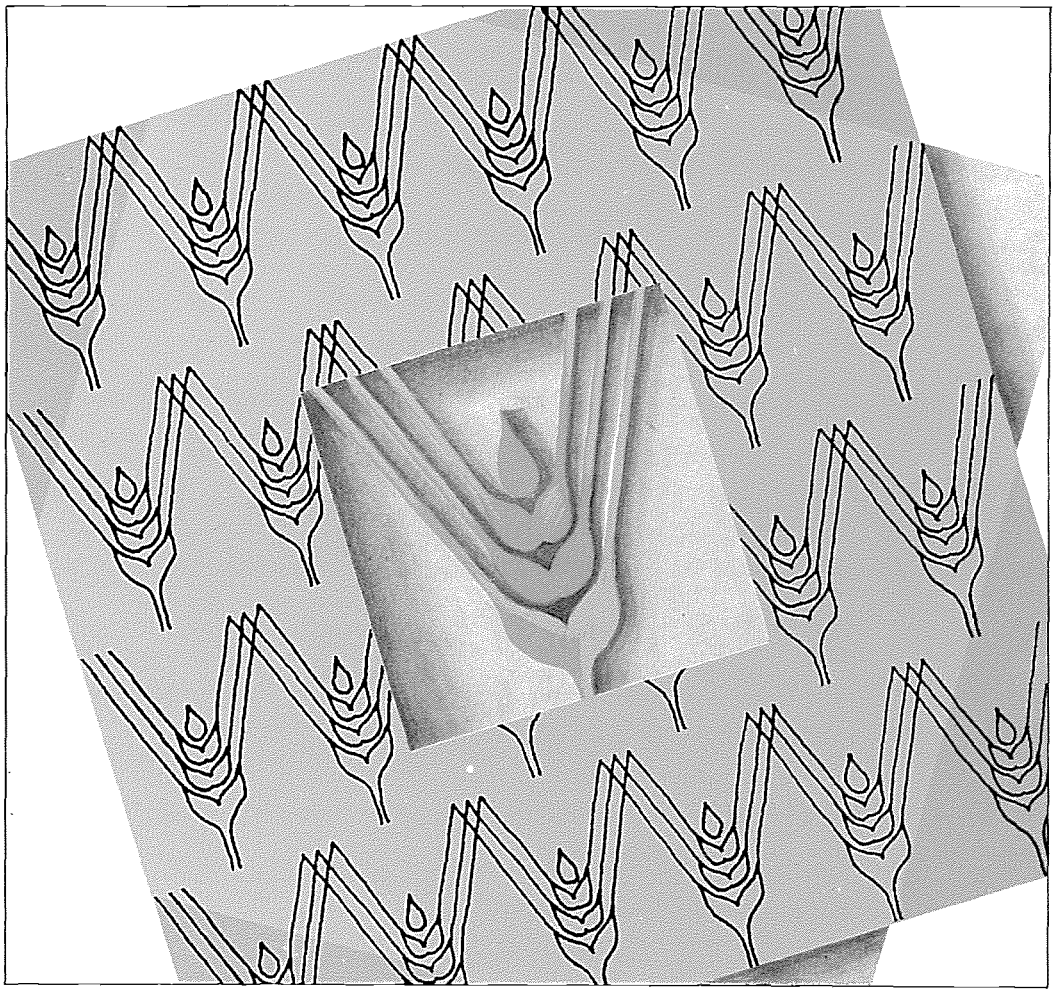
THE STATE OF FOOD AND AGRICULTURE



Mid-decade review of food and agriculture

1985

SPECIAL CHAPTERS

In addition to the usual review of the recent world food and agriculture situation, each issue of this report from 1957 has included one or more special studies of problems of longer-term interest. Special chapters in earlier issues have covered the following subjects:

1957 Factors influencing the trend of food consumption
Postwar changes in some institutional factors affecting agriculture

1958 Food and agricultural developments in Africa south of the Sahara
The growth of forest industries and their impact on the world's forests

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Some general problems of agricultural development in less-developed countries in the light of postwar experience

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1983 Women in developing agriculture

1984 Urbanization, agriculture and food systems

THE STATE OF FOOD AND AGRICULTURE 1985

FAO Agriculture Series *No. 19*

the state of food and agriculture 1985

Mid-decade review
of food and agriculture

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS
ROME 1986

The statistical material in this publication has been prepared from the information available to FAO up to 1 March 1986

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P-00
ISBN 92-5-102390-5
ISSN 0081-4539

Printed in Italy

Foreword

In retrospect, the year 1985 represented a very mixed picture of the world economy, especially of the world food economy. It was marked by the aftermath of the African famine, subsequent recovery of food production in many African countries, faltering and uneven economic growth in developed countries and declining per caput income in many heavily indebted developing countries. The fall in oil prices and decline in interest rates provided some relief to the oil-importing developing countries, but exacerbated the difficulties of oil-exporting, indebted developing countries.

While economic growth was slow to pick up in developing countries, increases in the volume of trade were largely offset by continued declines in commodity prices. The rise in some commodities such as coffee, towards the end of 1985, did not fundamentally presage a change in the market situation.

The economic recession of recent years and the resulting deterioration in living conditions in many countries often have made the nutritional status of the population worse. Poor countries have been obliged to adopt economic and fiscal structural adjustment policies to curtail government expenditure and imports, resulting in reduced wages and increased unemployment. While adjustment policies are necessary to lay the foundations of non-inflationary growth, specific programmes should be designed, as a bare minimum, to protect the most vulnerable groups from their damaging repercussions.

For all that, 1985 must also be regarded as a time of hope. The world has seen, as never before, a spectacular demonstration of human solidarity with Africa. The contributions made by numerous individuals and non-governmental organizations, who have worked together to relieve famine and hunger in Africa, have vindicated the emphasis placed on their role by the World Food Security Compact, adopted by the FAO Conference in November 1985, and have laid to rest any lingering doubts about the practical value of their contributions.

The recovery in food and agricultural production in Africa also augurs well for the coming year. Latest estimates show that thanks to greatly improved rainfall and the effects of policy changes, a per caput increase of about 2% in food and agriculture in 1985 was recorded in Africa compared with a decline of a similar magnitude in 1984. Nevertheless, improved food supplies came only later in the year, as the harvests came in for many countries affected by drought, particularly in the Sahelian zone. The populations of some countries caught up by wars or other military activities, continue to be deprived of adequate or reliable food supplies. Through Africa's Priority Plan for Economic Recovery prepared at the Organization of African Unity's 1985 Summit Meeting, held in Addis Ababa, African leaders showed a remarkable spirit of political will and determination to change the course of their development strategies, and to give priority in the allocation of resources to food, agricultural and rural development.

It should be recalled that earlier in 1985, in January and March, FAO held donor meetings to help raise funds for its programme for rehabilitating the agricultural sectors in Ethiopia and the other 24 African countries affected by drought in 1983-84. The response by the donor community to such calls for additional assistance was a measure of the goodwill expressed towards those in need. FAO has completed an in-depth study of African food and agriculture problems. The broad thrust of its analysis and conclusions was reflected in the resolution adopted by the recently held United Nations General Assembly Special Session on Africa.

The year 1985 further underlined the prevailing paradox of food shortages in many developing countries amidst a bountiful supply of food in developed countries. It also accentuated the problems existing with regard to world agricultural trade. Prices of most agricultural commodities continued to be extremely weak, but stocks still increased. There was also a virtual collapse of international commodity agreements. Farmers throughout the world, in developing and developed countries, continue to experience severe declines in income; thus, the structures of entire agricultural sectors and systems are facing new challenges of adjustment.

The early 1980s, the first-half of the Third UN Development Decade, which this edition of The State of Food and Agriculture surveys, was a difficult period for economic development. It underlined the imbalances and distortions that have become built into world agricultural production and trading systems. While the early 1980s can be considered a period of missed opportunities for growth for many developing countries, some of the most populous developing countries made remarkable strides in building up their food production and reducing their dependency on imports. The developed countries have become almost "too successful too fast" in adopting new agricultural technologies, and production growth has exceeded the requirements of their domestic markets and of an export demand that has lost much of the dynamism it showed in the 1970s. This situation has seriously distorted agricultural and trading patterns and practices.

The new round of Multilateral Trade Negotiations (MTN), the first steps for which were initiated in 1985, will hopefully include agricultural trade as well, which is a welcome prospect for the coming years. The underlying distortions on the side of agricultural production, however, will not be removed by reforms in trading practices alone, even though a rolling back of protectionist measures is most urgently needed. These must be reinforced by reforms in domestic support policies for agriculture in many developed countries. While negotiations on trade liberalization under the General Agreement on Tariffs and Trade (GATT) are underway, we know these negotiations will take several years. Meanwhile, there is need for action; first, in promoting increased cooperation among developing countries in agricultural trade; second, in authorizing the second window of the Common Fund for Commodities, which has more than $250 million at its disposal already, to operate on a provisional basis, in view of long delays and uncertainties in the ratification of the Common Fund.

The progress in Asia in expanding food and agricultural production in recent years shows that technological improvements coupled with adequate administrative skills and infrastructure, together with pragmatic policies, can achieve impressive results. Nevertheless, it would be premature to believe that agricultural and rural development problems have been largely overcome in Asia and Latin America. Widespread poverty and continued population pressures on land and other resources in Asia, and unequal access to resources and other signs of dualistic development in Latin America and the Caribbean are just the tip of a vast iceberg of problems and issues that demand immediate attention.

The year 1985 marked several important events that show the range and diversity of FAO's areas of concern and interest. One of these events was the 1985 World Conference in Nairobi to review and appraise the achievements of the UN Decade for Women launched in 1975. The Conference was built around the themes of equality, development and peace. The document, "Forward-Looking Strategies for the Advancement of Women", adopted by the Conference, stressed the important role of women as producers of food and providers of household security. It reaffirmed the call by the World Conference on Agrarian Reform and Rural Development's (WCARRD) Plan of Action for an equitable access for women to land and water and other resources, inputs and services.

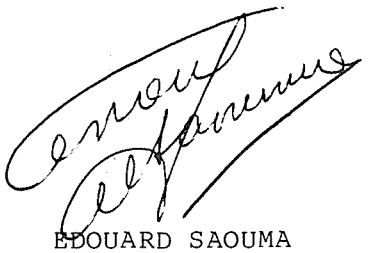
We must also recall that 1985 was the International Year of the Forest and marked the holding in Mexico of the Ninth World Forestry Congress. In addressing the opening session, I placed particular emphasis on the current unacceptable level of forest degradation and destruction in tropical and arid regions arising from the crisis of poverty that affects millions of people in developing countries. Forestry problems have to be tackled as an integral part of a strategy of rural development, not only because of the forest's role in protecting the environment, but also because tropical forests, in particular, possess an enormous diversity of irreplaceable plant and animal genetic resources. The Congress also emphasized the importance and urgency of the Tropical Forestry Action Plan, adopted by the FAO Committee on Forest Development in the Tropics earlier in the year.

It was also in 1985 that the FAO Conference adopted the International Code of Conduct on the Distribution and Use of Pesticides. The role of efficient and safe application of pesticides in the process of agricultural modernization can hardly be over-emphasized. This Code constitutes the first step towards the establishment of freely accepted international rules for the safe handling, distribution and use of pesticides.

In conclusion, 1985 marked an event that signals our rededication to the tasks that lie ahead: the 40th anniversary of the founding of FAO. We can take pride in FAO's contribution to the achievements made during the past four decades. This period has seen a doubling of the world's population, but food production has more than matched population growth.

At the same time we must remind ourselves of FAO's mandate and main responsibilities. We must act as a collective conscience, stimulating national and international action, for promoting growth, stability, equity and people's participation in the rural economies of the world. The experience of recent years has, more than ever, reminded us--if such a reminder was needed--how critical agricultural growth is to overall economic development, how closely macro-economic policies and programmes interact with the performance of the agricultural sector, and how growth in the world economy, especially in industrial countries, is closely bound up with the fortunes of developing countries.

The world food economy, characterized as it is by the interdependence between nations and sectors, faces a paradox of poverty amidst plenty, not only between nations but also within nations. This is a challenge that FAO, in cooperation with its Member Nations, must meet and overcome. FAO has a responsibility not only to analyse, diagnose and propose measures for the resolution of this paradox, but also to assist in the implementation of policies and programmes for the achievement of international agricultural adjustment, consistent with growth and equity.



EDOUARD SAOUMA

DIRECTOR-GENERAL

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Glossary

AAAID	Arab Authority for Agricultural Investment and Development
ACPE	Asian centrally planned economies
ARPA	Agriculture Rehabilitation Programme for Africa
ASEAN	Association of Southeast Asian Nations, Jakarta, Indonesia
CCP	Committee on Commodity Problems (FAO)
CGIAR	Consultative Group on International Agricultural Research
CMEA	Council for Mutual Economic Assistance
DAC	Development Assistance Committee (OECD)
DES	Dietary energy supplies
DMPC	Direction des Marchés, Prix et Crédit de Campagne, Zaire
EAGGF	European Agricultural Guidance and Guarantee Fund (EC)
ECLAC	Economic Commission for Latin America and the Caribbean
ECU	European Currency Unit
EEC	European Economic Community
ESCAP	Economic and Social Commission for Asia and the Pacific
GATT	General Agreement on Tariffs and Trade
GDP	Gross domestic product
GDR	German Democratic Republic
GIEWS	Global Information and Early Warning System
HYV	High-yielding varieties
IBRD	International Bank for Reconstruction and Development
ICARA	International Conference on Assistance to Refugees in Africa
ICO	International Coffee Organization
IDA	International Development Association
IEFR	International Emergency Food Reserve
IFAD	International Fund for Agricultural Development
IFPRI	International Food Policy Research Institute
IFS	International Fertilizer Supply Scheme (FAO)
IMF	International Monetary Fund
LAS	League of Arab States
LDCs	Least-developed countries
LIFDC	Low-income food-deficit countries
LPA	Lagos Plan of Action
MINDA	Mindanao Integrated Development Area, Philippines
MSA	Most seriously affected (countries by the oil crisis of 1973-74)
MTN	Multilateral Trade Negotiations
NAMBOARD	National Agricultural Marketing Board, Zambia
OAU	Organization of African Unity
OCA	Official Commitments to Agriculture
ODA	Official Development Assistance (DAC)
OECD	Organization Economic Cooperation and Development
OPEC	Organization of Petroleum Exporting Countries
PRONAL	Programa Nacional de Alimentacion
SAM	Sistema Alimentario Mexicano
SDR	Special drawing rights
STABEX	Stabilization of Export Earnings
TCDC	Technical Cooperation Among Developing Countries
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organization
WFP	World Food Programme

Explanatory note

The following symbols are used in the statistical tables:

- = none or negligible
... = not available

"1984/85" signifies a crop, marketing or fiscal year running from one calendar year to the next; "1983-85" signifies the average for three calendar years.

Figures in statistical tables may not add up because of rounding. Annual changes and rates of change have been calculated from unrounded figures. Unless otherwise indicated, the metric system is used throughout. The dollar sign ($) refers to U.S. dollars.

Production Index Numbers

The FAO index numbers have 1974-76 as the base period. The production data refers to primary commodities (e.g., sugarcane and sugarbeet instead of sugar) and national average producer prices are used as weights. The indices for food products exclude tobacco, coffee, tea, edible oilseeds, animal and vegetable fibres and rubber. They are based on production data presented on a calendar-year basis.1/

Trade Index Numbers

The indices of trade in agricultural products also are based on the 1974-76 period. They include all the commodities and countries shown in the FAO Trade Yearbook 1984. Indices of total food products include those edible products generally classified as "food."

All indices represent changes in current values of exports (f.o.b.) and imports (c.i.f.), all expressed in U.S. dollars. If some countries report imports valued at f.o.b. (free on board), these are adjusted to approximate c.i.f. (cost, insurance, freight) values. This method of estimation shows a discrepancy whenever the trend of insurance and freight diverges from that of the commodity unit values.

Volume and unit value indices represent the changes in the price-weighted sum of quantities and of the quantity-weighted unit values of products traded between countries. The weights are respectively the price and quantity averages of 1974-76, which is the base reference period used for all the index number series currently computed by FAO. The Laspeyres formula is used in the construction of the index numbers.2/

Definitions of "Narrow" and "Broad"

The OECD definitions of agriculture are generally used in reporting on external assistance to agriculture. The narrow definition of agriculture, now referred to as "directly to the sector" includes the following items:

1/ For full details, see FAO Production Yearbook 1984, Rome, 1985.

2/ For full details, see FAO Trade Yearbook 1984, Rome, 1985.

Appraisal of natural resources
Development and management of natural resources
Research
Supply of production inputs
Fertilizers
Agricultural services
Training and extension
Crop production
Livestock development
Fisheries
Agriculture (subsector unallocated)

The broad definition includes, in addition to the above items, activities that are defined as "indirectly to the sector." These activities are:

Forestry
Manufacturing of inputs
Agro-industries
Rural infrastructure
Rural development
Regional development
River development

Regional Coverage

Developed countries include: (i) developed market economies (North America, Western Europe, including Yugoslavia, Oceania, Israel, Japan, and South Africa); and (ii) the centrally planned economies of Eastern Europe (Albania, Bulgaria, Czechoslovakia, German Democratic Republic, including East Berlin, Hungary, Poland, Romania) and the USSR.3/

Developing countries include: (i) the developing market economies (Africa, Latin America, Near East 4/, Far East, and other); and (ii) the Asian centrally planned economies or ACPE (China, Democratic Kampuchea, Democratic People's Republic of Korea, Mongolia, and Vietnam).

3/ Note that industrial countries, (see Table 1-1), as defined by the International Monetary Fund (IMF) include: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany (Fed. Rep. of), Iceland, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Spain, Sweden, Switzerland, United Kingdom, United States. (They do not include Yugoslavia, Greece, Israel, South Africa, the centrally planned economies, and some smaller other countries).

OECD countries include: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany (Fed. Rep. of), Greece, Iceland, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, United Kingdom, United States.

4/ The Near East includes: Egypt, Libyan Arab Jamahiriya, the Sudan, Afhanistan, Bahrain, Cyprus, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Kingdom of Saudi Arabia, Syrian Arab Republic, Turkey, United Arab Emirates, Yemen Arab Republic, Democratic Yemen.

Introduction

This year's review of the state of food and agriculture takes place at the mid-point of the the Third UN Development Decade. It is therefore an appropriate time to assess the performance and experience of global agriculture during the early years of the 1980s, against the background of the 1970s. This year's review is made at both the world and regional levels, supplemented by a discussion of trends and changes in perspective in three areas of major contemporary interest: the use of energy in agriculture, revisiting a topic last discussed in The State of Food and Agriculture almost ten years ago; the environment; and agricultural marketing, the latter because of its influence on producer incentives and hence, output.

The tumultuous economic events of the 1970s witnessed important shifts in international prices of some major traded commodities and thus in economic power among groups of countries. There were also fundamental changes in some institutions, which had guided economic progress since the end of World War II, such as the use of a fixed exchange rate for the U.S. dollar in terms of gold. The 1970s, however, also witnessed continued growth in output and trade. Despite the unstable and uncertain environment in which the strategy for the Third UN Development Decade was formulated, there was hope for a continuation in the pace of economic growth and development in the 1980s.

This, however, was not to be, and--with the benefit of hindsight--could not be, given the imbalances and distortions that had built up over the preceding years. This was particularly so in the area of international debt, but structural changes also had taken place in markets, the composition of output and in the use of inputs. So the Third Development Decade, which officially began on 1 January 1981, ushered in a period of economic recession, the worst since the pre-war depression of the 1930s.

The "World Review" chapter demonstrates that agriculture was not isolated from these events. In fact, the growing interdependence of agriculture and other economic sectors, particularly through trade, had made the sector much more susceptible to powerful economic global forces.

The impact of the economic recession on agriculture was transmitted in several ways: rising unemployment, falling real incomes and worsening debt-servicing problems, which reduced the demand for food and agricultural products. The growth in agricultural trade, one of the features of the 1970s, was sharply cut back. Prices of most agricultural products became significantly weaker and while increases in input costs, which had greatly inflated in the 1970s, were also less pronounced, farmers in countries more open to trade were subjected to an intense cost-price squeeze. In North America, many farmers, who had heavily borrowed in the expansionist 1970s, were squeezed between rising real interest rates and falling land values. Budgetary considerations led to constraints on further production growth in the European Economic Community (EEC), but met considerable political resistance. In the developing countries, apart from the impact of weakening commodity prices, the squeeze on agriculture was also exerted through constraints on foreign exchange for imports and some aspects of economic adjustment programmes.

The most visible result of the recession was in export prices of agricultural commodities. They had grown by over 7% a year on average throughout the 1970s, but fell by more than 1% a year during 1980-84. Among the developing regions, the impact was uneven, with Africa being noticeably affected, as its exports are oriented to the markets of Western Europe, which were slow to respond to the economic recovery underway in 1983, particularly in the United States.

So far in the 1980s, there has been no measurable overall effect of these events on growth in global food production. There were marked differences, however, in regional growth rates. With rates slowing significantly in Africa, Latin America and the Near East, it was only accelerating growth in the Far East, including China, that pulled up the rate of growth for the developing countries overall. Among the developed countries, output growth in 1980-84 slowed dramatically in North America, remained unchanged in Western Europe, and accelerated in Eastern Europe and the USSR. There was no overall indication of any greater instability in production in developing countries although Africa suffered extensively from drought, but there was greater instability in the developed countries under the effects of policies restraining production, occasionally combining with adverse weather conditions.

On the side of input use, the most remarkable change was the slowdown in the growth of fertilizer use. It fell to less than half the rate of the 1970s in developing countries, the decline in Latin America and the developed countries being the most marked. Hence, fertilizer use increased less fast than output in the early 1980s. This was due to policy actions such as the Land Set-Aside Programmes in the United States, worsening price relationships and financial constraints on imports of developing countries. Aid for fertilizers also has not grown in recent years.

Growth in commitments of external assistance to agriculture, in nominal terms, became sluggish in the early 1980s, having grown rapidly in the previous decade. However, the appreciation of the U.S. dollar and a reduction in inflation rates meant that growth of commitments, in real terms, was maintained at the earlier rates. But there was a significant worsening in concessionality of assistance that had greatly improved during the late 1970s. In this respect, the call made in UN development strategy for the 1980s for increased flows of development assistance, has not been adequately answered as far as the agricultural sector is concerned.

External private lending to agriculture slumped drastically in the early 1980s, falling by nearly 80% between 1981 and 1983. The fall was particularly steep in Latin America, but Africa was also seriously affected.

The effects of these factors on that most basic measure of human welfare, the average daily dietary energy supplies (DES) of food available per caput, were slow to make themselves felt. But while there was some improvement overall (an increase of about 12%), there were wide regional differences. In the Asian centrally planned economies (ACPE) and the Near East, there were still some gains in the early 1980s, but in Africa, DES fell noticeably, a serious situation for the continent with such a slender margin for survival. This occurred even though food aid to Africa doubled on a per caput basis between the mid-1970s and mid-1980s.

Turning to the situation in 1985, the essential features were:

- A low rate of increase in food and agricultural production in 1985, but one that consolidated the recovery of 1984. At the regional level, there was a better distribution of production increases among the developing market economies than in 1984.

- A significant recovery in production in Africa, where many countries had been beset by drought during the previous three years. A recovery was recorded in some West African countries in 1984, and improved conditions became far more widespread in 1985.

- The production of a record cereal crop, leading to generally weaker prices in 1985, after showing some signs of strengthening in 1984, and the accumulation of stocks. Indeed, a situation of oversupply and weak market prices affected most agricultural commodities in 1985, with some exceptions, such as coffee towards the end of the year.

- There was little change in international prices of fertilizers in 1985. Fertilizer consumption increased in the year ending in mid-1984, mainly due to a recovery in consumption in North America. It seems unlikely that fertilizer use will increase in the near future at its high rate of the 1970s, and fertilizer prices currently are weak.

- The volume of world agricultural trade increased by only 3% in 1984, but by 5% in value. Exports, from the Far East and the ACPE showed the largest increase in 1984, but those of the Near East fell back.

On the institutional side, the main focus has been on the preparations for another round of Multilateral Trade Negotiations (MTN) to begin in late 1986. The MTN are to include agricultural trade problems, particularly protectionism and measures to enhance exports.

The chapter also reviews longer-term trends in external assistance to agriculture. Preliminary figures for 1984 indicate that official commitments to agriculture (OCA)--"broad" definition--decreased for the second time in the 1980s. The decrease was 12% in current dollars, but 9% in real terms, mainly because of the strengthening of the U.S. dollar and slowing inflation in the industrial countries. The declines in concessional commitments were less severe than in 1983, at 5% and 2% in current and 1980 prices, respectively.

The strongly rising trend of OCA in the late 1970s resulted in a marked but lagged increase in disbursements in the early 1980s, even though growth in commitments has levelled off since then. Projections show that if commitments remain at their 1983 level, disbursements will cease to grow by the end of the decade, at a level about 30% higher than that of 1983. If commitments grow by 5% a year--a rather unlikely event on current evidence--disbursements will also continue to grow and will double by 1995. These projections, however, must be seen against a background of declining disbursements from private external sources in the early 1980s.

In the fishery sector, adjustments are continuing to take place in response to the widespread adoption in 1982 of the UN Convention on the Law of the Sea. Furthermore, the strategy arising from the FAO World Conference on Fisheries Management and Development, held in 1984, is being implemented. The strategy evolves around planning the fishery sector: small-scale fisheries, aquaculture, international trade, and fish and nutrition. The adoption of the Law of the Sea in 1982 and the holding of the FAO Conference in 1984, already marked the decade as a period of adjustment and change for fisheries; adjustments that pose not only challenges but opportunities.

For the forestry sector, the worsening economic environment of the early 1980s posed more challenges than opportunities, especially for developing countries attempting to restructure their forestry sectors to produce more finished products. Even where some opportunities existed, such as in paper and paper pulp, the construction and utilization of domestic paper and pulp plants were beset by difficulties, especially in Africa. But the main problem facing the forestry sector of developing countries in the 1980s is to conserve the benefits that forests produce.

Depletion of forest resources with inadequate investment in reforestration and conservation is a primary concern. This was a major theme of the World Forestry Congress, held in Mexico in 1985, and the associated celebration of 1985 as being the International Year of the Forest.

The availability of stable and adequate supplies of energy is an essential prerequisite for maintaining and accelerating the pace of modernization in agriculture. For countries facing balance of payments difficulties, and from the point of view of conserving an unrenewable resource, the use of commercial energy in agriculture, largely based on petroleum products, is an issue to be kept under review.

The estimates show that after 1972, some developed country regions--North America and Oceania in particular--economized on energy use in agriculture, generally by the less intensive use of machinery. Energy consumption continued to increase rapidly in developing countries, but notably in the Far East, Near East and the ACPE, so that energy use in agriculture in developing countries now accounts for more than a quarter of global use in agriculture; ten years previously it had been less than a fifth.

The conclusion appears to be that in developed countries, the costs of energy should be allowed to determine the use of energy-consuming inputs; in developing countries, research interest should be maintained on evolving farming systems that, over the long term, will not impose large demands on conventional sources of energy.

Changes in environmental issues tend to take place rather slowly. By the mid-1980s, however, there was a clear demarcation between the sets of issues and problems confronting the developed and developing countries. In the former, agriculture has become highly industrialized, but its high productivity has generated surpluses of commodities difficult to market and at some considerable cost to ecosystems. Therefore, there are moves to reduce the intensity of farming practices, minimize environmental pressures and remedy the damage done in the past.

In developing countries, the overwhelming need is to increase food supplies--not forgetting the supplies of fuelwood needed for cooking--and to raise rural incomes. Often indigenous farming systems cannot sustain continued pressures to expand output of food and fuel without degrading the often fragile ecosystems on which they depend. As a consequence, the continuing degradation of tropical and subtropical ecosystems is one of the most intractable environmental problems of the mid-1980s. It is now nearly 15 years since the Conference on the Environment was held. During this time, activities in this area have moved away from studying environmental damage and developing strategies to reduce it. They have become increasingly focused on field projects that have direct benefits at local and national levels.

The early 1980s was a period of economic hardship for many developing countries, from which agriculture was not exempt. An increasing number of countries are examining the efficiency of agricultural markets as a means of obtaining greater agricultural output and as part of overall financial or budgetary adjustment. Examples are shown of institutional and policy changes that are being introduced, in some cases with FAO support. Training from management to farmer level is a necessarily important component of such agricultural marketing projects and the section on "Agricultural Marketing and Development" shows how this is done.

Turning to the "Regional Review" chapter, for Africa, the early 1980s will be recalled as a period of extreme difficulty and hardship. Debt, economic depression and drought make a dreary roll call to the Third UN Development Decade. This experience, however, has entailed a major review

of African development policies. The need to establish agriculture as the priority sector in Africa has received widespread recognition, and the political will to undertake the required shifts in policies, investment and current expenditure also has been expressed by African governments. An improved economic environment for the latter half of the decade would greatly contribute to Africa's agricultural and economic recovery.

The early 1980s was an extremely difficult period economically for Latin America as well. In this region, however, the agricultural sector was regarded as a more stabilizing influence, maintaining output and incomes and generating foreign exchange with which to service debt. Agriculture also faced difficulties. A climatically rather capricious series of years held down output growth, and declining prices on world markets contributed to declining agricultural incomes in several countries. There are concerns that the increased emphasis, necessitated by the crisis, towards promoting agricultural exports, will lead to measures favouring commercial agriculture as opposed to the small-scale sector. Similarly, another reaction to the crisis, a cutback in government expenditure, again could have discriminating effects against small-scale agriculture and low-income farmers.

The agricultural situation in the Near East also was affected by opposing forces and balances. Wars and civil strife, unfortunately still prevalent in the region, have widely disrupted agricultural activities, along with economic life in general. The economic recession of the early 1980s and declining oil prices resulted in a large decline in remittance income, some of which was flowing to the rural sectors of the labour-exporting, mainly agricultural economies of the region. On the other hand, declining earnings from petroleum reinforced the belief that a shift in policy orientation in the region towards agriculture was required to promote greater self-sufficiency in food and more reliable sources of it. Some countries achieved high rates of agricultural output growth, but came to rely on imported technology and inputs.

By most economic measures, the Far East region weathered the economic recession reasonably well. Nevertheless, in the agricultural sector, strains emerged as pressures on the environment mounted and commodity prices fell. Even excluding China, regional growth of food and agricultural production was maintained in the early 1980s, but closer inspection shows that this was entirely due to India's food production performance. Production growth fell back in both East and Southeast Asia--although it was still at a satisfactory rate--and in South Asia (excluding India). In fact, excluding India, South Asian food production growth failed to keep pace with population growth during 1980-84. The increasing competition in external agricultural markets also makes for uncertain growth prospects for the agricultural exporters of the region.

The early 1980s for China, a country hitherto rather insulated from world economic forces, was a period of rapid growth. This followed the policy reforms first introduced in the late 1970s, but modified throughout the early 1980s. Growth in agricultural production was spectacular, although it fell back in 1985. Other problems emerged such as inadequacies in transport and storage facilities. The desire of the Chinese authorities to attempt to stabilize retail prices, enhance rural incomes and adjust agricultural production patterns led to difficulties in planning and implementing policies. There now appears to be a period of reflection and retrenchment after the series of dramatic policy innovations in recent years. For whatever reason, China has emerged as a potentially powerful agricultural exporter while at the same time reducing its agricultural imports, and this fact has had a compelling effect on some agricultural markets.

The agricultural sectors of developed countries were not exempt from the economic shocks that characterized the first half of the 1980s. Simply stated, in North America, the EEC and in some other countries, weakening markets for agricultural commodities and declining prices revealed the weaknesses of farm income support systems that, coupled with greatly improved technologies, generated large, virtually unsellable surpluses, and mounting budgetary deficits. Even so, farm incomes contracted in the early 1980s between rising input costs, notably interest rates, and static or falling returns. Perversely, with modern, highly capitalized farming, in such a situation, the reaction is to try to produce more. This matter has yet to be resolved and meanwhile, competition mounts between the two major agricultural traders, the United States and the EEC, a situation made still more intractable by the recent accession of Spain and Portugal to the Community.

Different problems have emerged to affect agricultural policies in countries in Eastern Europe and the USSR in recent years. The main concerns of these countries are to improve efficiency, to economize on inputs, particularly energy-using inputs, and to raise output in a selective way to improve the availability of food and composition of diets. Questions of budgetary burdens of subsidies also arise, but more on the side of consumer subsidies rather than producer price supports. Various methods of improving the productivity of the farm sector are being tried, including in some countries a more tolerant attitude by governments towards privately owned farm plots and enterprises.

I. World Review

1. THE ECONOMIC ENVIRONMENT

The increasing interdependence of national economies and the profound effects this can have on food and agricultural output, trade and consumption, were highlighted during 1980-85. The economic environment of these years was much less favourable to food and agricultural consumption or production growth than during the 1970s. The erratic behaviour of the world economy also had widely varying effects on output, trade, inflation and external debt of different country groups and regions (Table 1-1).

The 1980-82 recession in the industrial countries gave way to an uneven recovery in economic activity. The recovery, initially confined to the United States and Japan in 1983, spread slowly and with less vigour to a growing number of countries in 1984 and 1985.

For developing countries, the economic recession was as sharp as that of 1974-75, but was longer lasting, more widespread and had more serious effects. In many cases, even low levels of economic growth were made possible only through a large increase in foreign debt that, in relation to the gross domestic product (GDP) of indebted countries, rose 41% between 1980 and 1985.

Output Growth and Patterns

During 1980-85, world output of goods and services grew 2.3% a year, only half that of its long-term rate. Output growth was maintained in developing Asia, but was much lower in the other developing regions. Substantial declines in per caput production were experienced in Latin America, Africa and the Middle East.

The sharpest decline in output growth took place in the oil-exporting countries and in developing countries with debt-servicing problems. Growth was slower in countries producing primary products than for producers of manufactures. Countries more closely linked to external trade were relatively more exposed to the effects of the recession; thus, low-income countries generally maintained higher growth rates than did middle-income, oil-importing countries.

Among industrial countries, the decline in output growth was worse for the European market economies and less severe for Japan and the United States. Following the 4.4% increase in world output in 1984, global output rose only 2.9% in 1985. Output growth in the industrial countries was 2.8%, and so sharply below the 4.7% increase of 1984. Output growth in the developing countries declined from 4.1% in 1984 to 3.2% in 1985.

Trade Growth and Patterns

During the 1970s, world trade growth was well above aggregate output growth, but during the early 1980s the growth rates for both trade and output were about the same. The same relationship that existed in the 1970s was restored only in 1984, when trade growth exceeded its long-term average and output growth was equal to its average. In 1985, however, world trade slowed down sharply, its rate being again similar to that of output.

Most of the distortions in trade growth patterns for the developing countries during the first half of the 1980s stemmed from the 1979-80 surge in oil prices or debt-servicing problems. Between 1981 and 1985, exports of oil-exporting countries declined, on average, nearly 10% a year; and import growth, at 3% a year, was also far below the previous

TABLE 1-1. ANNUAL CHANGES IN SELECTED ECONOMIC AND FINANCIAL INDICATORS, 1980-85

	1980	1981	1982	1983	1984	1985
	..... %					
Output						
Industrial countries	1.2	1.4	-0.4	2.6	4.7	2.8
Developing countries	3.5	2.2	1.6	1.3	4.1	3.2
Africa	3.8	1.7	0.8	-1.5	1.6	1.6
Asia	5.5	5.5	5.0	7.4	7.9	6.1
Middle East	-2.1	-1.8	-0.2	0.1	0.7	-1.6
Latin America	5.3	0.9	-0.9	-3.1	3.1	3.8
Consumer prices						
Industrial countries	11.8	9.9	7.3	4.9	4.7	4.1
Developing countries	27.1	26.0	24.5	32.7	37.4	39.3
Africa	16.5	21.3	12.7	18.6	19.8	13.6
Asia	13.1	10.6	6.2	6.6	7.1	6.7
Middle East	16.7	15.3	12.7	12.1	13.9	13.8
Latin America	54.2	59.1	66.3	102.4	122.6	144.0
Export volumes						
Industrial countries	4.1	3.6	-2.2	2.5	9.3	3.9
Developing countries	-4.0	-5.7	-8.1	2.9	7.1	0.4
Africa	-	-16.1	-7.0	3.8	4.6	6.1
Asia	9.2	9.3	0.5	10.1	14.0	2.5
Middle East	-15.2	-17.9	-19.8	-8.9	-3.2	-5.9
Latin America	1.2	6.1	-2.2	7.1	7.3	-1.2
Import volumes						
Industrial countries	-0.7	-1.5	0.1	5.1	13.0	5.2
Developing countries	8.5	7.1	-4.2	-3.2	2.2	-0.3
Africa	9.3	10.3	-9.0	-10.1	-0.3	-5.2
Asia	10.2	4.1	-0.2	6.4	6.7	6.3
Middle East	9.4	16.8	5.9	-2.8	-6.3	-11.4
Latin America	9.3	2.6	-17.7	-22.2	2.9	-1.3
Terms of trade						
Industrial countries	-6.4	-1.2	2.7	2.3	1.1	1.8
Developing countries	16.7	3.0	-1.2	-3.9	1.2	-2.2
Africa	15.2	2.3	-4.8	-3.3	2.4	-3.0
Asia	-1.8	-4.7	-0.8	-0.6	1.1	-1.2
Middle East	41.3	14.0	2.2	-8.8	-	-3.5
Latin America	7.0	-4.4	-5.8	-2.8	4.0	-3.0
Debt-service ratio a/						
Capital-Importing countries	17.1	20.5	23.6	22.0	22.9	24.1
Africa	13.6	15.5	19.6	22.8	24.8	27.0
Asia	8.2	9.5	11.2	10.8	11.8	12.3
Non-oil Middle East	16.3	18.1	18.6	20.1	22.9	25.8
Latin America	33.3	41.1	49.6	43.0	42.4	44.1

Note: "Industrial countries" are listed in the Explanatory Note.

a/ Payments (interests, amortization or both) as percentage of exports of goods and services.

Source: IMF, World Economic Outlook, April 1986.

rate. Countries with debt-servicing problems increased exports by 1.3% a year and reduced imports more than 5% a year; while countries without these problems increased exports nearly 7% and imports approximately 4% a year. Further, countries that were exporters of manufactures experienced stronger growth in the volume of their exports and less volatile movements in their terms of trade than did exporters of primary commodities.

Developing countries as a whole experienced declines in merchandise exports in the three consecutive years, 1980-82, slow growth in 1983, a substantial recovery in 1984 and a virtual stagnation in 1985 (Table 1-1). Export growth for developing countries in Asia was impressive; Latin America increased exports in four out of the six years; Africa experienced sharp reductions in 1981 and 1982, which was only partially compensated by gains in the following three years; and in the Middle East, the decline was extreme.

Merchandise imports of developing countries continued to grow in 1980 and 1981, but declined sharply in 1982 and 1983, and further in 1985, particularly in Africa and Latin America. Asia was less affected, although there was no growth in its merchandise imports in 1982 (Table 1-1).

Trade growth was also slower for the industrial countries, especially during 1981-83. Export growth remained positive (except in 1982), while imports declined during 1980-81. Exports increased at a lower rate than imports, except in 1980 and 1981.

Thus, export earnings and the positive trade balance for the developing countries as a group peaked in 1980, largely due to the high prices for oil. The trade balance for countries in the Middle East fell from $122 400 million in 1980 to $14 200 million in 1983 and only improved slightly in the two following years, mainly due to the decline in export earnings. In contrast, during 1980-85, the f.o.b. values for Asia's exports increased 27%, its imports 20%, and its negative trade balance declined after 1981. After sharp declines in 1981-82, Africa's export earnings stabilized, and reduced import expenditures after 1981 led to a growing positive trade balance during 1983-85. Latin America's export earnings were relatively constant, and import expenditures were reduced by over 40% from 1981 to 1985 in order to produce a positive trade balance needed to make debt-service payments.

Growth in the volume of world trade has slackened since mid-1984 and was estimated at around 2.9% in 1985. This is a steep deceleration from the 8.7% growth of 1984, which was the highest yearly increase since 1976.

The upsurge in world trade in 1984 largely reflected the increase of economic activity and import demand from the United States: imports by North America that year alone accounted for nearly two-thirds of the global increase in the dollar value of world trade.

The value of exports of developing countries rose 7% in 1984, but this was mainly because of the declining value of oil exports. Excluding the major developing oil-exporting countries, developing country exports rose over 12%, considerably faster than those of industrial countries. The dollar value of developing country exports, however, fell over 3% in 1985, with Latin America and the Middle East suffering the most.

World commodity prices in 1985 were generally depressed, especially those for non-oil commodities. The terms of trade of developing countries deteriorated about 2% in 1985, more than offsetting the modest improvement of 1.2% that occurred in 1984. The setback in export earnings and the already difficult financial constraints resulted in developing countries scaling back their imports again in 1985.

Prices, Currency Values and Interest Rates

Vastly different rates of inflation in domestic prices influenced currency values and greatly increased the number of currency devaluations in the first half of the 1980s. Declining prices for most products in international markets also added to the pressure for currency adjustments. By 1984, world trade prices (in U.S. dollars) for oil, manufactures and non-oil primary commodities were 9%, 14% and 18% respectively below their 1980 levels. Prices of manufactures strengthened slightly in 1985, but those of primary commodities showed a further sharp fall. There were declines in consumer price inflation in industrial and developing Asian countries, but inflation continued at relatively high levels in Africa and the Middle East and accelerated in Latin America (Table 1-1).

Inflation rates in industrial countries continued to fall in 1985 to 4.1%. Weak commodity prices are likely to hold down inflation rates in the industrial countries and, despite renewed pressures from other sources such as rising labour costs, inflation rates in these countries are likely to remain below 3% a year in 1986-87. Meanwhile inflation rates in developing countries continued to increase in 1985, especially in Latin America. They are expected to decline in 1986.

Abnormally high interest rates raised debt-servicing payments and forced indebted nations to increase debt or accelerate exports relative to imports. The slow growth in the world economy, however, made the expansion of exports difficult and, in many cases, forced governments to cut imports.

In the United States, the steep rise in real interest rates, from slightly negative in 1980 to above 9% by 1984, and declining inflation, combined to raise the value of the U.S. dollar in the first half of the 1980s. The sharp rise in real interest rates was an unexpected development in the midst of a recession. This, and the strong U.S. dollar rendered the debt situation for Latin America and Africa particularly difficult to handle. Some relief may be expected from the decline in interest rates and weakening of the U.S. dollar that took place in 1985.

Debt, Debt Service and Capital Flows

External debt of the capital-importing developing countries continued to rise during the early 1980s, reaching $888 300 million in 1985. Debt-servicing payments also rose, from $87 900 million in 1980 to $131 400 million in 1985. Between 1980 and 1985, the increase in debt for Latin America was the largest in absolute terms ($137 600 million).

Debt-service ratios in 1985 were higher than in 1980 for all regions, with Latin America having the highest ratio. The increase was most pronounced for Africa, where the ratio doubled (Table 1-1).

Net external borrowing during 1980-85 was largest for Latin America ($187 800 million). By 1985, however, Asia had almost overtaken Latin America. By 1985, net external borrowing was below the 1980-84 average for every region, as may be seen from the following:

Net External Borrowing

Region	1980-84 Average	1985
	... $ 000 million	
Africa	13.0	2.3
Asia	23.1	14.4
Latin America	37.1	4.5

The reduction of capital inflows from commercial sources since 1981, after a period of large availability of funds in international markets, was another dimension of the debt problem. By 1981, private creditors were by far the largest source of borrowing by developing countries, rising from $28 200 million in 1977 to $84 100 million in 1981. By 1984, however, net borrowings from private creditors declined to $13 600 million, the lowest level since the first oil price increase in 1973. Latin American countries accounted for 80% of the $70 500 million decline in net borrowings from these creditors.

