for Sugar) and the grain market (National Cereals Board or "ONIC").

The EEC Agricultural Guidance and Guarantee Fund (FEOGA) has assumed an increasing share of FORMA's market support activities. The CAP covers about 90 percent of all major commodities produced in the EEC. Under EEC policy, FEOGA reimbursed FORMA for seven-tenths of its price support and export subsidy actions in 1966/67. FORMA's direct responsibility is gradually being reduced to market-ordering operations among agricultural producers.

FEOGA has two sources of revenue: a portion of the levies imposed by member governments on agricultural imports from nonmember countries (about 90 percent in

1967/68 and 100 percent scheduled for 1970); and assessments on the national treasuries.<sup>5</sup> Substantial increases in Fund expenditures have precipitated a review of national and EEC agricultural policy. The French Minister of Agriculture, Robert Boulin, has pointed out that the EEC pricing system has stimulated overproduction without creating additional income, necessitating large increases in market support and export subsidy expense (3 and 16). Fundamental to present EEC and French difficulties are the burdensome costs of guaranteeing the small farmer a viable income, whether through price or other policies.

Producer groups also play an important role in regulating the market for agricultural products. Under the Complementary Act, producers are encouraged to organize to better protect their interests. Organization into one of the various types of producer groups is intended to foster cooperation by commodity or on a regional basis to improve production and adapt it to marketing needs. Agricultural Economic Committees, organized either by region or product, promote cooperation between producer groups by funding sales development and technical improvements in production practices. An act passed in 1964 has prompted producers to form contracts with dealers and processors for the sale of their products. Contract sales protect the producers and tailor production to market demands (13, pp. 226-253).

### Trade Policy

France has been aggressively seeking enlarged foreign markets for her agricultural exports, particularly soft wheat. Domination of the European market, especially the EEC, is a prime target. As a member of the Common Market, France is obligated to observe the trading regulations outlined in the CAP. Common Market regulations cover all major commodities except tobacco.

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<sup>5</sup> In 1967/68, the levies furnished less than half the \$1.3 billion budget; 32 percent of the remainder, about \$232 million, came from the French Treasury.

With FEOGA backing, France frequently grants export subsidies to move her higher-priced agricultural surpluses onto the world market. In 1965, direct subsidies on agricultural exports came to \$320 million, of which \$200 million alone were applied to wheat. The Government finances promotion of French agricultural exports through the Society for the Promotion of Agricultural Exports (SOPEXA), a public company.

French policy on agricultural imports from non-EEC countries is very protective. Such imports are frequently subject to quotas which can be varied according to market needs. EEC variable levies on imports have

been substituted for national customs duties under the CAP to provide trade restrictions on grains, dairy products, pork, beef and veal, poultry, and eggs. Fruit and vegetable imports are covered by the EEC minimum import price system. Imports of oilseeds, oilseed products, and tobacco are currently regulated by state trading organizations (20, p. 13).

France continues to maintain bilateral trade agreements with 35 countries outside the Common Market. These agreements must be terminated by 1970, the end of the transition period for the CAP.

## AGRICULTURAL ORGANIZATIONS

Farmers express their interests directly to the Government through various public, private, and cooperative organizations. The Chambers of Agriculture are official public agencies. There is a Chamber in each of France's 89 Departments (administrative units)--all are joined through a Permanent Assembly of the Chamber Presidents. Four-fifths of the members are elected by farmers and one-fifth appointed by professional organizations. Representatives from the Chambers of Agriculture voice farmers' views at the National Assembly and Ministry of Agriculture level and help establish goals for the economic and social development plans. At the departmental level, the Chambers advise in settlement of disputes among tenants, landowners, and workers; create or subsidize organizations for service of general interest to agriculture; and collaborate on programs for agricultural expansion. The most influential private organization on the national level

is the National Federation of Farmers Unions (FNSEA), which includes half of France's farmers. FNSEA includes a young farmers' organization (CNJA), a national organization for extension workers (FNGVPA), and a national organization for women.