The debt situation of developing countries, which worsened in 1985 with repayments falling due from earlier reschedulings, could deteriorate further with the lack of buoyancy in world trade and increased political pressure for protectionism. It is estimated that the debt service for indebted developing countries reached about 24% of their earnings from exports of goods and services in 1985. The debt problem, however, should be alleviated somewhat by the continuing decline in interest rates and the recent measures taken to drive down the value of the U.S. dollar in which most debts are denominated. If a lower value of the dollar results in more balanced trade flows, protectionist pressures, which have become especially strong in recent months, may ease. But this is more an issue of avoiding new protectionism rather than removing protectionist measures already existing.

Employment

Among industrial countries, growth in employment during the early 1980s was 0.5% a year, which was about one-fourth the average in the 1970s. Employment grew much more slowly in the United States and Japan and actually declined in Western Europe. Unemployment averaged 8.8% for Western Europe, which was about 2.5 times the average in the 1970s. In 1985, total employment in the industrial countries increased by 1.4%, with all but a few countries achieving significant gains.

Precise data are scarce for the developing countries, but with the exception of Asia, employment growth was slower than growth in the labour force. For example, in seven Latin American countries for which data are available, urban unemployment increased more than 50% between 1974-75 and 1983-84.

2. THE EFFECTS OF THE ECONOMIC ENVIRONMENT ON AGRICULTURE

Demand Factors

The 1980-83 world economic recession and its aftermath slowed growth in employment and incomes, disrupted trade flows, lowered world market prices, and aggravated debt-servicing problems. These developments had a strong negative impact on the demand for food and agricultural products. In some cases, foreign exchange shortages caused per caput food supplies to be reduced, which created upward pressure on consumer prices. In other cases, consumption was reduced because the increase in unemployment and reduction in earnings were large and widespread.

In some countries, mainly in Asia, per caput income growth was maintained or improved, trade growth remained relatively strong, debt continued to be serviced with relative ease, and consumer price inflation slowed. The result was strong demand for food and agricultural products. In many countries, however, and for all developing regions, except those in Asia, the four years 1981-84 were of declining per caput incomes, major distortions in trade patterns, increasingly difficult debt-servicing problems, and high or rising domestic price inflation. In these countries, demand for food and agricultural products was weak and, in many cases, per caput consumption declined.

In the developed countries, growth in per caput income remained positive overall, although at historically modest rates. Trade patterns became increasingly distorted and unemployment became a more severe problem. Food supply shortages and consumer price increases were observed in several Eastern European countries, but supplies were abundant and inflation rates were lower than in the developed market economies.

In some cases, particularly in Latin America, even where rises in food prices were not a prime cause of inflation, increases in wage rates have lagged behind those in food prices. Budgetary stringency also forced many governments to reduce or remove food subsidies and other nutrition intervention programmes.

Basic food requirements increased faster than effective demand in many developing countries. This was particularly so in much of Africa, where the average population growth rate at 3.2% a year, already the highest among developing regions, continued to accelerate.

The quantity and patterns of food demand were also affected by high rates of urbanization. The average growth rate in the urban population of developing countries was estimated to be nearly three times the urban growth rate of the developed countries (3.8% compared with 1.3%). Among developing regions, Africa had the highest current urbanization growth rate--more than 5% a year--compared with less than 3-4% a year for other regions. The changing patterns of food demand associated with rapid urban growth led to increased demand for imported food.

Supply Factors

The economic and financial situation had more immediate and direct effects on the demand for agricultural products than on supply. Slower growth in agricultural product consumption, however, soon led to large surpluses in exporting countries, which depressed international market prices and reduced export earnings. Lower prices reduced farm returns, in particular, in countries where farm prices are determined largely by market conditions. But developments in agricultural input prices were rather more favourable after the effects of the rise in oil prices of 1979-80 had been passed on.

Thus, the price-cost squeeze that the farm sector has been subjected to since 1980, arose more from weak output prices than from high prices of inputs. The main exception has been the cost of borrowing, which has had profound effects on the farm sector in developed countries. High interest rates forced many overcommitted farmers into bankruptcy and threatened the viability of agricultural financing agencies, particularly in the United States. This was reflected in declining land values, with the United States experiencing the sharpest fall since the 1930s.

In developing countries, other important factors affecting agricultural supply in a negative way included constraints on foreign exchange and economic adjustment programmes that combined to limit the importation of essential inputs such as fertilizers. Furthermore, public expenditure on agriculture, including input subsidies, was curtailed and investments reduced or delayed.

Agricultural Prices and Trade

Weak demand during 1980-84 contributed to a sharp decline in agricultural commodity prices. The price decline began in late 1980, and by 1982 agricultural commodity prices, in real terms, were extremely low. While prices recovered modestly in 1983, the recovery was short-lived, and the International Monetary Fund's (IMF) all-commodity index (1980=100) was only 77.5 in January 1986.

Weak demand for agricultural products was largely due to the income effects of the recession. It was weakest in the African and Latin American countries, where per caput incomes were reduced the most, and where modest changes in income led to large changes in consumption. It may also be partially explained by higher interest rates, which caused consumers to amend expenditure plans. Further, the economic recovery was led by sectors that require little or no imputs of raw materials, such as electronics and services.

Food commodity prices were more adversely affected than beverages and agricultural raw materials (Table 1-2; Fig. 1-1). Between 1980 and 1982, the dollar price indices for food, beverages and raw materials fell by around 20%. Prices strengthened in the two following years although, with the exception of beverages, they remained well below the levels of the early 1980s. A marked weakening in commodity prices has taken place since the second half of 1984, mainly due to ample supplies of agricultural products in world markets and continued weak demand in major food-importing areas.

TABLE 1-2. INDICES OF NON-OIL PRIMARY COMMODITY PRICES, 1982-85

Non-oil primary commodities	1982	1983	1984	1985
		1980=100 (US$)		
All non-oil primary commodities	80.0	85.2	86.6	75.9
Food	82.1	89.3	88.6	74.9
Beverages	79.6	86.1	100.0	88.3
Agricultural raw materials	81.1	83.6	87.8	77.3

Note: Prices are composed of 39 price series for 34 primary commodities.

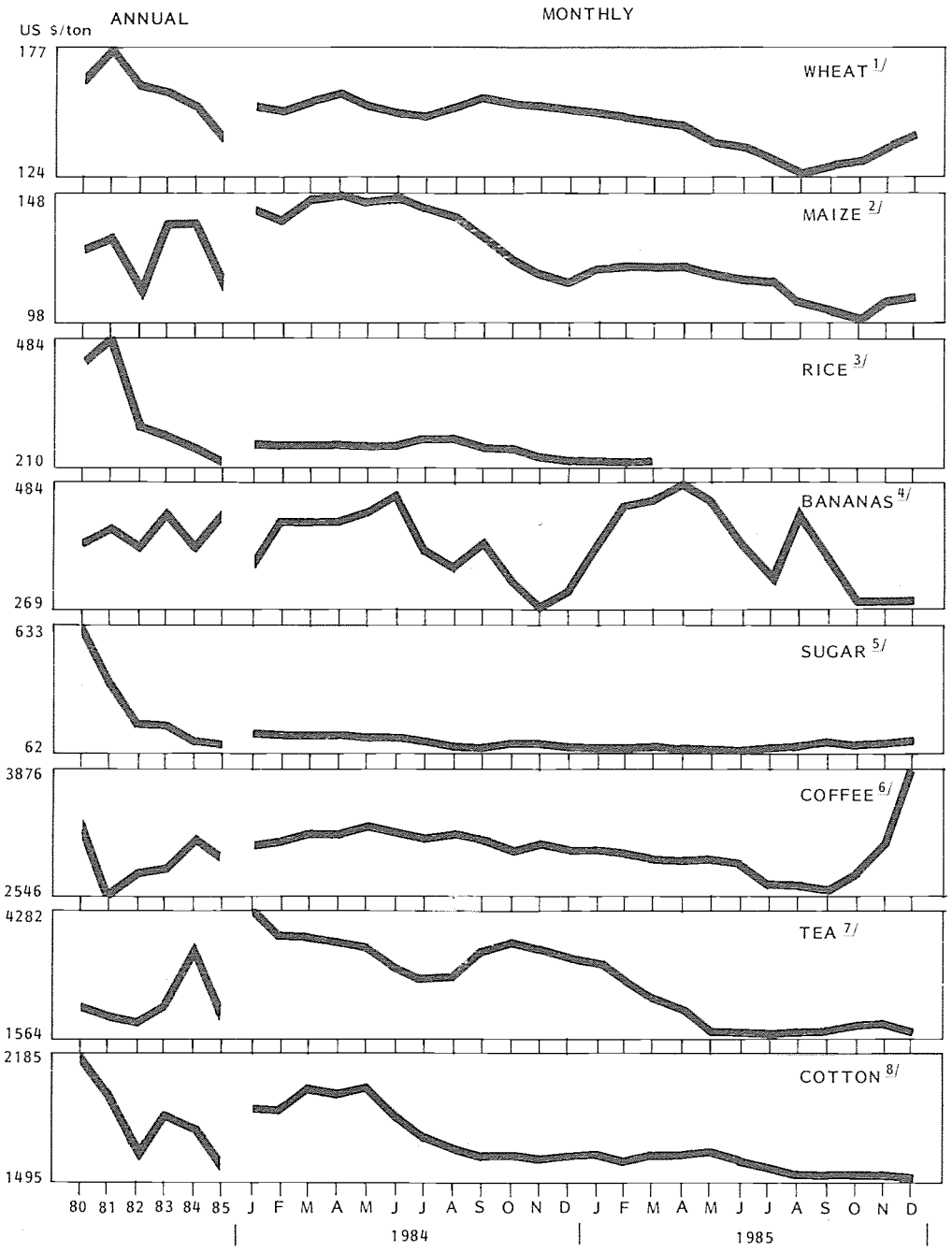
Source: IMF, International Financial Statistics, May 1986.

In developing countries as a whole, the dollar value of agricultural exports declined 1.2% a year during 1980-84, after having expanded by over 7% a year in the 1970s. Except in the Near East, agricultural exports fared less well than total exports, their value increasing by less in years of growth, and falling by more in years of slump. The regional pattern of agricultural exports was similar to that of total trade: between 1980 and 1984, the value of agricultural exports barely rose in the Far East (0.4%), but in Africa it declined 5% a year. In the other regions, agricultural export earnings declined slightly during 1980-84.

The overall decline in export earnings from agriculture occurred in a context of generally depressed demand and relatively large fluctuations in supply. The response of prices to such changes in the demand/supply balance caused wide variations in agricultural terms of trade. Other factors were the rise in the value of the U.S. dollar, which contributed to lower dollar prices for primary commodities, and the slow-down in inflation in industrial countries.

The net result of these factors was a stagnation or deterioration in the purchasing power of agricultural exports of developing countries during 1980-83, followed by some improvement in 1984. Although the index of dollar prices of their imports of manufactured goods and crude petroleum declined 13% during 1980-83, this was more than offset by an 18% drop in the unit value of their agricultural exports.

Figure 1 - 1 - INTERNATIONAL PRICES OF SELECTED AGRICULTURAL COMMODITIES, 1980-85



1/ Wheat, Hard Winter No 2, ordinary protein, f.o.b., Gulf, U.S.A.
2/ Maize, No 2 yellow, f.o.b., Gulf, U.S.A.
3/ Rice, milled - Thai white, 5% broken, f.o.b., Bangkok.
4/ Bananas, N.Y. f.o.b., green, 1st class, Central and South America.
5/ Sugar, raw, ISA Daily, f.o.b. and stowed Caribb. ports, bulk.
6/ Coffee, green 1976 International Coffee Agreement, composite price.
7/ Tea, London Auction, weighted average, all origins.
8/ Cotton, lint, Memphis Territory, MI - 3/32

Source: FAO, Statistics Division

On a regional basis, during 1980-83 there was a sharp deterioration in the income terms of trade of agricultural exports in Africa and, to a lesser extent, in the Far East; and an improvement in Latin America, although this was largely based on a sharp increase in the volume of agricultural exports in one year, 1983. The improvement in the Near East was based mainly on expanded exports of cotton. In 1984, however, there was a marked improvement in all regions so that, with the exception of Africa, the income terms of trade improved during 1980-84 (Table 1-3). This was not due to rising export prices of agricultural products, but to declining prices of imports together with some increases in export volumes. Nevertheless, by 1984 the agricultural income terms of trade of Africa and the Near East were still below their levels of the mid-1970s; for Africa, by as much as 23% (see Table 1-20 for the latest data available).

TABLE 1-3. ANNUAL RATES OF CHANGE IN INCOME TERMS OF TRADE OF AGRICULTURAL EXPORTS FOR MANUFACTURED GOODS AND CRUDE PETROLEUM, 1971-80 AND 1980-84

	1971-80	1980-84
	..... %	
Developing market economies	1.5	3.9
Africa	-0.5	-0.3
Far East	3.4	4.8
Latin America	2.4	4.9
Near East	-6.1	8.2
ACPE a/	-3.9	6.9
Total developing countries	1.2	4.4
Developed market economies	2.0	1.4
North America	2.1	2.2
Oceania	-1.9	-0.5
Western Europe	2.8	1.8
Eastern Europe and the USSR	-4.1	-1.6
Total developed countries	1.4	1.1

a/ Asian centrally planned economies.

Source: FAO, Statistics Division; Policy Analysis Division.

Food Imports

The main external factor affecting food supply in the early 1980s was the world economic crisis that forced many countries to restrain their imports of even essential goods, including food. During the 1970s, food imports increased in all developing regions at rates well exceeding the growth of population. Per caput food imports rose more than 3% a year in the Far East, 7% in Africa, and 8-11% in both the Near East and Latin America (Table 1-4).

For many countries, such major recourse to imports, including food aid, had been an important factor in improving nutritional standards, although at some cost. In the case of Africa, imports of food by the early 1970s accounted for about 6% of total calorie supplies, including livestock feed. Ten years later the share had increased to nearly 13%. Similar increases occurred in Latin America (from 8% to 15% of the total)

and the Near East (from 12% to 23%). Though less significant, the contribution of imports to total calorie supplies also rose in the Far East (from 5% to 7%).

TABLE 1-4. ANNUAL RATES OF CHANGE IN THE VOLUME OF PER CAPUT FOOD IMPORTS, 1971-80 AND 1980-84

	1971-80	1980-84
	..... %	
Developing market economies	7.2	0.6
Africa	7.1	0.5
Far East	3.2	0.2
Latin America	8.1	-6.4
Near East	10.8	5.8
ACPE	6.0	-4.5
Total developing countries	7.2	0.4
Developed market economies	1.4	0.7
North America	-1.1	1.1
Oceania	1.1	8.1
Western Europe	2.0	0.2
Eastern Europe and the USSR	6.9	-
Total developed countries	2.3	0.4

Source: FAO, Policy Analysis Division.

The early 1980s marked an end to this period of expanding food imports. In Latin America, the volume of per caput food imports actually declined more than 6% a year between 1980 and 1984 and between 4-5% a year in the Asian centrally planned economies (ACPE). In all other developing regions except the Near East, the increase in food imports was well below that of their populations. In the Near East, the volume of food imports per caput increased about 4% a year during 1980-83, less than one-third of the average rate of increase for the 1970s.

A few major high-income importing countries in each region accounted for much of the above overall changes. Both high- and low-income countries, however, reduced the growth of their food imports.

In a number of cases, mainly in Asia, a reduction in food imports was possible because of improved domestic food production. However, there were only rare examples of poor output performances being adequately compensated by increases in food imports during 1980-84.

The sharp reduction in food imports did not result in much financial relief during the early 1980s because export earnings also failed to expand. Therefore, food imports still accounted for a large and sometimes increasing share of foreign exchange earnings. In Africa, for example, the value of food imports in 1982-83 was equivalent to about 16% of total export earnings compared with 14% in 1972-73.1/ In the Near East, the

1/ Food imports include food aid. The actual cost of food imports to the importing country depends on the quantity of food aid received and its concessionality.

BOX 1-1

SUBSTANTIAL NEW PROGRAMME OF ACTION (SNPA) FOR THE 1980S FOR THE LEAST-DEVELOPED COUNTRIES: A MID-DECADE REVIEW

The SNPA, created by UNCTAD in 1979 and adopted in September 1981 by the UN Conference on the Least-Developed Countries (LDCs), was intended to deal boldly with long-term development problems of LDCs in four main areas: structural change, social needs, transformational investment and emergency support. A special meeting was convened in Geneva, 30 September to 11 October 1985, to review progress in these areas since the adoption of the programme. Representatives of 102 UNCTAD member countries and numerous governmental and non-governmental organizations and agencies examined the socio-economic situations of the LDCs and the domestic and external factors that conditioned them.

In reviewing the SNPA at the country level, food and agriculture were found to be critical areas. Not only did agricultural output growth in the LDCs (2.4% during 1980-85) fall far short of SNPA's objective of 4% a year during the 1980s, but per caput food production actually declined almost 0.5% a year. Only seven of the 36 LDCs recorded positive growth in per caput food output. The review emphasized the need for introducing coordinated and focused food strategies, particularly in the areas of: promoting cooperative development, appropriate price policies for agricultural inputs, and measures to ensure the full participation of the rural population--especially that of women. Donors were urged to make firmer commitments of technical, financial and food aid that should be integrated into long-term agricultural and food development plans.

Another area of particular attention included the development of human resources, through concrete measures in education and training, health, nutrition and population.

The review concluded that these efforts would require a massive mobilization of domestic and international resources. To mobilize domestic resources and ensure their effective use, the LDCs were urged to continue to create an appropriate policy framework, including price policies, institutional reform, rationalization of public expenditure and improved public sector management. They were also urged to adopt measures to mobilize domestic savings and to strengthen their financial and planning institutions.

The meeting recognized the need for a substantial increase in transfers of external financial resources and more generous modalities of assistance. The SNPA envisaged that the level of development assistance to the LDCs should double by 1985 compared with the annual level of transfers to them during 1976-80. The actual level of assistance, however, is expected to fall considerably short of this target in 1985. Nevertheless, a significant number of donors that had agreed in 1981 either to provide aid equivalent to 0.15% of their GNP or to double the level of their assistance to LDCs, had met or come close to achieving these targets.

Although, in general, most LDC donors provided more aid as grants on flexible terms, no progress has been recorded since 1981 on untying aid. Furthermore, there is scope for more donor participation in financing local and recurrent costs.

LDCs external debt rose to $35 000 million in 1983 and the review noted with satisfaction the cancelling of LDC official debt by some donor countries. Creditors were urged, when concluding debt rescheduling arrangements for an LDC, to give proper consideration

to the country's adjustment efforts.

The review also welcomed the EEC's decision to establish a system similar to STABEX (Stabilization of Export Earnings) for the nine LDCs not covered under the Third Lomé Convention, and to add raw jute to the list of the 48 agricultural products already covered by STABEX. While acknowledging the numerous efforts made by several developed countries to improve access to their markets for the exports of the LDCs, the review of the SNPA invited importing developed countries to do more to stabilize LDC export earnings.

ratio of the value of food imports to total exports also rose, from 8% to 11%, and in Latin America it remained fairly constant at around 10%. It was only in the Far East, where the situation improved due to increased export earnings coinciding with better output performances, that dependence on food imports was reduced.

Trends and Patterns in Food and Agricultural Production During 1980-85

World food production during the first half of the 1980s grew at the same rate as that of the 1970s (Table 1-5). But this was largely due to a high growth rate in the ACPE, mainly China, which country was the dominant source of the increase in world production of non-food products.

TABLE 1-5. ANNUAL RATES OF CHANGE IN FAO INDEX NUMBERS OF NET FOOD, NET NON-FOOD AND GROSS CROP PRODUCTION, 1971-80 and 1980-85

	Food		Non-food		Crops	
	1971-80	1980-85	1971-80	1980-85	1971-80	1980-85
	..... %					
Developing market economies	3.2	2.7	0.8	2.5	2.7	3.0
Africa	2.0	2.4	-	3.0	1.3	2.4
Far East	3.5	3.6	2.1	3.0	3.2	3.4
Latin America	3.7	2.1	0.6	2.0	3.0	2.9
Near East	3.4	1.8	-0.4	2.2	2.9	1.8
ACPE	3.2	5.4	2.6	13.0	3.3	5.6
Total developing countries	3.2	3.5	1.2	5.4	2.9	3.6
Developed market economies	2.1	1.4	0.1	-0.1	1.7	1.7
North America	2.9	-0.9	0.4	-1.3	3.1	1.1
Oceania	2.8	4.1	-1.4	3.0	3.4	8.3
Western Europe	1.7	1.4	2.1	4.3	1.0	1.8
Eastern Europe and USSR	1.5	2.7	0.7	0.0	0.9	3.3
Total developed countries	1.9	1.8	0.4	0.0	1.4	2.2
World	2.4	2.5	0.8	3.0	2.1	3.0
Low-income countries with per caput GNP up to $400 (1983)	2.8	4.4	1.5	9.4	2.6	4.6
Developing countries other than low-income	3.6	2.3	1.0	1.8	3.2	2.3
Least-developed countries	2.4	2.3	-1.4	5.4	1.6	2.6
Developing oil exporters	3.2	2.7	1.0	3.2	2.7	2.0
Developing non-oil exporters	3.2	3.6	1.2	5.5	2.9	3.8

Source: FAO, Statistics Division.

During 1980-85, the growth in food production, at 2.7%, in the developing market economies was well below the 1971-80 average and at a level barely exceeding population growth (2.4%). Africa, Latin America and the Near East all had food production growth rates that were below those of population growth rates during 1980-85. The welcome exception was the Far East, which continued to raise the growth rate of its food production significantly above that of its population.

The falling growth rate of production in Africa, where an improvement is most needed, is of greatest concern. In numerous countries such as Nigeria, Cameroon and Tanzania, total food production stagnated and even declined during the early 1980s. Moreover, the rate of increase was halved in the Near East, with the Sudan particularly affected; and it significantly slowed in Latin America, where growth in food production per caput was negative in such countries as Mexico, Venezuela, Colombia, Chile and Bolivia. Production of non-food crops was also stagnant in major exporting countries such as Brazil, Colombia and Chile. These poor performances were, to some extent, the result of some unusually severe natural disasters, but also reflected economic difficulties widely encountered in the early 1980s.

The developed market economies recorded a marked decline in the growth in food production in the 1980s, primarily due to the agricultural policies of the United States, which restricted production in an effort to reduce excess supplies. Adverse weather also played a role, especially in 1983. On the other hand, Eastern Europe and the USSR increased food production significantly during the early 1980s.

Yearly variations in food output remained within the 1-2% range in developing countries throughout the 1970s and early 1980s. Food output generally was more stable in Africa and Latin America than in the Far East and Near East. The instability of non-food crops was more pronounced than food crops, around 5%, although in the case of Latin America it exceeded 12%. For both food and non-food crops, fluctuations in output in developing countries tended to moderate during the early 1980s, particularly in the poorer developing countries.

In contrast, crop output in industrial countries was subject to greater instability: 4% during the 1970s and 10% during the early 1980s. Production in Western Europe and, more markedly, North America, was the most unstable. The fact that higher instability was found in industrial countries generally reflects their greater control over supplies, exerted through policy interventions. Conversely, in most developing countries many people live close to subsistence levels, and even low fluctuations in output may have devastating effects on them. Consequently, there is more reliance on crops that give low but stable yields. The fact that greater stability in output was found in many countries where output was stagnating, points more to secular deteriorating trends.

On the whole, the commodity composition of agricultural production did not undergo major changes over the last decade. However, some shifts occurred at the regional level in response to changing patterns of demand towards livestock products and more intensive livestock feeding.

In all regions and income groups, the share of cereals in total output remained almost unchanged between 1971-73 and 1981-82: at about 34% in developing countries as a whole, and 24% in developed market economies. The relative shares of livestock and oil-crop production increased, while that of roots and tubers, pulses and other crops declined. In developing countries as a whole, livestock output in 1982-84 accounted for 24% of the total, compared with 22% ten years earlier.

TABLE 1-6. SELECTED INPUT INDICATORS

	1980-82			% of change from 1971-73 to 1980-82 in:		
	Arable land a/	Fert. use b/	Irrigation c/	Arable land a/	Fert. use b/	Irrigation c/
	ha/caput	kg/ha	%	..... %		
Developing market economies	1.4	33.0	15.3	-3.3	93.0	12.5
Africa	1.4	9.3	1.7	-8.3	52.5	21.4
Far East	0.9	39.7	25.8	-5.1	111.2	18.3
Latin America	4.5	39.2	8.3	11.4	62.0	13.7
Near East	2.4	41.2	20.4	-9.9	134.1	1.5
ACPE	0.4	145.1	42.2	-2.6	172.7	15.0
Total developing countries	1.0	49.1	19.1	-1.9	117.3	11.7
Developed market economies	14.4	117.5	9.6	43.8	11.4	18.5
Eastern Europe and the USSR	7.7	107.8	8.1	31.2	43.2	47.3
Total developed countries	10.6	113.5	9.0	36.9	22.2	28.6
Low-income countries	0.7	58.2	26.6	-5.6	153.0	16.2
Least-developed countries	1.0	8.4	8.3	-11.8	115.4	20.3

a/ Arable land and area under permanent crops per caput of agricultural labour force.
b/ Consumption of fertilizers (total nutrient) per hectare of arable land area under permanent crops.
c/ Share of irrigated area in arable land and area under permanent crops.

Source: FAO, Statistics Division.

Factors of Production and Other Inputs

There is great regional diversity in land available per agricultural worker and in fertilizer use and irrigation. Recent improvements in agricultural output at the regional level derived more from higher land productivity than from land expansion.

In most developing countries, the agricultural labour force is increasing faster than land is being brought into use. Therefore, land per agricultural worker is declining, apart from Latin America where land is being brought into use at a high rate and the agricultural labour force is increasing only slowly. In developed countries the agricultural labour force is actually declining.

The proportion of irrigated arable land increased only 1.5% in the Near East from 1971-73 to 1980-82, where the major concern is the rehabilitation of "old" schemes, but by as much as 18% in the Far East and 21% in Africa (Table 1-6). Africa, however, has less than 2% of its land irrigated compared with more than 25% in the Far East.

Irrigation is expanding quite fast in the developed countries, particularly in Eastern Europe and the USSR. Moreover, the expansion in Western Europe (21%) during the 1970s was as high as any developing region, possibly in response to the agricultural support policies widely adopted in the region.

During the 1970s large but regionally uneven increases were recorded in the consumption of fertilizers (Table 1-7). China's fertilizer use grew at an annual rate of over 12% a year and by the early 1980s consumption reached 145 kg/hectare (ha)--over four times more than the 33 kg/ha consumed by the developing market economies as a group. On the other hand, stagnating fertilizer consumption in Africa only averaged 9 kg/ha during 1980-82 (see Table 1-6).

There was a marked slow-down in fertilizer consumption growth in all regions except the Near East during the early 1980s. In Africa, consumption failed to increase, while in Latin America it actually declined nearly 8% a year.

TABLE 1-7. ANNUAL RATE OF CHANGE OF FERTILIZER CONSUMPTION, TOTAL NUTRIENTS, BY REGION, 1971-80 and 1980-83

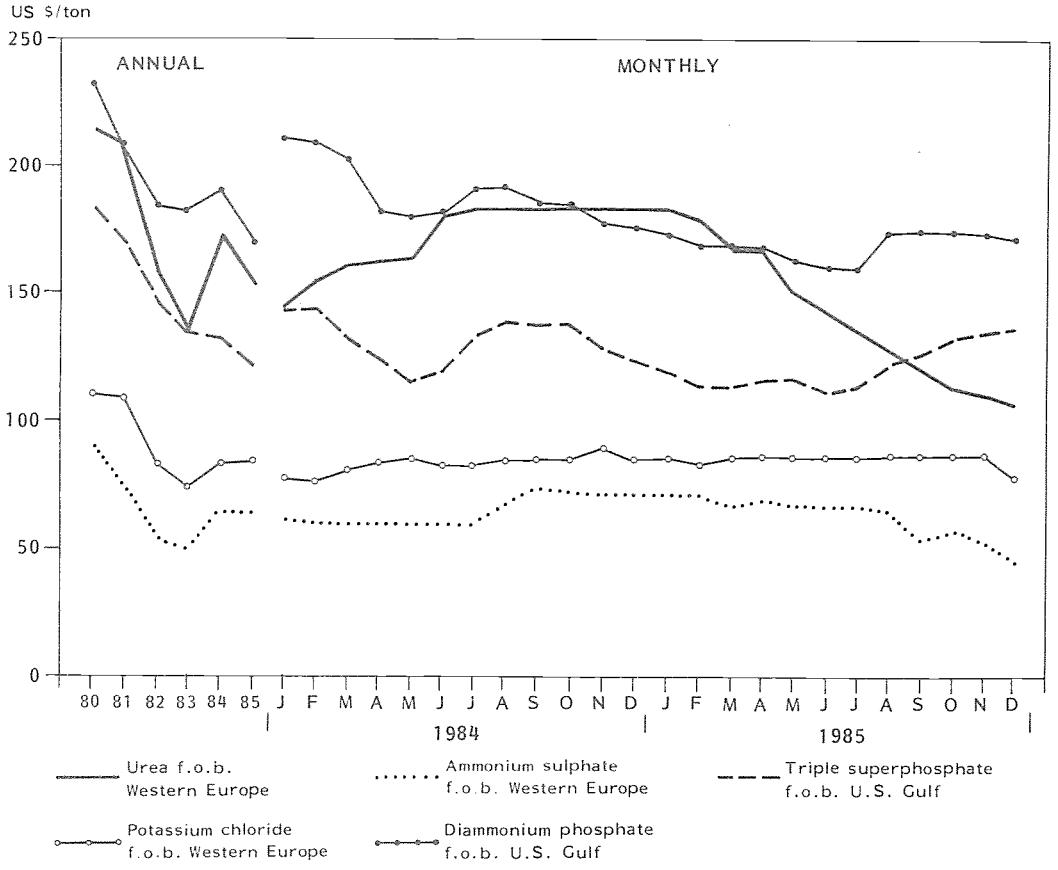
	Annual rate of change	
	1971-80	1980-83
	..... %	
Developing market economies		
Africa	6.1	-
Far East	10.2	6.5
Latin America	9.9	-7.8
Near East	11.1	10.4
ACPE	12.4	6.0
Developing countries	10.9	3.9
Developed countries	3.6	1.3

Source: FAO, Land and Water Development Division.

The slow-down in fertilizer consumption in recent years was due to restrictions on imports because of payment problems, reductions in fertilizer subsidies, low market prices for fertilizer-using crops, or drought. Fertilizer consumption in North America was severely affected by the Land Set-Aside Programmes of 1982-83, that coincided with drought in the latter year.

There was some increase in fertilizer consumption in 1983/84 in all developing regions except Latin America (see Table 1-16). Furthermore, fertilizer imports increased in 1983/84 in the ACPE (40%), Near East (30%), Africa (7%), and Far East (1%), but still declined in Latin America (15%). However, in three regions--Africa, the Far East and Latin America--fertilizer imports in 1983/84 were still below the levels of 1981/82. Such weak demand resulted in a period of declining export prices of fertilizers, following the significant increases in demand and prices that had taken place during the late 1970s. It was not until 1984 that prices of some fertilizers tended to rise again, although they fell in the last half of 1985 (Fig. 1-2).

Figure 1-2 - EXPORT PRICES OF FERTILIZERS, 1980-85



Severe difficulties in maintaining levels of imports of all agricultural inputs, including fertilizers, were also apparent by the early 1980s. A marked slow-down in the growth of imports or declines were noted in all developing regions, particularly in Latin America in 1981 and 1982, and in the Far East in 1982. Imports of inputs by African countries also declined, but by less than the other regions and from lower levels.

In the land-constrained Near East, ACPE and Far East, the arable area and land used for permanent crops declined or increased slowly from the mid-1970s to 1982--an annual decrease of 0.5% for the Near East and annual increases of 0.1% and 0.4% for the ACPE and Far East, respectively. The remarkable increases in agricultural production in Asia in recent years were thus achieved mainly through improved yields and increased intensity of land use. For example, cereal area harvested rose slightly over 2% between 1980 and 1983 in the Far East, and remained almost unchanged in the ACPE. On the other hand, yield per hectare in the two regions increased 11% and 22%, respectively, during these years.

In the more land-abundant regions--Latin America and Africa--land was brought into use at annual rates of 1.6% and 0.7%, respectively from the mid-1970s to 1982. Latin America expanded its area under cereals 6% between 1979/80 and 1983/84, and average yields improved nearly 13%. In Africa, cereal output suffered from deteriorating yields and, with the exception of 1982, there was no significant increase in area harvested.

These changes in the use of inputs, and in the pattern of labour/land use, contributed to important changes in labour productivity in agriculture. Output per unit of labour force employed in agriculture appears to have greatly improved in the ACPE during the 1980-84 period, compared with the decade of the 1970s (Table 1-8). This resulted from a marked increase in production and a decline in the number of persons employed in agriculture. Agricultural labour productivity also increased in the Far East because slower growth in the labour force combined with improved growth of output. By contrast, labour productivity failed to improve in Africa, where the agricultural labour force was growing nearly twice as fast as any other region. The growth in labour productivity decelerated significantly in Latin America, where a sharp downturn in output growth more than offset a slowing down in the growth of the agricultural labour force.

TABLE 1-8. ANNUAL RATES OF CHANGE IN POPULATION AND ESTIMATES OF PRODUCTIVITY OF AGRICULTURAL LABOUR, 1971-80 AND 1980-84

	Africa		Far East		Latin America		Near East		ACPE	
	1971 to 1980	1980 to 1984	1971 to 1980	1980 to 1984	1971 to 1980	1980 to 1984	1971 to 1980	1980 to 1984	1971 to 1980	1980 to 1984
	..... %									
Population	3.0	3.1	2.3	2.2	2.5	2.3	2.8	2.7	1.9	1.3
Agricultural labour force	1.5	1.5	1.0	0.7	0.6	0.4	0.8	0.8	0.5	-0.6
Agricultural production	1.8	1.8	3.4	3.9	3.3	2.0	3.0	1.6	3.1	7.1
Implied change in output per caput agricultural labour force	0.3	0.3	2.4	3.2	2.7	1.6	2.2	0.8	2.6	7.7

Source: FAO, Statistics Division.

Effects on Flows of External Assistance to Agriculture

Official commitments to agriculture (OCA) increased rapidly from 1974-75 to 1979-80, by 17% a year in current prices. Prices were inflating faster then, and the value of the dollar declined relative to other currencies, so in terms of 1980 dollars the increase in commitments averaged 6.4% (Table 1-9). The rate of expansion of OCA slowed to 5.1% a year from 1979-80 to 1982-83 in current prices, but with an appreciating U.S. dollar and slower inflation, the annual increase in constant dollars accelerated to 7% a year. There has been, however, a significant hardening in the terms of OCA in the early 1980s.

TABLE 1-9. OFFICIAL COMMITMENTS OF EXTERNAL ASSISTANCE TO AGRICULTURE (OCA) (BROAD DEFINITION), INCLUDING TECHNICAL ASSISTANCE GRANTS, TWO-YEAR MOVING AVERAGES, 1974-75 AND 1979-80 to 1983-84

	1974-75	1979-80	1980-81	1981-82	1982-83	1983-84
	..... $ million					
Total OCA						
Bilateral	2 168	4 659	4 608	4 931	4 834	4 543
Multilateral	2 711	5 915	6 875	7 183	7 435	6 835
Total at current prices	4 879	10 574	11 483	12 114	12 269	11 378
Total at constant 1980 prices a/	8 162	11 129	11 860	13 031	13 633	13 142
Non-concessional OCA						
Bilateral	250	216	138	170	172	236
Multilateral	1 508	2 733	3 353	3 838	4 318	3 963
Total	1 758	2 949	3 491	4 008	4 490	4199
Concessional OCA						
Bilateral	1 918	4 443	4 470	4 762	4 662	4 307
Multilateral	1 202	3 183	3 524	3 346	3 116	2 872
Total	3 120	7 626	7 994	8 108	7 778	7 179
	..... %					
Share of concessional OCA in total OCA	64	72	70	67	63	63
Share of concessional OCA in total ODA b/	12	19	19	20	20	18

a/ Deflated by UN unit value index of the export of manufactured goods.
b/ Share of official commitments to agriculture in total official development assistance to all sectors.

Sources: OECD and FAO, Policy Analysis Division.

Measured in current prices, the concessional component of OCA grew nearly 20% a year during the last half of the 1970s, but by 3% from 1979-80 to 1981-82, and has fallen nearly 6% a year since. Conversely, the annual rate of increase in non-concessional OCA accelerated from 11% a year from the mid- to late-1970s to 15% from then to 1982-83. But non-concessional OCA also declined in 1983-84, by 7%. As a result, the share of concessional OCA of total OCA, which had increased in the second half of the 1970s from 64% to 72%, fell back to 63% in 1983-84.

The rapid growth in concessional OCA during the last half of the 1970s mainly reflected the increasing agricultural emphasis of concessional official development assistance (ODA) to all sectors: agriculture's share rose from 12% in the mid-1970s to 20% by the end of the early 1980s. This share has since fallen back because concessional ODA has declined more slowly than has OCA since 1982.

There does appear to be a trend in focusing concessional assistance towards low-income countries and hence, Africa. For example, the least-developed countries (LDCs)--most of which are African--received less than 30% of concessional commitments in the mid-1970s, but about one-third of such commitments in the early 1980s. Countries assisted by the World Bank's International Development Association (IDA) similarly increased their share of concessional commitments from 75% to over 80%.

The proportion of aid available for local cost financing and recurrent costs, and that provided for current import requirements, have been receiving increasing attention from donors and recipients. Agricultural projects usually have substantial requirements for both forms of aid. Local costs typically form a relatively high proportion of small-scale agricultural and rural development projects. According to the Organization for Economic Cooperation and Development (OECD), some 8% of bilateral aid is available for local cost financing and there is no evidence of any upward or downward trend in the recent past.2/

Input Aid

Commitments of external assistance for fertilizers, pesticides and seeds declined during the early 1980s, from $1 015 million in 1979-81 to $733 million in 1983. Their share of total commitments to agriculture fell from about 9% to 6%.3/

Fertilizer aid, which has become the largest component of aid for inputs, declined sharply. From a 1978/79 high of nearly 2 million tons of fertilizer materials, fertilizer aid declined to only about 1 million tons in 1981/82 and 1982/83, representing about 7-8% of fertilizer imports of developing countries. In recent years, aid through FAO's International Fertilizer Supply Scheme (IFS) has dropped to only 1-3% of total fertilizer aid, which is now almost totally bilateral.

Although fertilizer aid is small in terms of world fertilizer consumption or imports, it assumes increasing importance in relation to the needs of the smaller low-income countries. For example, the current low levels of fertilizer aid are equivalent to one-eighth of the fertilizer import needs of the 50 MSA/LDC countries regularly monitored by FAO.4/

External Private Lending for Agriculture (Broad Definition)5/

The importance and role of external private flows to agriculture in developing countries, and particularly their complementarity with flows from other sources, have become a subject of concern at national and international levels in the 1980s. Various ways and means are being explored to increase access of developing countries to external sources of private lending.

Reporting on private flows to agriculture is hampered by the lack of adequate data. An attempt is made to review the levels of these flows over the last 14 years, using data available from the Debtor Reporting System of the World Bank on 77 developing countries (Table 1-10).

The trend in external private lending to agriculture seems to closely follow the trend observed for overall private lending to developing countries. Lending to agriculture increased rapidly in the 1970s, but has declined since 1979, particularly since 1981-82. Only agricultural loans from this source to countries in Asia and the Pacific have continued to grow in recent years.

2/ OECD, Development Cooperation, 1984 Review, Paris, Nov. 1984.

3/ See FAO, International Agricultural Adjustment Fifth Progress Report, C85/21, August 1985.

4/ See FAO, Fertilizer Aid to Developing Countries, Commission on Fertilizers, Ninth Session. FERT/85/5, Sept. 1984. The MSA countries are those that were "most seriously affected" by the oil crisis of 1973-74.

5/ For explanation of "broad definition," see Explanatory Note.

TABLE 1-10. LENDING BY EXTERNAL PRIVATE SECTOR TO AGRICULTURE IN DEVELOPING REGIONS, 1970-83

Region	Average			Annual rates of change		
	1970-74	1975-79	1980-83	1971-75	1975-79	1979-83
	.....$ million			..... %		
Africa	67	636	408	59.4	15.3	-26.4
(% of total)	(16.7)	(43.8)	(33.1)			
Far East & Pacific	76	181	507	18.6	27.7	10.3
(% of total)	(19.0)	(12.5)	(41.1)			
Latin America	196	589	245	31.9	0.4	-37.8
(% of total)	(48.9)	(40.5)	(19.8)			
Near East	62	47	74	-27.2	-0.9	-1.3 a/
(% of total)	(15.4)	(3.2)	(6.0)			
Total developing countries b/ (%)	401 (100)	1 453 (100)	1 234 (100)	26.1	8.3	-12.2 a/
of which LDC	31	60	118	55.5	10.0	-15.8 a/
External private commitments as % of total commitments to agriculture	..... %					
	23.4	26.3	18.1			

a/ 1979-82.
b/ Seventy-seven developing market economy countries.

Source: World Bank, Debtor Reporting System.

In 1983, private lending to agriculture dropped to $556 million compared with $969 million in 1982 and $2 574 million in 1981. Therefore, the share of private lending in total external lending to agriculture reached only 11% in 1983 compared with 30% in 1981 and an average of about 25% in the 1970s.

3. THE EFFECTS OF SUPPLY AND DEMAND FACTORS ON FOOD CONSUMPTION

Changes in population, employment, income as well as in food production, trade and prices, have had varying effects on the nutritional status of different regions and country groups (Fig. 1-3). Caloric consumption per caput was 12% higher in the early 1980s than 12 years earlier for the developing countries as a whole. The animal component of total dietary energy supplies (DES) rose from 7% to 8% during the same period (Table 1-11).

TABLE 1-11. DAILY PER CAPUT DIETARY ENERGY SUPPLIES (DES), DEVELOPED AND DEVELOPING COUNTRIES, 1969-71 AND 1981-83

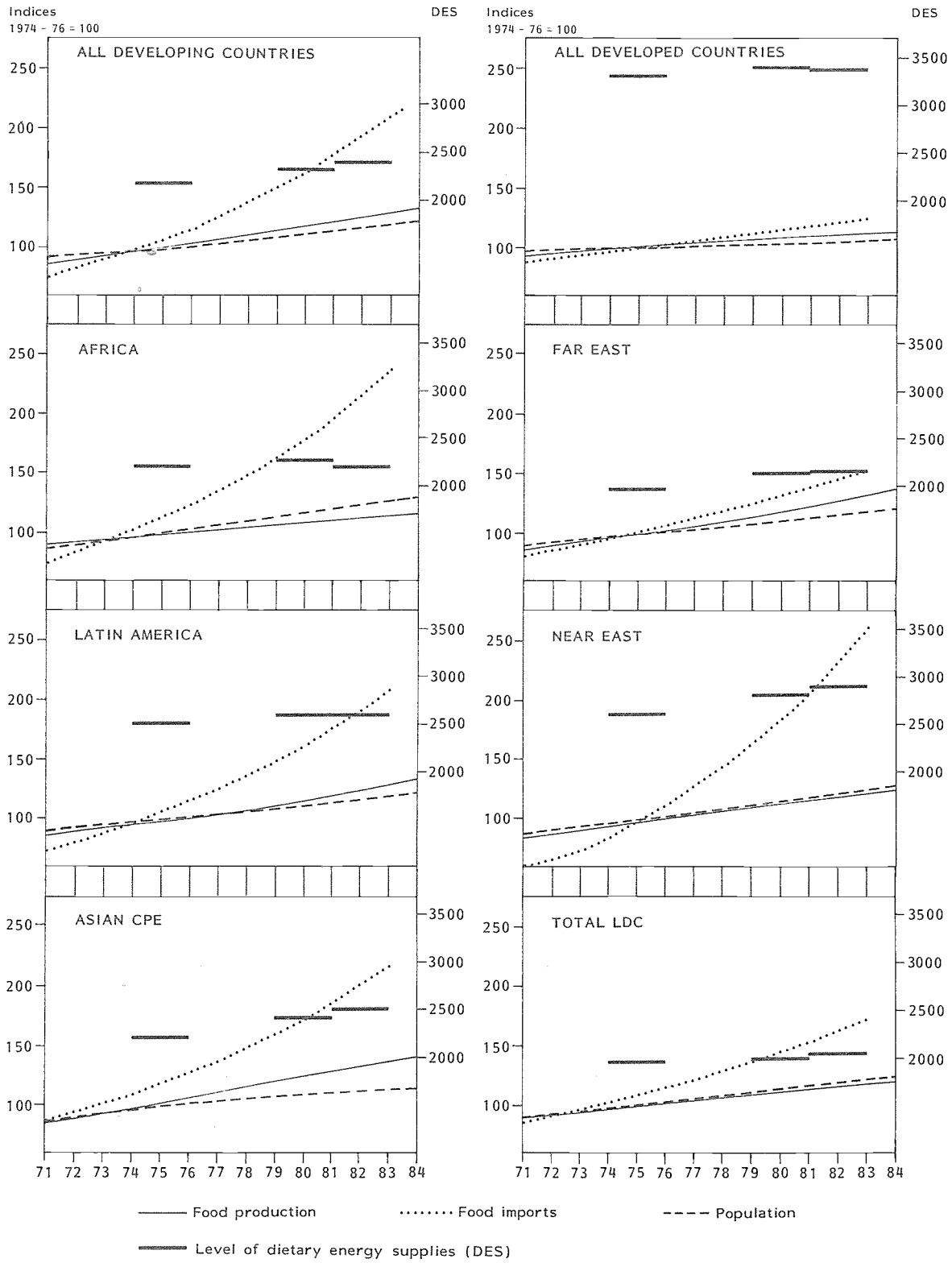
	1969-71			1981-83		
	Vegetable	Animal	Total	Vegetable	Animal	Total
	..... (calories/day)					
Developed market economies	2 220	1 040	3 260	2 290	1 080	3 370
All developed countries	2 310	970	3 280	2 360	1 030	3 390
Developing market economies	1 980	180	2 160	2 140	200	2 340
Africa	2 030	140	2 170	2 080	140	2 220
Latin America	2 100	400	2 500	2 180	460	2 640
Near East	2 170	230	2 400	2 580	320	2 900
Far East	1 910	110	2 020	2 060	130	2 190
ACPE	1 990	110	2 100	2 360	170	2 530
All developing countries	1 990	150	2 140	2 210	190	2 400

Source: FAO, Statistics Division.

This overall improvement in food consumption, however, varied widely by region and over time. At the regional level, the increase in DES from the early 1970s to the early 1980s was most impressive in the Near East where population, income and food imports were rising rapidly, and in the ACPE where population growth was declining and food production was increasing. But the situation in Africa demands the most attention. In this region, food consumption was affected by two opposing factors. On one hand, population and urbanization have rapidly expanded, creating the need for considerable increases in food supply. On the other, effective demand has been held down by declining per caput income.

Depressed demand and low rates of food production or import growth in most developing countries during 1980-84 resulted in a slow-down in the improvement in DES compared with the 1970s. Conversely, the strong improvement in DES that was achieved by the ACPE during the 1970s appeared to gain further momentum in the early 1980s.

Figure 1-3 - TRENDS IN FOOD PRODUCTION, POPULATION, VOLUMES OF FOOD IMPORTS AND LEVELS OF DES, 1971-84



On the supply side, both the growth in African food output and food imports have fallen below long-term trends. The result was an overall decline in DES during the early 1980s. Such a decline largely cancelled the gains that were achieved, at the cost of a growing dependence on food imports, during the 1970s. African consumption by 1983 was only about 93% of estimated calorie requirements, almost the same percentage as in the early 1970s.

Similar factors have affected, though to a different extent, food consumption in Latin America. Sharp falls in per caput incomes and food production growth rates resulted in an overall stagnation in DES between 1979-81 and 1981-83. While food consumption remained generally above estimated requirements, as may be expected from such an agriculturally rich region, food shortages became more widespread in the early 1980s.

The remarkable improvement in the food supply situation in the densely populated ACPE (essentially China) and other countries in the Far East has been a major achievement in the context of world food security. While per caput DES in the early 1970s was 8-10% below estimated requirements in both regions, a virtual balance between supply and needs was reached twelve years later in the Far East. Supplies during 1981-83 actually exceeded requirements by over 10% in the ACPE.

In both cases, the improvement in per caput DES has resulted from greatly improved levels of food output and relatively slow population growth. In this respect, the Chinese example is particularly outstanding, although the largest countries of South Asia (India, Bangladesh and Pakistan) also achieved high and accelerating growth rates in agricultural output.

Despite rising volumes of food imports, Asia also has remained far less dependant than other regions on external sources of food. In the early 1980s, the import content of total calorie supplies was 4% in the ACPE (2% 12 years earlier); and 7% in the Far East (5% during 1969-71).

After having sharply declined during the food crisis years of the mid-1970s, food aid stabilized during the late 1970s at about 8.5 to 9 million tons of cereals a year. Falling cereal prices in the early 1980s and more recently, the food crisis developing in Africa, has prompted a rise in food aid of nearly 10 million tons in 1983/84 and 12.5 millions tons in 1984/85.

The volume of food aid in cereals per caput has increased in all developing regions, except the Far East (Table 1-12).

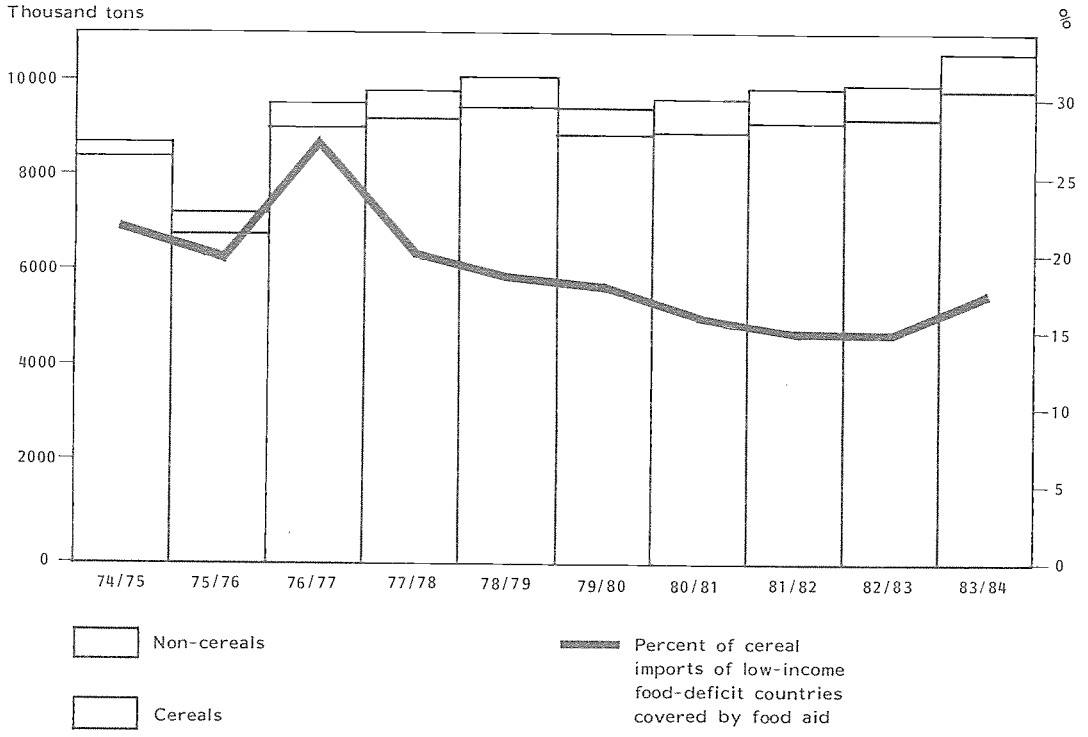
TABLE 1-12. VOLUME OF FOOD AID IN CEREALS PER CAPUT, 1973-76 AND 1981-84

	1973-74 to 1975-76	1981-82 to 1983-84
	... kg/caput ...	
Africa	3.4	6.4
Far East	3.3	2.0
Latin America	1.5	2.8
Near East	4.9	10.5
Low-income food-deficit countries	2.4	2.9
Least-developed countries	8.4	9.3
Total	1.7	2.0

Source: FAO, Commodities and Trade Division.

In so doing, food aid has recently covered an increasing percentage of the cereal imports of low-income food-deficit countries (LIFDC), from 15-16% in the late 1970s to 18% in 1983/84 and possibly 21% in 1984/85 (Fig.1-4). The corresponding share, however, was 22% in the mid-1970s, so the increase in food aid during the early 1980s, accompanied by an increasing focus on the LIFDC, has barely kept pace with their rising imports of cereals.

Figure 1-4 - SHIPMENTS OF FOOD AID, CEREALS AND NON-CEREALS, 1974/75 TO 1983/84.



4. FOOD AND AGRICULTURAL SITUATION IN 1985

Production

World food and agricultural production was 1.6% higher in 1985 than in 1984 (Table 1-13). This rate of increase is only one-third that of 1984, but it consolidates the recovery made that year from the setback to production incurred in 1983.

Growth in world crop production slowed considerably in 1985 to 1.5%, but this followed the exceptional gain of 7% made in 1984. Livestock production increased by a similar amount (1.7%), a slight deceleration in growth compared with 1984.

In developing countries, food production expanded at a slower rate in 1985 than in 1984 and, at about 2.5%, growth was less than the average rate of increase between 1980 and 1985, which was 3.5%. The increase of 3.5% for the developing market economies, however, was larger than in 1984. The slowing down in the growth rate of all developing countries largely reflects a smaller increase in the ACPE, mainly China, where production expanded very rapidly in 1983 and 1984.

TABLE 1-13. ANNUAL WORLD AND REGIONAL CHANGES IN FOOD, AGRICULTURE, CROP AND LIVESTOCK PRODUCTION, 1983-84 AND 1984-85

	Food		Agriculture		Crops		Livestock products	
	1983 to 1984	1984 to 1985	1983 to 1984	1984 to 1985	1983 to 1984	1984 to 1985	1983 to 1984	1984 to 1985
	..... %							
Developing market economies	2.2	3.5	2.7	3.7	3.6	3.7	0.3	3.5
Africa	4.9	4.8	4.9	5.0	6.5	5.7	0.5	3.1
Far East	1.7	2.2	2.2	2.4	2.3	2.2	1.9	3.7
Latin America	3.0	2.9	3.5	3.6	6.7	4.0	-2.4	2.9
Near East	-1.5	6.6	0.3	5.7	-0.8	6.3	2.3	4.4
ACPE	6.0	0.1	7.7	-1.2	7.5	-3.5	8.7	7.6
Total developing countries	3.3	2.5	4.2	2.2	4.8	1.5	2.2	4.5
Developed market economies	8.7	1.4	7.7	1.6	14.5	2.2	0.9	0.8
North America	14.7	5.6	13.9	5.1	26.2	7.2	-0.3	2.0
Oceania	-3.8	-0.1	-1.1	2.0	-0.8	-1.8	-1.5	5.5
Western Europe	5.9	-2.3	4.9	-1.3	9.1	-2.1	1.4	-0.7
Eastern Europe and the USSR	1.4	-0.2	1.8	0.3	0.6	-0.2	2.7	0.5
Total developed countries	6.0	0.8	5.4	1.1	9.5	1.5	1.6	0.7
World	4.8	1.6	4.9	1.6	7.0	1.5	1.8	1.7

Source: FAO, Statistics Division.

BOX 1-2

ABNORMAL FOOD SHORTAGES AND WFP EMERGENCY FOOD AID

By the end of 1985, FAO's Global Information and Early Warning System (GIEWS) on food and agriculture reported that 11 countries were experiencing abnormal food shortages. According to the regional classification of the GIEWS, six were in Africa (Angola, Botswana, Cape Verde, Ethiopia, Mozambique and the Sudan); four in Asia (Bangladesh, Democratic Kampuchea, Lebanon and Vietnam); and one in Central America (El Salvador).

The situation has improved considerably since 1984 (mainly because of better weather conditions and increased food production in sub-Saharan Africa) when the total was then 34 countries (25 in Africa, six in Asia, two in Central America and one in South America).

The steadily rising amount of total WFP emergency food aid in recent years is shown in the table below. The International Emergency Food Reserve (IEFR) is supplemented by an annual allocation of $45 million from the WFP's regular resources to meet such emergencies. In 1984, however, the allocation was above $54 million because of the rising costs of funding 63 emergency operations, mostly in Africa. In 1984, there were fewer but larger operations in more countries than in 1983.

In 1985, contributions to the IEFR were 764 466 tons of cereals and 60 418 tons of other food products such as milk powder and vegetable oil. These contributions were significantly higher than in 1984, the commitments for which were 620 600 tons of cereals and 45 350 for other food products.

WFP EMERGENCY OPERATIONS APPROVED ANNUALLY, 1981-85 a/

Year	No. of operations	No. of countries	WFP regular resources	ICARA b/	IEFR	Total
	No.	No.	.....$ million.....			
1981	53	30	44.4	1.0	132.9	178.3
1982	68	37	19.7	1.3	172.2	193.2
1983	68	36	45.0	-	155.3	200.3
1984	63	40	54.2	-	178.2	232.4
1985	55	32	43.9	-	181.0	224.9

a/ Commitments as approved at the end of each year, including insurance funds.
b/ International Conference on Assistance to Refugees in Africa.

Source: WFP, Resources Management Division.

One positive feature of food and agricultural production in 1985 was the better distribution of increases in production among the developing market economies. Production increased significantly more in 1985 than in 1984 in the Near East and Far East, while output growth was about the same (3%) in Latin America for 1984 and 1985.

Aggregate statistics for 1985 show a growth of food production in Africa at the same high level in 1985 as in 1984, as there were normal or

above-normal crops in most countries, and livestock production accelerated. The rather large increase in food and agricultural output in 1984 reflected the recovery from the drought-induced setback of 1983, particularly in southern Africa and the coastal countries of West Africa--the overall decline in 1983 was more than 3.5%. So the increase in food production in 1985 built on the 1984 recovery. It also reflected the greatly improved output levels of countries in southern, eastern and northern Africa and the Sahelian zone, which had been seriously affected by drought in 1984 and, in some cases, into 1985.

The overall food supply position for the then 21 drought-affected countries improved considerably during 1985 and was back to normal in many of them.6/ Nevertheless, around six countries will still require exceptional food assistance in 1985/86 (Box 1-2).

Changes in food production in developed countries in 1985 reflected:

- A slowing down in the rate of recovery from 1984 in North America (although the increase at 5.6% is still substantial) and in South Africa;

- A deterioration in weather conditions and hence a fall in production in Western Europe after the exceptionally favourable year of 1984; and

- A negative rate of growth in Eastern Europe and the USSR. While growth in crop production accelerated, that of livestock production decelerated and even that increase was based on considerable amounts of imported feed.

The average rate of increase in food production (0.8%) for the developed countries in 1985 was thus considerably below its long-term average rate of 1.9%.

There was a world record cereal crop in 1985 of 1 841 million tons (including rice as paddy), some 2.1% higher than 1984's output (Table 1-14). Most of this increase, however, was in coarse grains as world production of wheat declined marginally.

Further large increases occurred in oil-bearing crops, particularly soybeans in the United States where the harvest was more than 10% larger than in 1984, and tropical oils (palm oil and lauric acid oils). Production of coffee in 1985 strongly recovered from the reduction of 1984, and the effects of the drought later in the year in Brazil, will affect production only in 1986. World output of tea and cocoa continued to progress. Indeed, production of most crops (except wheat, sugar, cotton and possibly roots) expanded in 1985.

The growth in world output of livestock products in 1985 was almost the same rate as in 1984. In the dairy sector, in developed countries, the effects of quotas on milk collections introduced by the EEC in 1984-85 held down milk deliveries. Similarly, the Milk Diversion Programme in the United States was terminated in March 1985 and output rose. Milk production also increased in the USSR, but growth in dairy output in developing countries slowed. In contrast, meat production picked up in developing countries in 1985, but in developed countries it did not increase as fast, mainly because dairy herds were being culled at a slower rate than in 1984.

6/ The 21 drought-affected countries were: Angola, Botswana, Burundi, Burkina Faso, Cape Verde, Chad, Ethiopia, Kenya, Lesotho, Mali, Mauritania, Morocco, Mozambique, Niger, Rwanda, Senegal, Somalia, the Sudan, Tanzania, Zambia and Zimbabwe.

TABLE 1-14. AGRICULTURAL PRODUCTION, BY COMMODITY, 1984-85

Commodity	Developed countries			Developing countries			World		
			Change			Change			Change
	1984	1985	1984-85	1984	1985	1984-85	1984	1985	1984-85
	million tons		%	million tons		%	million tons		%
Total cereals a/	882.3	917.4	4.0	921.4	923.6	2.4	1 803.7	1 841.0	2.1
Wheat	319.6	306.3	-4.2	204.0	203.8	-.1	510.0	510.0	-1.6
Rice	26.1	26.3	-0.8	444.7	439.7	-1.1	470.8	466.0	-1.0
Coarse grains	431.0	472.4	9.6	191.6	195.6	2.1	622.6	668.1	7.3
Root crops	224.6	214.7	-4.4	369.7	367.4	-0.6	594.3	582.1	-2.1
Pulses	13.5	15.2	12.6	34.4	34.0	-1.2	47.9	49.2	2.7
Oil-bearing crops b/									
Oil content	22.2	23.9	7.7	36.9	39.9	8.1	59.1	63.8	8.0
Oilcake content	61.0	67.5	10.7	62.5	67.0	7.2	134.5	133.4	9.0
Sugar,centrifugal(raw)	42.5	41.7	-1.9	57.7	56.2	-2.6	100.2	97.9	-2.3
Cocoa beans	-	-	-	1.8	1.9	5.6	1.8	1.9	5.6
Coffee	-	-	-	5.2	6.0	15.4	5.2	6.0	15.4
Tea	0.3	0.3	3.2	1.9	2.1	10.5	2.2	2.3	4.6
Cotton lint	5.7	6.2	8.8	12.1	10.8	-10.7	17.8	17.0	-4.5
Tobacco	2.2	2.1	-2.7	4.0	4.4	10.0	6.1	6.6	8.2
Total meat	93.9	95.2	1.4	49.9	53.0	6.2	143.8	148.2	3.1
Total milk	382.7	385.5	0.7	117.3	122.0	4.0	499.9	507.5	1.5
Hen eggs	18.7	18.8	0.5	10.8	11.4	5.6	29.6	30.2	2.1

a/ Including rice as paddy.
b/ Total harvested production.

Source: FAO, Statistics Division.

BOX 1-3

WORLD CONFERENCE TO REVIEW AND APPRAISE THE ACHIEVEMENTS OF THE UN DECADE FOR WOMEN: EQUALITY, DEVELOPMENT AND PEACE, NAIROBI, JULY 1985

The 1979 World Conference on Agrarian Reform and Rural Development (WCARRD) was the first major international meeting to endorse an important programme of action for the integration of women in rural development, including equitable access to land, water, other natural resources, inputs and services, and equal opportunity to develop and employ their skills. It was therefore both appropriate and welcome that the document, "Forward-Looking Strategies,"* unanimously signed by all 157 participating governments or organizations at the World Conference, held in Nairobi in July 1985, should stress the role of women as food producers and highlight the results of WCARRD in the context of poor rural women. The document underlines the need to develop strategies, programmes and projects in the food and agricultural sector so that they fully integrate women in all aspects of the project cycle, and ensure their access to land, capital, technology and other production resources. Laws which block equitable access to resources may have to be changed.

It was noted that poverty and landlessness among rural women will increase significantly by the year 2000 and therefore governments should place a priority on policies that will ensure an equitable distribution of the benefits of development, taking women fully into account.

Also, the emphasis placed by the document on the importance of women's access to water for household and farm use echoes FAO's attempts to prepare and implement small-scale irrigation projects for women.

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* UN, "Forward-Looking Strategies of Implementation for the Advancement of Women and Concrete Measures to Overcome Obstacles to the Achievement of the Goals and Objectives of the United Nations Decade for Women for the Period 1986 to the Year 2000: Equality, Development and Peace", Nairobi, July 1985.

Agricultural Export Prices

The main characteristics of international markets for most agricultural commodities during 1985 were ample supplies, weak demand and declining prices. Mid-1984 appears to have been a turning point in the course of prices in most commodities. Indices of prices of tropical beverages and non-food commodities, which had risen through 1983 and early 1984 in response to strengthening demand, began to falter. They drifted lower into 1985 because harvests were good and economic activity and trade grew less strongly than anticipated.

Cereal prices continued to decline in 1985 and by the end of the year were about 10% lower than in 1984 (Table 1-15). Some temporary firming in prices in 1985 occurred because of the depreciation of the U.S. dollar against most major currencies since September. However, stocks were ample, and improved cereal production in the USSR meant that it would be importing less in 1985/86. Hence, the main element that could have supported cereal market prices was removed. Another source of price weakness was the expectation that the United States would lower market price supports on cereals. This expectation depressed world cereal prices to levels below current support prices in that country.

TABLE 1-15. EXPORT PRICES OF CEREALS AND OTHER SELECTED AGRICULTURAL COMMODITIES, 1984-85

	Wheat U.S. No.2 hard & ord. prot.	Coffee green, 1976 ICA composite price	Maize U.S. No.2 yellow	Rice 5% f.o.b. Thailand	Soybeans U.S. No.2 yellow	Sugar raw ISA Caribbean
	.....		$/ton		.....	
1984 - September	157	1308	131	254	238	90
October	155	2998	122	251	239	102
November	153	3042	117	231	234	96
December	151	2976	114	224	221	78
1985 - January	150	3020	119	224	220	80
February	148	2954	120	220	217	81
March	146	2932	120	221	226	84
April	145	2910	120	222	227	75
May	138	2910	117	222	213	62
June	135	2888	116	222	212	62
July	130	2668	115	210	206	71
August	124	2646	105	210	192	97
September	128	2626	102	210	190	113
October	130	2779	98	210	190	110
November	137	3112	106	212	190	120
December	142	3876	108	220	191	118

Source: FAO, Commodities and Trade Divsion.

Prices of livestock products weakened further, stocks remained high and competition in the market was intense. Prices of oilseeds, oils and fats, which were relatively strong through mid-1984, came under increasing downward pressure, as new crop supplies appeared sufficient to meet consumption requirements, and stocks--reduced in 1984--could be replenished. Increased supplies of oil-meals coupled with weak demand for livestock products and, hence, livestock feed and low cereal prices, combined to force down oil-meal prices to their lowest level in over ten years and almost 50% below their peak of October 1983.

The world price of sugar was also at historically low levels. It picked up a little after mid-1985 to approach its level of mid-1984 because some buyers entered the market and production in 1985/86 was expected to be 2-3% lower than in 1984/85. Nevertheless, stocks were equivalent to about 40% of annual consumption and these massive stocks were the main issue depressing market prices for sugar.

Prices of tropical beverages fell in 1985, particularly for tea. In July and August, the average London Auction price for tea was less than it was ten years ago. Coffee prices also fell, mainly because of greater production in 1985 and in response to the larger global export quotas agreed to in 1984/85 under the International Coffee Agreement. They hovered around the bottom of the International Coffee Organization (ICO) range. But speculation about the effects of the drought on production in coffee-producing areas of Brazil late in 1985, drove the price of coffee to its highest level in over eight years. Cocoa prices fell back sharply in mid-1985, but have pulled up again in more recent months. They were, however, significantly below their levels of late 1984.

Among the non-food agricultural commodities, only the price of jute showed some strength and doubled between the last quarter of 1983 and mid-1985. Trends in prices of all other commodities in this group were not favourable to producers. Prices for cotton were depressed by the expectation that the market-support price in the United States would be lowered.

Outlook for Cereals in 1985/86

The situation for cereals in 1985/86 is essentially a continuation of that of the preceding crop year: large supplies, sluggish demand and depressed trade and prices. Production of cereals in exporting countries has not increased as much in 1985 as in 1984, but importing countries have produced more cereals, particularly the USSR and in Africa, and so import demand is likely to be significantly reduced. The slow recovery from the economic recession and the continuation of the debt problem is holding down the increase in world consumption of cereals to only about 2% in 1985/86.

As a consequence, by January 1986, world cereal stocks at the end of 1985/86 were estimated to have increased by nearly one-quarter (23.8%). A projected figure of 389 million tons for 1986 easily exceeds the previous record of 1982/83 and represents 23% of expected world consumption, compared with 20% in 1984/85 and 17% in 1983/84.

Most of the estimated increase in cereal stocks by the close of 1985/86 is composed of maize. Changes in the composition of stocks are as follows:

- Wheat: 153.3 million tons, nearly 7% more than the year's beginning stocks;
- Coarse grains: 186.4 million tons, nearly 57% more;
- Rice (milled): 50.1 million tons, 4% less than the year's beginning stocks.

World imports of cereals in 1985/86 are expected to be 182.4 million tons, nearly 15% less than in 1984/85, and are composed as follows:

- Wheat: 87.5 million tons, less than in 1984/85;
- Coarse grains: 84.0 million tons, 17.9% less;
- Rice: 10.9 million tons, less than in 1984.

World trade in wheat is expected to be sharply reduced, reflecting the depressed state of import demand. Lower import requirements are expected for the USSR and a number of countries in Africa, Asia and Latin America because of improved production. The USSR alone is expected to import 40% less than in 1984/85. A further sign of the expanded base of supplies in recent years has been the large export availabilities in the smaller exporting countries. Shipments from Austria, Sweden and Hungary may decline in 1985/86, but India has a larger surplus of wheat.

A sharp reduction is also forecast in world trade in coarse grains. This forecast reflects three factors:

- Improved production prospects in several importing countries, particularly the USSR;
- Widespread financial problems that prevent many developing countries from purchasing their full requirements for direct consumption and livestock feed; and

- The tentative economic recovery in industrial countries that is depressing growth in the demand for livestock products and, hence, feed grains.

There are ample supplies of maize in the main exporting countries. China also has substantial quantities of maize for export, but less than in 1984/85; while in Africa, Zimbabwe, Malawi and Kenya have exportable supplies (those in Zimbabwe amounting to over 1 million tons).

Fertilizer

Prices. There were sharp rises in export prices of fertilizers, which peaked in 1980, followed by a period of declines (see Fig. 1-2). Prices rose again from about 1983, but there were no significant shifts during 1984, although being expressed in U.S. dollars, they continued to rise in terms of the currencies of most importing countries. Nevertheless, world fertilizer prices in U.S. dollar terms showed a downward trend in 1985, with the exception of triple superphosphate.

The price of urea fell drastically in 1985, declining by almost a half since the beginning of the year. Prices of ammonium sulphate also fell back. Prices of phosphatic fertilizers rose 7% in late summer 1985, presumably reflecting seasonal increased demand, but this was short-lived. It seems that fertilizers are becoming increasingly involved in counter-trade deals, which may account for the apparent weakness in reported prices.

Consumption. World consumption of the three primary nutrients--nitrogen (N), phosphate (P_2O_5) and potash (K_2O)--combined, increased in 1983/84 after two consecutive years of decline. The growth of 9.3% brought world consumption to 125 million tons (Table 1-16). This recovery was accounted for mainly by the developed market economies that, following the declines in the two previous years, registered increases in the consumption of each nutrient. The centrally planned economies as a whole also recorded substantial gains in the consumption of each nutrient, only that for potash had fallen the year before. Potash consumption declined in the developing market economies in 1983/84, following increases for each nutrient in the preceding year. Growth in phosphate consumption in 1983/84 was less that in the year before. For nitrogen it was greater, but less than the most recent five-year average growth rate, as was that for phosphate and potash. In the centrally planned and developed market economies, on the other hand, the 1983/84 growth rate for each nutrient was much greater than its most recent five-year average rate.

The increase in the consumption of each nutrient in the developed market economies in 1983/84 was mainly due to the recovery in North America. Compared with the increases recorded there, those in the other developed regions were modest. The recovery was due to an increase in crop area in the United States, higher crop prices in 1983 and the general economic improvement in North America. Nevertheless, consumption in North America in 1983/84 was less than in 1980/81, by about 1.4 million tons of nutrients. The small increases in Western Europe apparently were due to unfavourable price relationships and drought in the southern parts of the region.

Early estimates indicate that there was a small growth of 1% in U.S. consumption in 1984/85. This was due to the 4% increase in nitrogen consumption since potash consumption declined 4% and that for phosphate, 16%. The very small average increase was apparently due to some reduction in crop area and the generally depressed condition of the U.S. farm economy. Growth in consumption is not expected to increase in Western Europe because of the moderating influence of the EEC's Common Agricultural Policy.

TABLE 1-16. FERTILIZER CONSUMPTION, BY MAJOR NUTRIENTS, 1981-84

	1981/82	1982/83	1983/84	Change 1982 to 1983	Change 1983 to 1984	Annual rate of change 1980 to 1984
	..... million tons			..... %		
Developed countries						
Nitrogen	35.21	34.57	38.12	-1.8	10.3	1.6
Phosphate	21.61	20.80	22.40	-3.7	7.7	-1.0
Potash	19.93	19.20	21.54	-3.7	12.2	0.6
Total nutrients	76.74	74.57	82.05	-2.8	10.0	0.6
Developing countries						
Nitrogen	25.07	26.49	28.78	5.7	8.6	5.7
Phosphate	9.19	9.80	10.46	6.6	6.7	5.4
Potash	3.81	3.70	3.87	-2.9	4.6	0.7
Total nutrients	38.07	39.98	43.12	5.0	7.9	5.1
Africa	1.46	1.34	1.47	-8.2	9.7	4.5
Far East	10.77	11.25	12.27	4.5	9.1	6.5
Latin America	6.36	6.46	5.71	1.6	-11.6	-4.7
Near East	3.24	3.82	4.26	17.9	11.5	10.4
ACPE	16.20	17.10	19.39	5.6	13.4	7.3
World						
Nitrogen	60.27	61.06	66.91	1.3	9.6	3.3
Phosphate	30.80	30.59	32.86	-0.7	7.4	0.8
Potash	23.74	22.90	25.41	-3.5	11.0	0.6
Total nutrients	114.81	114.55	125.17	-0.2	9.3	2.0

Source: FAO, Land and Water Development Division.

The small decrease in potash consumption in the developing market economies in 1983/84 was due to the large fall in Latin America, particularly in Brazil and Mexico. These two countries were also mainly responsible for the fall in the consumption of nitrogen and phosphate in Latin America, but Colombia also recorded a substantial decline in phosphate consumption in 1983/84. Consumption of each nutrient in Africa recovered from the declines of the year before, with the average growth rate being about twice that of the most recent five-year average. Near East growth rates were lower than in the preceding year for each nutrient, but were still higher than the five-year average. In the Far East they were higher than in 1982/83 and the five-year average rate, with a strong recovery in potash consumption from the decline of the year before.

The fall in fertilizer consumption in Latin America in 1983/84--attributable mainly to the larger consuming countries--was due to financial constraints, drought in some countries and lower agricultural export prices for agricultural commodities. It is expected that there will be a recovery in fertilizer consumption in Latin America in 1984/85,

although a substantial recovery would be required to reach the 1980/81 level of 7.5 million tons of the three nutrients combined. Growing conditions improved in Mexico following the 1983 drought there. The general improvement in the world economy had a favourable effect on agricultural export prices and some countries have special programmes to increase fertilizer use. In the case of Argentina, it has introduced a fertilizer-crop exchange system used earlier in the Republic of Korea and other Asian countries.

Consumption of each nutrient increased in Africa in 1983/84 despite drought severely affecting the Sahel and southern regions, with the largest increases taking place in countries of the northern and western parts of the continent. This was primarily due to the large increase in phosphate consumption since that of nitrogen declined for the second consecutive year. Due to financial difficulties of many countries, fertilizer aid has played an important role in Africa. Thirty countries out of 44 in 1981/82 to 1982/83 and 28 out of 44 in 1983/84 obtained at least some of their fertilizer imports as aid. The regions most dependent on aid were central Africa and the Sahel. With improved weather conditions in 1985, fertilizer consumption should continue to increase, but supplies may not be available because of the financial problems of many African countries and the lack of fertilizer aid.

Consumption growth rates in the Near East were higher than the five-year average for each nutrient in 1983/84. This was despite lower growth rates in Turkey (the largest consumer in the region) than in the previous year for nitrogen and phosphate, and a fall in the consumption of potash, owing primarily to a less favourable fertilizer-crop price relationship, but also to financial constraints on imports. Other large consumers such as Egypt and Iran increased their consumption, as did Saudi Arabia that recorded very high rates of growth in consumption because of its very favourable fertilizer-crop price relationship. The importance of Turkey as regards its relative prices of fertilizers and crops, and its ability to import, will have an important influence on the growth of fertilizer consumption in the Near East in 1984/85, even if the substantial recent gains made in countries such as Syria, Iraq, Egypt and Saudi Arabia, continue.

The higher growth rate in the Far East in 1983/84 than the most recent five-year trend was owed to increased consumption in nearly all countries. Nevertheless, India accounted for a substantial share of the increase, while Pakistan and Indonesia recorded declines in their consumption. In Indonesia the decline was because of drought, whereas in Pakistan it was because of a less favourable fertilizer-crop price relationship, as the fertilizer subsidy was reduced. Growth in fertilizer consumption in the Philippines was small in 1983/84, as economic problems brought about currency devaluations that adversely affected the country's ability to import fertilizer and raw materials for domestic production, which also resulted in higher farm prices for fertilizers. With another year of generally good weather, fertilizer consumption is expected to increase in 1984/85, with India again accounting for a major share because of its policies and programmes that promote the increased use of fertilizers.

The centrally planned economies of Asia and Eastern Europe contributed to the increase in the consumption of each nutrient in 1983/84. There was a large increase in potash consumption in the ACPE where it had declined sharply the year before. Potash and phosphate consumption recovered from declines the previous year in the Eastern European countries. China, which is the largest consumer in Asia, had ample fertilizer supplies from large imports to supplement its local production. Changes, however, in the country's agricultural price system in 1984/85 could result in reduced growth rates of fertilizer consumption in that country.

Agricultural Trade

The volume of trade in crops and livestock products benefited the least from the recovery in world trade in 1984 and expanded only 3%, compared with an increase of 12% for trade in manufactured goods. With terms of trade, however, generally moving in favour of agricultural products, the increase of about 5% in the value of agricultural exports approached that of total merchandise trade (Table 1-17).

Agricultural trade was conditioned by the large supplies of many agricultural products in world markets, following the plentiful harvests of 1984 and by demand factors associated in particular with:

- The uneven spread of the economic recovery among countries;
- The difficult debt situation of many developing countries;
- Measures introduced by industrial countries to economize on the use of primary commodities; and
- The strengthening of the U.S. dollar that caused substantial shifts in the competitive position of countries with respect to trade.

TABLE 1-17. VALUE OF WORLD EXPORTS OF AGRICULTURAL (CROP AND LIVESTOCK), FISHERY AND FOREST PRODUCTS, AT CURRENT PRICES, 1982-84

				Change		Annual rate of change
	1982	1983	1984	1982 to 1983	1983 to 1984	1980 to 1984
	.... $ 000 million ...			..... %		
Agricultural products	212.5	208.7	218.5	-1.8	4.7	-2.4
Total developing countries	64.1	66.5	73.0	3.8	9.7	-0.4
Total developed countries	148.4	142.2	145.5	-4.2	2.3	-3.3
Fishery products	15.3	15.8	16.0	2.8	1.3	0.9
Total developing countries	6.6	6.8	7.1	2.9	5.1	3.8
Total developed countries	8.7	9.0	8.8	2.7	-1.6	-1.2
Forest products	46.6	47.7	50.9	2.3	6.8	-2.5
Total developing countries	7.0	7.5	7.6	7.0	1.0	-3.9
Total developed countries	39.6	40.2	43.3	1.4	7.9	-2.3
Total	274.5	272.2	285.4	-0.8	4.8	-2.2
Total developing countries	77.7	80.9	87.7	4.0	8.5	-0.4
Total developed countries	196.8	191.3	197.7	-2.8	3.3	-3.0
	..... %					
Share of developing countries	28	30	31			

Source: FAO, Statistics Division; Fisheries Department; Forestry Department.

Though modest in relation to other sectors, the recovery in the volume of world agricultural trade in 1984 followed a three-year period of very slow growth. Within the main groups of crops and livestock products, the volume of trade in food, particularly cereals and tropical beverages, showed the highest rates of increase in 1984 (Table 1-18).

TABLE 1-18. FAO INDEX NUMBERS OF VOLUME, VALUE AND UNIT VALUE OF WORLD EXPORTS OF CROP AND LIVESTOCK PRODUCTS, BY MAJOR COMMODITY GROUPS, 1982-84

	1982	1983	1984	Change 1982 to 1983	Change 1983 to 1984	Annual rate of change 1980 to 1984
	.. 1974-76=100 ..			..... %		
Volume						
Total crops and livestock	136	137	141	0.8	2.9	1.4
Food	141	141	146	0.1	3.4	1.4
Cereals	142	143	151	0.9	5.3	0.8
Feed	188	202	186	7.6	-7.8	3.5
Raw materials	107	108	110	1.4	1.3	-0.3
Beverages a/	120	124	132	3.0	7.0	3.6
Value						
Total crops and livestock	162	159	166	-1.8	4.6	-2.9
Food	162	156	163	-3.5	4.3	-3.4
Cereals	148	146	152	-1.3	4.3	-3.6
Feed	237	262	231	10.6	-11.9	0.5
Raw materials	139	140	148	0.7	5.4	-2.7
Beverages a/	174	177	204	2.1	14.8	-0.6
Unit value						
Total crops and livestock	122	119	121	-2.5	1.8	-4.1
Food	118	113	114	-3.9	0.7	-4.6
Cereals	107	103	103	-3.3	-0.7	-4.6
Feed	127	128	121	1.2	-5.2	-3.4
Raw materials	129	131	135	0.8	3.2	-2.2
Beverages a/	147	149	162	1.3	8.7	-3.3

a/ Coffee and tea, excluding cocoa, which is included under "Food".

Source: FAO, Statistics Division.

Cereal trade rose 5.3% in volume, and 4.3% in value terms, in 1984 largely reflecting purchases of grain by the USSR and increased import requirements in Africa. Current estimates, however, of the requirements in the main cereal-importing countries, in particular the USSR, suggest a sharp decline in world agricultural trade in 1985-86.

Trade in tropical beverages expanded nearly 15% in value in 1984, as the enlargement of the ICO export quotas initially coincided with high prices. A strengthening in demand in the major importing countries also

boosted tea trade, although competition with domestic demand for available supplies led India to introduce export intervention measures. Trade in sugar contracted throughout 1984 and reflected lower import requirements in many traditional markets, but there appears to be more buyers' interest in 1985 and export prices have risen.

A major feature in the regional pattern of agricultural trade in 1984 was the strong recovery in exports of crops and livestock products of all developing regions, except the Near East (Table 1-19). The increase was, however, insufficient to result in a positive growth in the value of their agricultural trade during 1980-84.

Imports of agricultural products in 1984 rose significantly in all developing market economies, but the growth rate was markedly lower than that of exports. As a result, developing countries as a whole improved their position for the second consecutive year as net agricultural exporters. In 1982, their aggregate trade balance showed a net deficit. Moreover, the improvement in their trade balance in 1984 was on a sounder basis than in the previous year, when it mainly resulted from a contraction in imports.

Within such an overall improvement, regional situations varied widely. The 11.4% gain in export earnings in 1984 in Africa was the highest achieved in a single year since 1977. This gain, however, only partially offsets the losses incurred between 1981 and 1983, when the aggregate fall in export earnings exceeded 30%. Also the expansion in agricultural exports in 1984 reflected, to a large extent, the massive increase in shipments by some of the region's main trading countries. In particular, exports by the Côte D'Ivoire, Cameroon and Tanzania rose 40-45% in value. Agricultural (mainly food) imports in Africa also rose nearly 5%, bringing their current value close to the level of 1982. The increase in imports was far more significant in countries south of the Sahara, where the widespread crop failures of 1983 caused acute domestic food shortages in the following year.

The sharp increase in agricultural exports in the Far East in 1984 marked an end to a two-year period of sluggishness. Much of the increase was accounted for by the large shipments of natural rubber and tropical beverages by Malaysia and Indonesia, although a sizeable growth in exports was also achieved by Thailand and the Philippines. On the side of imports, a notable feature was the 50% increase in the value of India's agricultural imports between 1982 and 1984, sharply contrasting with the stagnation of its agricultural exports. Although India remained a net agricultural exporter in 1984, it was only by a narrow margin. Two years earlier India's agricultural imports had only represented 57% of the value of its exports.

Export earnings from agriculture in Latin America in 1984 continued to recover from the severe setback of 1980-82. The recovery was, however, mainly concentrated in the largest agricultural exporters of the region: Brazil, Colombia, and, to a lesser extent, Argentina. There was also a moderate revival in agricultural imports after three years of restrictions caused by the economic crisis. Again, imports by a few of the major trading countries of the region, particularly Brazil, Cuba, Mexico and Venezuela, accounted for most of the aggregate increase in agricultural imports.

The imbalance between aggregate agricultural exports and imports in the Near East continued to worsen in 1984. Depressed market conditions and low prices, in particular for cotton, contributed to depress export earnings in the two main exporters of the region, Egypt and Turkey. On the other hand, growth in food imports of Egypt and several oil-exporting countries, particularly Iraq and Saudi Arabia, resumed strongly in 1984.

TABLE 1-19. VALUE OF WORLD AGRICULTURAL TRADE (CROPS AND LIVESTOCK), AT CURRENT PRICES, BY REGION, 1982-84

	1982	1983	1984	Change 1982 to 1983	Change 1983 to 1984	Annual rate of change 1980 to 1984 price	Annual rate of change 1980 to 1984 volume a/
	..$ 000 million ..			..... %			
Developing market economies							
Export	59.7	61.7	67.4	3.3	9.2	-0.8	2.8
Import	58.7	58.3	62.4	-0.6	7.0	-0.4	2.9
Africa							
Export	8.3	7.8	8.7	-6.7	11.4	-5.0	-0.9
Import	9.9	9.4	9.8	-5.1	4.8	-2.4	4.4
Far East							
Export	17.6	17.9	20.8	2.1	16.0	0.4	3.3
Import	16.1	16.7	17.8	3.8	6.7	1.2	4.1
Latin America							
Export	27.7	30.1	32.2	8.6	7.0	-0.3	3.7
Import	11.5	11.1	11.7	-3.2	4.7	-6.8	-4.9
Near East							
Export	5.7	5.4	5.1	-4.1	-6.2	-0.6	1.8
Import	20.5	20.4	22.4	-0.7	10.1	3.7	6.6
ACPE							
Export	4.4	4.9	5.6	10.4	15.1	5.1	11.5
Import	8.3	6.9	6.3	-17.2	-9.1	-8.5	-5.7
Total developing countries							
Export	64.1	66.5	73.0	3.8	9.7	-0.4	3.4
Import	67.0	65.2	68.6	-2.7	5.3	-1.3	-1.9
Developed market economies							
Export	139.2	133.8	137.6	-3.8	2.8	-3.1	1.3
Import	139.6	137.2	144.0	-1.7	4.9	-2.5	2.5
Eastern Europe and USSR							
Export	9.3	8.3	8.0	-10.2	-4.7	-6.2	-0.8
Import	27.7	26.4	26.8	-4.8	1.5	-3.3	-
Total developed countries							
Export	148.4	142.2	145.5	-4.2	2.3	-3.3	1.2
Import	167.3	163.6	170.7	-2.2	4.4	-2.6	2.1
World							
Export	212.5	208.7	218.5	-1.8	4.7	-2.4	1.8
Import	234.3	228.8	239.4	-2.3	4.6	-2.3	2.2
Share of developing countries in world agric. trade	..... %						
Export	30	32	33				
Import	29	28	29				

a/ Obtained by deflating current values of trade with the indices (1974-76 = 100) of export and import unit values of agricultural products.

Source: FAO, Statistics Division.

The situation in the ACPE reflected the overwhelming weight of China, where the steady improvement in agricultural production performances in recent years has permitted an expansion in exports and a contraction in food imports. In only three years--1982 to 1984--China's export/import ratio increased from 53% to nearly 90%, thus bringing the country to the verge of reversing its traditional position as being a net agricultural importer.