France's most numerous farm organizations are cooperatives. In 1964, there were an estimated 250 cooperative unions and 19,000 cooperatives registered. Membership was estimated at about 1.5 million. Existing cooperatives can be grouped into three categories: (1) purchasing cooperatives, which buy and retail materials and machinery to farmers; (2) service cooperatives, which provide services other than purchasing and marketing, such as artificial insemination or rental of farm machinery; and (3) production, processing, storage, and marketing cooperatives (e.g., producer groups).

## AGRICULTURAL TRADE

### Imports

Ranking fourth among importing nations of the world, France spent \$2.4 billion on imported agricultural products in 1963 and

\$2.6 billion in 1967, or 28 percent and 21 percent, respectively, of the total spent for imports. In 1967, almost 30 percent of France's agricultural imports came from Western Europe, and 18 percent of these

imports came from other members of the EEC. Five years earlier, 21 percent came from Western Europe, and 13 percent came from EEC countries. In the 1963-67 period, Africa also became a more important supplier, with 37 percent of the agricultural import trade in 1967. Most of France's imports from Africa originate in former African territories now associated with the EEC, called "Associated Overseas Countries" (AOC's). The United States is France's largest single agricultural supplier. The U.S. share of agricultural trade rose from 6 percent in 1963 to over 8 percent in 1967, when imports from the U.S. came to \$220.1 million. Other major trading partners are the Netherlands, Belgium-Luxembourg, Algeria, and Australia.

France's major agricultural imports are fruits and vegetables, especially citrus fruits. The bulk of fruit and nut imports originate in the AOC's. Fresh fruits come primarily from Spain, Morocco, Martinique, Italy, and Algeria. Principal fresh fruits imported are oranges and bananas. In 1967, major suppliers of vegetables, especially fresh vegetables such as tomatoes, were the EEC (34 percent) and Morocco (32 percent).

France is dependent on imports for her supply of raw cotton. In 1967, cotton and wool imports constituted over 85 percent of total natural fiber imports. The United States has been France's largest single supplier of cotton; it contributed 14 percent of France's import needs in 1967. The AOC's provided 19 percent of cotton imports, and other African countries provided 12 percent. Chad, Egypt, Mexico, and Brazil are important suppliers. Wool purchases are chiefly from Australia. Australia supplied 45 percent of wool imports in 1967.

France imports substantial quantities of coffee; coffee imports were valued at \$174.4 million in 1967. Largest suppliers are the AOC's, especially the Ivory Coast, and Brazil, which, in 1967, provided 60 percent and 17 percent of import needs, respectively.

France lacks self-sufficiency in production of meat. In 1967, meat shipped into France came primarily from other EEC countries (42 percent of total meat imports). The Netherlands alone supplied 22 percent of France's meat imports. Other regions had the following shares of the market; European Free Trade Association (EFTA) and the Council for Economic Mutual Assistance (CEMA)--14 percent each; the Latin American Free Trade Association (LAFTA)--10 percent (9 percent of which was from Argentina); and the United States--9 percent. Imports of fresh pork comprised 40 percent of total meat imports, and fresh beef--17 percent.

Expanded livestock production and changed feeding practices have led to substantial increases in the demand for animal feed. Over three-fourths of imports in the animal feed category are oilseed cake and meal. The United States furnishes France with over half of its oilseed cake and meal imports. Senegal and Argentina are also important suppliers.

Imports from the United States.--Principal French imports from the United States are oilcake and meal, oilseeds, wheat, corn, edible offals, cotton, and citrus fruit. Highest dollar imports from the United States are oilcake and meal, worth \$58.8 million in 1967. As for oilseeds, imports from the United States have been rising, and reached \$17.3 million in 1967. The United States is France's prime supplier of wheat and corn. Imports of U.S. wheat, primarily durum and hard wheat used in baking, amounted to \$30.5 million, or 50 percent of total wheat imports. The United States supplies over half of France's corn imports; these were valued at \$20.1 million in 1967. Imports of U.S. edible offals increased to \$20.8 million in 1967, or 45 percent of the market. U.S. cotton sales have continued to be high, but part of the U.S. market has been lost to Mexico, the USSR, and Turkey, which have been selling cotton at lower prices. The United States has profited from a growing French market for citrus fruits, with sales reaching \$10.7 million in 1967 (6.5 percent of the market).