Terms of trade

Both the net barter and income agricultural terms of trade improved in developed and developing regions in 1984. This improvement consolidated the gains of the previous year, when the steady deterioration in agricultural terms of trade, which had begun in 1977, came to an end. It reflected higher prices of agricultural exports in relation to import prices of other products and expanded the volume of agricultural trade (Table 1-20).

TABLE 1-20. NET BARTER AND INCOME TERMS OF TRADE OF AGRICULTURAL EXPORTS FOR MANUFACTURED GOODS AND CRUDE PETROLEUM, 1980-84

	1980	1981	1982	1983	1984
	..... 1974-76=100				
Net barter terms of trade					
Developed market economies	69	68	66	69	71
Developing market economies	78	69	65	73	81
Africa	90	74	72	79	90
Far East	74	68	60	70	81
Latin America	76	68	64	72	78
Near East	71	71	67	74	79
Income terms of trade					
Developed market economies	101	102	98	101	109
Developing market economies	90	85	81	93	104
Africa	78	67	65	67	77
Far East	98	94	89	99	121
Latin America	90	88	81	100	107
Near East	67	78	80	87	94

Source: FAO, Statistics Division; Policy Analysis Division.

This improvement took place despite generally depressed export prices for food products since the second quarter of 1984, but an overall strengthening in non-food prices. For the year as a whole, food prices in all market economies declined nearly 5% below the levels of 1983, but prices of non-food agricultural products rose 6.2%. Against this mixed picture for agricultural prices in 1984, international quotations of other major groups of traded products fell. U.S. dollar prices of manufactured products fell 3.6% and that of crude oil 2.5%.

With prices of many agricultural products exported mainly by developed countries (cereals, dairy products, meat) remaining generally depressed, the decline in prices of manufactures and crude oil did not bring about any major improvement in the agricultural terms of trade for this group of countries. In contrast, developing regions profited from higher quotations for tropical beverages, oils and fats, and several categories of raw materials, including jute, hides and skins.

On balance, therefore, the net barter terms of trade of agricultural products in 1984 improved about 11% in developing market economies, but by only 3% in developed market economies. Taking into account changes in the volume of agricultural shipments, the overall purchasing power of agricultural exports (income terms of trade) increased about 12% in developing market economies and 8% in the developed.

BOX 1-4

GROWTH OF TRADE: AN ALTERNATIVE MEASURE

The task of measuring growth in the value of regional or world trade was made more difficult when major trading countries moved to floating exchange rates in the early 1970s. The difficulties have been made worse by the convention of using the U.S. dollar as the key currency for measuring trade, mainly because of its undervaluation for much of 1970s and its subsequent overvaluation in the 1980s.* In recent years, movement in the value of the U.S. dollar in relation to other currencies has reflected capital flows responding to monetary and fiscal policies rather than reflecting the forces of supply and demand for currencies resulting from the trading of goods and services.

The use of Special Drawing Rights (SDRs) to measure such aggregates as trade flows therefore has come into greater use as an alternative to the dollar. The SDR is, in a functional sense, a "basket" of five major currencies and reflects their relative importance in trade and finance. The U.S. dollar is the single major component and on 1 January 1986 accounted for 42% per SDR; the Deutsch mark, 19%; the Japanese yen, 15%; the French franc, 12%; and the British pound sterling, 12%.**

Using the SDR to measure trade flows reduces the growth rates of imports and exports in the 1970s as measured by the U.S. dollar and turns the negative dollar trade growth rates into positive rates in the early 1980s. For example, agricultural exports of developing countries in the early 1980s appear to have experienced a growth rate of over 4% a year when measured in SDRs compared with a decline of 1.6% a year when measured in U.S. dollars. But whatever measurement is used, it remains clear that since the early 1980s trade has indeed experienced a slow-down in growth.

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* The dollar, which had been maintained at overvalued levels during the late 1960s, fell 15% from 1970 to 1973-74. By 1978, its value stood at only 79% of its 1970 level. After 1978, however, its value stabilized and then rose strongly from 1980. The appreciation led to a sharp fall in the dollar value in trade exacerbating the 1980-83 recession. Since early 1985, however, the dollar has weakened against all currencies, except the Australian and Canadian dollars.

** The actual weight of each currency varies from day to day as exchange rates move. At the recent peak value of the dollar in March 1985, its actual weight per SDR reached 57%.

ANNUAL GROWTH RATES OF TOTAL TRADE FOR WORLD, DEVELOPED AND DEVELOPING REGIONS, 1971-80 and 1980-84

		Imports		Exports	
		1971-80	1980-84	1971-80	1980-84
		..... %			
World	(US$)	20.3	-2.5	26.3	-1.6
	(SDR)	17.7	3.3	17.7	4.2
Developed	(US$)	19.4	-3.2	18.7	-0.9
	(SDR)	16.6	2.6	17.4	5.0
Developing	(US$)	23.9	-0.5	26.2	-5.1
	(SDR)	21.1	5.4	24.8	0.5

ANNUAL GROWTH RATES OF AGRICULTURAL TRADE FOR WORLD, DEVELOPED AND DEVELOPING REGIONS, 1971-80 and 1980-84

		Imports		Exports	
		1971-80	1980-84	1971-80	1980-84
		..... %			
World	(US$)	16.2	-2.3	16.0	-2.4
	(SDR)	13.7	3.6	13.5	3.4
Developed	(US$)	14.7	-2.5	16.8	-2.8
	(SDR)	12.1	3.3	14.2	3.0
Developing	(US$)	19.5	-1.8	14.8	-1.6
	(SDR)	16.9	4.1	12.3	4.2

Among developing regions, the Far East achieved the greatest improvement in terms of trade, followed by Africa. The recovery in Africa, however, has to be considered in light of the long period of collapse in agricultural export earnings that preceded it. Agricultural exports in 1984 would have only enabled Africa to purchase about the same volume of manufactured goods and crude oil as in 1980 and almost one-quarter less than during 1974-76.

Although changes in world agricultural trade in 1985 cannot yet be quantified, prospects are for generally depressed market conditions for a majority of trading countries and commodities. As previously reviewed, prices of almost all agricultural products have tended to fall throughout 1985, and prospects for trade are less than buoyant mainly due to lower import requirements of cereals by the USSR. A further indication of the sluggishness of world trade was that by August 1985 maritime freight rates on some major routes fell to their lowest levels since mid-1978. Subsequently, rates rose on some routes, but the freight market remained vulnerable to changes in the supply of vessels.

Although tin is not an agricultural commodity, the current crisis in the international tin market, which has been closed since 24 October 1985, has cast a shadow over other commodity markets, especially those control-

led by international trade agreements. In October 1985, the International Tin Council ran out of money with debts to the London Metal Exchange brokers and the banks, and trading had to be suspended.

Recent developments 7/

International attention has focused mainly on agricultural trade problems caused by the adoption of protectionist policies. Agricultural trade will be among the issues for discussion under the proposed new round of Multilateral Trade Negotiations (MTN), and preparatory meetings to set the agenda began in early 1986. Actual negotiations may begin in late 1986.

The work of the General Agreement on Tariffs and Trade (GATT) Committee on Trade in Agriculture, established by the Ministerial Session of GATT in November 1982, continued throughout 1985. The committee prepared a set of recommendations that were adopted by GATT contracting parties in November 1984 and another set of recommendations regarding, among other things, Article 11 (market access) and Article 16 (export subsidies) were presented at the 41st Session of GATT contracting parties in November 1985. The committee was instructed to continue its technical work in parallel with the preparatory committee, which by mid-1986 will set the agenda and largely determine the agricultural issues to be presented for adoption at a ministerial meeting scheduled for September 1986.

The OECD Committees for Agriculture and Trade also have continued work on agricultural trade under the 1982 Ministerial Mandate. This mandate covers approaches for a balanced and gradual reduction of protectionism in agriculture, examination of national policies significantly affecting agricultural trade, and methods for improving the working of world markets for agricultural products. OECD country studies have been completed regarding the mandate and a report on this work is expected in June 1986. Sufficient groundwork has been accomplished to enable agricultural matters to be included in the proposed new round of MTN.

The FAO Committee on Commodity Problems (CCP) met in October 1985 and discussed a wide range of problems relating to trade in agricultural commodities, including protectionism in agricultural trade and a review of action taken on the resolution adopted at the FAO Conference of 1979 on commodity trade, protectionism and agricultural adjustment. Specific agreement was reached on efforts to persuade countries to eliminate export subsidies and their equivalents, as well as measures to curb access to international markets.

Resource Flows to Agriculture in the 1980s

External assistance

a) Commitments

Levels. Long-term trends have been discussed in an earlier section. In 1984, the latest year for which comprehensive data are available, total official commitments to agriculture (OCA) (broad definition) decreased for the second time during the 1980s.8/ Commitments reached $10 639 million

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7/ The FAO Commodity Review and Outlook 1985-86 contains a more detailed review of the commodity market situation and international action on trade issues.

8/ The broad definition includes assistance directly to the agricultural sector, plus the following indirect activities: forestry, manufacturing of inputs, agro-industries, rural infrastructure, and rural, regional and river development. (While the narrow definition corresponds to assistance directly to the sector). For further details, see Explanatory Note.

compared with $12 115 million in 1983, representing a decline of 12% in current prices. Mainly due to the appreciation of the U.S. dollar against other major currencies, however, this decline was reduced to 9% in real terms (Table 1-21). The decline took place because of an decrease in commitments from multilateral sources, particularly by the World Bank. Bilateral commitments, which fell sharply in 1983, were maintained at about the same level in 1984.

Concessional commitments to agriculture declined nearly 15% in 1982 to 1984 (in current dollars). The 1982-84 decline in constant prices, however, was less (7.6%). The decrease from bilateral and multilateral sources was almost identical in percentage terms. Non-concessional commitments, which had increased 12% in current dollars in 1983 and had partially offset the decline that year in concessional commitments, fell dramatically in 1984, by 23%. The share of concessional commitments in total OCA, which reached 61% in 1983--an historically low share--rose again to 66% in 1984, although it had fallen in absolute terms. Apart from the decline in total commitments in both 1983 and 1984, the continued decline in concessional flows is a particularly disturbing recent development in external assistance and has contributed to the hardening in the overall terms of lending.

All multilateral financing agencies decreased their concessional assistance to agriculture in 1983, except for the regional development banks, which increased theirs by more than 30% (but this was still below the levels they gave in 1980 and 1981). Most of the decline in multilateral concessional OCA in 1983 was accounted for by IDA and the International Fund for Agricultural Development (IFAD).

The decline in multilateral concessional OCA, which began in 1981, continued in 1984 with a further decline of more than 7% in current prices and 4% in constant prices. The major decrease in 1984 in multilateral assistance concerned, however, non-concessional OCA, which in current dollars plunged to $3 328 million compared with $4 598 million in 1983, a decline of about 27% in one year. Non-concessional OCA by the International Bank for Reconstruction and Development (IBRD) in 1984 fell more than a half.

Subsectoral distribution. From 1980 to 1983, of total commitments to agriculture (broad definition), about 66% supported activities more directly related to agricultural production (narrow definition); the rest was devoted to forestry, manufacturing of inputs, other agro-industries, rural infrastructure, and rural, regional and river development.

Multilateral OCA has tended to focus more on activities promoting agricultural production, this being particularly so for concessional commitments. In 1984, total and concessional multilateral commitments to agriculture (narrow definition) accounted for 84% and 90%, respectively of total and concessional multilateral OCA. These shares are higher than those observed from 1980 to 1983, but they do not show any particular trend.

Among all activities related to agriculture (broad definition), investment in rural development and rural infrastructure remains the major activity to which concessional and non-concessional capital assistance is directed, followed by land and water development and agricultural services. The shares of capital assistance directed to agricultural services and to river development, however, have increased in recent years.

Regional distribution. The Asia and Pacific region is the main recipient of total and concessional OCA, followed by Africa, Latin America and the Near East. In the 1980s, the major development in regional distribution of total OCA has been the increase in the share for Africa, particu-

TABLE 1-21. TOTAL AND CONCESSIONAL COMMITMENTS OF EXTERNAL ASSISTANCE TO AGRICULTURE (BROAD DEFINITION), 1980-84

	Total commitments					Concessional commitments				
	1980	1981	1982	1983	1984 a/	1980	1981	1982	1983	1984
	..... $ million									
At current prices										
Total commitments	11 156	11 809	12 419	12 115	10 639	7 963	8 024	8 190	7 364	6 993
Bilateral	4 483	4 732	5 130	4 537	4 548	4 357	4 583	4 940	4 384	4 230
Multilateral	6 673	7 077	7 289	7 578	6 091	3 606	3 441	3 250	2 980	2 763
World Bank	3 913	4 171	4 358	5 280	3 261	1 680	1 643	1 595	1 334	1 487
IBRD	2 233	2 528	2 763	3 946	1 774	-	-	-	-	-
IDA	1 680	1 643	1 595	1 334	1 487	1 680	1 643	1 595	1 334	1 487
IFAD	453	235	445	258	188	431	236	413	258	159
Regional development banks	1 736	2 029	1 826	1 339	1 911	934	948	590	786	476
OPEC multilateral	134	158	180	224	253	124	130	172	125	163
UNDP b/	204	217	199	169	142	204	217	199	169	142
FAO (TF/TCP) c/	113	136	137	143	161	113	136	137	143	161
CGIAR d/	120	131	144	165	175	120	131	144	165	175
At constant 1980 prices e/										
Total commitments	11 156	12 563	13 499	13 767	12 516	7 963	8 536	8 902	8 368	8 221
Bilateral	4 483	5 034	5 576	5 516	5 350	4 357	4 875	5 370	4 982	4 976
Multilateral	6 673	7 529	7 923	8 611	7 166	3 606	3 661	3 532	3 386	3 251

a/ Preliminary.
b/ United Nations Development Programme.
c/ TF/TCP = Trust funds/ Technical Cooperation Programme.
d/ Consultative Group on International Agricultural Research.
e/ Deflator used: UN index of unit value of exports of manufactured goods, 1980=100.
d/ Preliminary.

Sources: FAO and OECD.

larly south of the Sahara. In 1983, sub-Saharan Africa received 26% of total OCA and 34% of concessional OCA compared with 20% and 25%, respectively in 1980.

b) Disbursements

Levels. It is now possible to make estimates of subaggregates of disbursements along the same line as those relating to commitments, which are used regularly for reporting on aid to agriculture.

From estimates of annual disbursements (Table 1-22) and annual commitments (Table 1-21), it is clear that total disbursements from 1980 to 1983 remain still far below the levels of commitments made during the same period.9/ Disbursements nevertheless increased steadily during this time reflecting the rapid growth of commitments from the mid-1970s and the speed of disbursements described above. For example, the World Bank's high growth of commitments to agriculture over the last ten years ($5 280 million committed to agriculture in 1983 compared with $1 565 million in 1974) reflected a high growth in disbursements from 1980 to 1983. World Bank disbursements therefore increased from $2 054 million in 1980 to $3 214 million in 1983. They reached $3 970 million in 1984, exceeding the level of World Bank commitments in that same year. This considerable increase was also because disbursements of new commitments by the World Bank to agriculture during 1983-84 was faster than in earlier years.

Sectoral and regional distribution. The pattern of sectoral and regional distribution of disbursements from 1980 to 1983 follows closely that observed for commitments during the same period. The shares of total and concessional disbursements for Africa, particularly sub-Saharan Africa, have been increasing also during this period, as in the case of commitments. In contrast, the share of disbursements received by the Near East was slightly higher than that of commitments because this region's share of commitments declined quite sharply during the early 1980s.

Outlook and projections. As indicated earlier, the level of disbursements in any given year is the result of commitments made in that year and in the preceding nine years, as well as the speed of disbursements. For example, disbursements in 1990 will be affected by the amount of commitments made from 1981 to 1990 and by the rates at which they are disbursed. Hence, keeping unchanged the typical speed of disbursements shown in Box 1-5, total disbursements of capital assistance to agriculture (broad definition) may be projected using actual commitments in the early 1980s and various assumptions of commitment growth in the mid- and late-1980s (Table 1-23).

The projected annual average growth rate of disbursements between 1983 and 1990, resulting from the four assumptions, vary from about 1% to more than 8%; and between 1990 and 1995, from an average decline of more than 4% to an average increase of more than 8%. By 1995, there is a difference of more than 250% between projected annual disbursements of the pessimistic (-5%) assumption and the more optimistic (10%) one on growth in commitments. If commitments continue to decline, then disbursements will begin to fall back in 1987 and more noticeably by the end of the decade. If there is zero growth in commitments, disbursements will fail to grow from 1988, but remain 30% above their level of 1983. Even if commitments were to grow at 10% a year, disbursements would increase at a slower rate because commitments grew faster than 10% a year during the

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9/ Disbursements in any given year are determined by the levels of commitments in that and preceding years, as well as by the speed of disbursements (see Box 1-5).

TABLE 1-22. DISBURSEMENTS OF TOTAL AND CONCESSIONAL EXTERNAL ASSISTANCE TO AGRICULTURE (BROAD DEFINITION), 1980-83

Source	Total disbursements				Concessional disbursements			
	1980	1981	1982	1983	1980	1981	1982	1983
	..... $ million							
At current prices								
Total disbursements	7 325	7 793	8 660	8 812	5 701	5 967	6 291	6 088
Bilateral	4 046	4 088	4 282	3 869	3 890	3 935	4 050	3 783
DAC/EEC a/	3 814	3 940	4 167	3 650	2 708	3 886	3 930	3 582
of which:								
- Capital grants b/	1 698	1 524	1 805	1 464	1 698	1 524	1 805	1 464
- Technical assistance grants c/	950	853	858	840	950	853	858	840
OPEC bilateral	232	148	115	219	232	148	115	219
Multilateral	3 279	3 705	4 378	4 943	1 811	2 032	2 241	2 305
World Bank	2 054	2 381	2 826	3 214	865	1 064	1 168	1 144
IBRD	1 244	1 367	1 690	2 099	55	50	32	28
IDA	810	1 014	1 136	1 116	810	1 014	1 136	1 116
IFAD	45	66	93	138	45	66	92	124
Regional development banks	639	689	893	1 012	365	338	418	471
OPEC multilateral	86	68	60	89	81	63	57	76
UNDP c/	204	200	190	160	204	200	190	160
FAO (TF/TCP) c/	113	136	137	143	113	136	137	143
CGIAR c/	120	131	144	165	120	131	144	165
Other technical assistance grants c/	18	34	35	22	18	34	35	22
At constant 1980 prices d/								
Total disbursements	7 325	8 290	9 413	10 014	5 701	6 348	6 838	6 918

Note: TF/TCP = Trust funds/Technical Cooperation Programme.

a/ Based on data provided by the Development Assistance Committee (DAC) Secretariat of the OECD and processed by FAO.

b/ Based on expected disbursements and not on actual flows; data on actual disbursements are not available.

c/ Technical assistance grants have been assumed to be fully disbursed in the year of commitment.

d/ Deflator used: UN index of unit value of exports of manufactured goods, 1980=100.

Sources: FAO and OECD.

Table 1-23. **PROJECTIONS OF DISBURSEMENTS OF CAPITAL ASSISTANCE TO AGRICULTURE (BROAD DEFINITION), 1983-90 and 1995**

Commitment growth assumptions during 1983-95: (Annual growth) a/	1983	1984	1985	1986	1987	1988	1989	1990	1995	Projected average annual growth rate 1983-90	Projected average annual growth rate 1990-95
	Index numbers of disbursements (1983=100)									..... %	
-5%	100	116	120	122	121	118	114	109	85	1.1	-4.1
Zero growth	100	117	122	126	129	130	130	130	130	3.3	0.0
5%	100	117	124	131	137	143	150	157	199	5.8	4.0
10%	100	118	126	136	147	159	173	189	302	8.3	8.1

a/ Compound growth rate.

late 1970s, and this is reflected in more rapid growth in disbursements during the mid-1980s. Growth in disbursements, however, would subsequently slow.

BOX 1-5

DISBURSEMENTS OF EXTERNAL ASSISTANCE TO AGRICULTURE

FAO's data bank on external assistance now includes, in addition to data on commitments, detailed information on disbursements of loans and grants to agriculture since 1974. In a review of disbursements of multilateral assistance, some preliminary findings were discussed in The State of Food and Agriculture 1983. This earlier work can be expanded now to include disbursements of bilateral assistance, as well as their sectoral and regional distributions.

Speed and pattern of disbursements. Data available suggest that official commitments to agriculture (OCA) made in any given year take more than ten years, on average, to be fully disbursed. Generally, however, by the fourth year, including the year of commitment, half of the amount committed already has been disbursed, and within the fifth or sixth year, three-fourths has been disbursed (see Table below).*

There are significant differences in the speed of disbursements between concessional and non-concessional lending to agriculture and between groups of donors and recipients. Concessional commitments seem to be disbursed at a higher speed than non-concessional commitments, particularly during the first years following the year of commitment. More than 54% of concessional loans made during 1974-80 were disbursed by the fourth year, while the corresponding proportion for non-concessional loans reached only 47% on average.

Bilateral concessional commitments are also disbursed at a faster rate than multilateral commitments because the latter generally are larger than bilateral loans and fund longer-term projects. Also, bilateral lending contains a large component of commodity aid, such as fertilizer aid, which is normally disbursed very rapidly.

There is little difference in the speed of disbursements of concessional commitments of the World Bank and regional development banks, although the latter appear to disburse their non-concessional commitments at a slightly faster rate.

During the last ten years, except for the World Bank, there appears to be no clear trend in the speed of disbursements as measured by the average annual ratio of disbursements to commitments. In 1983 and 1984, however, the World Bank significantly increased disbursements of its new commitments mainly because of the development of adjustment and sector lending. Detailed analysis by donors, purpose and recipient groups is being undertaken and will be forthcoming.

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* The year of commitment is defined as the year in which the loan or grant is signed.

PERCENTAGE OF ANNUAL CUMULATIVE DISBURSEMENTS OF TOTAL CAPITAL COMMITMENTS TO AGRICULTURE (INCLUDING GRANTS), 1974-83

Year of commitment	Cumulative disbursements a/									
	1st year	2nd year	3rd year	4th year	5th year	6th year	7th year	8th year	9th year	10th year
	..... %									
1974	6	21	39	54	67	78	84	90	93	95
1975	6	24	41	57	71	81	88	92	95	
1976	8	23	40	54	66	75	83	87		
1977	6	20	37	53	66	77	84			
1978	6	20	34	47	59	67				
1979	5	18	34	48	60					
1980	9	21	33	46						
1981	6	17	31							
1982	10	23								
1983	8									

a/ The first year of disbursement corresponds to the year of commitment, the second, to the year after, and so on.

Sources: FAO and OECD.

These projected disbursements are expressed in current dollars. Hence, growth in disbursements may become negative in real terms if the dollar loses value against other major currencies and price inflation continues even at a modest rate. For example, even under a fairly optimistic assumption of a 10% growth in commitments, the growth in disbursements becomes negative if the deflator rises between 8% and 9% a year between 1984 and 1990.10/ It may be recalled that although world economic conditions may have been exceptional at that time, the deflator rose more than 10% a year between 1974 and 1980.

Since disbursements measure actual flows that have direct and, in many cases, immediate effect on production and development, increased attention should be given by donors and recipient countries to the two factors determining disbursement levels: namely, the level of commitments and the speed of their disbursement.

Commitments to agriculture increased at an average rate of 17% a year in the period 1974-75 to 1979-80. Various multilateral and bilateral donors in recent years have also adopted policies aimed at increasing the speed of disbursements. It is possible therefore to maintain the growth of disbursements, if the present decline in commitments to agriculture is reversed and appropriate policies to speed up disbursements are implemented.

The overall conclusions to be drawn from these developments are as follows:

- In current dollars, total OCA fell back sharply in 1983 and concessional commitments did so in particular. Since 1980, because the increasing value of the U.S. dollar against other major currencies coincided with a slowing down in inflation in industrial countries, the declines were rather less severe in terms of constant dollars.

10/ The deflator used is the UN unit value (dollar) index of exports of manufactured goods.

- The situation deteriorated further in 1984 because multilateral OCA declined sharply and bilateral commitments remained virtually unchanged.

- The declining share of concessional commitments in total commitments indicates a hardening in the overall terms of official lending to agriculture in the early 1980s. The situation improved in 1984 only because concessional commitments fell less sharply than non-concessional commitments.

- Notwithstanding these developments in commitments, disbursements still rose in the early 1980s, mainly reflecting the rapid growth in commitments in the late 1970s. However, unless commitments resume their growth immediately, disbursements will begin to fall by 1988 and may have begun to do so already for concessional commitments.

- Since 1980-81 private lending to agriculture has declined in most developing regions. This was reflected quite rapidly in disbursements from this source to the sector.

Food aid

At the end of 1985, the FAO estimate of shipments of food aid in cereals in 1984/85 (June/July) was about 12.5 million tons, 2.7 million tons higher than the previous year. This significant increase mainly reflected larger shipments to Africa. The estimate of commitments of food aid in cereals for 1985/86 was sharply lower, at about 10.9 million tons, again largely reflecting the changed food aid needs of Africa. This quantity includes a donation of over 100 000 tons of rice paddy (68 000 tons milled-basis) by Indonesia for emergency assistance. Indonesia was the world's largest importer of rice until several years ago.

Pledges by 82 donors to the regular resources of the World Food Programme (WFP) for its current 1985-86 biennium amounted to $988.8 million, about 73% of the target of $1 350 million. Pledges by 99 donors for the 1983-84 biennium amounted to $972.6 million, 81% of the $1 200 million target. The WFP target for the 1987-88 biennium of $1 400 million, comprising aproximately 3.25 million tons of food and $405 million in cash, was approved by the 23rd Session of the FAO Conference in November 1985.

5. FISHERIES AND FORESTRY

Fisheries

In the mid-1980s, world fisheries continued to experience a period of significant adjustment and change, mainly in response to the adoption of the 1982 United Nations Convention on the Law of the Sea. A little over a decade ago, most commercially exploited stocks of fish were common property, available to all. Now, almost all marine resources, which together account for some 90% of the world catch, fall within the 370 km national jurisdiction of coastal states.

This global acceptance of national authority to manage the fish stocks found within extended zones of jurisdiction has created new opportunities and responsibilities for coastal states. It also has brought problems of adjustment to these states and to countries that traditionally operated distant-water fleets. The governments of developed and developing countries are having to review their individual and collective strategies and policies concerning fisheries, and many states need to obtain the skills, technology and financial and physical resources required to take full advantage of the resources over which they have recently acquired jurisdiction.

Major initiatives in this respect were taken in 1984 at the FAO World Conference on Fisheries Management and Development, which endorsed a Strategy for Fisheries Management and Development and adopted five associated programmes of action. The strategy provides principles and guidelines for the consideration of governments and international organizations when planning policies and actions to increase the contribution of fisheries to national, economic, social and nutritional goals. The programmes of action, which deal with the planning of fisheries management and development, the promotion and protection of small-scale fisheries, the further development of aquaculture, the boosting of international trade in fish and fishery products, and the promotion of the role of fisheries in alleviating undernutrition, provide for greater assistance to developing countries as they seek to increase their fish production and enhance their self-reliance in fisheries management and development. While designed mainly for implementation by FAO, the programmes are firmly based upon the concept of international and regional collaboration and reinforced bilateral and multilateral support for the fisheries sector.

The issues raised by the new Law of the Sea are numerous and complex. Many of the major fish stocks are fully or even over-exploited. The opportunity created by extended national jurisdiction to conserve and better manage these valuable resources must be firmly grasped; collaborative management systems must be agreed upon in respect to common stocks that are shared by neighbouring countries. Not only must the conventional resource base be secured, but steps must be taken to increase overall production by using the considerable potential of species presently underexploited or neglected. Moreover, support is required for the increasing priority being attached by governments to inland-water fisheries and particularly to aquaculture.

The major challenges are that of bridging the potential gap between supplies and a demand being consistently boosted by growing populations, and of bringing increasing supplies of a vital food to market at acceptable prices.

Means must therefore be sought not only to increase the catch of fish, but also to make better use of it once it has been harvested. By reducing the present heavy losses incurred through spoilage during transport and distribution and finding ways of marketing fish discarded over the side when harvesting more valuable species such as shrimp, supplies could be greatly increased without catching one additional fish!

Another important issue in the search for greater food fish production is the need to protect and develop small-scale fisheries, which account for over a quarter of the world catch, and to protect the welfare of its fishermen.

Despite the extension of national jurisdiction over fisheries, many of these problems can best be tackled through intercountry and interregional collaboration. Further steps need to be taken to strengthen existing mechanisms for international cooperation in fisheries management and development.

Fish production in 1984

The world catch of fish reached a record level in 1984 (the latest year for which complete data are available). They indicate that total fish production was 82.7 million tons, an increase of almost 6 million tons (7.6%) over 1983 (Table 1-24). A major factor underlying this increase was the recovery in stocks of small pelagic species off the western coast of Latin America, which was severely affected by the "El Niño" current in 1983. Notable increases were achieved by Ecuador (whose catch almost trebled), Peru (56%) and Chile (12%). Their combined produc-

TABLE 1-24. CATCH OF FISH, CRUSTACEANS AND MOLLUSCS, INCLUDING ALL AQUATIC ORGANISMS EXCEPT WALES AND SEAWEEDS, COUNTRY GROUPS AND WORLD, 1974-76, 1983 AND 1984

	1974-76	1983	1984	Change 1983 to 1984	Annual rate of change 1974 to 1984
	.... million tons			..... %	
Developing market economies	23.6	29.3	31.9	9.0	3.3
Africa	3.7	3.6	3.3	-8.9	-1.1
Far East	11.5	15.2	15.6	2.7	3.3
Latin America	7.4	9.2	11.7	27.8	5.1
Near East	0.7	1.1	1.1	1.3	6.2
Others	0.3	0.2	0.2	-3.7	-1.6
ACPE	6.1	7.6	8.4	10.8	2.9
Total developing countries	29.7	36.9	40.3	9.3	5.0
Developed market economies	26.2	28.8	30.5	5.7	1.3
North America	3.9	5.5	6.0	10.0	4.6
Oceania	0.2	0.3	0.3	4.1	6.4
Western Europe	11.4	11.2	11.5	1.8	-0.3
Others	10.6	11.9	12.6	6.4	1.5
Eastern Europe and USSR	11.2	11.2	11.8	6.1	0.5
Total developed countries	37.4	39.9	41.8	5.0	3.1
World	67.1	76.7	81.8	6.6	2.1

Source: FAO, Fisheries Department.

tion of 8.4 million tons accounted for nearly two-thirds of the total Latin American output of fish, which rose 2.5 million tons, an increase of nearly 30%.

Further substantial increases in catches were also attained by four other major producers: Japan maintained its position as the world's largest producer of fish with a catch of 12 million tons, a growth of 766 000 tons over 1983; the USSR increased its catch by 836 000 tons, to reach a total of 10.6 million tons; China's output rose 14% to 5.9 million tons; and the United States set a record output of 4.8 million tons, which represented an increase of 16.2% compared with 1983.

Experiences in 1984 were variable in other developed countries. Canada suffered a decline of 7.5% mainly as a result of lower landings of groundfish. Production also failed to expand in most Western European countries. In Norway, the quota-controlled catch of capelin fell by more than a third and, as a result, total Norwegian fish production dropped over 13%, although the catch of food fish remained unchanged. Conversely, Iceland increased its capelin catch sixfold to reach a 1984 output of 865 000 tons, more than half of its total fish production of 1.5 million tons.

Excluding Latin America, total output in 1984 by developing market economies changed little. Fish production in the Far East, which contributed 15.7 million tons to the world catch, continued at a high level. Increases in catches were reported by such major producers as India, the Republic of Korea, Indonesia, the Philippines and Thailand. Output in the Near East, however, remained static and declined in Africa.

BOX 1-6

FISHERMEN AND FISHING COMMUNITIES

The world's fisheries incorporate a wide range of activities, including inland, coastal and oceanic fisheries and aquaculture. They range in size and technology from modern long-distance vessels employing sophisticated catching and preserving methods to rudimentary dug-out canoes and simple beach nets. Millions of people work full- or part-time in this sector and in its secondary supporting services. The vast majority, are employed in small-scale artisanal fisheries that typify this sector in most parts of the developing world.

These artisanal fisheries make a vital contribution to food supplies, especially in the LDCs of Asia and Africa. Small-scale fishermen, however, are generally among the most disadvantaged socio-economically. They often live in remote, isolated locations where there is no alternative to fishing as a means of survival. They work in an unpredictable environment, facing greater environmental dangers than do farmers and for less reward.

Ways to improve their living standards as well as to further the development of this sector were keynoted as major objectives at the FAO World Fisheries Conference in 1984.

One of the major programmes of action approved by the conference concentrates on assisting the integrated development of fishing communities, taking into account technical aspects of development and socio-economic needs of the communities. It is based upon the encouragement of the active participation by fishermen themselves in planning and implementing development activities. Special attention also is given to the role of women and young people in this sector. Funding, estimated at $3.5 million a year, is being sought by FAO to establish a worldwide network of small-scale fishery development groups to support these artisanal fishing communities.

To further promote international awareness of the important role and problems facing this sector, a major theme for World Food Day 1986 will be "Fishermen and Fishing Communities."

Fish trade in 1984

Although the volume of fish and fish products entering international trade was maintained in 1984, the overall depressed prices of the main fish commodities resulted in a decrease in both export and import values (Table 1-25). This was particularly the case with fishmeal, imports of which rose in volume some 2%, but with a total value of 8% less than in 1983; exports rose to 650 000 tons bringing the year-end total to some 2.2 million tons. For shrimp, there were record supplies in the United States reflecting higher domestic landings, lower exports and firm imports; there were record imports in Japan, but lower in Europe; and prices were generally depressed. U.S. canned tuna imports were up, but prices remained low. For canned small pelagic fish, it was a difficult year for Mediterranean sardines, pilchard and mackerel. For cephalopods, Japanese octopus imports were up, and there was a large supply but low demand in Europe. Exports in fishoil reached record levels, and prices recovered but were still below the trend.

Export earnings of developed countries went down in 1984 ($8 836 million from 1983's $8 983 million). The developing countries, however, continued to expand their share of total world fish exports, accounting for 44%, with export earnings rising to $7 100 million compared with 1983's $6 774 million.

TABLE 1-25. FAO INDEX NUMBERS OF VOLUME, VALUE AND UNIT VALUE OF EXPORTS FISH AND FISHERY PRODUCTS, 1980-84

	1980	1981	1982	1983	1984	Change 1982 to 1983	Change 1983 to 1984	Annual rates of change 1980 to 1984
	..... 1974-76=100					..... %		
Volume								
World	136.7	140.9	144.6	151.8	158.9	+5.0	+4.7	3.8
Total developing countries	160.5	168.4	183.6	191.2	204.1	+4.1	+6.7	6.3
Total developed countries	124.9	127.4	125.5	133.7	137.1	+6.0	+3.0	2.3
Value								
World	225.1	233.6	226.4	232.8	235.8	+2.8	+1.3	0.9
Total developing countries	258.4	278.4	281.8	290.1	304.8	+2.9	+5.1	3.8
Total developed countries	207.5	210.0	197.3	202.7	199.4	+2.7	-1.6	-1.1
Unit value								
World	164.0	165.7	155.7	152.9	147.7	-1.8	-3.4	-2.9
Total developing countries	162.1	167.2	154.8	153.7	150.2	-0.7	-0.2	-2.3
Total developed countries	166.7	166.0	156.5	153.3	146.2	-2.0	-4.6	-3.4

Source: FAO, Fisheries Department.

The situation in 1985

According to preliminary information, the world fish catch in 1985 did not exceed the record level reached in 1984. Lower small pelagic catches by Latin American countries, quota restrictions in the U.S. conservation zone and on the Norwegian capelin catch, and management measures for Japanese small pelagic stocks, resulted in a short-term decline in the world catch. But this affected fishmeal more than food fish production. Overall, prices strengthened in 1985 compared with the generally low levels of 1984, particularly for tuna. The decline in fishmeal prices, which started in September 1983, appears to have been arrested.

Forestry

When comparing the early 1980s with the 1970s, the broad pattern in production of forest products was one of substantially slower growth in the developing countries, while the developed countries increased their production more rapidly. This is mainly attributable to the major expansion in the developed market economies in 1983 and 1984, and sustained, to some extent, in 1985. This period of growth followed a fairly sharp recession in the output of forest products in 1981 and 1982 in these countries.

Production in 1984

In 1984 (the latest year for which complete data are available), the current dollar value of world exports of forest products was nearly 10% below the 1980 value, though exports picked up considerably in comparison with the worst year, 1982. Exports of developing countries in 1984 were still 15% below those of the peak year, 1980.

By the end of the 1970s, the total value of developing countries' exports in forest products exceeded the value of their imports. Since then, they have reverted to being substantial net importers of forest products. This situation arose because the reduction in the value of roundwood exports, by about a third after 1980, has not been offset by the small increase in the value of exports of processed wood products.

Activity in the forestry sector in 1984 reflected the more vigorous expansion of the modern sector in the economies of the developing countries, the recovery in growth of the U.S. economy, but slower growth in the other developed economies.

Output of roundwood products in 1984 grew more slowly than the average from 1974 to 1984, but that of processed wood products grew faster than the long-term average, particularly for paper and paper products (Table 1-26).

In developing countries, the major contribution of the forestry sector is to energy supply, particularly for rural communities. The consumption of fuelwood in developing countries in 1984 was 1 400 million m^3, the energy equivalent of 460 million tons of coal. This contribution was valued at around $70 000 million. Fuelwood and wood recycled in the energy systems of developed countries contribute a further $20 000 million a year.

The developing countries' production of modern-sector wood products was: 94 million m^3 for sawnwood, 17 million m^3 for wood-based panels, and 15 million tons for paper, with a total value of about $30 000 million. The production of these wood products in developed countries was valued at around $150 000 million. Overall, the forestry sector contributes to the world economy some $270 000 million annually.

Table 1-26. OUTPUT OF MAIN FOREST PRODUCTS, TOTAL DEVELOPING AND DEVELOPED COUNTRIES AND WORLD, 1974-76, 1983 AND 1984

	1974-76	1983	1984	Change 1983 to 1984	Annual rate of change 1974 to 1984
	..... million m^3			..... %	
ROUNDWOOD	2 616	3 004	3 037	1.1	1.7
Total developing countries	1 370	1 646	1 673	1.7	2.3
Total developed countries	1 246	1 358	1 364	0.4	0.9
Fuelwood and charcoal	1 285	1 571	1 598	1.7	2.6
Total developing countries	1 117	1 318	1 344	2.0	2.1
Total developed countries	167	253	254	0.3	5.6
Industrial roundwood	1 332	1 433	1 439	0.4	0.7
Total developing countries	252	328	329	0.4	3.3
Total developed countries	1 080	1 105	1 110	0.5	0.1
PROCESSED WOOD PRODUCTS					
Sawnwood and sleepers	422	450	452	0.4	0.5
Total developing countries	66	95	96	0.9	4.7
Total developed countries	356	355	356	0.2	-0.5
Wood-based panels	89	104	106	1.9	1.5
Total developing countries	9	17	18	3.9	7.5
Total developed countries	80	87	88	1.5	0.6
	..... million tons				
Pulp for paper	111	131	138	5.2	2.1
Total developing countries	8	14	14	0.9	6.7
Total developed countries	103	117	124	5.7	1.7
Paper and paperboard	143	176	186	6.1	2.7
Total developing countries	13	20	21	4.1	6.3
Total developed countries	130	155	165	6.3	2.3

Source: FAO, Forestry Department.

Among wood products, paper production expanded the most in 1984, with an annual rate of increase of 7% in North America and 10% in Europe. The increased pressure of demand on capacity in developed countries has favoured production in the developing countries because developed country exports were less competitive and there were increased opportunities in international markets, particularly for paper pulp.

Developing countries depend on imports for some 25% of their consumption of paper, and for 15% of the pulp input for local paper production. Paper and pulp production capacity, however, is growing faster than consumption and this is an important area in which developing countries are reducing, or trying to reduce, their overall dependence on imports.

African countries are dependent up to 60% on imports to meet their consumption needs. Attempts to rectify this situation by the construction

of domestic pulp and paper industries have been beset by difficulties. New mills have been constructed or started in Nigeria, Tanzania, Cameroon and Zambia. The new mill in Cameroon was shut down due to a major accident. Another mill in Angola was shut down as a result of sabotage. The commissioning of new capacity in Tanzania and Nigeria has been greatly delayed. In view of the hundreds of millions of dollars of investment involved, these difficulties are greatly increasing the cost of offsetting the region's net import bill for paper by some $650 million a year.

The development of mechanically processed wood products in the early 1980s was less favourable worldwide than that for paper and pulp. Although consumption expanded to recover the previous peak level of 1979, industrial capacity had been rationed to reduce costs but, in effect, to increase capacity as well. The resulting intensive competition in the market has tended to cause prices to fall. Several developing countries with sawmilling industries orientated to export markets had difficulty in finding outlets, and their production fell.

Current issues and concerns

The issue of current major concern in forestry deals with how to maintain the benefits that forests produce. Pressure for land, cultivation and grazing, and the desperate need for wood as fuel, particularly in areas with less favourable conditions, is resulting in depletion and destruction of the remaining forests.

Current levels of investment by developing countries in reforestation and forest conservation, though more than the previous decade, are still at very low levels. The reversal of the trend of forest destruction is urgent to ensure future supplies of wood to meet the need for household fuel and to secure the protection of soil and water, the basis of community food supplies. The role of the forest in protecting and preserving plant and animal genetic resources is also gravely threatened.

International Year of the Forest

The FAO Council, at its 86th Session in Rome in November 1984, passed a resolution that declared 1985 the "International Year of the Forest." This resolution requested member countries to give special recognition to the forest during 1985, arising from the Council's concern that the world cannot afford further damage and degradation to its forests. This concern arose from the alarming rate at which tropical forests are being depleted, the damage from air pollution in temperate regions, the destruction of forests by fire in the Mediterranean, among other areas, and the value that forests play in preventing desertification in arid zones. Forest damage can harm agriculture, lower the quality of water, threaten conservation of wildlife and fish populations, and worsen the quality of life in general.

A specific request was directed to the Ninth World Forestry Congress, held in Mexico in July 1985, to pay special attention to long-term conservation and the proper use of forest resources (see Box 1-7).

Trade in forest products in 1984

In 1984, the total value of export trade in forest products increased 6% to $50 700 million. This increase mainly was due to a rise of 8% in the exports of developed countries, to $43 100 million. The value of developing countries' exports increased only 1%.

The volume of exports of roundwood, sawnwood and wood-based panels increased 3-4%, that of paper pulp, 2%, and that of paper, 8% (Table 1-27). Increased exports of paper reflected increased world

BOX 1-7

NINTH WORLD FORESTRY CONGRESS

Foremost among the events marking 1985 as International Year of the Forest was the convening of the Ninth World Forestry Congress in Mexico City, 1-10 July 1985. Organized and hosted by the Mexican Government along with technical support provided by FAO, the Congress brought together more than 2 000 foresters and related professionals, under the theme of "Forest Resources in the Integral Development of Society."

FAO Director-General Edouard Saouma set the tone of the meeting with his speech to the opening session. While not minimizing the threats caused by air pollution and forest fires in the temperate zones, he placed particular emphasis on the unacceptable level of forest degradation and destruction in tropical and arid regions, resulting from what he termed the "crisis of poverty" that afflicts millions of people in the developing world. He added that "the future of the forest is the future of mankind," and called on the participants of the Congress to tackle forestry problems as part of overall rural development strategy.

The role of forestry in rural development received major attention during the ten days of plenary and technical sessions in Mexico City. Issues discussed included: (i) the contribution of forestry to food security (food and fodder production, soil and water conservation, soil enrichment, cropland protection); (ii) meeting the energy crisis in developing countries (fuelwood and charcoal for domestic and industrial uses); (iii) raising incomes (forestry employment and small forest-based enterprises); (iv) increasing productive land use (desertification control, combining tree crops with food crops, etc.); and (v) increasing people's participation in the production, protection and utilization of trees and forest products.

At the closing session, delegates endorsed a declaration known as the Manifesto of Mexico, setting forth a series of conclusions and principles designed to generate greater attention to the socio-economic and environmental benefits derived from forestry. Among the actions recommended were the need to: (i) pursue new forest strategies that harmonize people and their environments; (ii) improve communications between the forestry sector and the political, financial and public sectors; (iii) strengthen forestry research, training, education and extension programmes in order to integrate forestry into rural development; (iv) restore degraded watersheds and combat desertification; and (v) develop small-scale forest enterprises to generate employment and income.

The Congress also emphasized in its declaration "the importance and urgency of the Plan of Action on Tropical Forests," which was initiated and adopted by the FAO Committee on Forest Development in the Tropics in May 1985, and which became the subject of a special session during the Congress.

The Congress declared its support for all initiatives geared at accelerating the implementation of actions in the plan's five priority areas: forestry and land use; fuelwood and energy; conservation of tropical forest ecosystems; forest-based industrial development; and institutions.

TABLE 1-27. VOLUME OF EXPORTS OF MAIN FOREST PRODUCTS, TOTAL DEVELOPING AND DEVELOPED COUNTRIES, 1974, 1982-84

	1974	1982	1983	1984	Change 1982 to 1983	Change 1983 to 1984	Annual rate of change 1974 to 1984	Annual rate of change 1980 to 1984
	..... million m^3				..... %			
Industrial roundwood	108.4	92.2	100.4	101.0	2.2	0.6	-0.9	-2.6
All developing countries	43.5	33.2	32.2	29.0	-3.1	-9.8	-4.1	-7.2
All developed countries	64.9	65.0	68.2	72.0	4.9	5.6	0.8	-0.2
Sawnwood and sleepers	61.9	73.3	83.89	86.9	14.5	3.6	3.5	3.2
All developing countries	7.4	9.2	10.4	10.5	12.1	1.5	3.4	0.4
All developed countries	54.4	64.1	73.5	76.4	14.8	3.9	3.5	3.7
Wood-based panels	13.0	15.3	17.1	18.3	12.1	7.1	3.2	2.6
All developing countries	3.7	5.2	6.5	7.1	25.6	9.0	5.5	10.2
All developed countries	9.2	10.1	10.6	11.3	5.1	6.0	2.0	-1.1
	..... million tons							
Pulp	17.4	17.3	19.6	20.1	13.3	2.4	2.7	0.8
All developing countries	0.6	1.6	1.8	1.7	13.4	-3.9	15.0	1.8
All developed countries	16.8	15.7	17.8	18.4	13.3	3.1	2.0	0.7
Paper and paperboard	30.1	33.7	36.7	39.7	9.1	8.1	4.2	2.9
All developing countries	0.5	0.9	1.1	1.4	23.7	26.0	12.0	8.9
All developed countries	29.6	32.8	35.6	38.3	8.7	7.6	4.0	2.7

Source: FAO, Forestry Department.

consumption, which rose 11 million tons in 1984 or 6%. Half of this increase in consumption of paper was accounted for by the United States; its paper imports increased 1.9 million tons, accounting for 60% of the rise in world trade in paper.

The world average unit value of exports of logs, sawnwood and panels fell 3-5% in 1984, but the unit value of paper exports increased 3%. As a consequence, the shift in terms of trade for the forest products of developing countries was generally unfavourable, compared with developed countries more involved in the export of paper, which benefited from the prevailing high exchange rate of the U.S. dollar. For example, the unit value of sawnwood and plywood exports of Asian countries fell about 6%.

The major shifts in trade flows resulting from changes in currency exchange rates, combined with the relatively small growth of economic activity, particularly in the construction industry--which is a major user of mechanically processed wood products--has stimulated discussion of protective tariffs, subsidies and restrictions on trade. Forest products have featured in discussions, (particularly between the United States, Japan, and Canada) concerning access of U.S. wood products to Japanese markets and Canadian wood exports to U.S. markets.

To foster more effective participation of developing countries in international trade in forest products, great importance is attached to improving the trading infrastructure. Under the Integrated Programme on Commodities of the United Nations Conference on Trade and Development (UNCTAD), the Tropical Timber Agreement was ratified by the requisite number of exporting and importing countries on 31 March 1985.

6. OTHER ISSUES

Energy Use in Agricultural Production: Latest Trends

Agriculture's share of commercial energy

When oil prices quadrupled within a very short period in the early 1970s, and doubled again at the end of the decade, as in other sectors, there was renewed interest in the economy of commercial energy in agriculture, particularly developing countries which were facing severe problems with their balance of payments. Large increases in crop yields had been achieved in the developed countries through the use of energy-intensive inputs, and many developing countries would be able to meet the rapidly rising food demand of their populations only by substantially raising yields on both existing and new land. Such a development entailed a rapid increase in the application of commercial energy to agriculture.

The State of Food and Agriculture 1976 reviewed this problem on the basis of 1972 data.11/ That inquiry is carried forward here by looking at what happened to energy used in world agriculture between 1972 and 1982. Estimates that follow show it continued to rise at a relatively fast pace, particularly in developing countries, despite the generally unfavourable circumstances of increased real energy prices, a world recession, lower real prices for many export commodities and a growing problem of foreign debt. High marginal returns from the use of commercial energy in agriculture (still applied at relatively low levels in developing countries in the 1970s and early 1980s) are one likely reason for this situation. In the developed countries, however, energy use per hectare declined from very high levels in North America and stagnated in Oceania.

11/ FAO, The State of Food and Agriculture, 1976, Rome, 1977, pp. 79-111.

Financing an increasing demand for commercial energy was a major problem for most oil-importing countries during 1972-82, as was knowing how much of their total supply would be needed for agricultural production purposes through the use of farm machinery, fertilizers, irrigation and pesticides.

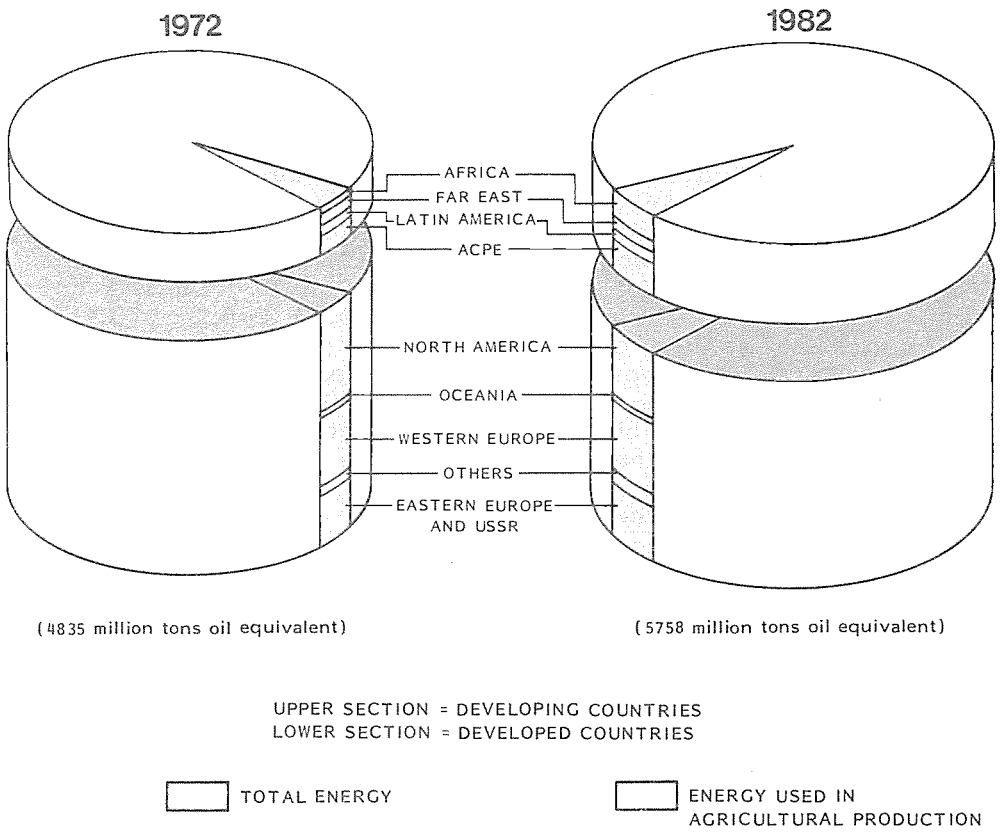
Estimates show that agriculture production consumed only a very small but increasing part of total commercial energy used. At the world level, agriculture's share was estimated at only 4.2% in 1972 and 5% in 1982 (Table 1-28). The developed countries as a whole (with 4.1%) were very close to the world average in 1972 because they accounted for 83% of commercial energy used in agriculture. Agriculture's share of total commercial energy used in developing countries was higher (4.9%), but it only accounted for 17% in world agriculture. Ten years later, even more rapid growth in energy used in agriculture in developing countries took agriculture's share of total energy used to 6.5% compared with 4.6% in the developed countries. As a consequence, the proportion of energy used in agriculture in developing countries of the world total rose to nearly 27% by 1982 (Fig. 1-5). During this ten-year period, agriculture's share of total energy fell only in the Near East, because of the rapid urban and industrial development in the region; it rose marginally in Africa, surged ahead in the ACPE and, most pronounced of all, in the Far East (from 6.5% to 14.1% of total energy used). Meanwhile, agriculture's share of total commercial energy used changed little in North America, Eastern Europe and the USSR, rose by a quarter in Western Europe, but declined by nearly a third in Oceania.

TABLE 1-28. USE OF COMMERCIAL ENERGY, TOTAL AND IN AGRICULTURAL PRODUCTION, 1972 AND 1982

	Total		Energy used in agricultural production			
	1972	1982	1972	1982	1972	1982
	million tons, oil equivalent				.... %	
Developing market economies	413	730	22	45	5.3	6.1
Africa	35	51	2	3	5.0	5.4
Far East	135	147	9	21	6.5	14.1
Latin America	187	298	7	11	3.8	3.8
Near East	54	232	4	10	7.4	4.3
Others	1	3	-	-	3.8	2.0
ACPE	276	444	12	32	4.3	7.2
Total developing countries	689	1 175	34	77	4.9	6.5
Developed market economies	3 066	3 109	129	154	4.2	4.9
North America	1 763	1 668	68	66	3.9	4.0
Oceania	53	82	3	4	6.5	4.4
Western Europe	954	1 004	52	68	5.4	6.8
Others	296	354	6	16	2.1	4.6
Eastern Europe and USSR	1 080	1 474	40	57	3.7	3.8
Total developed countries	4 146	4 583	169	210	4.1	4.6
World	4 835	5 758	202	287	4.2	5.0

Sources: UN, Energy Statistics Yearbook, 1982, (N.Y., 1984); and FAO estimates.

Figure 1-5 - SHARE OF COMMERCIAL ENERGY USED IN AGRICULTURAL PRODUCTION, BY COUNTRY GROUP AND REGION, 1972 AND 1982



When comparing total commercial energy used per caput of the total population with commercial energy used per agricultural worker in 1972, in only two regions (North America and Oceania) was the energy used per agricultural worker larger than the per caput consumption of the population as a whole. These two levels, however, were roughly equal in Western Europe (Table 1-29). By 1982, Western Europe had joined North America and Oceania as regions where energy used per agricultural worker exceeded that used per caput for the population as a whole. By 1982, the energy used per agricultural worker in developing countries had closed to about a third of the level used per caput for the entire population.

Changes in energy use in agricultural production 12/

At the world level, the manufacture and operation of farm machinery accounted for the largest but declining share of commercial energy used in agricultural production in both 1972 (58%) and 1982 (52%). The ranges were from 17% in the Far East to 74% in Oceania in 1972, and from 16% in the ACPE and 72% in Oceania in 1982. Chemical fertilizers came next, with 39% of the world total in 1972 and 44% in 1982. In developing regions alone, however, fertilizer came first with as much as 64% of their total energy used in agriculture for this purpose in 1972 and 69% in 1982. The manufacture and operation of irrigation equipment used only about 2% of world commercial energy input for agricultural production in 1972 and 1982, with the highest proportions in the Near East and the Far East. The corresponding proportion for pesticides was also about 2% at the world level (Table 1-30; Fig 1-6).

12/ See Box 1-8.

TABLE 1-29. TOTAL COMMERCIAL ENERGY PER TOTAL POPULATION AND ENERGY USED IN AGRICULTURAL PRODUCTION PER AGRICULTURAL WORKER, 1972 AND 1982

	Total energy per caput		Energy in agriculture per agric. worker	
	1972	1982	1972	1982
	..... kg, oil equivalent			
Developing market economies	229	316	51	95
Africa	117	125	20	26
Far East	131	113	33	72
Latin America	628	785	193	286
Near East	319	1 046	123	235
Others	234	513	27	33
ACPE	295	400	40	106
Total developing countries	251	343	47	99
Developed market economies	4 136	3 875	3 433	5 581
North America	7 609	6 492	18 929	25 744
Oceania	3 366	4 503	6 361	7 786
Western Europe	2 654	2 682	2 453	4 387
Others	2 203	2 323	491	1 789
Eastern Europe and USSR	3 052	3 847	851	1 557
Total developed countries	3 786	3 866	2 006	3 294
World	1 260	1 250	252	344

Sources: UN, Energy Statistics Yearbook, 1982 (N.Y.: 1984); and FAO estimates.

Figure 1-6 - DISTRIBUTION OF COMMERCIAL ENERGY USED IN AGRICULTURAL PRODUCTION, BY INPUT, DEVELOPED AND DEVELOPING COUNTRIES, 1972 AND 1982.

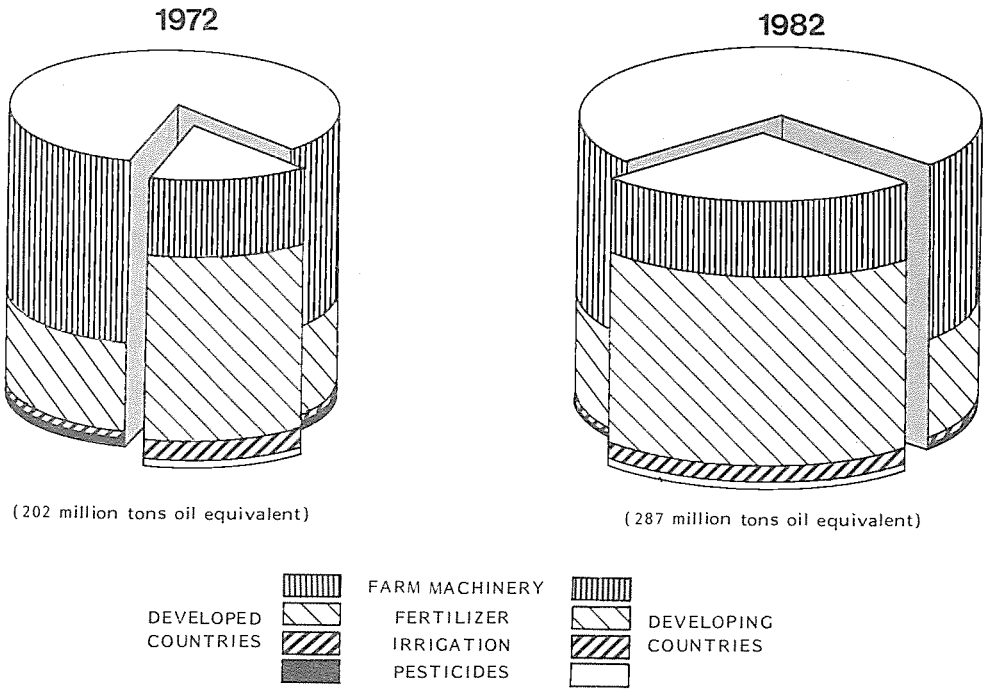


TABLE 1-30. TOTAL COMMERCIAL ENERGY USED IN AGRICULTURAL PRODUCTION AND SHARE OF EACH INPUT, 1972 AND 1982

	Total		Farm machinery		Fertilizer		Irrigation		Pesticides	
	1972	1982	1972	1982	1972	1982	1972	1982	1972	1982
	million tons, oil equivalent		%							
Developing market economies	22	45	32.5	32.4	60.3	61.3	6.3	4.9	1.0	1.4
Africa	2	3	46.4	41.0	47.0	49.2	4.9	4.2	1.5	5.5
Far East	9	21	17.4	21.9	75.0	71.4	7.1	6.9	0.4	0.7
Latin America	7	11	46.2	40.3	50.4	56.2	1.7	1.4	1.7	2.1
Near East	4	10	34.6	42.9	51.4	49.1	13.2	6.8	0.8	1.1
ACPE	12	32	17.5	15.7	70.9	79.3	7.1	3.0	4.5	2.0
Total developing countries	34	77	27.2	25.5	64.0	68.8	6.6	4.1	2.2	1.7
Developed market economies	129	154	68.9	68.4	28.5	29.1	0.9	1.0	1.7	1.5
North America	68	66	71.9	66.8	25.2	29.7	1.1	1.4	1.9	2.1
Oceania	3	4	73.8	72.2	24.9	26.4	0.9	1.0	0.5	0.4
Western Europe	52	68	65.7	66.4	32.0	31.6	0.6	0.6	1.6	1.3
Eastern Europe and USSR	40	57	47.6	44.9	49.5	52.7	0.8	0.8	2.1	1.6
Total developed countries	169	210	63.9	62.1	33.4	35.5	0.9	0.9	1.8	1.5
World	202	287	57.8	52.3	38.5	44.3	1.8	1.8	1.9	1.6

Source: FAO estimates.

BOX 1-8

ESTIMATES OF HOW COMMERCIAL ENERGY IS USED IN AGRICULTURE

Mineral fertilizer is the fastest growing user of commercial energy in agriculture and in 1982 accounted for nearly 70% of the energy used in agriculture in developing countries and 44% in the world. Nitrogenous fertilizer, which is very energy-intensive (1 kg of N requires about 1.85 kg, oil equivalent, for its manufacture, packaging, transport and distribution), accounts for a large and rising share of energy used in fertilizers (83% in 1972 and over 85% in 1982); phosphatic fertilizer (1 kg of P_2O_5 requires 0.33 kg, oil equivalent) and potassic fertilizer (1 kg of K_2O requires 0.21 kg, oil equivalent) account for the remainder.

The manufacture and operation of farm machinery is responsible for the largest, but declining share of commercial energy used in agriculture (52% in 1982, mainly because of its importance in developed countries). Agriculture in developing countries still depends primarily on human and animal energy. About 2 kg, oil equivalent, of energy is required to manufacture 1 kg of farm machinery. The total weight of a tractor and its associated equipment in North America is estimated to be about 15 tons per tractor, whereas in the developing countries, the average is 6 tons per tractor. Energy inputs for machinery operation also vary: the estimates of annual fuel consumption range from about 5 tons, oil equivalent, per tractor in North America to 3 tons, oil equivalent, per tractor in developing countries. About 60% of the energy used for farm machinery is for its operation and 40% for its manufacture.

Although pesticides account for only a very small share (less than 2%) of total commercial energy used in agriculture, they are the most energy-intensive of agricultural inputs. It is estimated that 2.3 kg, oil equivalent, are required to manufacture, package, distribute and apply 1 kg of pesticide. This is because most modern pesticide raw materials are derived from petrochemicals and contain formulating agents and usually oil-based solvents. They are not, however, widely used in agriculture in developing countries and seldom exceed 1 kg of active ingredient per hectare.

Irrigation, which also accounts for about 2% of total commercial energy used in agriculture, is mainly of two kinds: gravity flow and pump. Energy used for the construction of dams and for maintenance of irrigation canals is excluded from the estimates used here. The first, because dams usually are constructed for electric power generation and not for irrigation; and second, because farm machinery is normally used for this purpose. Therefore, irrigation equipment is limited to pumps, engines, pipes, sprinklers, etc. Annual production of such equipment was estimated to be 360 000 tons in 1982, and the average energy requirement was 2 kg, oil equivalent, per kilogram of equipment. Estimates of annual fuel requirements for irrigation vary from 160 kg/ha in developed countries to about 200 kg/ha in Africa and the Near East.

Economic aspects

Although the amount of commercial energy used in agriculture in developing countries has risen sharply in recent years (as shown in Table 1-29), there is still a very wide gap in the level of energy used per agricultural worker between the developing and developed countries. There are also very marked differences in levels of output. However, energy used in agriculture per agricultural worker in North America in 1982 was 1 000 times that in Africa, while agricultural output (in 1974-76 dollars) per North American worker was less than 100 times that in Africa (Table 1-31). As can be expected, there are major differences in agricultural production functions at these two extremes, and hence in the relative importance of commercial energy. In 1982, regional averages in the developing and developed regions were 99 kg and 3 294 kg, respectively of oil equivalent of energy used in agriculture per agricultural worker; and $418 and $6123 respectively of agricultural output per agricultural worker.

Regional differences diminish considerably when energy input is compared with output per unit of area, as levels of intensity of cultivation vary considerably from one region to another within the two main groups.

As already noted, in developed countries the much larger share of commercial energy used in agricultural production is associated with a significantly lower share of world agricultural output, implying that the incremental gains in output from the large amounts of energy used are considerably below those of developing countries. This was evident between 1972 and 1982 when regional changes in the volume of agricultural production were associated with changes in labour and commercial energy used (Table 1-32). Once again, wide differences in production functions for developing and developed countries are indicated: with a 38% rise in output in developing countries being associated with a rise of 6% in land use, of 7% in the number of agricultural workers, and of almost 130% in commercial energy; compared with a 16% rise in output in developed countries, a 1% increase in land, a 24% drop in workers, and an increase of about 25% in energy inputs.

An additional 43 million tons, oil equivalent, used in developing countries in 1982 compared with 1972, was associated with an increase in agricultural output of $88 000 million (in 1974-76 prices). This ratio compares with an almost identical rise of almost 42 million tons, oil equivalent, in developed countries, but this was associated with an output rise of about $54 000 million.

From these data it is possible to calculate average elasticities of energy used during the period (see Table 1-32). These elasticities relate to the changes in agricultural output to changes in energy consumption. Striking regional differences emerge from this period that witnessed dramatic increases in the world prices of petroleum products and, hence, in energy costs. Among developing regions, the ACPE showed the lowest elasticity, followed closely by the Near East and Far East regions. Latin America was the most responsive developing region. Elasticities were generally higher in developed countries, but much more so in developed market economies.13/ Energy use was particularly sensitive to changes in

13/ The overall elasticity of about 1.0 for the developed market economies is similar to that prevailing during the 1970s, for these economies as a whole where an increase in total output required an approximately equal increase in energy used. Recent data show that these countries' economies have become much more responsive to energy consumption as a result of the rising costs of energy.

TABLE 1-31. ENERGY USED IN AGRICULTURE AND AGRICULTURAL OUTPUT, PER AGRICULTURAL WORKER AND PER HECTARE OF LAND (ARABLE AND PERMANENT CROPS), 1972 AND 1982

	Energy used in agriculture				Agricultural output a/			
	per agric. worker b/		per ha b/		per agric. worker b/		per ha b/	
	1972	1982	1972	1982	1972	1982	1972	1982
	kg, oil equivalent				$ (1974-76)			
Developing market economies	51	95	34	65	401	488	268	337
Africa	20	26	16	18	370	393	238	273
Far East	33	72	34	76	254	322	259	345
Latin America	193	286	48	63	1 202	1 547	295	344
Near East	123	285	47	120	766	958	289	404
Others	27	33	34	49	563	609	725	908
ACPE	40	106	103	278	218	309	562	811
Total developing countries	47	99	45	96	326	418	312	405
Developed market economies	3 433	5 581	333	388	5 700	9 227	552	642
North America	18 929	25 744	293	279	21 096	36 791	327	400
Oceania	6 360	7 786	84	78	17 185	24 133	228	242
Western Europe	2 453	4 387	535	715	4 794	7 708	1 046	1 258
Others	491	1 789	321	858	3 104	3 243	2 033	1 556
Eastern Europe and USSR	851	1 557	142	203	2 628	3 766	438	492
Total developed countries	2 006	3 294	253	312	4 002	6 123	505	580
World	252	344	143	195	712	854	403	485

a/ Based on 1971-73 average.
b/ Based on 1981-83 average.

Source: FAO estimates.

relative prices in Oceania and North America. In the latter region, energy used in agriculture marginally declined while output increased by a quarter, triggering a change in the sign of elasticity and indicating a wasteful use of energy in the early years of the period.14/ Elasticities, however, were much lower in Western Europe and particularly in Eastern Europe and the USSR.

TABLE 1-32. PERCENTAGE OF CHANGE IN AGRICULTURAL PRODUCTION AND SELECTED INPUTS, AND ELASTICITY OF ENERGY USED, 1972-82

	Agric. production	Arable land & perm. crops	Agric. workers	Energy	Elasticity of energy used a/
	..... %				
Developing market economies	34.6	6.9	10.6	105.5	0.33
Africa	23.3	7.4	15.8	55.6	0.42
Far East	39.3	4.5	9.8	136.0	0.29
Latin America	36.2	16.8	5.8	56.5	0.64
Near East	34.6	-3.8	7.7	149.3	0.23
ACPE	35.1	0.6	2.6	171.2	0.21
Total developing countries	37.5	6.0	7.3	128.5	0.29
Developed market economies	18.6	1.9	-26.8	19.1	0.97
North America	24.8	2.0	-28.4	-2.7	-9.90
Oceania	18.1	11.2	-15.9	3.0	6.03
Western Europe	18.2	-1.7	-26.5	31.5	0.58
Eastern Europe and USSR	11.8	-0.3	-22.0	42.8	0.28
Total developed countries	16.1	1.0	-24.1	24.6	0.65
World	24.9	3.6	4.0	41.8	0.60

a/ Elasticity of energy used in agricultural production is the percentage of change in volume of agricultural production to the percentage of change in energy used in agricultural production.

Source: FAO estimates.

Widely differing responses to additional energy amounts used in agriculture between developing and developed countries are also shown where input/output ratios are measured by units of commercial energy required per $1 000 (in 1974-76 dollars) agricultural output and by output per ton, oil equivalent, in both 1972 and 1982 (Table 1-33).

In the developed regions, an improvement in the economy of energy used in North America and Oceania between 1972 and 1982 can be noted compared with a continued deterioration in this area in Western Europe, Eastern Europe and the USSR where farmers were more protected from relative changes in output prices and energy costs. The very large increase in energy use in relation to output in the other developed regions was due to rapid mechanization in Japan where four-wheeled tractors largely re-

14/ Referring back to Table 1-30, it will be seen that all the decline in energy use can be traced to machinery. It may be surmised, therefore, that rising interest costs played an equally important role as did the cost of energy itself.

placed the former two-wheeled types. Among developing regions, there were declines in the response to incremental energy used during this period. It required about 237 kg, oil equivalent, per $1 000 output in 1982 compared with only 143 kg in 1972, with widely differing figures for the individual regions. The declines in response were particularly large in the ACPE, Near East and Far East regions. Such data, as well as the above elasticity mesurements, lend support to the concerns relating to the rising cost of the green revolution's energy-intensive model of agricultural development applied to low-income countries, poor in domestic-energy resources. These concerns will become particularly relevant if the current period of extremely weak prices for petroleum products on world markets should end.

TABLE 1-33. RELATIONSHIP BETWEEN ENERGY AND OUTPUT, BY REGION, 1972 AND 1982

	Energy/Output		Output/Energy	
	1972	1982	1972	1982
	kg, oil equivalent per $ 000 (1974-76)		.... $ (1974-76).... per ton, oil equivalent	
Developing market economies	128	195	7 813	5 128
Africa	53	67	18 868	14 925
Far East	131	223	7 634	4 484
Latin America	161	185	6 211	5 405
Near East	161	298	6 211	3 356
ACPE	184	343	5 435	2 915
Total developing countries	143	237	6 993	4 219
Developed market economies	575	605	1 739	1 655
North America	897	700	1 114	1 425
Oceania	370	323	2 702	3 099
Western Europe	512	569	1 954	1 757
Other	108	552	6 326	1 813
Eastern Europe and USSR	324	413	3 088	2 411
Total developed countries	486	538	1 995	1 859
World	348	402	2 874	2 488

Source : FAO Estimates.

Environmental Trends in Food and Agriculture

By the mid-1980s, environmental aspects of food and agricultural production, which includes forestry and fisheries, differed markedly between the developed and developing countries.

Modernization of production techniques in the developed countries has evolved progressively over several centuries. Considerable investment has been in agricultural research during the latter part this period, research which mostly centred on a better understanding and management of the temperate ecosystems.

Today, modern agricultural production systems in developed countries are largely run on an industrial basis, and are heavily mechanized and energy-intensive, as shown in the previous section. They have an increasingly detrimental impact on the environment, leading to soil erosion, pesticide resistance, fertilizer runoff and narrowing genetic

diversity. To counteract these developments, present environmental trends in developed countries aim to reduce non-farm inputs, develop safer agrochemicals, rehabilitate flora and fauna, and protect the natural resource base through better assessment, planning and management.

The situation in developing countries is quite different. In many, modernization of agriculture, which is often based on models provided by the developed countries, has tended to neglect lessons learned over the centuries of indigenous production systems. Modernization has taken place in fragile ecosystems for which scientific knowledge is still scanty, and with limited financial resources and trained manpower. This process usually continues under great pressure to meet food, fuel and income needs of millions of poor and undernourished people. Meanwhile, factors such as rapid population growth, lack of incentives and means of production for farmers to increase food and fuelwood requirements, as well as inadequate marketing systems, are placing immense strain on natural resources and contributing to their degradation.

It is therefore very important that the right approach and technology are adopted for better management, use and conservation of natural resources, so as to increase food and agricultural production while at the same time doing the least environmental harm. In this respect, there is still a long way to go for the development of appropriate production systems that are ecologically sound, socially accepted and economically viable. New technologies, however, are evolving such as integrated farming systems for the semi-arid zones and humid tropics, management of tropical forests and inland fisheries, agroforestry, biofertilization and the biological control of pests.

Further, the current utilization of non-farm inputs, particularly agrochemicals, by the developing countries is usually too low to have any large-scale negative impact on the environment. For instance, they are currently using only 20% of total pesticides used in world agriculture. Pesticide poisoning, however, is estimated to kill more than 10 000 persons a year worldwide, and cause serious illness in about 400 000 persons, a large portion of these in developing countries. The average use of chemical fertilizers in Africa is only 5-10 kg/ha, while in the developed countries it is more than 100 kg/ha. Nevertheless, measures to protect the environment must be established and implemented in developing countries, where possible, however small the danger may appear under current farming practices.

Since the Conference on the Environment, held in Stockholm in 1972, activities directly related to the environment primarily have consisted of preparing review papers, case studies and guidelines on topics ranging from soil degradation, animal genetic resources, human health and marine pollution. Much of this work was undertaken through inter-agency meetings, conferences and workshops and was needed to identify and examine environmental problems and to design strategies for solving them. Efforts were made to synthesize the work of organizations active in environmental issues and to establish strong working relationships among them. This goal has been largely achieved with the result that, in recent years, activities have focused increasingly on field projects that have direct benefits at the local and national levels. Examples of such projects are discussed in the following subsections.

Integrated pest control

Agricultural pests are among the most serious constraints to attaining higher levels of food production. Numerous training programmes on integrated control of agricultural pests have been undertaken in recent years. Some programmes have focused on training extension workers in pest-control techniques and how to communicate this new knowledge to

farmers. For example, a project in East Africa works with government ministries to devise a regional programme for pest management and carries out a pilot demonstration project for a maize-legume cropping system.

Inventory and monitoring

A pilot project on Inventory and Monitoring of Sahelian Pastoral Ecosystems was an integrated project in Senegal to establish a natural resource data base for the regular assessment of land conditions and for use in national planning. By incorporating a strong training component in the project, participants from throughout Africa were exposed to modern data collection and management techniques. Particular emphasis on training Senegalese professionals and ministry officials in stages of project implementation has helped to institutionalize the activities. The reports, manuals and guidelines prepared as part of the project also have provided an overview of the approach used and the working documents required for a project of this type. Senegal now has an established natural resource data base for monitoring and planning land used in the pastoral ecosystems of the country and a group of 20-30 persons familiar with it.

Wildlife and protected areas

The well-known Asian bulletin--Tigerpaper--has been in publication for more than a decade. It reports on research findings, meetings and general information relating primarily to wildlife and protected areas in Asia. Now a similar publication is underway for Africa, called Nature and Fauna. A key element of these bulletins is the exchange of information among colleagues and the development of cooperative networks. Both bulletins provide a forum for publication of material on issues that might not normally be known or widely recognized. By publishing regularly and providing information applicable at the working level, demand has risen sharply to the extent that, for example, the Tigerpaper is now published partly on a subscription basis.

A project which is just getting underway in Latin America also aims at establishing networks of experts on wildlife and protected area management. The professional and technical capabilities of about 50 persons in the region will be strengthened through international support to existing training institutions for workshops and seminars. A quarterly bulletin called Puma will be produced to coordinate activities and encourage the exchange of technical information on wildlife and protected areas. The final phase of the project will help governments assist the integration of wildlife and protected area activities into national conservation strategies and development plans.

Planning and assessment

National conservation strategies are being undertaken in about a dozen countries in Latin America, Africa and Asia in an attempt to improve the integration of natural resource conservation issues with development plans. These strategies are a way to set priorities within a country and to offer opportunities to mobilize local expertise and to develop a broad base of communication between those involved in conservation and in development. As conservation strategies are developed and refined, they become a source of information for use in national planning and a way of identifying key projects that contribute to national or local development while enhancing environmental quality.

Other projects include the establishment of laboratories in West Africa and the Caribbean for monitoring marine pollution; the provision of equipment, experts and training on methods to improve soil fertility and legume production through biological nitrogen fixation; and training courses on food contamination caused by mycotoxins.

As countries continue to recognize the importance of incorporating environmental issues into development programmes and the demand on natural resources grows, the need for assistance at the country level will also continue to increase. All of these diverse elements contribute to the broadly-based efforts needed to develop integrated, sustainable agriculture in the coming years.

Agricultural Marketing and Development

During the early 1980s, agricultural policy attention was increasingly focused on the need to maintain adequate production incentives and marketing efficiency as farming systems became more intensified. This section highlights some marketing issues such as infrastructure, policies, management and operations.

Marketing infrastructure

FAO's (1981) study, Agriculture: Toward 2000, examined the implications of approximately doubling food and agricultural production in developing countries between 1980 and the end of this century. It was estimated that marketed production in these countries would have to be more than trebled, rising from 35% of total production in 1980 to 54% by the year 2000. This, in turn, implies the need for massive investment in marketing infrastructure. Gross investment requirements for transport, first-stage processing, storage and other marketing facilities were estimated to amount to $530 million, at 1975 prices, during the 20-year period.

Some progress has been made in this area in the last decade, stimulated by rapid urbanization. But in many cities in Africa and Asia, where marketing infrastructure is already inadequate, food demand will double in ten years, a challenge of such magnitude never faced in the developed countries.15/

The construction of new wholesale markets and supply centres sited and designed to avoid traffic congestion and to facilitate better handling methods and organization are among the ways of improving food supply systems in metropolitan centres. The promotion of vertical links along the marketing channels to reduce the costs arising from small-scale independent operations and uncertainties regarding supplies and outlets is also needed. Such links are gradually being achieved by (i) direct integration of successive enterprises; (ii) voluntary grouping; (iii) vertical coordination of marketing activities; (iv) public provision of services to support those engaged in food distribution, including short- and long-term credit; (v) technical and business advisory services, as well as price and outlook information services; and (vi) provision of practical training programmes adapted to the requirements of managers and staff of food distribution enterprises.

Expansion of wholesale and retail markets in pace with population growth is essential, and there must be incentives for those concerned to make the necessary investments. Central government interest is increasing but, as suggested below, policies applied are too often ill-informed, arbitrary, or of an ad hoc character and, hence, negative in effect.

Although considerable progress has been made in some countries by the early 1980s in the improvement of rural marketing infrastructure, in others, particularly in Africa, there are still many important farming

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15/ See FAO, The State of Food and Agriculture 1984, "Urbanization, Agriculture and Food Systems", Rome, 1985.

areas with poor facilities. They face difficulties even in maintaining their existing weak infrastructure such as roads, telephone systems and transport, which have deteriorated in some rural areas.

Marketing policies

In recent years, there has been a perceptible shift in the attitude of many governments in developing countries towards relaxing their hold over agricultural marketing systems, particularly in Africa where government intervention in agricultural marketing has been more common. Governments are recognizing that current policies need to be reviewed to enhance operational efficiency and lower costs, while providing better services to producers and consumers alike. In particular, many countries have found it extremely difficult to control the efficiency and effectiveness of parastatal organizations under monopoly market conditions.

The following typical points stand out from a review of food marketing policies and their implementation in Africa:

- The rigid controls on producer prices, marketing margins and retail prices, opening and closing dates of official agricultural campaigns, and the compulsory declaration of purchases and sales to private merchants;

- The extreme variability of policies affecting official and private marketing agents, the latter often being alternatively authorized and prohibited; and

- The poor and erratic performance of official marketing agencies with regard to volumes of produce bought, especially staple foods. In some years, when market prices are high, the agency will buy virtually no produce because its prices are set too low. In good years, however, its relatively high buying prices will attract virtually all the produce available and stock financing will emerge as a problem as well as the provision of stores.

A trend towards liberalization and private trading makes little practical sense, however, if official pricing and marketing margins do not even cover the cost of services to be provided by the trade. Official ignorance or non-acceptance of the true cost of marketing frequently leads to high financial deficits for state trading agencies. Even now, few governments in developing countries have a specialized marketing department or service that, in principle, should be responsible for sorting out problems in this area. Recently, governments facing particularly difficult trading conditions have recognized the importance and complexity of the entire agricultural marketing system. In Africa, for instance, the Governments of Guinea, the Côte d'Ivoire, Mali and Zaire are considering or have taken the decision to withdraw from direct participation in marketing and to establish instead specialized market facilitating departments (see Box 1-9).

Marketing management and operations

Since the early 1980s FAO has been giving particular attention to staff training to improve the managerial and physical handling efficiency of food marketing. Some important recent contributions have been management support to the Nepal Food Corporation, a stock control information system for the National Agricultural Marketing Board (NAMBOARD) in Zambia, fruit and vegetable marketing management in China, and training in fruit and vegetable post-harvest handling in several other Asian countries.

BOX 1-9

REFORMS IN AGRICULTURAL MARKETING: EXAMPLES FROM ZAIRE AND SENEGAL

A FAO/UNDP project in Zaire has been assisting the government since 1981 with establishing and operating a marketing, price and credit service (Direction des Marches, Prix et Credits de Campagne or DMPC), within the Ministry of Agriculture and the Rural Development Department. This service was set up also to help the government reformulate and implement its agricultural marketing policy. The policy, as regards the staple food sector, is based on trade liberalization to the extent that even national food crop marketing boards were dismantled. The new marketing policy also promotes and encourages private trade participation in the supply of consumer goods and agricultural inputs to farmers and the marketing of their output. The role of the DMPC currently consists in securing:

- Regular consultation and collaboration with all major operators involved in the assembling of basic data (supply, demand, costs and prices) to assist in preparing the marketing distribution campaign;

- The formulation of measures to improve the efficiency of the marketing system for major food staples (including access to marketing credit, financing of investment in transport, storage, processing facilities, feeder-road maintenance, etc.); and

- The supervision and evaluation of marketing campaigns, and the formulation and follow-up of improvement measures for future operations.

The Government of Senegal is also undertaking a major revision of its cereal policies, particularly with regard to marketing aspects. On the institutional side, a study is being undertaken on centralizing and strengthening two agencies in charge of monitoring food security (Commissariat à la Securite Alimentaire) and price stabilization (Caisse de Peréquation et de Stabilisation des Prix). The new structure is expected to function in free competition with the private sector. Official prices are to be abolished and a more flexible system of floor prices are to be established instead.

One major project under study in Senegal is the reorientation and coordination of large private enterprises specializing in groundnut marketing, which would be merged into a consortium that would guarantee the purchase of cereals in local markets. This consortium would benefit from special credit facilities for the buying of cereals at floor prices during the harvest period and the sale in urban markets during periods of relative scarcity.

A key political issue to be faced by the new food security and price stabilization institution in Senegal concerns the external sector. In recent years, imports of large quantities of rice (which account for approximately 90% of total cereal consumption in the capital city, Dakar) have been the key to maintaining consumer prices in urban centres at socially acceptable levels. It is now debated to what extent such massive commercial and concessional imports can be substituted by domestic purchases of local food for urban markets.

Special efforts are also being made to support technical cooperation among developing countries (TCDC) through, for example, the Asian Food Marketing Associations and the Latin American Network of Food Markets.

In 1984, FAO also conducted food and agricultural marketing manpower surveys and national workshops in nine African countries. As follow-up action, a ten-year development plan for food marketing manpower is being drafted in Ethiopia, and similar work is being planned in Tanzania. A systematic training programme in this area has now been developed by FAO and is being applied in a growing number of countries (see Box 1-10).

Marketing by small farmers and rural women

Small farmers generally and women in particular--who often are the main operators in rural markets--share common problems in marketing their agricultural produce. These include production oriented to consumption rather than to markets, small marketable surpluses, ineffective marketing practices, lack of facilities and credit, and poor group action. This important area is now receiving greater attention from governments and international agencies, with increased emphasis being placed on better marketing extension services.

For example, in 1984 FAO introduced in nine Asian countries innovative village-level training programmes, emphasizing self-help by learning from village-level "success stories" of small-farmer marketing groups, while similar training programmes for rural women were undertaken in 15 African countries.

Input marketing

Input marketing also plays a vital role. The ready availability of reasonably priced inputs such as fertilizers, at the right time and in the right form and place, can be a strong incentive to farmers to increase production.

Input marketing strategies should vary according to the stages of development of input use in a given country or regions within a country. For fertilizer use, there are essentially three stages, which can be classified as "introductory", "take-off" and "maturity" stages. Emphasis on four policy variables (physical availability, farmers' awareness, credit availability and the economics of fertilizer use) should be consistent with the developmental stage of input use prevailing.

There is a wide variety of input marketing systems in developing countries. These range from single channel, state monopolies to competitive systems involving both public and private sectors at different stages, to entirely uncontrolled enterprises operating within the private sector. The former tend to be more common in Africa, and the latter in the market economies of Asia and Latin America, where consumption levels are generally higher. Governments frequently aim to control purchasing and wholesale distribution in order to manage fertilizer supply in accordance with national agricultural development policy. Experience shows, however, that this objective can be achieved without such government involvement. It is also increasingly recognized that private sector retailers have an important role to play and should be encouraged to do so.

The opportunity for competitive marketing systems to operate effectively depends mainly on the pricing structure. Where pan-territorial pricing is in force, and transport and distribution costs are averaged over all users, private dealers will have little incentive to promote sales in remote areas. If parastatals and cooperatives do so, it is usually at a high cost, which is subsequently covered by government subsidies. Under these circumstances, little attention is generally paid to the specific cost elements, which can often be reduced under more competitive systems.

FAO has placed much emphasis in recent years on assisting input marketing organizations and policy-makers develop an understanding of marketing costs and the need for their control. In Asia, this was done in cooperation with the Fertilizer Advisory Development Information Network for Asia and the Pacific (FADINAP), under the auspices of FAO, UNIDO and ESCAP. Surveys on fertilizer costs and margins have been carried out in Africa and Asia and training seminars have been held in several countries in both regions. Attention is being paid to marketing efficiency as it relates to policy issues (e.g., foreign exchange allocation, and transport and pricing policies) and to the development of skills in marketing management and distribution logistics.