## Exports

According to the 1967 value of total exports, France is the world's fourth largest exporter and the third largest exporter of agricultural products. During 1963-67, agricultural exports constituted about 17 percent of total exports and were valued at \$1.8 billion in 1967. In 1967, over half of France's agricultural exports went to the EEC, and almost three-fourths to Western Europe. About 14 percent of farm exports went to Africa, France's second most important trading bloc, compared with 19 percent in 1963. Export trade to the AOC's amounted to 10 percent of total agricultural exports. The Federal Republic of Germany (FRG) is France's most important customer for farm products, taking about 25 percent of French agricultural exports. Other important outlets are Italy, Belgium-Luxembourg, the United Kingdom and Switzerland. Algeria is France's principal market in Africa.

France's major agricultural exports are cereals and cereal products, valued at \$575.9 million in 1967. Grain exports more than tripled over the 1955-67 period due to expanded production and export subsidies. About half of France's cereal exports were marketed in the EEC, with over 25 percent of the total going to the FRG. France's most important cereal export was wheat, valued at \$201.9 million in 1967. The EEC, and especially the FRG and Italy, absorbed about 35 percent of the wheat trade, the AOC's--15 percent, and all of Africa--37 percent. Barley and corn exports, valued in 1967 at \$183.2 million and \$128.5 million, respectively, have become increasingly important components of the French grain trade.

France is finding growing markets for its beverage exports, especially wine, worth \$199.2 million in 1967, and distilled liquors, worth \$126.8 million. Four markets buy almost 60 percent of French wine exports--the United States (\$32.8 million in purchases), the FRG, the United Kingdom, and Belgium-Luxembourg.

French exports of dairy products and eggs have shown a dramatic rise since 1963, reflecting growing EEC export subsidies for milk and butter. Total French exports of dairy products and eggs increased 114 percent over the 5-year period 1963-67. In 1967, the EEC took over half of France's milk and egg exports. Italy and the FRG are particularly important outlets for French dairy products and eggs.

Of fruit and vegetable exports, greatest earnings are in fresh fruits (\$83.3 million in 1967). In 1967, fruit products brought another \$21.6 million, and vegetables, \$79 million. Due to increased production, France began boosting fruit exports in 1965/66. Apples, once in deficit, earned \$36.1 million in 1967. Pear exports also showed significant gains. The fruit and vegetable market is dominated by the EEC.

Fresh or frozen meat makes up almost three-fourths of French exports of meat and meat preparations. Beef sales are highest, constituting almost 60 percent of total sales. Poultry-meat sales have been declining due to reductions in broiler exports; these were about 9 percent of total sales in 1967. Meat sales to the EEC constituted almost three-fourths of the meat export trade. Germany alone takes almost 60 percent of total sales, primarily in fresh or frozen beef.

Exports to the United States.--The United States holds a relatively small share of France's agricultural export trade. Sales to the United States increased from \$57 million in 1963 to \$81.9 million in 1967, but the U.S. market share remained at 4 percent. The most important item in France's export trade with the United States is alcoholic beverages, primarily wine. Valued at \$35.6 million in 1967, sales came to 43 percent of France's agricultural exports to the United States. Between 1963 and 1967, U.S. purchases increased over 70 percent, and total beverage exports increased about 30 percent. French exports of cheese and curds to the United States increased substantially from \$2.4 million in 1963 to \$6.4 million in 1966, but were down to \$5.3 million in 1967. Diversion to

cheese production and supply available for export increased as the EEC surplus of milk and butter mounted. The French have also been expanding exports to the United States

of crude animal materials and preserved fruit and fruit preparations. Over the 1963-67 period, U.S. purchases of natural fibers and hides from France declined.

## OUTLOOK

With improvements in farm structure and technology, France can anticipate an overall advance in agricultural production. Changes in consumer demand will favor meat and dairy products and deemphasize cereals and potatoes. Prospects for long-term production hinge on EEC agricultural policy decisions, however. Given the present EEC policy for dairy products and structural problems in French beef and dairy production, milk production will continue its upward spiral, thereby aggravating the EEC milk and butter surplus and intensifying the EEC's search for export markets. The surplus of soft wheat will also increase at present price levels. The uniform price determined by the EEC which went into effect for soft wheat may further stimulate production, since the EEC price is consider-

ably higher than that received formerly by the French farmer. Barley and corn output and exports should also make strong gains. Harmonization of grain prices will tend to reduce extra-Community grain imports. Production of durum wheat and vegetable oils, however, will remain insufficient to meet domestic demand--import demand should remain strong: production of durum wheat is less profitable than soft wheat, and African crushing industries can be expected to become an increasingly important source of vegetable oil. In the coming decade, France will probably attain self-sufficiency in pork, eggs, and poultry; export increasing quantities of beef to EEC countries; and expand apple and pear exports considerably.