BOX 1-10

TRAINING IN AGRICULTURE AND FOOD MARKETING

Target groups and subject areas for training are represented in this systematic programme outline that has been developed by FAO to help countries set up training programmes

Target group	Subjects to be included and type of training
Personnel employed in:	I. PRE-SERVICE TRAINING AT UNIVERSITY LEVEL AND IN-SERVICE SEMINARS AND WORKSHOPS
1. Government marketing facilities and regulating services: market research, market information, trade, including policies, feasibility studies and commercial advice	1. Market development concepts, international trade policies, market research methods, economic analysis, market price policy and forecasts, market intervention, feasibility studies, project formulation
2. Large-scale marketing enterprises (agro-industry): state corporations, cooperatives, private enterprises (wholesale, retail, processing, storage, input supplies)	2. Agro-business management, including financing, marketing techniques, sales promotion, international trade, project formulation
3. Market support agencies: development and financing corporations, consulting firms, agricultural allied industries	3. Market principles, feasibility studies, analysis and planning
4. Market training institutions: universities, other training institutions	4. Market development concepts, principles, research techniques, training principles and techniques
5. Large-scale markets: wholesale markets	5. Market analysis, regulation, management, standardized grading, information, extension

	II. TECHNICAL TRAINING AT INTERMEDIATE LEVEL: SHORT COURSES, WORKSHOPS AND SEMINARS
1. Farm leaders and personnel in medium- and small-scale marketing: market extension officers, farmer cooperatives, specialized commodityhandling personnel, those responsible for assembly, transport, processing, storage, selling	1. Market principles, produce and input marketing, commodity handling methods, record-keeping, agro-business management, market promotion, planning and financing
2. Personnel in public marketing institutions: inspection service for local and export marketing. Marketing managers of medium- and small-scale markets (assembly, wholesale, retail markets, including livestock markets)	2. Marketing principles, regulations and promotion techniques, record-keeping, extension and advisory techniques, produce handling techniques, including grading and sorting, produce and import marketing, grading and packaging
3. Agricultural extension personnel:	3. Marketing principles, planning, information, commodity handling methods
	III. VOCATIONAL TRAINING BY WORKSHOPS OR SHORT-COURSES
1. Small-scale business and foremen: traders and labour supervisors for assembly, processing, storage and distribution firms, markets and assembly stations	1. Marketing principles, produce handling techniques, pricing, input applications, simple record-keeping
	IV. SHORT-DURATION WORKSHOPS OR FIELD DAYS
1. Farmers, farmer leaders	1. Marketing principles, group marketing, produce handling and storage techniques, use of market information and production planning

ANNEX 1-1. MAJOR ECONOMIC, MARKET AND INSTITUTIONAL EVENTS RELATED TO FOOD AND AGRICULTURE, 1980-85

	Economic and market events	Institutional developments		
		Natural & human resources	Trade & development	Food security
1980	Pace of industrial output and volume of merchandise trade slows significantly but inflation rises. The onset of world economic recession. No increase in agricultural output (a decline of 1.6% in developed countries). Sharp increase in cereal trade and prices. Decline in cereal stocks.	World conservation strategy is launched. UN World Water Decade initiated. World Conference on the UN Decade for Women.	International Development Strategy (IDS) for 3rd UN Development Decade. Multifert (Panama) formed under auspices of Latin American Economic System (SELA) to promote fertilizer trade within member countries.	OAU's Special Economic Summit adopts Lagos Plan of Action. Food Aid Convention enlarged to include binding commitments of 7.6 million tons of cereals a year. Establishment of ASEAN Emergency Rice Reserve.
1981	Output growth still depressed in developed countries. Recession also begins to affect developing country output. Inflation eases in developed (10%), but not in developing countries. Agricultural output recovers (3.8%) particularly in developed countries. Further but less marked increases in cereal trade and prices. Cereal stocks decline further to 16% of consumption.	UN Conference on New and Renewable Sources of Energy (Nairobi).	UN Conference on LDCs (Paris) adopts a Substantial New Programme of Action for the 1980s and calls for expansion for the Generalized System of Preferences. North-South Summit at Cancún Conference devises base for future Multilateral Trade Negotiations (MTN). Caracas Programme of Action annually reviews, monitors and coordinates implementation of Economic Cooperation Among Developing Countries (ECDC).	IMF's Compensatory Financing Facility for cereal imports begins operation. Committee on World Food Security (CFS) adopts agenda for consultations and possible action to deal with acute and large scale food shortages. The IEFR reaches its annual target of 500 000 tons of cereals for the first time.

ANNEX 1-1 (cont.)

	Institutional developments		
Economic and market events	Natural & human resources	Trade & development	Food security
1982 Economic recession at its deepest (zero growth in industrial output and reduction in volume of trade). Continued easing of inflation, including in developing countries. Growth in agricultural output reduced (2.6%) but above long-term average. Cereal imports of developing countries stagnate, stocks recover (18% of consumption). Indebtedness of developing countries sharply worsens. World export prices of agricultural products 16% lower than in 1981.	Concluding session and adoption of the UN Convention on the Law of the Sea signed by 119 States.	Versailles Summit aims at monetary stability. GATT sets up Committee on Trade in Agriculture with Work Programme for the 1980s on safeguards, dispute settlement, rules and activities re LDCs, tropical products, quantitative restrictions, structural adjustment and trade policy.	FAO Council establishes Regional Commission on Food Security for Asia and the Pacific.
1983 Slow economic recovery in terms of output and trade. Inflation falls below 5% in industrial countries but quickens to 44% in non-oil developing countries. Sharp decline in agricultural output in developed countries. Cereal imports decline, stocks increase to 19% of consumption and cereal prices ease. Indebtedness problem of non-oil developing countries at its worst (debt-service ratio 150%). Widespread drought causes large number of food emergency situations in southern and western Africa. The value of world exports of agricultural, fishery and forestry products decreased for the third year.	First review of Programme of Action of World Conference on Agrarian Reform and Rural Development (WCARRD). FAO Expert Consultation on Women in Food Production.	UNCTAD VI (Belgrade) addresses the problems of protectionism and structural adjustment in world trade; gives further support to ECDC, particularly Global System of Trade Preferences (GSTP); reaffirms support for Common Fund for Commodities. Half-way stage in implementing Tokyo Round of tariff reductions. International Wheat Agreement extended for three years but without economic provisions.	Food Aid Convention is renewed for a further three years. CFS revises food security concept. Considerable increases in food and pledges to disaster-stricken African countries. FAO/World Food Programme (WFP) Special Task Force established to monitor food situation in African countries. Establishment of the Action Committee on Regional Food Security (CASAR) within the framework of Latin American Economic System (SELA).

ANNEX 1-1 (cont.)

	Institutional developments		
Economic and market events	Natural & human resources	Trade & development	Food security
1984 Economic recovery gathers pace but uneven and uncertain. World output expands by 5.6%, the best performance in eight years. Agricultural exports also perform well, advancing by 7%. Inflation rates stabilize but interest rates remain high. Debt problems remain acute. More optimistic outlook on world food production, up by more than 4%. However, worsening food situation in eastern Africa and the Sahel. Major food crisis in Ethiopia. Food production increases are concentrated in the United States, Western Europe, and some of the larger developing countries such as China and India.	FAO World Conference on Fisheries Management and Development (Rome) adopts five Programmes of Action - fishery planning, management and development; small scale fisheries; aquaculture; international trade; and fish as food. The International Conference on Population reviews fertility and the family; population distribution migration and development; population, resources, environment and development; mortality and health policies. By December 1984, 159 states had signed the UN Convention on the Law of the Sea.	Third Lomé Convention negotiated between the EEC and 64 ACP states to run for five years. Little real increase in transfer of resources to ACP countries. List of products covered by STABEX is extended however. UNCTAD achieves consensus on a programme of work on protectionism and structural adjustment. China becomes an official observer at GATT. International Agreement on Jute, Jute Products and Timber enter into force provisionally. Agreement on Natural Rubber extended for two years. Quito Declaration, adopted at Latin American Economic Conference, sets out new framework on debt and short-term measures.	Interim System of Food Reserves generally supported by the Committee on World Food Security (CFS). At FAO Regional Conference for Africa, Ministers of Food and Agriculture of African countries adopt a set of policy measures (Harare Declaration) to give higher priority to agriculture by adopting more effective policies for food and agricultural development and increasing efficiency of resource use in government institutions.
1985 Continuation of global recovery in output and trade, though at a lower rate than in 1984. Inflation rates continue to slow down in industrial countries, but accelerate in developing countries. Worsened debt situation of developing countries.	International Year of the Forest. Ninth World Forestry Congress (Mexico City) on the theme of Forest Resources in the Integral Development of Society.	Bonn Economic Summit of seven major industrial countries strongly endorses new GATT Round of MTN to begin in 1986.	Cereal food aid shipments during 1984/85 total almost 12.5 million tons, surpassing the target of 10 million tons for the

ANNEX 1-1 (cont.)

	Economic and market events	Institutional developments: Natural & human resources	Trade & development	Food security
1985 (cont.)	Expansion in food and agricultural output (1.4%) less pronounced than in 1984 but better distributed among developing regions. Stagnation in agricultural trade. Ample stocks and depressed prices for most agricultural commodities. Sharp rise in coffee prices at end of year.	The FAO Conference approves an International Code of Conduct on Distribution and Use of Pesticides. Conference (Nairobi) reviews and appraises the International Women's Decade which ended July 1985. 157 countries sign "Forward-Looking Strategies" stressing inter alia the WCARRD recommendations on rural women.	EEC extends its STABEX programme to cover 36 LDCs, as opposed to the 27 it has covered up to now. Tropical Timber Agreement ratified. Establishment of Association of State Trading Organizations (ASTRO) of Third World countries. The Caribbean Community (CARICOM) (Kingston) agrees to ensure free trade in 54 agricultural commodities among member states. International Agreement on Cocoa extended until 30 September 1986.	first time since it was set by the World Food Conference in 1974. CFA adopts WFP recommendations to ensure food aid effectively supports national development plans and programmes of recipient countries. The Compact on World Food Security receives support from the majority of members during the 23rd Session of FAO Conference in November. FAO develops Agriculture Rehabilitation Programme for Africa (ARPA) in 25 drought-affected countries. FAO Conference reaffirms its support for the Global Information and Early Warning System and endorses plans to strengthen it.

II. Regional Review

1. AFRICA 1/

Introduction

In the first half of the 1980s--two decades after most African countries gained independence--Africa economically remains extremely weak. Some progress was made in the 1960s and early 1970s, but since then the growth rate of national income (as measured by GDP) has faltered. The Lagos Plan of Action of 1980 called for greater economic and food self-sufficiency for African countries, but progress in the agricultural sector seriously lags behind the Plan's optimistic targets.2/ Efforts to expand or diversify agricultural production were frustrated by external factors such as the oil price rise of 1979-80, the world recession of the early 1980s that contributed to reduced export prices for African goods, and the difficulty of competing in increasingly protected and competitive markets. Furthermore, internal constraints, particularly in the area of development policy, have not been sufficiently addressed.

Most African countries continue to experience severe difficulties in the mid-1980s. Drought devasted almost half of the continent between late 1982 and 1985 bringing immense suffering and hardship to some 25 African countries. Payments also became due on loans that were incurred in the previous decade in order to boost agricultural and industrial production, but which frequently failed to generate either the profits or foreign exchange anticipated.

As a consequence, the shortage of foreign exchange--a chronic problem for most African countries--has become even more critical. A fear now shared by many African governments is that their destinies are controlled by natural and global economic forces outside their control. The Declaration of Heads of African States, at the 21st Summit of the Organization of African Unity (OAU) in July 1985, was an expression of the frustration of this situation, but also the political will to overcome it. The focus is now on the agricultural sector.

General Macroeconomic Performance

The economic performance of African developing countries, with a few exceptions, was almost disastrous in the early 1980s. The annual real growth rate of per caput GDP was about 1% in the 1970s, but this was mainly due to the fast growing oil-exporting economies of northwestern and western Africa (Table 2-1a, 2-1b). In the opening years of the 1980s, real GDP for the region as a whole, failed to grow at all and so declined by more than 6% in per caput terms, losing in two years much of the growth of the previous decade. Although total output improved in 1984 and 1985, it has not compensated for the earlier losses nor kept pace with the 3.2% annual increase in population growth during the first half of the decade.

1/ "Africa," for purposes of this discussion, includes all developing countries on the continent, except Egypt, Libya Arab Jamahiriya and the Sudan, which are included in the Near East region. (Note: Tables 2-1a, 2-1b also omit some smaller African countries).

2/ The Organization of African Unity (OAU), "Lagos Plan of Action for the Economic Development of Africa, 1980-2000," Geneva, 1981.

TABLE 2-1a. AFRICA: SELECTED INDICATORS

NORTH, WEST AND CENTRAL AFRICA

COUNTRY AND COUNTRY GROUP	POPULATION NOS (THOUS) 1984	POPULATION GROWTH RATE (PERCENT) 71-80	POPULATION GROWTH RATE (PERCENT) 83-84	GNP PCAP ($) 1982	GDP LOC CONSTANT CURRENCY GROWTH RATE 71-80	GDP LOC CONSTANT CURRENCY GROWTH RATE 80-82	TOT-EXP GROWTH RATE (PERCENT) 71-80	TOT-IMP GROWTH RATE (PERCENT) 71-80	TOT-EXP GROWTH RATE (PERCENT) 80-84	TOT-IMP GROWTH RATE (PERCENT) 80-84
TUNISIA	7042	2.31	2.38	1380	7.14	2.96	10.23	12.27	-2.27	0.95
ALGERIA	21272	3.10	3.38	2350	7.39	3.30	16.46	11.35	-1.25	2.21
MOROCCO	22848	2.75	3.34	860	5.72	2.11	0.85	7.11	-1.22	-1.29
N.W.AFRICA	**51162**	**2.83**	**3.22**	**1551**	**6.81**	**2.86**	**12.19**	**10.39**	**-1.37**	**1.19**
CAPE VERDE	317	1.70	1.28	370	2.44	-1.58	-7.18	-2.73	11.15	9.32
NIGER	5940	2.51	2.91	300	3.29	2.36	17.80	14.23	-9.73	-9.43
GAMBIA	630	2.23	1.94	360	4.88	5.75	-1.55	9.97	11.54	-5.08
SENEGAL	6352	3.64	2.57	490	2.17	6.54	0.91	3.33	5.71	5.90
MAURITANIA	1832	2.72	2.98	480	1.35	6.21	-8.44	3.08	15.22	-4.83
BURKINA FASO	6768	1.98	2.44	210	3.73	5.36	3.25	7.77	-5.19	-0.20
MALI	7825	2.10	2.91	170	5.15	0.72	1.81	7.20	6.44	-0.88
CHAD	4901	2.06	2.34	80	-1.74	-14.06	3.14	-6.59	6.91	16.63
W.A.SAHEL	**34565**	**2.44**	**2.64**	**268**	**2.39**	**2.37**	**2.49**	**5.20**	**2.68**	**0.59**
SÃO TOMÉ+PRN.	94	1.38	2.17	390	1.42	-4.07	3.20	-2.43	9.37	10.96
TOGO	2838	2.28	2.98	350	3.39	0.67	7.26	12.33	-9.99	-9.70
BENIN	3890	2.53	2.94	330	3.58	3.75	-9.43	8.89	10.11	11.27
SIERRA LEONE	3536	1.52	1.84	390	1.83	0.54	-6.46	-1.02	-10.35	-18.45
GUINEA	5301	2.11	2.40	300	4.39	1.19	12.64	-0.12	1.56	5.68
GUINEA BIS.	875	4.63	1.39	220	3.44	1.83	10.21	-7.28	-0.04	-7.20
GHANA	13044	2.92	3.31	340	-0.47	-4.53	0.10	-0.23	-5.57	-8.86
EQ.GUINEA	383	1.91	2.13	...	-1.90	...	-18.15	-19.56	21.74	24.13
W.A.LOW-INC.	**29961**	**2.51**	**2.82**	**335**	**1.11**	**-2.12**	**0.68**	**1.97**	**-4.08**	**-1.81**
CÔTE D'IVOIRE	9474	4.05	3.42	910	6.43	-0.21	8.08	9.82	-3.37	-7.75
CONGO	1695	2.48	2.67	1370	4.20	21.78	16.82	4.14	8.78	30.43
LIBERIA	2123	3.23	3.21	490	1.79	-3.28	-4.00	1.27	-3.81	-1.30
GABON	1146	1.24	1.69	4840	4.32	-0.81	14.70	9.44	-2.23	7.86
NIGERIA	92037	3.50	3.39	850	4.58	-4.45	14.92	17.09	-10.66	0.60
CAMEROON	9467	2.36	2.59	880	6.59	9.54	7.03	7.90	1.98	-0.82
W.A.MID-INC.	**115942**	**3.39**	**3.29**	**899**	**4.80**	**-2.70**	**12.71**	**13.71**	**-7.86**	**0.40**
BURUNDI	4503	1.56	2.88	240	3.85	5.98	4.24	7.87	15.12	8.78
ZAIRE	32084	2.82	3.00	180	-0.84	0.71	-5.34	-10.78	-19.93	9.77
CENT.AFR.REP.	2508	2.03	2.37	310	2.09	-0.96	-1.50	-4.84	13.37	19.26
RWANDA	5903	3.30	3.56	260	5.57	5.34	5.14	12.62	7.81	5.25
CENT.AFRICA	**44998**	**2.70**	**3.02**	**204**	**0.63**	**1.63**	**-4.32**	**-6.94**	**-12.84**	**9.39**

(CONT.)

(CONT.) TABLE 2-1a.

EASTERN AND SOUTHERN AFRICA

COUNTRY AND COUNTRY GROUP	POPULATION NOS (THOUS) 1984	POPULATION GROWTH RATE (PERCENT) 71-80	POPULATION GROWTH RATE (PERCENT) 83-84	GNP PCAP ($) 1982	GDP LOC CONSTANT CURRENCY GROWTH RATE 71-80	GDP LOC CONSTANT CURRENCY GROWTH RATE 80-82	TOT-EXP GROWTH (PERCENT) 71-80	TOT-IMP GROWTH (PERCENT) 71-80	TOT-EXP RATE (PERCENT) 80-84	TOT-IMP RATE (PERCENT) 80-84
TANZANIA	21710	3.40	3.61	270	4.77	-1.99	-5.80	-0.62	-4.65	-3.31
UGANDA	15150	3.02	3.59	240	-2.93	7.00	-7.70	-8.54	19.75	3.33
ETHIOPIA	35420	2.26	2.80	140	2.41	1.91	-1.53	2.10	5.21	12.87
KENYA	19761	4.04	4.23	390	5.39	3.56	3.22	3.28	-2.98	-8.72
SOMALIA	5423	5.68	2.92	290	4.12	1.41	0.16	4.57	5.71	8.46
DJIBOUTI	354	7.15	2.61	...	...	...	-10.41	1.63	39.77	5.30
EAST AFRICA	**97818**	**3.14**	**3.39**	**243**	**2.50**	**2.72**	**-1.93**	**0.79**	**1.77**	**-1.19**
MADAGASCAR	9731	2.64	2.85	320	0.59	-5.30	-1.86	0.85	0.56	0.15
MALAWI	6788	2.82	3.35	210	5.66	1.12	1.32	1.93	4.68	-6.19
COMOROS	443	3.83	2.78	340	...	...	-4.15	-3.15	24.51	9.59
NAMIBIA	1507	2.62	2.87	1910	...	...	...	...	...	...
MOZAMBIQUE	13693	4.15	2.87	...	-3.07	-0.27	-15.18	-11.35	-11.35	7.13
S.A.LOW-INC.	**32162**	**3.31**	**2.96**	**411**	**-0.80**	**-1.72**	**-5.37**	**-4.07**	**0.24**	**1.08**
REUNION	555	1.74	1.28	4000	...	...	-0.88	4.24	-6.06	5.96
MAURITIUS	1031	1.27	1.78	1230	6.42	5.88	4.49	8.06	3.99	-2.47
SWAZILAND	630	2.75	3.11	930	3.88	5.26	1.57	11.56	-1.65	2.25
LESOTHO	1481	2.33	2.56	510	9.18	3.88	7.41	13.77	-18.47	-1.72
SEYCHELLES	74	2.26	4.23	2370	...	...	15.89	6.70	11.41	1.85
BOTSWANA	1042	3.85	3.48	890	11.80	4.32	13.23	8.17	16.69	6.14
ZAMBIA	6445	3.04	3.42	640	0.69	1.26	-8.49	-8.17	-9.42	-2.98
ZIMBABWE	8461	3.33	3.59	850	1.70	7.51	-2.85	-4.36	-0.52	-0.31
ANGOLA	8540	3.35	2.41	...	-6.97	-3.67	-3.26	-2.71	4.05	7.65
S.A.MID-INC.	**28259**	**3.09**	**3.01**	**878**	**0.20**	**2.80**	**-3.18**	**-0.26**	**0.95**	**2.48**
AFRICA	**434867**	**3.03**	**3.15**	**632**	**3.96**	**0.01**	**6.88**	**6.60**	**-4.12**	**0.84**

NOTE: -NOT ALL AFRICAN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.

TABLE 2-1b. AFRICA: SELECTED INDICATORS

NORTH, WEST AND CENTRAL AFRICA

COUNTRY AND COUNTRY GROUP	NET AGPROD GROWTH RATE (PERCENT) 71-80	80-84	AGRIC.EXPORTS DEFL VALUE GROWTH RATE 71-80	80-84	NET FOOD PROD GROWTH RATE (PERCENT) 71-80	80-84	FOOD IMPVOL GROWTH RATE (PERCENT) 71-80	80-84	AGRLAND PCAGLAB GRORATE* (PERCENT) 80-83	AGRIC LABOUR GROWTH RATE (PERCENT) 71-80	83-84	PRODUCTIVITY. LABOUR GROWTH RATE (PERCENT) 71-80	80-84	LAND (PERCENT) 71-80	80-83
TUNISIA	2.27	-0.41	-8.66	-1.39	2.14	-0.42	9.50	6.31	-0.31	0.51	0.21	2.37	-0.31	2.21	-0.32
ALGERIA	1.39	0.56	-13.88	-21.61	1.38	0.17	15.12	5.40	-0.99	0.94	1.04	1.13	0.53	1.16	-1.29
MOROCCO	1.30	1.43	-5.93	-14.31	1.36	1.36	7.13	2.52	-0.43	1.78	2.35	-0.39	-1.37	0.88	-1.15
N.W.AFRICA	**1.50**	**0.84**	**-8.31**	**-12.64**	**1.50**	**0.68**	**11.97**	**4.60**	**-0.64**	**1.30**	**1.58**	**0.54**	**-0.50**	**1.31**	**-1.00**
CAPE VERDE	2.89	-6.90	-2.96	-16.64	2.92	-7.07	4.64	1.87	-1.12	1.53	0.96	2.52	-5.78	4.10	-10.27
NIGER	5.09	-2.41	-6.46	-1.24	5.11	-2.40	9.07	-5.49	-1.65	1.65	1.83	3.22	-4.02	1.11	0.07
GAMBIA	-3.55	1.83	-5.14	8.40	-3.58	1.83	16.35	22.63	0.08	1.05	0.79	-4.38	2.26	-4.92	5.67
SENEGAL	0.14	2.08	-3.51	28.10	0.13	1.74	-0.79	12.22	-1.29	2.20	1.09	-1.41	0.00	-0.21	1.83
MAURITANIA	1.68	-1.96	-3.85	2.54	1.68	-1.96	7.65	9.12	-1.83	1.92	1.91	-0.23	-3.28	4.24	-3.16
BURKINA FASO	2.53	0.45	1.26	-1.47	2.25	0.34	8.20	-0.34	-0.22	0.83	1.20	1.65	-0.51	0.93	0.41
MALI	4.06	0.82	4.36	5.20	3.66	0.81	-6.50	37.07	-1.60	1.08	1.83	2.88	-1.10	1.61	2.29
CHAD	2.15	-0.66	0.11	7.37	2.48	-1.46	-11.85	44.82	-0.96	1.11	1.08	0.92	-1.59	0.85	1.71
W.A.SAHEL	**2.43**	**0.07**	**-1.22**	**7.66**	**2.37**	**-0.14**	**1.74**	**13.74**	**-1.12**	**1.30**	**1.45**	**1.47**	**-1.26**	**0.66**	**1.28**
SÃO TOMÉ+PRN.	-4.09	2.47	0.01	-9.09	-4.08	2.49	5.69	-3.12	-1.49	0.51	1.05	-4.56	1.04	-4.22	-0.66
TOGO	1.58	-0.72	0.19	-3.57	1.52	-0.85	13.46	30.56	-1.15	0.77	1.46	0.91	-2.04	1.50	-1.18
BENIN	2.43	3.41	-13.12	11.47	2.85	2.88	2.86	2.38	-1.21	1.05	1.52	1.75	1.65	1.76	0.02
SIERRA LEONE	1.22	0.02	2.54	0.17	1.19	0.33	2.17	-11.31	0.12	-0.11	0.09	1.40	0.07	-0.70	3.85
GUINEA	0.68	2.71	-7.55	-0.54	0.66	2.76	9.78	-0.60	-0.89	0.84	1.07	-0.19	1.54	0.65	3.31
GUINEA BIS.	1.78	8.54	4.71	17.39	1.79	8.55	-1.68	5.76	-0.65	3.43	0.10	-1.44	7.68	1.53	8.92
GHANA	-1.74	1.22	0.91	-17.26	-1.75	1.47	-1.87	5.08	-1.14	0.97	1.29	-2.60	-0.16	-2.24	-2.20
EQ.GUINEA	...	...	-16.41	16.45	...	...	-0.06	-0.08	-0.94	0.82	0.94	...	...	...	...
W.A.LOW-INC.	**-0.43**	**1.54**	**-0.89**	**-11.06**	**-0.41**	**1.67**	**2.31**	**3.21**	**-0.90**	**0.85**	**1.08**	**-0.49**	**0.56**	**-0.07**	**0.68**
CÔTE D'IVOIRE	5.10	-0.80	9.55	-0.75	6.16	1.68	5.84	1.11	-1.19	2.69	1.98	2.42	-2.43	0.80	0.56
CONGO	2.22	0.56	-2.80	8.30	2.11	0.58	10.84	15.56	0.26	0.02	0.01	2.17	0.62	1.52	0.89
LIBERIA	2.00	0.86	2.31	-2.90	2.94	1.27	6.28	1.57	-1.44	1.54	1.46	0.48	-0.59	1.82	0.67
GABON	0.15	2.19	11.01	-12.10	0.16	2.17	18.03	12.57	-0.27	0.07	0.34	0.13	1.92	-4.74	1.87
NIGERIA	2.83	0.93	-6.24	-2.99	2.88	0.95	24.38	...	-0.76	1.18	0.84	1.58	0.16	2.58	0.38
CAMEROON	1.98	0.50	4.98	-0.88	1.97	0.60	5.54	8.23	-0.99	1.19	1.18	0.86	-0.74	0.39	-0.80
W.A.MID-INC.	**2.86**	**0.79**	**3.76**	**-1.07**	**2.94**	**0.99**	**19.13**	**4.81**	**-0.85**	**1.36**	**1.03**	**1.55**	**-0.28**	**1.99**	**0.24**
BURUNDI	2.16	2.47	4.60	15.03	2.30	2.68	9.39	5.84	-1.28	0.30	1.62	1.90	0.90	1.08	4.11
ZAIRE	1.57	3.35	-4.48	1.84	1.64	3.30	-3.54	3.61	-0.68	1.48	1.48	0.12	1.86	0.99	3.45
CENT.AFR.REP.	1.68	0.74	-3.67	7.68	1.82	1.02	-1.12	11.88	-0.60	1.25	1.17	0.42	-0.34	1.05	0.04
RWANDA	4.97	3.06	8.72	5.94	4.78	2.96	14.27	4.94	-1.38	2.52	2.55	2.45	0.50	2.02	5.39
CENT.AFRICA	**1.82**	**3.20**	**-1.19**	**5.63**	**1.87**	**3.19**	**-1.76**	**4.49**	**-0.86**	**1.49**	**1.65**	**0.74**	**1.35**	**1.11**	**3.07**

(CONT.)

(CONT.) TABLE 2-1b.

EASTERN AND SOUTHERN AFRICA

COUNTRY AND COUNTRY GROUP	NET AGPROD GROWTH RATE (PERCENT) 71-80	80-84	AGRIC.EXPORTS DEFL VALUE GROWTH RATE 71-80	80-84	NET FOOD PROD GROWTH RATE (PERCENT) 71-80	80-84	FOOD IMPVOL GROWTH RATE (PERCENT) 71-80	80-84	AGRLAND PCAGLAB GRORATE* (PERCENT) 80-83	AGRIC LABOUR GROWTH RATE (PERCENT) 71-80	83-84	PRODUCTIVITY LABOUR GROWTH RATE (PERCENT) 71-80	80-84	LAND GROWTH RATE (PERCENT) 71-80	80-83
TANZANIA	4.11	-1.17	-3.87	-0.00	5.79	-0.33	2.09	-4.41	-1.98	2.08	2.24	2.33	-3.60	3.73	-2.12
UGANDA	0.18	10.14	-6.02	11.21	0.69	10.01	-7.38	-23.55	1.06	1.74	2.27	-3.33	8.21	-3.02	8.81
ETHIOPIA	2.00	-0.34	-1.45	4.04	2.03	-0.98	23.29	17.29	-1.02	1.03	1.45	0.97	-1.56	1.81	1.34
KENYA	2.92	3.41	4.30	7.46	2.09	3.51	-0.18	2.33	-2.24	2.62	2.86	0.33	0.44	2.09	5.23
SOMALIA	0.93	0.20	1.03	-0.09	0.93	0.19	11.35	4.73	-3.02	5.11	1.48	-3.91	-2.22	0.59	1.17
DJIBOUTI	...	...	4.67	...	...	...	12.21	23.37	...	5.45	-0.59	...	...	...	...
EAST AFRICA	**1.69**	**4.34**	**-1.46**	**5.48**	**1.98**	**4.56**	**6.31**	**2.11**	**-1.20**	**1.83**	**2.00**	**0.28**	**-0.15**	**1.18**	**2.50**
MADAGASCAR	1.35	2.35	-0.72	0.38	1.38	2.48	6.74	5.82	-1.07	1.04	1.23	0.36	1.21	-1.60	1.94
MALAWI	2.38	2.90	1.62	8.29	1.51	2.49	-2.75	-8.93	-1.49	1.61	2.00	0.75	1.00	1.76	3.58
COMOROS	2.37	1.50	-8.14	43.10	2.56	1.42	2.07	12.13	-1.76	2.57	1.81	-0.17	-0.62	2.33	1.06
NAMIBIA	-1.32	-2.20	-12.66	-10.93	-1.51	-1.70	-1.29	2.24	-0.44	0.46	0.75	-1.80	-2.83	-1.43	-2.40
MOZAMBIQUE	-0.98	-1.69	-18.14	-13.95	-0.48	-1.30	10.44	5.14	-0.67	1.80	0.30	-2.75	-2.15	-1.20	-1.75
S.A.LOW-INC.	**0.60**	**0.83**	**-6.11**	**1.18**	**0.59**	**0.93**	**6.49**	**3.93**	**-1.04**	**1.43**	**1.11**	**-0.60**	**-0.04**	**-0.55**	**0.76**
REUNION	3.50	1.51	-1.27	-12.95	3.81	1.44	5.38	4.14	0.65	0.15	0.15	2.53	0.24	2.99	-2.52
MAURITIUS	-0.38	3.00	0.68	0.25	-0.41	2.95	5.73	-1.42	-1.24	0.85	1.05	-1.17	1.73	-0.53	6.68
SWAZILAND	4.28	2.76	4.08	-4.41	3.48	3.33	7.36	-5.46	-10.58	0.94	1.08	3.46	1.71	2.43	14.16
LESOTHO	0.37	-0.31	-8.84	2.44	0.85	-0.27	12.73	3.80	-0.32	0.87	0.95	-0.40	-1.41	3.34	-1.33
SEYCHELLES	...	...	4.11	-15.32	...	...	5.11	-2.17	7.81	0.64	0.99	...	...	...	...
BOTSWANA	-3.51	0.96	-2.47	10.20	-3.55	0.97	15.30	3.68	-1.81	2.82	1.81	-3.88	-1.00	-2.52	3.49
ZAMBIA	2.80	1.84	-11.99	10.98	2.83	1.40	-1.58	-12.71	-1.23	1.39	1.61	1.47	0.05	2.62	-0.06
ZIMBABWE	2.61	-3.72	-3.56	3.16	1.44	-6.98	-12.66	33.24	0.15	1.68	1.94	0.59	-5.45	1.83	-9.79
ANGOLA	-4.23	-0.10	-13.53	-10.10	0.36	0.38	23.78	-0.79	-0.94	1.86	0.83	-5.86	-0.94	-4.17	-0.59
S.A.MID-INC.	**0.78**	**0.03**	**-4.82**	**-1.07**	**1.08**	**-0.51**	**9.70**	**0.26**	**-1.03**	**1.56**	**1.42**	**-0.93**	**-1.80**	**0.10**	**-1.53**
AFRICA	**1.85**	**1.78**	**-1.45**	**-0.33**	**1.96**	**1.82**	**11.10**	**4.72**	**-0.99**	**1.48**	**1.48**	**0.60**	**-0.15**	**1.08**	**0.71**

NOTE: -NOT ALL AFRICAN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.
* AGRICULTURAL LAND PER CAPUT AGRICULTURAL LABOUR FORCE GROWTH RATE.

Between 1980 and 1983, African oil-exporting countries, as a group, also experienced declining economic growth, although this was largely due to the precipitous decline in Nigerian oil revenues.3/

The main reasons for the poor economic performance have been declining industrial and slow-growing agricultural production, weak export earnings and a deepening debt burden. Africa's balance of payments continued to deteriorate during 1980-84. The real value of total exports fell over 4% a year in this period, but although growth in the value of total imports also slowed drastically, it was not sufficient to stop the trade deficit from widening. For many countries, growing debt-service payments have resulted in continued net outflows of foreign exchange.

Forty-three percent of Africa's exports are only from nine countries of northwestern Africa and the middle-income countries of western Africa. During 1971-80, exports from these two areas grew 12-13% a year in real terms. During 1980-84, however, their exports declined 1% and 8%, respectively. Export earnings of Africa's largest oil-exporting countries--Nigeria and Algeria--declined between 1980 and 1984, with price declines offsetting modest increases in production. Other producers of non-agricultural, primary commodities also experienced similar declines in export earnings during the early 1980s, as international demand for raw materials and minerals fell. The decline in Morocco was relatively small (about 1% a year in real terms), but in other countries such as the Niger, Togo, Zaire and Zambia, it was much higher, 9-11%.

Recent trends in the terms of trade of African countries underline their difficulties in achieving any growth in export earnings. The net barter terms of trade for Africa declined 4% a year between 1980 and 1983, showing that export prices fell significantly relative to prices of imports. Preliminary estimates indicate a moderate recovery in export earnings in 1985, but barely enough to offset earlier losses.

The strong dollar and rising real interest rates, which combined with an increasing reliance on commercial credit carrying variable interest rates, created a severe debt problem in the early 1980s. Total disbursed and official long-term debt by African countries grew 20% a year between 1973 and 1983. The growth rate of debt, however, declined sharply from 31.2% during 1976-79 to 7.3% during 1980-83. Nevertheless, in the case of sub-Saharan countries, external debt accounted for nearly 63% of their GDP in 1984 compared with 35% in the late 1970s. Payment arrears have mounted over the past few years and debt reschedulings have become commonplace.

Quality of Life

The slow growth in food production, financial constraints and rapid population growth have led to a deterioration in the quality of life in most African countries. Urban population growth rates are the highest in the world at a time when economic output has stagnated. Similarly, in rural Africa, the pace of development is slow, while the rural population is still growing at a relatively rapid rate of 2% a year.

Between 1971-73 and 1981-83, daily per caput calorie consumption rose slightly, from 2 124 to 2 214 calories. Consumption increased 1.8% a year in northwestern Africa, but only 0.4% in western Africa. Furthermore, central, eastern and southern Africa experienced declines. Only northwestern Africa had calorie intake levels exceeding 2 250 calories per caput a day by the beginning of the 1980s.

3/ Oil-exporting countries on the continent include Algeria, Angola, Cameroon, the Congo, Gabon, Nigeria and Tunisia.

During the early 1980s, central Africa was the only subregion where nutrition status improved. In the drought years between late 1982 and 1985, nutrition levels fell even lower in many countries, and per caput calorie consumption in the region overall declined by 1.5% a year during 1981-84. Low average consumption levels, in a region where food supplies fluctuate widely, create high vulnerability to food supply disruptions. As a consequence, poor nutrition increases both disease susceptibility, and thus, indirectly, mortality levels.

Agricultural Production and Trade

Agriculture (including fisheries and forestry) accounts for a relatively large percentage of the GDP in most African countries. Notable exceptions are Algeria, Morocco, Zambia, Zimbabwe, Gabon and the Congo, where agriculture's share is below 20%. Yet Africa is the only region to have experienced a decline in per caput agricultural production for the past decade ending in 1984. In addition, per caput agricultural output levels are low and extremely variable compared with other regions of the world.

Food production in net terms grew at an annual rate of less than 2% between 1971-80 and 1980-84, and hence, there was a decline in per caput terms of more than 1% a year. The experiences of the various countries and subregions, however, differed widely. As mentioned, between late 1982 and early 1985, 25 African countries were severely affected by drought. Growth in food production in the early 1980s thus slowed in northern Africa, the Sahelian zone, some countries in western and southern Africa; but it accelerated in other countries in western, central and eastern Africa.

In 1985, food and agricultural production recovered strongly in most African countries, with an overall increase of 30% over that of 1984. Cereal production reached a record 60 million tons, about 15 million tons more than in 1983 or 1984. Several countries achieved exceptional surpluses in coarse grains.4/ External assistance will be required in some cases to make full use of these surpluses to meet the import needs of neighbouring deficit countries. In contrast, according to FAO, six African countries are continuing to experience food emergencies in 1985/86 (See Box 1-2). Per caput food production, however, remains overall below 1980 levels, and the effects of the recent drought make it difficult to assess what the underlying trend is in food and agricultural production.

There has been moderate growth in the production of non-cereal export crops during the early 1980s. Strong gains were made in production of cotton, tea and tobacco, especially in eastern and southern Africa. Coffee production in western Africa, however, declined nearly 1% a year and cocoa bean production fell more than 4% a year.

Africa's agricultural exports are primarily beverages, tobacco, oilseeds, fibres and livestock products. During 1980-84, the purchasing power of these exports declined slightly each year, while the volume of food imports increased nearly 5% a year, but still less than half the average annual rate during 1971-80. In the Sahelian zone, however, real agricultural export earnings increased nearly 8% a year between 1980 and 1984, largely because of Senegal and Chad. Nevertheless, the volume of food imports (including food aid) grew nearly 14% a year in the Sahelian zone, because of drought. In other areas, particularly in western and northern Africa, declines in export earnings were caused by weak demand on world markets and, in some cases, difficulties of supply.

4/ Zimbabwe, Malawi, Kenya, the Sudan, Benin and Togo.

Developments in the livestock sector during the early 1980s have been mixed. For the region as a whole, per caput production remained relatively unchanged. Substantial losses were experienced in the Sahelian zone and eastern Africa due to the drought, but in central and coastal West Africa production expanded.

Production Constraints

There are many interrelated factors that explain the poor performance of African agriculture. The rapidly growing population contributes to problems in a sector already constrained by such natural factors as limited area of cultivable land in several countries and variable rainfall. The irrigated area is less than 2% of the arable land area. Also, most agricultural producers are smallholders with limited assets. Their productivity is low, in part, because their technical inputs are minimal. Weak physical infrastructure, poor marketing systems, unpredictable government policies and inimical world economic conditions have contributed also to the region's agricultural crisis.

Population growth is placing increasing pressure on the land with the result that, in many areas, land resources are being severely degraded. Africa's poor quality soils compared with those of other regions are also a serious handicap. It is estimated that over 80% of African soils are of low fertility and 43% are too dry for rainfed agriculture. In countries such as Ethiopia and those in the Sahelian zone, soil erosion, desertification or deforestation are seriously reducing productivity. Several countries such as Burkina Faso, the Niger, Senegal, Kenya and Lesotho face a scarcity of arable land. Land constraints are not universal, however, and in several African countries (Cameroon, Angola, Zaire and Zambia) land is still abundant although, in some cases, its agricultural use is limited by diseases such as trypanosomiasis and onchocerciasis.

Weather is the primary factor explaining production variability in the Sahelian zone and in eastern and southern Africa. African crops and pastures are susceptible to highly variable year-to-year changes in rainfall. Growing seasons are short and the timing of rains is as important as the quantity. Planting practices and crop maturation therefore are closely linked to the distribution of rains during the growing season. In the Niger, cumulative rainfall during the 1985 growing season was actually less than in 1984, but because of the better distribution of rains during the season, sorghum and millet yields were much higher.

The most plentiful yet neglected resource for agricultural development in Africa is the small farmer who accounts for most of the crop production on the continent. Consequently, production strategies based on small-scale farming need more careful and cohesive policy-making and administrative guidance than presently exists. In constrast, in some countries, former plantations or large-scale farms have been nationalized or the development of large-farming schemes has been encouraged. In some cases, as with Mali's rice schemes, these larger enterprises provide farming inputs, but retain the smallholder as the basic unit of organization. They demand, however, managerial skills--often lacking--and may use up the limited government budgets for their capital needs.

Availability and quality of inputs such as seeds, fertilizers, fuel, farm machinery and tools, are additional factors leading to poor production performance. Also, the slow development and introduction of improved plant varieties have limited agricultural output. This is attributed partly to the diversity of growing conditions in Africa and the meagre investment in agricultural research and development in the past. Some advances were made during the 1960s, particularly with the introduction of high-yielding maize varieties in Kenya, Zambia and Zimbabwe, but further progress has been disappointing.

Agricultural output is also constrained by shortages and misallocations of manpower. Because real returns for agricultural labour are generally low in many parts of Africa, labour is scarce during critical periods in the cropping cycle. Agricultural labourers are often attracted to urban areas, or as was the case, for example, with Somalia, Lesotho and the Sahelian countries, to employment opportunities in other countries. As a result, urban populations are growing much faster than rural populations and this requires yet greater marketable food production if dietary levels are to be maintained without recourse to more food imports. Nevertheless, the agricultural labour force is still growing, and because growth in output has been so poor, productivity of agricultural labour fell back in the early 1980s, having grown very slowly during the previous decade.

Shortages of skilled managers and technicians also have affected the performance of programmes in support of agricultural activities. Trained manpower are not used effectively or are over-extended, partly because African governments themselves are overcommitted. Women are often neglected, not only in the development of a skilled labour force, but in their traditional role of being responsible for household food supplies. In some parts of Africa women provide up to 90% of the rural food supply: in West Africa up to 80% of the labour force in all trading rural activities is female; and in Ghana 97% of fish traders are women.

Policy Developments

Alarmed by the general situation of an agricultural sector chronically unable to match population growth rates, many African countries have taken measures to try to improve agricultural performance. The Lagos Plan of Action of 1980, which emphasized greater self-sufficiency in food, as noted, has so far failed to bring about a rapid improvement in the food situation. Apart from the above-mentioned structural problems, implementation of the Plan has been hindered by events such as the drought, the rise in the value of the U.S. dollar, high interest rates and declining commodity prices. The Harare Declaration of 1984, which recognized that the responsibility for agricultural development lies with African governments themselves, pledged to contribute more attention and funds to agriculture.5/ But there has been little evidence of African governments being able to increase the share of public expenditure on agriculture during the first-half of the 1980s.

The general consensus is that smallholder agriculture in Africa has been neglected and indigenous development models, suited to environmental conditions, need to be redefined and adopted. A democratization of the development process with farmers, including women, participating in the planning and implementation of projects is seen as a necessary step to improve productivity.

An important aspect of indigenous models of development for Africa is less reliance on centralized decision-making. After two decades or more of experience with parastatals and other forms of implementing state interventions in agriculture, many African governments have decided to allow more flexible pricing methods by relying more on markets. For example, Mali has closed three marketing parastatals and has allowed market forces to determine the prices of millet and sorghum. Ghana is phasing in a return to a situation where market prices for cocoa largely determine producer prices. Zambia is promoting smallholder and commercial agriculture and relieving many parastatals of the burden of pricing. And

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5/ Made at the 13th FAO Regional Conference for Africa, 16-25 July 1984, Harare, Zimbabwe. See CL 86/INF/14, September 1984.

Guinea has adopted an interim policy of providing incentives to farmers, while it studies the decision-making environment of the farmer so that appropriate policies can be formulated later.

Many countries have also recognized the need to upgrade and expand their transportation and marketing systems. Research has shown that marketing margins are highest in Africa of all developing regions partly because of high transport costs, but also because of inefficient input and output markets. Achieving greater agricultural output will require better performances in delivery systems for farmers and consumers.

Also, stimulating increases in production of peasant farmers will require a better understanding of the varied circumstances and socio-economic conditions that they operate in. African farming is composed of many micro-systems involving climate, weather, soils and social cultures. The adoption of improved seeds, new varieties and methods, which were successful in other more "homogenous" environments, have frequently failed in Africa. In addition, the marginal lands being brought increasingly into production by farmers migrating from more productive but densely populated land require adjustments on the part of the farmers who have never worked under similar conditions.

Obtaining a better understanding of the working terrain of peasant farmers may be achieved by involving them in the development process and through extension services designed to help supply them with timely and appropriate information.

Many African countries have recognized the need to strengthen existing research institutions or establish new ones that are capable of improving crops, varieties and methods. But extremely tight budgets and poor administration of existing research programmes have constrained such research precisely at the time when it is most needed. An efficient extension system must be supported by research so that it has the right information to offer farmers. Locally adapted varieties must be available, as well as the required technical inputs. The forthcoming FAO in-depth study on Africa's food and agricultural problems will focus, among other things, on such technological aspects.

The first wave of significant economic policy reforms originated from the balance-of-payments emergencies of the late 1970s and early 1980s. During this time 21 sub-Saharan governments negotiated economic stabilization programmes with the International Monetary Fund (IMF). Six of the 21 programmes were in the form of extended three-year arrangements and 15 were stand-by arrangements.

The general belief was that balance-of-payments were of a short-term nature and could be reversed by implementing suitable adjustment policies. In 1982, after the effects of the second oil price increase of 1979 were felt, it was realized, however, that the balance-of-payments problems in African countries were more intractable than at first believed. Many African governments have undertaken structural adjustment policies under IMF auspices, with varying degrees of success.

Other multilateral agencies such as the World Bank advocated for Africa systematic country-level analyses leading to the design and adoption of national programmes for overcomming key obstacles to short-term recovery, medium-term economic reactivation, and long-term development. It proposed that donors make medium-term and monitorable commitments in forms of aid appropriate to these countries' needs.

External Assistance

Low levels of investment in African agriculture have been a result of financial constraints and low returns. The economic dilemma faced by African countries has forced many of them to rely increasingly on concessional financial assistance. For example, official concessional commitments to African agriculture per agricultural labourer were five times the 1974-76 average in 1982-83, while official non-concessional commitments were 3.1 times the mid-1970s' average. Furthermore, disbursements of assistance to agriculture increased nearly 18% between 1980-81 and 1982-83.

Per caput food aid to Africa nearly doubled from the mid-1970s to the early 1980s. Africa received 50% of all food aid in 1984, largely in response to the food emergency.

Increasing recognition of the intensive international support needed to implement the rehabilitation of agriculture in Africa is shown by recent funding efforts such as:

- The support given to FAO's Agriculture Rehabilitation Programme for Africa (ARPA), launched in early 1985 involving 272 projects costing $250 million in the 25 drought-affected countries in 1983/84;

- The World Bank's Special Facility for sub-Saharan Africa, in excess of $1 400 million, to support short- and medium-term economic recovery efforts, which became effective on 1 July 1985; and

- The aid given in response to the UN appeal made in March 1985 of $1 500 million for emergency relief in Africa.

Financial support, however, needs to be substantial and long-term to obtain any significant improvement in the economic and food situations in Africa.6/ Measures to overcome the prevailing debt crisis in Africa, to improve commodity export earnings and to enhance returns on investments are also necessary.

There is the combined need to mobilize the domestic political will and commitment to carry out policy reforms and make agriculture the focus of a development strategy. There is also the need to mobilize international financial support. The Harare Declaration of 1984 and the OAU's Africa's Priority Programme for Economic Recovery 1986-1990, were first steps in resetting development priorities giving a clear priority to agriculture.7/ The United Nations General Assembly's Special Session on Africa, held in May 1986, also focused more international attention on the region's long-term development problems, including agriculture. In this respect, agriculture can no longer claim to be Africa's neglected economic sector.

6/ Although it is estimated that the 29 poorest African countries will need $6 500 million in annual foreign aid from 1985 to 1990, donors are expected to provide no more than 40% of that amount.

7/ OAU, Africa's Priority Programme for Economic Recovery 1986-1990, adopted by the 21st Session of the Assembly of Heads of State and Government of the OAU, 18-20 July 1985, Addis Ababa, Ethiopia.

2. LATIN AMERICA

The Economic Crisis of the 1980s

Agricultural policies and performance during the early 1980s must be assessed in the light of the economic crisis that has affected the region since 1981. The magnitude of the crisis--the worst since the early 1930s--appears evident from most macro-economic indicators (Table 2-2a, 2-2b). Not only did economic growth decelerate well below the average rates of the previous decades, but it actually declined during 1982-83. By 1984, per caput income was 13% lower than at the beginning of the 1980s. In some countries such as Bolivia, El Salvador, Uruguay, Venezuela and Guatemala, the decline in per caput income well exceeded 20%. Most countries in the region shared in the decline, with only a few exceptions such as Cuba.

The 1980-83 world recession was perversely accompanied by a strong worsening in inflation, the region's traditional economic problem. The average inflation rate rose from 57% in 1980 to over 175% in 1984. In several countries such as Argentina, Bolivia, Brazil and Peru, the spiral of prices became an uncontrollable process, irresponsive to traditional stabilization programmes. Inflationary pressures coincided with a sharp increase in unemployment and underemployment. There was also a substantial decline in real wages, which between 1981 and 1982 fell 20-30% in Argentina and Costa Rica, and in 1983, 10-30% in Brazil, Chile, Peru and Uruguay.

The negative domestic performances were closely linked to external factors. Several events combined to expose Latin America to the full impact of the recession. These events included: reduced export demand and sharply deteriorating terms of trade, particularly during 1981-83; a rapid increase in real interest rates that, after being negative during much of the 1970s, rose to well above 15% in many countries; and, probably the most immediately destructive of all, a sudden net outflow of capital in 1982-83, after a long period of financial expansion.8/ Net external borrowings declined sharply during 1981-85. Borrowings from private creditors collapsed from $56 500 million in 1981 to only $300 million two years later. As a consequence, interest payments paid in 1983 and 1984 exceeded net external borrowings by a total of $46 300 million.

External debt, which had been in many cases closely linked to the region's growth, development strategy and performance, abruptly became an overwhelming burden.9/ Three countries--Argentina, Brazil and Mexico--accounted for the bulk of the region's massive debt. By 1983, the service of the debt in these countries absorbed one-fourth to one-half of their total earnings from exports of goods and services. On a per caput basis, however, it was in Central American and Caribbean countries--particularly Panama, Costa Rica, Nicaragua and the Bahamas--that external debt was more heavily concentrated. Nevertheless, most Latin American countries were forced to adopt adjustment measures involving heavy social and developmental costs. Domestic austerity measures and a sharp reduction in the volume of merchandise imports (by 18% in 1982 and a further 24% in 1983) proved insufficient to pay the interest on their debts, and reschedulings began in 1982.

8/ Estimates by the Economic Commission for Latin America and the Caribbean (ECLAC) point to a 16.5% cumulative deterioration in the terms of trade during 1980-85.

9/ Increased indebtedness was encouraged during 1976-80 by the rapid increase in export values (about 20%) in relation to the nominal rate of interest (about 10%). This allowed even countries with very high ratios of debt to exports a comfortable margin for debt repayment.

TABLE 2-2a. LATIN AMERICA: SELECTED INDICATORS

LATIN AMERICA

COUNTRY AND COUNTRY GROUP	POPULATION NOS (THOUS) 1984	POPULATION GROWTH RATE (PERCENT) 71-80	POPULATION GROWTH RATE (PERCENT) 83-84	GNP PCAP ($) 1982	GDP LOC CONSTANT CURRENCY GROWTH RATE 71-80	GDP LOC CONSTANT CURRENCY GROWTH RATE 80-82	TOT-EXP GROWTH (PERCENT) 71-80	TOT-IMP GROWTH (PERCENT) 71-80	TOT-EXP RATE (PERCENT) 80-84	TOT-IMP RATE (PERCENT) 80-84
MEXICO	77040	3.08	2.58	2740	6.39	3.62	10.52	6.56	16.55	-14.30
BRAZIL	132648	2.38	2.23	2170	7.87	-0.30	6.07	5.39	10.67	-9.14
TRINIDAD+TOB.	1105	0.29	1.19	6920	5.19	2.55	8.04	2.31	-11.78	0.38
CUBA	9966	1.24	0.64	...	...	...	8.57	4.65	11.83	10.03
COSTA RICA	2534	2.79	2.59	1150	5.63	-5.73	3.98	3.87	2.52	-3.43
JAMAICA	2290	1.48	1.42	1240	-1.78	1.63	-2.37	-6.53	-3.06	5.32
NICARAGUA	3162	3.00	3.47	860	0.39	2.01	-1.39	-1.03	0.59	0.98
DOMINICAN REP.	6101	2.60	2.35	1340	6.08	2.69	-0.43	3.88	-1.30	0.06
PANAMA	2134	2.46	2.15	2120	4.09	3.92	-1.70	-0.33	-2.13	5.93
GUATEMALA	8165	3.10	2.94	1130	5.69	-1.44	5.77	6.22	-1.25	-3.42
HONDURAS	4232	3.47	3.40	660	4.53	-0.34	4.76	5.77	1.89	1.60
EL SALVADOR	5388	2.94	2.98	700	3.98	-6.88	4.90	4.53	-2.34	-0.04
HAITI	6419	2.35	2.57	300	3.62	-1.11	5.42	7.09	1.77	11.12
L.A.CENT+CAR	**51496**	**2.36**	**2.29**	**1127**	**4.01**	**0.02**	**5.06**	**2.78**	**1.69**	**4.10**
COLOMBIA	28110	2.17	2.16	1420	5.27	1.60	5.95	4.98	0.48	4.79
CHILE	11878	1.71	1.68	2190	1.58	-4.83	3.95	4.56	0.61	-9.82
VENEZUELA	17819	3.61	3.26	4140	5.00	0.47	4.65	8.91	-0.54	7.82
PERU	19197	2.74	2.63	1260	2.93	2.11	0.96	-2.21	8.58	2.27
ECUADOR	9090	3.02	3.19	1610	8.70	2.84	12.24	9.22	4.44	-4.72
BOLIVIA	6200	2.57	2.75	610	4.69	-5.22	5.94	5.68	-2.80	-1.60
L.A.ANDEAN	**92294**	**2.58**	**2.55**	**1970**	**4.42**	**0.33**	**4.70**	**6.18**	**0.92**	**2.39**
ARGENTINA	30094	1.65	1.58	2070	2.12	-5.56	3.80	3.17	5.09	-18.60
PARAGUAY	3576	3.32	3.00	1570	8.96	3.07	3.63	9.84	3.34	6.84
URUGUAY	2990	0.37	0.71	3400	3.55	-4.50	4.54	9.06	4.23	-15.89
L.A.SOU-CONE	**36660**	**1.68**	**1.65**	**2133**	**2.48**	**-5.16**	**3.87**	**4.16**	**4.94**	**-16.75**
LAT.AMERICA	**390138**	**2.49**	**2.32**	**2120**	**5.93**	**0.20**	**5.58**	**5.08**	**6.57**	**-4.76**

NOTE: -NOT ALL LATIN AMERICAN AND CARIBBEAN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.

TABLE 2-2b. LATIN AMERICA: SELECTED INDICATORS

LATIN AMERICA

COUNTRY AND COUNTRY GROUP	NET AGPROD GROWTH RATE (PERCENT) 71-80	80-84	AGRIC.EXPORTS DEFL VALUE GROWTH RATE 71-80	80-84	NET FOOD PROD GROWTH RATE (PERCENT) 71-80	80-84	FOOD IMPVOL GROWTH RATE (PERCENT) 71-80	80-84	AGRLAND AGRIC LABOUR PCAGLAB GRORATE* (PERCENT) 80-83	71-80	83-84	PRODUCTIVITY LABOUR GROWTH RATE (PERCENT) 71-80	80-84	LAND 71-80	80-83
MEXICO	3.26	1.30	-3.05	4.40	3.75	1.63	24.66	-3.59	0.10	0.79	0.16	2.85	1.96	3.61	1.01
BRAZIL	3.72	2.82	0.78	4.68	4.89	3.06	18.07	-11.58	1.41	0.50	0.22	3.35	1.83	0.95	0.09
TRINIDAD+TOB.	-4.15	-4.64	-8.19	-6.42	-4.11	-4.60	5.89	2.84	-0.52	0.18	0.96	-1.32	-3.43	-2.33	-2.95
CUBA	2.78	3.94	10.09	7.74	3.01	3.70	2.28	0.86	1.89	-1.37	-1.65	5.08	5.37	2.31	3.04
COSTA RICA	3.04	-0.13	2.82	1.89	3.12	-1.10	1.24	-4.18	0.87	1.88	1.12	1.19	-1.59	0.75	-3.03
JAMAICA	0.60	-0.31	-8.97	11.36	0.57	-0.48	0.46	1.37	1.55	-1.77	-0.96	2.84	0.86	0.23	-1.45
NICARAGUA	2.70	2.77	0.40	1.79	3.11	2.85	8.07	-5.12	-0.85	1.11	1.51	1.42	1.88	2.22	4.23
DOMINICAN REP.	1.85	2.61	-4.68	1.41	1.65	3.34	7.75	-4.63	-0.34	1.53	1.34	0.70	1.44	-0.26	2.56
PANAMA	3.22	1.13	-5.94	3.37	3.14	1.03	1.98	-0.18	0.34	0.50	0.15	2.60	1.08	2.43	1.22
GUATEMALA	4.56	-2.00	6.02	-2.20	4.43	0.63	13.94	-13.46	-0.47	1.96	1.73	2.62	-3.19	3.26	-2.69
HONDURAS	2.64	2.34	5.74	-1.30	1.74	1.82	26.93	-22.95	-2.51	2.43	2.72	0.46	-0.24	1.24	2.53
EL SALVADOR	3.57	-1.57	6.03	-7.41	4.76	0.05	9.28	4.11	-1.82	2.04	1.91	1.77	-3.38	2.48	-3.82
HAITI	1.14	1.79	2.61	-2.90	1.44	1.46	13.31	-0.38	-0.49	1.32	0.86	-0.37	0.95	0.04	1.20
L.A.CENT+CAR	**2.61**	**1.17**	**5.25**	**3.81**	**2.59**	**1.66**	**4.50**	**-0.61**	**-0.42**	**1.23**	**1.03**	**1.43**	**0.17**	**1.68**	**1.20**
COLOMBIA	4.21	0.86	6.33	-0.83	4.15	0.83	4.96	4.42	0.99	-1.04	-0.73	5.43	1.59	2.95	0.37
CHILE	1.99	1.99	19.25	5.43	1.97	2.02	1.59	-6.17	0.30	0.02	-0.34	2.01	1.91	0.70	0.86
VENEZUELA	2.81	0.48	-6.64	17.33	3.03	0.47	15.16	-1.52	-0.19	0.97	0.10	3.49	1.38	3.70	1.33
PERU	-0.03	3.59	-6.44	-0.25	-0.34	4.47	4.73	-1.62	0.03	1.11	0.97	-0.96	1.80	-1.51	1.02
ECUADOR	2.77	-0.99	2.86	-2.86	2.79	-1.08	12.87	6.32	-1.94	1.67	2.00	1.01	-2.75	3.24	-2.52
BOLIVIA	2.58	-2.93	1.41	-23.38	2.81	-2.98	7.26	0.00	-1.41	1.35	1.58	1.42	-3.96	-0.76	-5.39
L.A.ANDEAN	**2.68**	**1.04**	**4.20**	**-0.62**	**2.59**	**1.19**	**9.71**	**-1.43**	**-0.13**	**0.47**	**0.47**	**2.24**	**0.39**	**1.44**	**-0.41**
ARGENTINA	3.88	2.76	2.32	7.65	3.84	2.72	1.80	-11.63	1.44	-0.86	-0.88	4.46	3.70	3.07	2.16
PARAGUAY	4.92	0.47	3.26	9.88	4.11	0.61	0.95	1.34	-2.17	2.76	2.43	3.33	-1.66	-2.71	0.88
URUGUAY	0.62	2.77	-2.44	0.90	0.82	2.87	-5.17	-4.74	1.59	-1.96	-1.61	2.42	3.94	0.20	4.31
L.A.SOU-CONE	**3.76**	**2.65**	**2.01**	**7.24**	**3.70**	**2.63**	**0.73**	**-5.55**	**0.66**	**-0.14**	**-0.21**	**4.07**	**2.54**	**2.75**	**2.20**
LAT.AMERICA	**3.34**	**2.03**	**2.49**	**4.26**	**3.81**	**2.25**	**11.33**	**-3.40**	**0.49**	**0.65**	**0.38**	**2.73**	**1.31**	**1.90**	**0.74**

NOTE: -NOT ALL LATIN AMERICAN AND CARIBBEAN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.
* AGRICULTURAL LAND PER CAPUT AGRICULTURAL LABOUR FORCE GROWTH RATE.

By the mid-1980s, most countries in the region faced severe economic difficulties as the signs of recovery that were apparent in 1984, particularly in external accounts, weakened in 1985. According to provisional estimates by ECLAC, Latin America's total GDP rose more than 3% in 1984. This moderate growth rate--the first positive one in per caput terms (0.9%) since 1980--was, however, followed by a further slow-down in 1985 to an overall growth of 2.7% (0.4%) in per caput terms. The current account deficit, which had fallen from $41 000 million to only $1 000 million in 1984, rose more than fourfold in 1985. This resulted mainly from a 4% decline in the unit value of exports, which completely offset the gains made in the previous year, and a 2% fall in the volume of shipments. But this decline was concentrated in Mexico and the other oil-exporting countries (except Peru) and in Brazil. The value of imports declined (2%) in 1985, after having shown a weak recovery in the previous year. With external debt growing 5.5% in 1984, a slower pace than export earnings (about 9%), the ratio of debt to exports decreased for the first time since 1980. As debt was still 3.3 times larger than exports, the ratio remained much higher than the average ratio of 2.3 recorded during 1978-81. In 1985, the small number of loans received resulted in external debt rising only about 2%, and, for the first time in the recent history of the region, debt declined in real terms.

The process of debt reschedulings became particularly active between mid-1984 and the end of 1985. Nevertheless, despite numerous rescheduling agreements and improved terms of repayment obtained in the third round of rescheduling operations, commercial banks continue to be reluctant to significantly increase their loans to the region.

The Economic Crisis and Agriculture

The impact of the economic crisis has had profound repercussions on the production, consumption and trade of food and agricultural products, as well as on the living standards of rural populations in particular.

With few country and commodity exceptions, agricultural growth lost considerable momentum in relation to the previous decades. Between 1980 and 1984, agricultural and food production increased 2% and 2.3% a year, respectively, compared with annual rates of 3.3% and 3.8%, respectively during the 1970s. It was only in 1984 that a sizeable recovery took place, with increases of 3.8% for food and 3.5% for agricultural production. In 1985, growth in food production slowed to 3.2%, but the growth of agricultural output was maintained at 3.6%.

Most Latin American countries shared in the negative trend. Central American, Caribbean and Andean countries were particularly hard hit, and agricultural output in the early 1980s increased at less than half the average rate of the 1970s. Performances were also disappointing in the external sector: from 1977 to 1982, the real value of agricultural exports declined, so that their purchasing power in 1982 was barely 80% of that in the mid-1970s. A substantial recovery, however, was achieved in 1983 and 1984, particularly in several major exporting countries of the region such as Argentina, Brazil, Mexico and Venezuela. But again, a majority of Central American, Caribbean and Andean countries experienced a continuing, even worsening erosion in the purchasing power of their agricultural exports during 1980-84.

Particularly unfavourable weather conditions played an important role in such performances. The natural disasters associated with the El Niño current were largely responsible for the 1982-83 production shortfalls in Andean countries, especially in Bolivia, Ecuador and Peru. Extensive floods in 1981-82 were partially responsible for the heavy production losses in the Caribbean, Venezuela and Paraguay. In 1985, prolonged dry spells in northeastern Brazil and floods in Argentina devastated maize and

wheat crops in these countries. Also, extensive disruption in the supply and distribution of food were caused by the earthquake in Mexico and the volcanic eruption in Colombia in the latter part of 1985. Nevertheless, such unusually adverse climatic conditions and natural disasters only explain part of the problem. An equally important role was played by socio-economic factors affecting domestic and external supply and demand.

Agricultural performance was affected on the side of domestic demand by a deterioration in real incomes and purchasing power of the population. Per caput income fell for three consecutive years during 1982-84, finally stabilizing at a level only equal to that reached in the mid-1970s. Although recent data on food consumption patterns are only fragmentary, such declines in income and the limits placed on imports mentioned earlier, had strong negative influences on the quantity and quality of food consumed.10/

External demand was also negatively affected by the stagnation of economic activity in the industrial countries and by the upsurge of trade protectionism. Agricultural exports, which had played an important role in the region's economic growth during 1975-80, declined substantially in 1981 and 1982, in value terms, and only recovered partially in 1983.

On the supply side, agricultural performance was influenced by restrictions in fiscal and monetary policies that forced governments to considerably reduce their involvement in production activities. In several countries, including Argentina, Costa Rica, Chile and Panama, public expenditure on agriculture (in constant prices) declined sharply between 1978 and 1982.11/ Although the effects of such budgetary stringency on production are difficult to assess, a number of studies and empirical observations suggest that the impact of government expenditure on agricultural performance in the region is considerable.12/

Agricultural production and farm incomes were also affected by a price/cost squeeze affecting food and export crops. In a group of ten selected countries in the region, an overall deterioration in real farm prices of cereals and export crops was noticeable during 1981-83.13/ For cereals, most of these countries appeared to have experienced stagnating or declining producer prices between 1978-80 and 1981-83 (Costa Rica being the exception). Cereal producers in the Dominican Republic during 1981-83 were paid 43% less, in real terms, than in the early 1970s. For producers of export crops, more directly exposed to the negative economic environment prevailing during 1981-83, these were catastrophic years, especially for Argentina, Brazil, Colombia, the Dominican Republic, Ecuador and Peru.

10/ For example, in Costa Rica it was found that the level of production necessary to achieve self-sufficiency in rice, as estimated in 1980, proved excessive in 1985, in view of the reduction in demand.

11/ See FAO, Public Expenditure on Agriculture in Developing Countries 1978-82, ESP, Rome, 1984.

12/ See Victor Elias, Government Expenditures in Agriculture and Agricultural Growth in Latin America, Research Report Nos. 23 and 50, IFPRI, 1981 and 1985.

13/ Argentina, Bolivia, Brazil, Colombia, Costa Rica, Dominican Republic, Ecuador, Jamaica, Mexico and Peru.

A major factor behind the growing difficulties among producers was the increase of input prices. For the region as a whole, fertilizer consumption per hectare of agricultural land declined from 9.4 kg/ha in 1979 to only 7.9 kg/ha in 1983. Such reductions were largely cost-induced, as in the case of Venezuela, where the dollar price of urea rose nearly 260% between 1980-81 and 1982-83.

Cost was also a limiting factor in agricultural machinery use. The number of tractors in operation in the region increased from 920 000 to 955 000 between 1981 and 1983. The average increase (about 16 000 a year) was considerably smaller than that recorded during the previous five years (26 000 a year). The increase in the number of tractors imported into the region during 1980-82 was slow (3% a year) and concentrated in a few countries, particularly Venezuela and Mexico. In other countries with relatively high levels of mechanization (Argentina, Cuba, Chile and Colombia), the number of tractors remained unchanged or even declined during 1980-83.

As regards the use of improved seeds, some encouraging progress was achieved in the 1980s in the case of maize, with the progressive introduction of hybrid varieties. The use of these varieties permitted yield improvements of 20-100%, especially in Argentina and Chile. Again, however, the high cost of inputs associated with the introduction of improved varieties, greatly limited their widespread use particularly among small- and medium-size farms.

Public Sector Policies

Two contrasting features conditioned agricultural policy and programmes during the 1980s. On the one hand, a number of measures suggested that agriculture was given higher priority relative to other sectors. On the other, restrictive monetary, fiscal and income measures reduced the scope and impact of government participation in agriculture-related activities.

Several factors accounted for the "rediscovery" of agriculture. On the internal side were the growing political and social tensions emerging from high food prices, widespread malnutrition and stagnant peasant incomes in low-income, rainfed areas. Externally, the compelling need to substitute food imports and generate foreign exchange also played a major role. Finally, the fact that agriculture was less affected by the economic crisis than other sectors seemed to imply that agriculture was the region's most reliable source of growth, employment and foreign exchange.14/ Because food prices generally lagged behind other prices, agriculture even appeared at times as a moderating influence in the overall inflation rate of the region. This renewed emphasis on agriculture is evident in many official statements and sectoral action programmes. Some policy examples include: the ambitious package of measures under the Mexican Sistema Alimentario Mexicano (SAM) and Programa Nacional de Alimentación (PRONAL) schemes; the Back to the Land Programme in Costa Rica; and the recent bold policy measures in Ecuador that emphasize the role of agricultural entrepreneurs.

These good intentions, however, have been greatly hampered by the negative economic climate. While remaining heavily interventionist, governments have been forced to considerably curtail the use of subsidies in their agricultural development and food distribution programmes, reduce their involvement in marketing and pricing, and revise their investment plans downwards.

14/ Agricultural production in Latin America rose 2% a year during 1980-84, compared with almost zero growth in total GDP. While export earnings from agriculture stagnated, the value of total merchandise exports declined about 1% a year during the same period.

Among the countries in the region, many forms of state intervention have occurred at one time or another (intervention in marketing and prices, subsidized inputs and credit, support to domestic production of inputs, government financial and technical participation in programmes of research, extension, investments in irrigation, opening up of new lands, etc.). During 1976-80 such policy measures were implemented very widely, often through large-scale investments, including long-term projects. Although there were also important rural development and social programmes in favour of small-scale agriculture, government policies of economic incentives, especially in connection with prices, input supplies and credit, were chiefly biased towards large, modern commercial farms.

The 1980s may have witnessed an accentuation of such a bias. Modern and export-oriented agriculture, perceived as a key element in the struggle for recovery and achieving an external equilibrium, captured a large share of government resources and benefited from a liberalization of foreign exchange policies. But small peasant farmers were the losers from such policy orientation. Only a few countries, including Mexico, Colombia, Ecuador and Costa Rica, pursued integrated rural development programmes with any vigour. Furthermore, rural development schemes with special provisions in favour of small farmers, such as in Nicaragua and Panama, have been isolated efforts.

As is usually the case in a period of crisis, changes in policy measures were often a reaction to day-by-day problems requiring immediate attention. Short-term considerations relating to adjustment and stabilization often prevailed over long-term objectives of economic and social development. Although a number of food plans and programmes were launched, particularly since 1983-84, their nature and scope addressed immediate concerns such as the alleviation of social tensions and inflationary pressures, rather than aimed at improvements in the nutritional and living standards of the population.

Agricultural policies were largely conditioned by the profound political and economic changes that took place during 1980-85. On the whole, macro-economic policies appear to have moved towards moderate forms of liberalism. While some countries such as Argentina, Chile, Peru and Uruguay abandoned the rigid implementation of neoliberal monetary policies, in several countries, including Brazil, Mexico and Ecuador, policy measures have become more market-oriented.

In the external sector, an important change was the progressive relaxation of foreign exchange policies. The traditional system of currency pegging, mini-devaluations and parallel exchange rates, gave way to a more flexible system of currency adjustment, bolder realignments and elimination of preferential exchange rates of selected imported items. Such measures unquestionably benefited the competitive and income positions of agricultural exporters, and the balance of payments situations of exporting countries. The devaluation of currencies and other measures to restrict imports also may have created conditions for agricultural production in internal markets to increase. In the short run, however, the sharp reduction in food imports, which fell more than 3% a year in volume during 1980-84, have contributed to critical food shortages and civil unrest, such as in Bolivia, the Dominican Republic and Peru. Also, shortages and high prices of imported inputs have increased production costs, which perhaps more than any other single factor have caused stagnating yields and declining farm incomes.

3. NEAR EAST 15/

General Economic Situation

The economic and agricultural situation in the Near East during the early 1980s has been affected by war and civil strife, the sharp increase in oil prices in 1979-80, the subsequent surge and then precipitous fall in export earnings of the region's oil-exporting countries, and the rise and decline in the flow of remittances to the labour-exporting countries. The average rate of growth of merchandise imports fell by half in real terms, and the growth in real national income fell to a quarter of its average rate during 1971-80, and thus declined in per caput terms (Table 2-3a, 2-3b).

The effect of the contraction caused by the decline in oil-export earnings varied across the region. High-income, oil-exporting countries, where activities related to petroleum comprise the bulk of GDP, witnessed a dramatic reversal in their current account positions, but were able to finance both budget and balance of payments deficits from previous surpluses. While public expenditure on goods and services directly related to household welfare (health services and food and housing subsidies) were only marginally affected by the decline in export earnings, signs of austerity were apparent in investment budgets and many major construction projects were cancelled or delayed.

The decline in construction activity and lower demand for other services forced many foreign labourers to return home. This was evident by changes in population growth rates of labour-importing or labour-exporting countries. For example, the 1983-84 population growth rate of the United Arab Emirates, a labour-importing country, was a third of the average rate during 1971-80, while population growth accelerated by a third in the Yemen Arab Republic, a labour exporter during the earlier periods.

The decline in foreign remittances from repatriated workers transmitted the contraction in the oil economies throughout the Muslim world, not only in the Near East. Countries that relied heavily on remittances to finance trade deficits such as Egypt, Jordan, and the Yemen Arab Republic, were the most severely affected.

The cost of wars in the Arabian Gulf and elsewhere in the region have compounded the economic difficulties experienced, particularly in Iran and Iraq. Military expenditures have crowded out domestic investment, conscription has disrupted labour markets, and much industrial capacity has been destroyed. Warfare in Lebanon and particularly the 1982 Israeli incursion, destroyed much of the nation's industrial base and stimulated a large outflow of refugees and capital. The economic disruption in Lebanon has been particularly severe: real GDP declined 6-7% a year during the 1970s, and a further 40% during 1980-84 it is estimated, although firm data are lacking. The conflict in Lebanon also has placed a military burden on Syria. Both Afghanistan and the Sudan have been embroiled in conflicts as well since 1979. Large external transfers of capital and reschedulings of debt (in the case of the Sudan) have kept these two countries from complete insolvency.

15/ Countries included, for purposes of this discussion, are: Egypt, Libya Arab Jamahiriya, the Sudan, Afghanistan, Bahrain, Cyprus, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Kingdom of Saudi Arabia, Syria Arab Republic, Turkey, United Arab Emirates, Yemen Arab Republic, and Democratic Yemen.

TABLE 2-3a. NEAR EAST: SELECTED INDICATORS

COUNTRY AND COUNTRY GROUP	POPULATION NOS (THOUS) 1984	POPULATION GROWTH RATE (PERCENT) 71-80	POPULATION GROWTH RATE (PERCENT) 83-84	GNP PCAP ($) 1982	GDP LOC CONSTANT CURRENCY GROWTH RATE 71-80	GDP LOC CONSTANT CURRENCY GROWTH RATE 80-82	TOT-EXP GROWTH (PERCENT) 71-80	TOT-IMP GROWTH (PERCENT) 71-80	TOT-EXP RATE (PERCENT) 80-84	TOT-IMP RATE (PERCENT) 80-84
NEAR EAST										
U.A.E.	1255	16.17	4.93	24080	13.03	-9.33	21.56	26.85	-5.13	2.67
KUWAIT	1703	6.34	5.19	19610	2.39	-3.77	9.11	14.88	-10.59	7.89
BAHRAIN	414	4.72	4.28	9860	7.83	5.50	14.09	14.17	-0.94	3.06
OMAN	1181	4.23	4.42	6370	6.29	3.20	18.49	17.98	7.52	16.14
QATAR	291	8.33	3.56	22060	...	...	15.75	21.42	-5.31	-0.18
N.E.HIGH-INC.	**4844**	**7.44**	**4.76**	**16820**	**7.38**	**-5.03**	**14.18**	**19.05**	**-5.61**	**5.41**
LIBYA	3471	4.13	3.86	8430	4.23	-8.91	9.22	9.68	-11.36	6.81
SAUDI ARABIA	10824	4.90	3.87	15820	10.01	4.65	22.57	34.77	-16.92	12.84
IRAN	43799	3.16	3.05	...		...	6.71	8.25	9.95	-3.31
IRAQ	15158	3.54	3.44	...	12.29	...	21.57	19.77	-14.23	-0.66
N.E.OIL-EXP.	**73252**	**3.51**	**3.29**	**14025**	**7.03**	**1.02**	**16.82**	**18.82**	**-13.33**	**6.65**
CYPRUS	659	0.24	1.23	3900	4.66	3.48	3.99	2.53	5.29	8.08
TURKEY	48811	2.30	2.40	1360	5.29	4.63	0.68	5.69	28.13	12.40
SYRIA	10189	3.45	3.82	1680	9.82	1.00	11.57	13.12	2.98	4.79
LEBANON	2644	0.61	0.34	...	-6.58	...	-1.91	-0.80	-2.93	4.19
JORDAN	3375	2.25	3.94	1690	10.75	6.69	18.91	15.95	5.92	7.63
N.E.MID-INC.	**65678**	**2.35**	**2.60**	**1455**	**5.37**	**4.20**	**3.57**	**6.42**	**14.89**	**8.49**
EGYPT	45657	2.31	2.52	670	7.80	8.08	-1.00	9.65	3.19	24.35
YEMEN AR	6386	1.90	2.47	500	8.49	5.57	0.74	36.00	19.87	-0.93
SUDAN	20945	3.05	2.86	430	7.29	3.68	-6.55	3.70	5.35	-1.55
YEMEN DEM	2066	2.22	2.79	470	10.06	0.82	4.94	11.74	1.55	5.36
AFGHANISTAN	14292	1.58	0.45	...	3.89	...	4.94	4.52	12.93	15.42
N.E.LOW-INC.	**89346**	**2.31**	**2.27**	**583**	**7.35**	**6.70**	**-0.82**	**10.56**	**4.56**	**14.59**
NEAR EAST	**233120**	**2.75**	**2.73**	**2611**	**6.76**	**1.67**	**14.72**	**15.13**	**-9.69**	**7.55**

NOTE: -COUNTRY GROUP FIGURES ARE WEIGHTED.

TABLE 2-3b. NEAR EAST: SELECTED INDICATORS

NEAR EAST

COUNTRY AND COUNTRY GROUP	NET AGPROD GROWTH RATE (PERCENT) 71-80	80-84	AGRIC.EXPORTS DEFL VALUE GROWTH RATE 71-80	80-84	NET FOOD PROD GROWTH RATE (PERCENT) 71-80	80-84	FOOD IMPVOL GROWTH RATE (PERCENT) 71-80	80-84	AGRLAND PCAGLAB GRORATE* 80-83	AGRIC LABOUR GROWTH RATE (PERCENT) 71-80	83-84	PRODUCTIVITY LABOUR GROWTH RATE (PERCENT) 71-80	80-84	LAND 71-80	80-83
U.A.E.	...	...	21.23	-13.57	...	...	26.74	0.88	-0.16	14.49	3.45	...	...	...	...
KUWAIT	...	...	2.21	-3.35	...	...	10.32	6.89	18.15	3.67	3.72	...	...	...	...
BAHRAIN	...	...	-22.22	-2.19	...	...	7.97	3.71	-3.02	3.21	2.80	...	...	...	...
OMAN	...	...	47.75	21.34	...	...	19.46	16.14	-1.97	2.72	2.94	...	...	...	...
QATAR	...	...	-9.70	...	...	...	11.69	3.47	9.62	6.77	2.09	...	...	...	...
N.E.HIGH-INC.	...	...	**9.51**	**-7.30**	...	...	**16.34**	**5.25**	**-0.12**	**6.89**	**3.01**	...	...	...	...
LIBYA	6.86	4.36	-11.72	...	6.99	4.44	10.88	0.79	4.97	-3.73	-4.57	10.49	10.91	6.11	7.28
SAUDI ARABIA	3.13	18.91	15.82	-12.53	3.10	19.06	20.53	11.23	-1.82	3.25	2.26	3.50	21.57	4.59	22.27
IRAN	3.72	1.54	-13.55	-7.89	4.17	1.41	15.13	12.25	-0.97	0.85	0.94	3.09	1.03	6.34	4.86
IRAQ	0.87	-1.21	-8.23	-2.40	1.16	-1.59	17.21	7.96	-1.59	1.52	1.53	0.60	-1.28	1.28	3.69
N.E.OIL-EXP.	**3.34**	**3.07**	**-10.41**	**-7.54**	**3.69**	**3.00**	**16.13**	**9.80**	**-1.12**	**1.33**	**1.18**	**2.86**	**4.70**	**5.15**	**5.60**
CYPRUS	0.34	-0.42	-3.51	6.96	2.68	6.70	2.44	8.61	-0.25	-0.52	0.33	1.18	2.03	0.65	2.03
TURKEY	3.38	1.97	-1.78	8.70	0.35	-0.40	-2.30	20.63	-1.95	-0.57	-0.76	3.89	3.08	3.07	4.94
SYRIA	8.35	0.30	-6.22	16.62	3.60	1.94	4.57	15.32	-2.91	2.28	2.77	5.85	-3.25	9.06	1.44
LEBANON	-0.80	-1.19	-2.11	-9.51	10.04	-0.61	5.19	-3.72	7.31	-5.74	-6.83	5.82	6.59	0.78	-1.09
JORDAN	2.73	6.64	15.02	-10.88	-0.36	-1.11	11.17	2.65	0.93	-0.85	0.85	4.30	7.80	2.83	14.97
N.E.MID-INC.	**3.68**	**1.80**	**-2.14**	**7.40**	**0.78**	**-0.13**	**5.00**	**7.79**	**-1.90**	**-0.37**	**-0.48**	**4.05**	**2.65**	**3.98**	**4.40**
EGYPT	1.03	0.76	-12.84	4.80	1.28	2.14	16.81	8.30	-1.55	1.63	1.84	0.10	-0.30	3.80	1.43
YEMEN AR	1.82	-0.91	-0.39	-32.21	1.91	-0.97	24.31	5.94	-1.26	0.79	1.44	1.05	-2.20	1.66	-3.56
SUDAN	1.86	4.71	-6.95	4.31	3.45	2.93	3.22	-7.36	-1.74	2.02	1.79	0.05	2.71	1.46	6.28
YEMEN DEM	0.97	1.03	-5.14	-2.91	1.22	0.57	8.28	6.00	-0.12	0.57	1.21	0.63	0.18	0.04	1.09
AFGHANISTAN	2.44	1.11	4.73	-3.07	2.36	1.24	-1.28	2.27	1.71	0.61	-0.30	1.72	2.82	2.33	1.09
N.E.LOW-INC.	**1.43**	**2.01**	**-8.92**	**3.17**	**2.06**	**2.27**	**15.73**	**6.76**	**-0.71**	**1.39**	**1.23**	**0.59**	**1.20**	**2.00**	**3.46**
NEAR EAST	**3.10**	**2.09**	**-5.21**	**4.85**	**1.65**	**1.03**	**14.42**	**8.28**	**-1.20**	**0.81**	**0.64**	**2.27**	**2.42**	**3.74**	**4.47**

NOTE: -COUNTRY GROUP FIGURES ARE WEIGHTED.
* AGRICULTURAL LAND PER CAPUT AGRICULTURAL LABOUR FORCE GROWTH RATE.

Effects on Agriculture

The continuing overall economic difficulties besetting the region have affected food and agriculture on both the demand and supply sides. During the 1970s, the high rate of population growth for the region of 2.7% a year (from high natural rates of increase and immigration) combined with the rapid growth in per caput income of about 4% a year. This led to large increases in the demand for food, in particular for livestock products. In most oil-exporting countries, households shifted from a diet dominated by cereals to one containing more meat and dairy products. For example, it is estimated that the regional demand for meat rose nearly 6% a year during the 1970s. High rates of growth in the urban population also led to shifts in consumer tastes towards new and more convenient foods. From 1970 to the early 1980s, the average rate of urbanization for nine high- and middle-income, oil-exporting countries was about 8% a year.

The majority of countries in the region have been pro-natalist or non-commital on the population issue. During the early 1980s, demand arising from population growth continued to be high, as regional growth was maintained at the level of 1971-80, although with significant changes among countries, as pointed out earlier. The stagnation or decline in per caput income and austerity measures affecting food subsidy programmes depressed effective demand, although the largest falls in income took place in the high-income, oil-exporting countries. In non-oil countries, with two-thirds of the region's population, per caput income continued to grow, even if at a lower rate than previously. The net effect was lower growth in food demand compared with the 1970s.

It is in the external trade sector that this slow-down in demand was most evident. During the 1970s, imports of food and feed increased rapidly because of a lack of dynamism in domestic food production, particularly cereals; a rapidly expanding livestock sector increasingly dependent on imported feeds; and a growing demand for food fueled, in some cases, by generous consumer subsidies. The value of food imports, excluding fish, more than doubled from $9 300 million in 1975 to nearly $21 600 million in 1981. In volume terms, regional imports of food rose by an average annual rate exceeding 14% during 1970-81, and in the oil-exporting countries, the volume of food imports rose more than 16% a year, quadrupling in a decade.

Growth in the volume of food imports decelerated to only 8% a year during 1980-84. The slow-down was particularly sharp in the high-income, oil-exporting countries, whose growth in imports of food fell to a third of the average rate for the 1970s. Nevertheless, food imports continued to grow faster than in other developing regions. In contrast, for two middle-income countries--Turkey and Syria--imports of food increased rapidly in the early 1980s.

Part of the reason for the continued relatively high regional rate of increase in imports of food, including livestock feed, is that the development of domestic livestock and poultry sectors is a common policy objective in the region. As domestic herds and flocks increase, so does the need for imports of feed, because domestic feed supplies cannot keep pace with demand. Yet subsidies on feed have been necessary in many countries to make domestic production competitive with imported meat. Feed subsidies and continued demand for livestock products have induced rapid increases in the volume of feed-grain imports. Thus, barley, sorghum and corn imports increased steadily during the 1980-83 recession.

Despite some reductions in the growth of food imports in recent years, there has not been a significantly reduced dependence on external supplies. The cost of food imports still accounts for a substantial share of total imports: 40-50% in Egypt and about 15% in Saudi Arabia.

The increase in regional food production was also inadequate to meet recent changes in food demand. Net food production increased less than 2% a year during the 1970s and only about 1% a year during 1980-84. Despite some quite high average rates of growth in some countries such as Saudi Arabia, Libya and Cyprus, regional growth in food production failed to equal that of population. Cereal production in particular stagnated as well as being highly unstable. In contrast, livestock production expanded between 3-4% a year, reflecting the changing patterns of food demand towards meat products. Much of this expansion of livestock production was dependent on imported feeds and technology. For example, in 1984, while Saudi Arabia produced a surplus of wheat, domestic sorghum production declined and imports of feed-grains increased steadily, exceeding 4 million tons.

Production performances in the region were highly variable at the country level. Syria's output was adversely affected by low rainfall during much of 1984. Egypt's generally sluggish agricultural performances of only 1% or less average growth in net agricultural production was punctuated by good gains in cereal output in 1982. Dramatic increases in wheat output were achieved by Saudi Arabia, where wheat output rose from 3 000 tons during the early 1970s to 1.3 million tons in 1984, about double domestic needs, but at the cost of heavy subsidization with domestic buying prices being several times higher than world prices. Output, particularly of crops, fluctuated widely in Jordan, Syria and Libya, which are subject to uncertain rainfall and have only about 10% of their arable land under irrigation. In these countries, the index of instability in cereal production was as high as 25% during 1969-84. In contrast, all of Egypt's arable land is irrigated and yields generally are stable.