## TABLES

Table 1.--France: Area and production of major crops, average 1960-64, annual 1964-67

Crop	1960-64	1964	1965	1966	1967	1960-64	1964	1965	1966	1967	
	average					average					
		----- 1,000 hectares -----					----- 1,000 metric tons -----				
Grain <sup>1</sup> .....	9,221	9,223	9,379	9,194	9,157	24,115	26,048	29,089	26,725	31,789	
Wheat.....	4,233	4,388	4,521	3,992	3,850	11,745	13,838	14,760	11,297	13,969	
Feed grains.....	4,708	4,585	4,607	4,976	5,106	11,875	11,699	13,844	14,972	17,362	
Barley.....	2,284	2,360	2,430	2,642	2,777	6,261	6,791	7,378	7,421	9,713	
Oats.....	1,213	1,094	1,070	1,094	1,028	2,628	2,310	2,509	2,578	2,784	
Corn.....	902	893	869	961	1,009	2,624	2,105	3,420	4,331	4,111	
Other.....	201	238	238	274	305	361	493	537	642	754	
Potatoes.....	825	680	574	536	531	11,596	11,419	11,068	10,449	10,232	
Sugarbeets.....	387	425	395	290	313	14,803	16,241	16,961	12,750	12,769	
Apples <sup>2</sup> .....						854	1,039	1,060	1,217	1,408	
Pears <sup>2</sup> .....						302	331	281	297	317	
Vegetables <sup>2</sup> .....						5,038	5,086	5,167	35,237	35,294	
Wine <sup>4</sup> .....	1,332	1,312	1,297	1,296	n.a.	59,033	60,170	66,435	60,200	n.a.	

<sup>1</sup> Includes rice and rye.

<sup>2</sup> Commercial production only.

<sup>3</sup> Estimate.

<sup>4</sup> Data on crop-year basis beginning 1960/61. Data on area excludes vineyards not in production. Data on production in hectoliters.

n.a. = Not available.

Sources: Statistique Agricole Annuelle, 1960-67, French Ministry of Agriculture.

Agricultural Statistics, Statistical Office of the European Communities: No. 2, 1963 and No. 3, 1967 (fruit and vegetable data); No. 6, 1966 and No. 9, 1967 (wine data).

Production Vegetale, Statistical Office of the European Communities, No. 7, 1968.

Table 2.--France: Livestock numbers, 1954 and 1960-67

Year	Cattle		Sheep	Goats	Poultry	Hogs	Horses
	Total	Cows milked					
1954.....	17,323	8,849	8,013	1,257	90,000	7,568	2,215
1960.....	19,502	9,830	9,063	1,172	103,000	8,603	1,729
1961.....	20,583	10,067	8,924	1,176	105,000	9,217	1,617
1962.....	20,286	10,032	8,945	1,124	105,000	9,080	1,526
1963.....	20,041	9,711	8,626	1,068	105,000	8,967	1,357
1964.....	20,244	9,624	8,821	1,041	108,000	9,043	1,228
1965.....	20,641	9,716	9,056	1,014	110,000	9,238	1,114
1966.....	21,184	10,622	9,186	1,019	110,000	9,840	1,044
1967.....	21,417	10,550	9,248	942	112,000	9,746	1,009

----- 1,000 head -----

<sup>1</sup> Estimate.

Source: Agricultural Statistics, Statistical Office of the European Communities: No. 7, 1968; No. 2, 1967 (data on cows milked and poultry).

Table 3.--France: Livestock products, average 1960-65, annual 1964-67

	Beef	Veal	Pork <sup>1</sup>	Mutton and lamb	Total red meat <sup>2</sup>	Poultry meat	Total meat <sup>3</sup>	Wool	Cow's milk	Eggs
Average:										
	----- 1,000 tons ----- Millions -----									
1960-65.....	1,057	378	969	108	2,479	485	3,448	26.8	24,768	9,167
1964.....	1,026	374	949	103	2,527	550	3,569	24.0	25,235	9,740
1965.....	1,043	375	1,049	111	2,653	587	3,763	27.7	26,780	9,220
1966.....	1,104	385	1,042	117	2,709	610	3,872	27.9	28,016	9,700
1967.....	1,203	404	1,091	118	2,870	640	4,114	28.2	29,355	10,000

<sup>1</sup>Includes rendered lard, excludes fatback.

<sup>2</sup>Includes horsemeat, excludes goatmeat.

<sup>3</sup>Includes offals and other meats.

Sources: Agricultural Statistics, Statistical Office of the European Communities: 1968, No. 7.  
Revised data on beef, veal, pork, and mutton and lamb production--furnished by French Ministry of Agriculture: Fall, 1968.

Table 4.--France: Imports of agricultural products, total U.S. share, 1963-67

Commodity	1963		1964		1965		1966		1967	
	Total	From U.S.	Total	From U.S.	Total	From U.S.	Total	From U.S.	Total	From U.S.
----- Million U.S. dollars -----										
Fruits and vegetables .....	492.7	16.5	477.2	15.5	515.5	17.8	569.1	18.2	590.6	20.8
Natural fibers <sup>1</sup> .....	480.3	40.4	460.6	54.6	400.2	27.8	443.4	22.0	356.1	22.1
Coffee, tea, cocoa, spices .....	201.8	.5	248.1	.4	216.3	.4	249.2	.4	245.5	.4
Meat and meat preparations ...	128.8	9.1	223.7	22.4	214.5	20.3	236.0	23.5	231.1	21.2
Animal feed .....	91.9	27.1	96.9	33.4	117.0	42.6	141.9	56.6	150.3	59.3
Oilseeds, nuts, kernels.....	167.6	17.4	162.9	23.8	157.3	14.8	164.8	16.4	149.1	17.3
Other agricultural imports.....	873.2	43.9	1,002.1	65.4	969.6	83.9	1,023.0	82.2	891.0	79.0
Total agricultural imports .....	2,436.3	154.9	2,671.5	215.5	2,590.4	207.6	2,827.4	219.3	2,613.7	220.1
----- Billion U.S. dollars -----										
Total imports .....	8,724.4		10,066.7		10,335.9		11,839.6		12,337.5	

<sup>1</sup>Excludes cotton waste, not carded or combed; cotton carded or combed; and wool carded or combed, wool tops, and waste of wool and of other animal hair.

Source: UN agricultural trade data (unpublished).

Table 5.--France: Exports of agricultural products, total U.S. share, 1963-67

Commodity	1963		1964		1965		1966		1967	
	Total	To U.S.	Total	To U.S.	Total	To U.S.	Total	To U.S.	Total	To U.S.
-----Million U.S. dollars-----										
Cereals and cereal products ..	356.7	.6	486.8	3.3	534.6	.5	584.7	.7	575.9	2.4
Beverages <sup>1</sup> .....	169.1	20.8	183.4	24.5	187.0	27.8	209.8	31.3	217.5	35.6
Dairy products and eggs .....	127.2	2.7	143.1	2.9	176.3	4.8	238.8	7.3	272.3	7.3
Fruits and vegetables .....	120.7	4.3	117.7	4.1	186.7	4.5	178.0	4.6	192.5	5.6
Meat and meat preparations ..	99.7	.9	100.2	.6	104.1	.6	117.3	.9	119.6	.8
Other agricultural exports .....	479.5	27.7	581.1	31.5	525.3	32.0	519.9	30.0	480.6	30.2
Total agricultural exports ..	1,352.9	57.0	1,549.3	66.9	1,714.0	70.2	1,848.5	74.8	1,858.4	81.9
-----Billion U.S. dollars-----										
Total exports.....	8,079.6		8,990.3		10,048.2		10,886.2		11,377.5	

<sup>1</sup> Excludes distilled liquor.

Source: UN agricultural trade data (unpublished)

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