Public Sector Policies

Alarm at the decline in regional self-sufficiency in food, which already had been voiced during the 1970s, gained added impetus with the economic crisis of the early 1980s. Many countries in the region achieved nutritional standards well above those in other developing regions. But doubts were raised about the long-term viability of food policies that were largely based on subsidies and imports. There was also a new emphasis on agriculture, first to diversify the productive base of the economy, and second, because agriculture is a renewable resource, unlike oil.

Measures taken in recent years to redress the situation revolved around three areas. The first concerned a re-examination of food subsidies and incentives for agricultural production, involving the appraisal of the cost-effectiveness of parastatals involved in agricultural marketing.

The 1980-83 world recession, declining oil prices, and the persistence of high real interest rates in international capital markets, raised the opportunity costs of policies designed to cushion domestic producer and consumer prices from changes in world prices for agricultural commodities. The pressure to adjust policies were strongest in countries with high levels of external debt relative to GDP and export earnings. For example, Turkey, which experienced a financial crisis in the late 1970s, undertook a series of structural adjustment policies, including devaluations, reductions of protective tariffs and subsidies and increased incentives for agriculture, particularly those for agricultural products for export. As a result, Turkey's agricultural exports, which had declined in real terms nearly 2% a year during the 1970s, rose nearly 9% a year during 1980-84. Thus, the country has emerged in the 1980s as an important supplier of cereals, livestock and vegetable products to other Near Eastern countries.

Many consumer subsidy policies are designed to insure adequate nutrition for poorer households but are unnecessarily costly, as they do not focus exclusively on target groups. Egyptian bread subsides, which partially explain Egypt's unusually high caloric intake level given its per caput income, are available to all Egyptian citizens. The cost of these food subsidies accounted for 17% of total public expenditure in Egypt during the late 1970s.

Food subsidies are not easily reduced, however, as price increases meet with strong, often violent opposition. Consequently, the nominal prices of food staples remained fixed in several countries in the region, including Egypt. In other countries, annual nominal increases, to keep pace with increasing nominal costs, are slowly becoming institutionalized, but real price increases are rare. Nor is narrowing the focus of subsidies easily accomplished. Employing a means test to determine economic need, a frequent proposal, entails large administrative costs and is not always politically palatable.

In the high-income, oil-exporting countries, consumer subsidies compose a small proportion of public expenditure. Furthermore, producer subsidies are not yet a significant drain on domestic resouces, and in many cases, serve as a means of transferring resources to largely rural populations.

The second area of measures was an increasing emphasis on agriculture in national plans and investment priorities. For example, a more than threefold increase in planned expenditure on agriculture in Algeria, a doubling in Libya, and more than a tenfold increase in Saudi Arabia, from 1975 to 1980. In other cases, however, agriculture merely maintained its share of total expenditure, and actual expenditure was less than planned.

The third area associated with the above change in emphasis was the establishment of joint ventures and schemes for agricultural development between the capital-surplus countries and those with a large potential for expanding agriculture. A series of investment proposals were made in the mid-1970s and early 1980s under the auspices of such organizations as the League of Arab States (LAS) and the Arab Authority on Agricultural Investment and Development (AAAID).16/

In the middle- and low-income countries, the higher costs of financing imports are raising the expected rate of return on agricultural investment relative to investment opportunities in other sectors. Irrigation projects have long taken a large share of agricultural investment in the region, and while the expansion of irrigated land is undoubtedly crucial in the long run, in a era of financial austerity, larger and quicker returns may be gained through the rehabilitation of existing schemes. New technologies for reducing evaporation loss and retarding soil salinization are particularly important.

But the emphasis placed on investment has led to many capital-intensive projects, particularly in livestock, which employ technologies highly dependent on imported feed and trained manpower. Problems also have arisen in identifying, preparing and appraising projects, a process itself which requires trained and experienced manpower.

Throughout the region more resources devoted to the improvement of local animal breeds could reduce the risk of "turnkey" livestock projects, which rely on imported breeds, pharmaceuticals, feeds and technicians.

16/ See Strategies for Agricultural Investment in the Near East, NERC 84/85, prepared for the 17th FAO Regional Conference for the Near East, March 1984.

The development of domestic feed markets--natural fodders as well as grain--to supply projected herds would conserve valuable foreign exchange, enhance farm incomes, and help integrate rural and urban markets.

The financial conditions of many countries in the region, particularly the low-income countries, constrain even the most basic agricultural investments. Several proposals for the capital-surplus countries to invest in neighbouring countries with large agricultural potential were voiced in the 1970s, but little substantive investment has occurred. Thus, progress has been slow in cooperative investment proposals, most of which remain under consideration.

Regional economic integration has been discussed greatly during the last two decades; yet, as with intraregional investment, little progress has taken place. With greater incentives to trade regionally, however, the prospects for agricultural investment and closer regional coordination could be improved.

The early 1980s witnessed a sharpening in the dilemma facing the Near East. The need to reduce its dependence on imported foods and to diversify its economies have been made more acute. Yet declining oil revenues in the oil-exporting countries of the region have reduced the scope for raising producer incentives and the funds available for capital investment.

Therefore, there has been a reappraisal of development strategy and less dependence on massive investment of imported technology and inputs. The new emphasis is towards smaller projects, involving small-scale farmers or pastoralists.

4. FAR EAST 17/

Economic and Agricultural Performances

The Far East (excluding China for the purpose of this discussion, which is covered in the next section) successfully weathered the effects of the economic recession. For the most part, it avoided the debt and food supply crises that affected other developing regions and managed to curb the rate of inflation. The key performance indicators are shown in Table 2-4a, 2-4b. For example, average annual growth rates for the region as a whole in the early 1980s were:

- Real GDP, total and per caput, up 4.9% and 2.8%, respectively (during 1980-82);
- Volume of merchandise exports, up 8.1%;
- Volume of merchandise imports, up 9.5%;
- Agricultural production, up 3.9%;
- Agricultural labour productivity, up 3.3%; and
- Land productivity, up 4.1% (during 1980-83).

Furthermore, the region maintained low and stable debt-service ratios of 10-11% in the early 1980s. It also had the lowest population growth (2.1%) and inflation (about 9%) rates of all developing regions.

In the early 1980s, which included the worst economic recession in 50 years, there were slight declines in net barter terms of trade and in the dollar value of agricultural exports, which nevertheless increased in real

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17/ Countries included, for purposes of this discussion, are: Republic of Korea, Hong Kong, Singapore, Malaysia, Indonesia, Brunei, Macau, the Philippines, Thailand, East Timor, Burma, Sri Lanka, Pakistan, Maldives, Nepal, Bangladesh, Bhutan, and India.

TABLE 2-4a. FAR EAST: SELECTED INDICATORS

ASIA

COUNTRY AND COUNTRY GROUP	POPULATION NOS (THOUS) 1984	POPULATION GROWTH RATE (PERCENT) 71-80	POPULATION GROWTH RATE (PERCENT) 83-84	GNP PCAP ($) 1982	GDP LOC CONSTANT CURRENCY GROWTH RATE 71-80	GDP LOC CONSTANT CURRENCY GROWTH RATE 80-82	TOT-EXP GROWTH (PERCENT) 71-80	TOT-IMP GROWTH (PERCENT) 71-80	TOT-EXP RATE (PERCENT) 80-84	TOT-IMP RATE (PERCENT) 80-84
KOREA REP.	40309	1.77	1.39	1910	9.09	6.23	18.78	13.21	18.00	11.92
HONG KONG	5498	2.54	2.02	6150	10.03	6.57	7.31	7.15	13.10	10.03
SINGAPORE	2540	1.50	1.28	5980	8.08	8.13	12.11	8.87	10.12	9.04
MALAYSIA	15204	2.47	2.29	1870	7.82	6.15	10.25	7.75	7.06	10.71
INDONESIA	162167	2.29	1.71	580	7.75	5.05	17.80	9.70	4.94	19.24
BRUNEI	269	5.85	3.46	22150	10.50	-9.78	27.90	2.34	-5.05	11.75
MACAU	309	1.66	1.65	2710	...	...	12.76	4.48	11.08	10.60
PHILIPPINES	53395	2.56	2.50	820	6.45	3.39	3.54	7.15	3.71	2.34
THAILAND	50584	2.47	2.05	790	7.45	5.18	8.61	8.13	6.80	7.27
EAST TIMOR	638	-0.78	3.57	...	...	...	...	...	...	...
ASIA EAST+SE	**330913**	**2.29**	**1.88**	**1027**	**8.03**	**5.27**	**12.00**	**8.99**	**9.83**	**10.63**
BURMA	38513	2.44	2.56	190	4.85	6.15	1.24	-2.87	-5.91	-5.79
SRI LANKA	16076	1.66	2.09	320	5.16	8.23	0.75	4.80	12.00	2.58
PAKISTAN	98971	2.87	3.05	380	5.05	5.71	-1.08	7.91	7.47	8.85
MALDIVES	173	3.02	2.98	...	...	...	-7.28	5.34	16.19	12.97
NEPAL	16107	2.47	2.34	170	2.89	4.70	-7.49	2.36	33.92	19.45
BANGLADESH	98464	2.85	2.75	140	5.04	3.49	-5.21	-1.52	5.13	-1.86
BHUTAN	1388	2.06	2.06	...	...	...	...	...	...	...
ASIA SOUTH	**269692**	**2.69**	**2.76**	**248**	**4.93**	**5.40**	**-1.55**	**3.99**	**8.32**	**5.55**
INDIA	746742	2.25	1.98	260	3.75	4.20	1.31	5.03	7.05	2.19
CHINA(EX TAIW)	1032705	1.88	1.14	300	5.66	5.16	4.82	8.12	11.01	9.51
ASIA(EX-CHINA)	**1347347**	**2.34**	**2.11**	**447**	**5.98**	**4.88**	**9.94**	**8.09**	**9.60**	**9.47**

NOTE: -NOT ALL FAR EASTERN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.

TABLE 2-4b. FAR EAST: SELECTED INDICATORS

ASIA

COUNTRY AND COUNTRY GROUP	NET AGPROD GROWTH RATE (PERCEN) 71-80	80-84	AGRIC.EXPORTS DEFL VALUE GROWTH RATE 71-80	80-84	NET FOOD PROD GROWTH RATE (PERCENT) 71-80	80-84	FOOD IMPVOL GROWTH RATE (PERCENT) 71-80	80-84	AGRLAND PCAGLAB GRORATE* 80-83	AGRIC LABOUR GROWTH RATE (PERCENT) 71-80	83-84	PRODUCTIVITY LABOUR GROWTH RATE (PERCENT) 71-80	80-84	LAND 71-80	80-83
KOREA REP.	5.28	4.30	4.26	-6.39	5.50	4.50	7.39	-0.24	0.84	-0.07	-1.27	5.99	7.01	6.22	7.13
HONG KONG	-5.53	18.16	1.54	21.41	-5.53	18.16	3.93	1.74	7.13	-1.22	-3.07	-1.51	25.14	3.73	28.65
SINGAPORE	-3.75	0.16	6.76	10.24	-3.70	0.39	6.23	10.18	-6.92	-0.31	-2.94	4.04	2.00	7.68	7.41
MALAYSIA	3.92	1.98	6.04	9.22	4.33	2.39	4.88	9.75	-0.65	0.94	0.87	2.97	1.92	3.06	2.63
INDONESIA	4.03	3.70	6.78	3.22	4.06	3.82	14.26	-16.91	0.91	0.71	0.22	3.28	3.58	3.33	2.09
BRUNEI	4.01	2.88	-8.67	-38.06	3.99	2.89	4.66	5.80	-4.33	0.30	-1.86	3.93	3.27	9.88	8.96
MACAU	1.66	15.01	5.80	40.45	1.66	15.01	4.00	1.41	...	-1.17	-1.30	2.47	14.77	...	...
PHILIPPINES	6.12	0.51	-0.07	-3.37	6.00	0.46	-1.01	-0.95	0.14	0.54	0.76	5.54	0.02	4.62	0.85
THAILAND	3.99	3.67	6.17	4.96	3.95	3.68	10.88	-0.13	0.68	1.49	1.12	3.20	2.90	1.77	2.37
EAST TIMOR	...	...	-8.12	...	...	...	-44.08	...	-0.68	-2.04	2.24	...	...	...	...
ASIA EAST+SE	**4.87**	**3.65**	**4.97**	**5.32**	**5.03**	**3.84**	**6.79**	**-0.01**	**0.69**	**0.81**	**0.39**	**3.79**	**3.26**	**3.17**	**2.21**
BURMA	2.99	5.45	-1.38	-2.59	3.01	5.59	7.54	-15.87	-0.44	0.33	0.64	2.63	5.20	3.35	6.38
SRI LANKA	4.77	-0.84	-3.36	14.33	7.24	-1.30	1.16	-2.20	-1.55	1.76	2.25	2.92	-2.91	3.53	-2.67
PAKISTAN	3.05	3.46	-0.08	-7.44	3.42	3.46	11.39	9.27	-1.54	1.21	1.66	1.71	1.50	2.26	3.10
MALDIVES	1.89	3.22	-6.50	8.85	1.89	3.22	8.68	5.18	-2.46	2.66	2.60	-0.76	0.67	1.88	3.56
NEPAL	0.98	3.25	-13.38	16.02	1.01	3.50	1.24	-8.51	-1.76	2.04	1.79	-0.99	1.56	-0.53	2.86
BANGLADESH	3.01	1.83	-6.36	6.41	3.03	1.75	-2.48	3.93	-2.02	2.44	2.05	0.41	-0.30	2.82	2.10
BHUTAN	2.41	2.51	-9.42	7.07	2.44	2.55	2.14	10.68	0.13	1.63	1.69	0.73	0.87	0.25	0.73
ASIA SOUTH	**3.07**	**2.74**	**-2.94**	**2.52**	**3.36**	**2.80**	**3.57**	**3.53**	**-1.62**	**1.77**	**1.74**	**0.98**	**0.99**	**2.54**	**3.34**
INDIA	2.88	4.59	-0.72	2.43	2.92	4.71	4.55	9.33	-0.53	0.82	0.47	1.93	4.08	2.50	4.94
CHINA(EX TAIW)	3.02	7.68	-4.11	13.34	3.05	6.76	12.60	-4.91	0.44	0.42	-0.35	2.94	7.76	3.58	7.09
ASIA(EX-CHINA)	**3.81**	**3.88**	**3.02**	**4.65**	**3.94**	**4.03**	**5.78**	**2.65**	**-0.46**	**1.00**	**0.69**	**2.16**	**3.33**	**2.64**	**4.13**

NOTE: -NOT ALL FAR EASTERN COUNTRIES ARE LISTED.
-COUNTRY GROUP FIGURES ARE WEIGHTED.
* AGRICULTURAL LAND PER CAPUT AGRICULTURAL LABOUR FORCE GROWTH RATE.

terms because of the appreciation of the dollar. Low export prices and higher costs of inputs resulted in a lower growth rate in the early 1980s in agricultural GDP (a proxy for agricultural income), particularly in South Asia.

The region's smaller and weaker countries, particularly the Pacific islands of Fiji, Samoa, Tonga and Vanautu (not shown in the table), suffered severe economic blows and their income growth was set back. Furthermore, the Philippines suffered an acute debt crisis in 1983 and had to suspend principal payments on its foreign debt of $25 000 million. This crisis, together with continued high real interest rates, was a salutary warning and caused most governments in the region to restrain monetary growth and fiscal deficits to try to slow the growth in their own foreign debt.

The greatest relative advance in agricultural production in recent years was achieved by India whose agricultural output growth accelerated from less than 3% to 4.6%. 18/ In some other large countries of South Asia (Bangladesh, Pakistan and Sri Lanka), annual increases in net agricultural production during 1980-84 fell back compared with their average for the 1970s of 3-3.5%, especially food production. In these latter countries, population growth also accelerated a little so that during 1980-84 their average annual growth in food production only just kept pace with population growth; whereas in India, growth in net food production per caput approached 3% a year. Therefore, South Asia's enhanced agricultural performance was really due to India, which in terms of population is three times as large as the other countries in the subregion. Nevertheless, sustained agricultural output helped maintain the subregion's overall rate of economic growth at a higher level during the recession-troubled 1980-83 period.

In contrast, the major East and Southeast Asian countries (Indonesia, Malaysia, the Philippines, the Republic of Korea and Thailand), most of which are members of the Association of Southeast Asian Nations (ASEAN), saw their average rate of net agricultural production decline one-quarter: 4.9% during 1971-80 to 3.7% during 1980-84. Their overall economic growth rate also slowed significantly, to just over 5% during 1980-82 compared with 8% during 1971-80. Some countries of this group, particularly the Philippines as mentioned above, recently have encountered severe economic difficulties, and a worsening of their debt position. This situation has required recourse to IMF stand-by credits and the introduction of economic adjustment programmes, which may adversely affect agricultural output. Indonesia is also facing severe economic difficulties because of declining oil revenues and its current development plan (Repelita IV) has had to be significantly cut back, with possible harmful effects on agricultural performance.

Nevertheless, cereal production in the Far East increased over 4% a year during 1980-84, with wheat production recording an annual average growth rate of more than 7%. These impressive performances were not the result of favourable weather conditions alone, as several countries, including India, Indonesia and Pakistan, suffered from adverse weather in 1982/83.

As a consequence, a great improvement in regional food security occurred between the mid-1970s and mid-1980s. During this period, cereal production increased by about one-half but population by only one-quarter. As an example, rice production in Indonesia increased more than 60% between 1974 and 1984, making that country, formerly the largest rice im-

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18/ China's recent agricultural performance is discussed in the following section.

porter in the world, self-sufficient in rice. In fact, Indonesia exported about 100 000 tons to the Philippines in 1985. As another example of rising food supplies, India's cereal stocks were nearly 17 million tons (rice on milled basis) by mid-1985, more than double the level of 1981. Regional stocks of cereals have risen about 40% between 1980 and 1985.

While increased cereal production has provided the base for the greatly improved food supplies in the region, cooperative measures have also been taken at a subregional level to improve security against shortfalls in times of sudden emergencies. These consist of the ASEAN Food Security System, established in 1980, comprising 50 000 tons of rice held among five countries.

Policy Developments

A flexibility in policy-making and planning and an alertness to changing economic conditions accounted for a large part of the success achieved in the region. Cereal production was improved by creating a favourable environment for the introduction of new technologies, primarily based on high-yielding varieties (HYV). A recent example was the "supplementary rice measure" introduced in Thailand in 1985 to maintain incentives for farmers at a time when the export price of rice weakened. In other cases, government policies have been consistent in their support of agriculture. For example, the Indonesian Government has followed a policy of progressively decreasing the ratio of prices of urea/paddy, although at the cost of a significant increase in fertilizer subsidies.

A similar pragmatism can be noted in the region's development planning activities in which it has gained considerable experience. The limitations of central planning have been widely recognized and hence a stronger role has been given to more local level planning and people's participation in planning and decision-making. Some examples are the Panchayat experiment introduced in West Bengal (India) in 1978 that mobilizes partly remunerated labour in rural development; and, more recently, the Mindanao Integrated Development Area (MINDA) Programme in the Philippines that involves the active participation of the programme's beneficiaries in its planning and implementation. A common aspect of these approaches is the sharing of responsibilities between government and local people in promoting development.

Areas of Concern

Despite the relatively impressive performance that agriculture has achieved in recent years in the region, several major issues of concern have emerged by the mid-1980s.

Constraints on land resources. Eight countries in the region have less than 0.4 ha per agricultural worker. These include Bangladesh and India, which between them have nearly 850 million people and where the land per agricultural population ratio fell 22% and 10% respectively during the 1970s. A continuation of the deterioration in this ratio in South Asia will reduce the amount of land per agricultural worker by a sixth within a decade.

Added pressure on the land has contributed to land degradation, but environmental problems are not confined to the extremely land-scarce countries. Examples are salinity in irrigation schemes in Pakistan, rapid deforestatation in Thailand, and cultivation of marginal (sloping) land in Nepal.

Efforts have been made to control land use in some countries of the region, but so far little in South Asian countries. Countries still with a land frontier (Indonesia, the Philippines and Thailand) are attempting

to promote intensified land use rather than continue with high rates of land clearance. Along with the need to curtail deforestation, there is also a vital need in the region to preserve plant genetic resources, of which the forest zones are the main repository.

Nutrition. There is a clear difference in nutritional status between countries in the East/Southeast subregions and countries in the South Asia subregion. The former generally have adequate average nutritional levels, while the latter do not. The large numbers of malnourished in the region overall (about 200-300 million in 1979-81, depending on assumptions used) and the still inadequate distribution of food to vulnerable groups, remain major concerns.

The Far East region has a long experience with food distribution systems and supplementary programmes covering target group feeding, food-for-work and emergency relief. The food distribution systems recently in operation in the major countries of the region are as follows:

Subsidized Food Grain		Food Stamps
(Without rationing)a/	(With rationing)	
Indonesia	Bangladesh	Sri Lanka b/
Korea, Republic	India	
Malaysia	Pakistan	
Philippines		

a/ Until 1983, Thailand also operated a subsidized price system (double price) for rice, now discontinued.

b/ Since 1979.

Source: FAO, "Selected Experiences of Increasing Access to Foodgrain Supplies by the Vulnerable Sections of the Population in Asia and the Pacific," APCFS/85/5 - February 1985.

While it was recognized that these programmes benefited the recipients, they were biased towards urban residents or "entitled" groups such as civil servants and the military. There appears to be, however, a shift in policy towards more general income-generating development to tackle widespread malnutrition. The Poverty Alleviation Programmes under India's 1980-85 Plan are a current example.

But financial stringency caused by the economic recession forced curtailment of food assistance programmes in many countries. By the early 1980s, expenditure on these programmes diminished significantly compared with ten years earlier: in Bangladesh, from around 25% of government revenue to 5%; and in Pakistan, from 15%-19% to less than 5%.

Trade. The value of the region's agricultural trade expanded by about 16% a year in dollar terms during the 1970s. The growth rate in real terms was 3%, considerably less. Nevertheless, ASEAN countries, in particular, successfully expanded their agricultural exports, such as Thailand (rice, maize and cassava) and Malaysia (plantation crops). The failure of agricultural export values to significantly increase in dollar terms during 1980-84 (the average rate of increase for the region was only 0.4% a year) reflected the stagnation in world trade and increased competition in agricultural markets, even within the region. Protectionism was also having an increased effect, particularly, in markets of manufactured goods, but even some of these have implications for agriculture, for example, textiles.

With increasing competition in export markets, the future status of China as an agricultural exporter, took on greater significance for the region. Increased self-sufficiency in food products and larger trade deficits arising from a wider adoption of a more open trading policy, could result in China becoming a more aggressive competitor in what could be shrinking Asian export markets. Therefore, economic and policy developments in China were being carefully surveyed by major trading countries of the region.

There were diverse reactions to the developments in the trade situation. Some countries showed flexibility in their policy response; for example, in Thailand, where more traders were permitted to export rice, export taxes on rice were lowered. In other cases, there was an increasing recourse to countertrade deals. Attempts were also made to diversify export products and markets. As countries in the region became more self-sufficient, however, and competition mounted, there was growing pressure to harmonize production within the region and share markets among the countries at the expense of free trade.

Financial flows. Since the mid-1970s, the region has been regularly receiving about one-half of all concessional and non-concessional official commitments of external assistance to agriculture (OCA). The low-income countries of South Asia are also dependent on multilateral sources of concessional commitments, such as from IDA and IFAD. Therefore, the slackening in the flows of OCA, observable since 1980, particularly in multilateral concessional commitments, is a major concern for the region.

There have been significant commercial flows--often via transnationals--into plantations and other agro-industries in the ASEAN countries of Malaysia, the Philippines and Thailand. Commercial investment, however, has remained relatively small in South Asia. Overall, lending from external private sources to the agricultural sector in the region grew over 18% a year during the early 1970s, nearly 28% a year during the late 1970s, and still maintained a positive growth of 10% a year during the 1980s, when private external investment was being cut back in other developing regions (Table 2-5).

TABLE 2-5. FAR EAST: SHARE OF PRIVATE DEBT IN TOTAL PUBLIC GUARANTEED DEBT

	1974	1980	1983
	.... $ 000 million		
East Asia and Pacific			
Total public guaranteed debt a/	21.8	74.2	103.0
Private debt	8.1	31.8	48.7
Share of private debt (%)	37.2	42.9	47.3
South Asia			
Total public guaranteed debt a/	24.6	48.5	57.8
Private debt	1.3	3.2	4.4
Share of private debt (%)	5.3	6.6	7.6

a/ Includes undisbursed funds.

Source: World Bank, World Debt Tables, 1984-85.

Despite the welcome increase in the flows from private sources, there is concern that there has been a slackening in official and, in general, concessional flows. There is also concern that commercial investments in ASEAN countries have caused distortions in the sectoral allocation of funds by their being concentrated in a few areas, namely in capital, technology-intensive agro-industries such as poultry production. It has also been observed that investment by transnationals often does not generate linkages to domestic resources. Failure to use local materials for the packing of products on the grounds of their lack of quality is a common example.

The mobilization of domestic savings in rural areas for subsequent investment in agriculture is a current preoccupation. Foreign remittances have offered new savings potential for several countries in the region because many migrant workers come from rural areas and remit large proportions of their earnings. A recent study in Pakistan, however, showed that although much of the $2 000 million remitted annually to Pakistan went to rural areas, only 1-2% was invested there. In addition, workers' remittances, which are an important source of foreign exchange earnings for some countries (in 1982 remittances exceeded Pakistan's export earnings by 12% and were equivalent to 70% of export earnings for Bangladesh), also have levelled off or declined as a consequence of the 1980-83 economic recession.

Other countries, such as the Republic of Korea, have shown that even relatively poor households need and benefit from improved savings services. Ensuring that real deposit rates were adequately positive in times of inflation, mobilized surprisingly large amounts of rural savings.

5. CHINA

Since policy reforms began in 1978, China's economic performance has been remarkable. During 1980-83, total GDP rose more than 6% a year; population growth declined slightly during this period to 1.1% a year (from 1.9% a year during 1971-80); available food supplies increased dramatically; and caloric intake rose 4% a year. While the total labour force continued to grow at the same rate as the population, the agricultural labour force declined 0.3% a year, freeing labourers for employment in other sectors. During 1980-84, growth of total merchandise exports rose in real terms 11% a year and imports 9.5% a year, with exports thus staying ahead of imports. The need, however, for agricultural imports dropped sharply, and the volume of food imports declined nearly 5% a year during 1980-84, enabling China to increase its imports of other goods and services for its economic development. The remarkable performance of the agricultural sector underlay the gains made in the standard of living (see Table 2-4a, 2-4b).

Performance in Agriculture

Agriculture in China has made impressive progress since the late 1970s. Net agricultural production increased at an annual rate of 7.7% during 1980-84 compared with an annual growth rate of 3% during 1971-80. As farmers responded to agricultural reforms made between 1978 and 1984, production accelerated and farm incomes grew substantially. Per caput net income of the farming population rose 5% a year during 1980-83, while it had improved at an annual rate of only 0.5% during 1971-80. By the end of 1984, grain production was up 34%, cotton 189%, oilseeds 128%, sugar crops 101%, and tobacco about 130% over their 1978 levels.

Efficiency also increased: (i) the value of output per agricultural worker rose at an annual rate of nearly 8% during 1980-84 compared with less than 3% during 1971-80; (ii) previously underutilized capacity was

more effectively used; and (iii) land productivity doubled, rising to 7% a year during 1980-84 compared with annual gains of 3.6% during the previous decade.

Structural and Policy Changes

The remarkable performance of China's agricultural sector between 1978 and 1984 may be largely attributed to policy changes since 1978. During the early 1980s, the transition from semi-subsistence to market production accelerated, as both the structure of production and policies were altered to allow market forces to determine more agricultural production. The reforms implemented through 1984 introduced greater flexibility in farming, improved its profitability and achieved the goal of enlarging national agricultural supplies. The former distribution system was retained.

The major policy change, which also had structural implications, was the introduction in 1981 of the so-called "responsibility system." Under this system, communes as economic units were broken up and there was a return to family-size farms. Farm households made two basic contracts. The first was concluded with the village administration for use of particular plots of land for 15-year periods (50 years for orchards). This time frame gave the farmer the necessary confidence in the durability of the reforms to improve the productivity and management on his plots. This resulted in considerably more efficient use of previously underutilized agricultural capacity and contributed significantly to production growth. The responsibility system linked remuneration directly to the amount of output achieved.

A second contract, signed with the village supply and marketing cooperative, the government's purchasing agent, specified the amount and type of produce the farm household agreed to deliver to the government under fixed procurement quotas. This contract also guaranteed government purchase of all surplus production at an above-quota bonus price. The bonus was an important incentive to production because major crops such as grains, cotton, and oilseeds could not yet be sold on free markets. Bonuses for grains were 50% and for oilseeds and cotton, 30% above the quota price. In 1985, farmers were getting guaranteed prices for just about 40% of what they grew.

To further encourage the farmer to raise production, both the fixed-quota farm purchase prices and the bonuses for above-quota sales to the government were raised, once in 1979 and again in 1980. Purchase price increases for major crops were: grain 20%, cotton 15%, and vegetable oils an average of 25%.

Awards of chemical fertilizer were also used to encourage growth of farm production. Specific amounts of fertilizer, either free or at reduced prices, were provided by the government for above-quota production of major crops sold to the government. This policy, combined with incentives for increased efficiency, led chemical fertilizer use to rise 88% between 1978 and 1983.

Availability of rural credit was expanded, more rural agricultural banks were established, and banking reforms allowed more farm households to take out loans.

In another important reform, the former policy of local self-sufficiency in food was altered and rural specialization encouraged. Crop producers could choose the non-grain crops most suited to their land--cotton, sugar, oilseeds, tobacco or vegetables--and the government would guarantee grain supplies for these non-grain farmers. The 70% increase in cereal imports between 1977 and 1984 helped ensure adequate government

supplies of cereals for such specialization to take place. Labourers with skills in other agricultural subsectors such as livestock and fisheries or forestry, were also encouraged to leave crop raising and specialize in those subsectors to help improve the variety of the national diet and raise incomes. By the end of 1984, 14% of households in China had become such specialized producers.

Specialization in non-agricultural activities such as processing, marketing and services, was also encouraged to further develop the rural sector. While agriculture remains the predominant occupation of most of the rural population, proportionally more rural people are establishing local industries and various kinds of services. By 1984, there were some 1.65 million rural enterprises, mostly vertically integrated, which involved 15% of the rural households at the township and village levels. These enterprises employed more than 34 million workers and accounted for over 10% of the rural labour force. The value of their output was equal to more than one-half that of the total value of crop production.

In addition, during this period, the government increased the transfer of resources in support of agriculture. During 1979-84, a total amount of 140 000 million Renminbi-Yuan (RMBY) was transferred to agriculture by raising state acquisition prices of farm products, subsidizing the sale of inputs, reducing taxes, and diverting funds away from, for example, energy projects.19/

Policy Modifications in 1985

Because of the very rapid growth during 1978-84, surpluses of some crops emerged, particularly grains and cotton. The government's monopoly on purchases of major agricultural products and its commitments to purchase all surplus production of these crops led to growing stocks and overburdened domestic transportation systems. It is estimated that the proportion of marketed farm produce of total production increased from 36% in 1978 to over 60% in 1984.

One result of this increased production, together with insufficient domestic transport facilities, was increased exports. Surplus production could not always be transported to domestic markets and so had to be exported even though deficits existed in some areas. In 1984, grain imports were drastically reduced, and China turned from being an importer to an exporter of maize and cotton. In 1983, the value of exports of farm produce, processed agricultural products and outputs of other rural occupations linked to agriculture was $9 500 million. This sum was nearly 43% of China's total exports, an increase of 55% over 1978.

During 1980-84, however, higher prices offered for government purchase of surplus production also led to steadily rising government subsidies. Because government purchase quotas were fixed, an increasing proportion of farm purchases received the higher, above-quota prices each year. By 1983, budget subsidies between fixed retail prices and growing procurements made at higher prices, reached 42% of total budget revenues, and were still growing.

As 1985 approached, it was clear that the success of the agricultural policies of 1978-84 had created new problems that needed to be solved immediately. To enable infrastructure development to catch up with production growth and to reduce the growing budget subsidies, China had to slow the growth of its agricultural production. The Third Session of the

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19/ In mid-1969, the Chinese currency was renamed the Renminbi; however, the old name "Yuan" continued to be used. The official exchange rate in October 1985 was approximately RMBY 3 = US$ 1.

12th Party Congress in October 1984 therefore modified the policies that had evolved during the previous five or six years. These new reforms stabilized the growth of agricultural purchase prices in 1985. Government purchase of grains and cotton--the crops in surplus--was limited and its monopoly on the purchase of major crops was ended, altering the farm distribution system for the first time. Farmers' risks increased as a consequence.

First, farm purchase prices for major crops were switched in 1985 from the dual-price system with quota and above-quota prices and bonuses, to a system of single-farm purchase prices, based on the weighted average of the old quota and above-quota prices and bonuses. This new pricing system stopped the continual growth of farm incomes and government subsidies. In some cases, it lowered farm prices and farm incomes.

For grain, the new 1985 purchase prices became the weighted average of 30% of the old quota price and 70% of the old above-quota bonus. Single pricing for some oilseeds and cotton had already begun in 1984. The single price for cotton, however, was reduced in 1985, a 2.5% price drop for two-thirds of cotton producers.

Secondly, government purchase of grains and cotton was limited to only the contracted amounts. The government no longer guaranteed to purchase any production above the agreed amount. Producers now had to sell above-quota production in the free market at prices determined by the market.

Grain contracts in 1985 were written for only 75-80 million tons, less than 20% of the crop compared with purchases of more than 25% in 1984. Cotton contracts were limited to 4.25 million tons, 30% less than the previous year's procurements.

For cotton, there were to be no procurements above the contracts under any circumstances. But for grain, the government did not completely cut off its above-quota purchases because it could intervene and buy extra additional amounts if free market prices were to fall below the old quota price, establishing the latter as a floor price.

Despite changes in grain and cotton marketing, the government continues to guarantee the purchase of all above-quota production of oilseeds and sugar, supplies of which must still increase to meet excess demand.

In a third change, reinforcing other modifications for production policy for grains and cotton in 1985, fertilizer rewards for above-quota production ceased. Since farm households must now pay for fertilizer out of their own incomes, production costs were increased, and fertilizer used on these crops dropped. Beginning in 1985, agricultural loans from rural credit cooperatives were also more difficult to obtain.

Finally, while production of grains and cotton was being scaled back in 1985, livestock was expected to continue its recent rapid growth in order to help improve the dietary composition of the national diet. During 1985, government retail prices for livestock products were raised throughout the country to continue to encourage the expansion of livestock production.

Outstanding Issues

The agricultural progress achieved during the previous five years raises a number of issues.

Agricultural production remains high even though producers responded to the policy modifications of 1985 by shifting substantial cereal and

cotton acreage into production of oilbearing crops, sugar, tobacco, vegetables, fruits and fish. Production of cereals and cotton fell from the 1984 records, but they were still the third and second-best crops, respectively on record. Oilbearing and tobacco crop area increased considerably and production of fruit, vegetables and pulses rose. Hence, there was little decline in the total value of agricultural output. The drop in the 1985 cereal harvest was partly because wheat-growing northeastern China had an unusually wet spring and dry autumn. Cereal production is estimated at about 344 million tons, 6% below the previous year's record and approximately equal to production in 1983. As a result, the government has recently adopted a more cautious policy towards further liberalization of agricultural markets.

Inadequate transportation and storage facilities are a large and most pressing problem, causing some surplus commodities, which might otherwise have been transferred to deficit provinces, to be exported. In some areas, surplus wheat and rice may be fed to livestock because feed grains are in short supply or because of a lack of transport out of the province. Guangdong Province, China's third largest rice producer, has a rapidly growing livestock sector and is a good example of this situation. In 1983, Guangdong produced only 65 000 tons of maize, a minute fraction of the national maize crop, but 17.9 million tons of rice. Yet the government prohibited Guangdong from importing maize in 1985 because there was a large surplus in Jilin and other northern provinces. Although Guangdong obtained maize from northern provinces, its supply, and that of other southern provinces, remained short of demand. China, however, exported nearly 5 million tons of maize in 1985, primarily to Japan, the USSR and the Republic of Korea.

New storage facilities were hastily constructed in 1985. The government also contracted with farm households for temporary storage of grains purchased by the government. But this had only a small effect on the storage problem.

Growing cotton stocks are another significant difficulty. Despite cotton purchase price decreases, cotton area and production in 1985 remained second only to 1984, and stocks continued to rise rather than fall as planned.

Although there have been changes in the composition of output, livestock, forestry, and fisheries output constituted only about 21% of the total value of agricultural output in 1983. China needs to continue faster growth in these sectors if it is to meet the increasing demand for these products from a population with rising incomes and expectations.

As food has become more abundant, demand for food of better quality and variety has become more pronounced. Consumption of coarse grains and tubers fell 50% during 1978-83, while consumption of wheat and rice rose 38% and 19%, respectively. There is a glut of low-quality rice that accounts for 20% of paddy output, while high-quality rice constitutes only one-quarter of output and only 1% of exports. Plans are to reduce the acreage and output of low-quality rice and hence to improve the market value of the rice crop. The government hopes that high- and medium-quality rice will comprise 60% and 30%, respectively of total rice output by the end of the 1980s.

Surplus labour is another problem. With more efficient farming, about one-third of the rural labour force has become surplus to food production needs. Moreover, it is expected that by the year 2000 there will be 450 million labourers in rural China, but less than a third of them will be needed for crop-farming.

Uneven regional development is an inevitable problem in such a vast country as China. Living standards in the more developed areas near the metropolitan centres along the coast are estimated to be more than three times those in the less-developed inland provinces. Furthermore, there are still over a dozen regional areas of poverty that contain about 10% of the rural population. Special measures are being taken to speed up the development of these less-developed areas.

Other important problems include control of rising inflation and expansion of rural energy, which is in short supply. An indication of inflation can be obtained from the index of retail sales, which rose an annual average of about 3% during 1980-84 compared with an annual increase of only 1% during 1975-79. Rural energy consumption rose 45% in 1984 over 1980, an average growth of 11% a year.

For all its remarkable achievement in recent years, China believes that it still has some way to go in terms of increasing per caput agricultural output and food consumption. In 1984, a record year, it just attained the world average per caput cereal output. The proportions for other commodities were 55% for meat, 20% for milk and 16% for sugar. China only exceeds the world average per caput output for cotton. Nevertheless, based on recent agricultural performances, China appears to be well on the way to achieving its target of quadrupling its agricultural output between 1980 and 2000 and attaining a per caput income of $800 by the end of this century. That would compare with a 1980 level of $300 and would qualify China as a middle-income country.

Expected Actions in the Remainder of the 1980s

China already has plans to solve some of the above problems. The Seventh Five-Year Plan for 1986-90 was announced in late 1985. It includes many of the same priorities that were begun in 1985, holding grain production stable, slowing growth of cotton production, and rapidly expanding livestock, fisheries, vegetables, processing, transportation and services. Investment in transportation, storage, and energy are among China's highest priorities in this plan. Growth of industrial and agricultural output is to average a modest increase of 7% a year, down from an average of roughly 10% a year during the previous five years. But because population growth will also slow, planned income growth of about 5% a year will keep living standards rising.

The price reform package announced in late 1984 and begun in 1985 still has not yet been completely implemented. It also calls for eventual extension of increases in government-controlled retail prices for such products as cereals and edible oils. The goal of these reforms is to allow retail prices, which have been fixed for sometime, to float to a point that more accurately reflect the commodities' true values.

To cushion the impact of increases in retail prices, the government granted urban residents a wage subsidy. While this subsidy partly offsets the savings the government obtained from stabilizing farm purchase prices in 1985, it differs from the earlier subsidy in that it is fixed and will not result in rising deficits.

Refinements in quality differentials of both farm purchase prices and retail prices are also planned. These modifications would award higher prices to producers of higher quality grains, cotton, oilseeds and livestock products. These refinements, coupled with more accurate retail prices, should begin to link future supply more closely with demand.

To further expand rural infrastructure and use some of the surplus labour, further diversification of the rural economy is planned. It is envisaged that the value of output of rural industry and services will

increase at four times the annual rate of crop output over the next 15 years and will account for more than half of gross rural output by the year 2000. Over two-thirds of the rural labour force will then be employed in animal husbandry, fisheries, forestry, processing, mining, building, transport, energy, handicraft and other cottage industries and services.

Substantial expansion of feed processing is also planned. Total production of mixed and compound feed rose to 12 million tons in 1984, more than double the amount produced in 1982. A recently released draft plan for the feed industry calls for production to increase to 50 million tons by 1990 and 100-120 million tons by the year 2000.

6. DEVELOPED MARKET ECONOMIES OF NORTH AMERICA, WESTERN EUROPE, OCEANIA AND JAPAN

Demand/Supply Imbalance

The most important development in food and agriculture in the majority of Organization for Economic Cooperation and Development (OECD) countries during the early 1980s was the increasing imbalance between supply and demand of all major products.20/ Intermittent surpluses had occurred in previous decades, but they mainly affected commodities such as dairy products, sugar and some cereals. The more recent situation, however, was characterized by structural surpluses in a wide range of products and by limited prospects for significant and sustained adjustment in either demand or supply.

High production and weak demand for principal agricultural commodities resulted in rising stocks, lower prices, increased competition for market shares and, as a further consequence, higher public expenditure in support of agriculture in most OECD countries. The combination of yield-enhancing technology and high-support prices resulted in over-production of many commodities, particularly wheat, dairy products and beef.

Commercial agricultural markets stagnated because the economies of developing countries were not growing and debt problems prohibited import expansion or even maintenance of past levels of imports. In addition, many developing countries provided incentives to spur production of traditionally imported products in order to increase food self-sufficiency. The markets of developed countries expanded slowly because of already high income levels, dietary concerns, and very low rates of population growth. Chronically high unemployment rates also had negative influence on domestic demand. Exceptionally large imports of food or feed, such as those by the USSR in 1984 and 1985, represented only minor and temporary relief to overburdened cereal markets.

Faced with this situation, many governments increased export subsidies in attempts to maintain market shares and slow growth in stocks, while providing relatively high support prices in order to protect farmers' incomes. Consequently, public expenditure on agriculture reached record levels in many countries at a time when budget deficits were creating widespread financial and political problems.

The outlook is for continued low prices in world markets. Production will be difficult to curtail because of the technological improvements still to be exploited and the need for heavily capitalized farmers to

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20/ OECD countries and developed market economies are listed in the Explanatory Note.

service their debt. Producer prices in net importing and exporting countries of this group are still relatively high. Meanwhile demand is likely to remain low because of economic difficulties, including debt, in developing countries. Hence, competition for shrinking markets will be even more fierce and costs of agricultural support programmes will mount.

The EEC and the United States: Farm-Income Squeeze

The EEC and the United States are the world's largest trading areas and the leading contenders in international agricultural markets. The EEC is the leading world importer of agricultural products overall, and the second largest exporter after the United States. The two areas also trade extensively with one another. The EEC purchases over one-fifth of total U.S. agricultural exports and is the source of one-tenth of U.S. imports. The two regions also account for 40-50% of world cereals stocks.

These factors underline the overwhelming weight of the United States and the EEC in world agricultural markets and their vital position in world food security. The national interests involved in formulating and implementing agricultural production and trade policies have profound implications for world commodity prices and trade flows.

A system of guaranteed market prices and export subsidies applied under the EEC's Common Agricultural Policy (CAP) permitted the Community to emerge as a major agricultural exporter in the early 1980s. The recent changes in the relative position of the United States and the EEC in world trade have important implications for both their domestic farm incomes and budgetary policies.

Total expenditure of the European Agricultural Guidance and Guarantee Fund (EAGGF) rose from 11 141 million European currency units (ECUs) in 1981 to 18 400 million ECUs in 1984, and to an estimated 20 000 million ECUs in 1985. Export subsidies in 1985 in the EEC accounted for about 37.5% of the total CAP budget and may rise to 40% in 1986. Most of the expenditure in 1985 was accounted for by relatively few products: dairy products (about 29%), cereals (15%), beef and veal (12%), sugar (8%), and fats (6%).

The appreciation of the U.S. dollar in relation to European currencies from 1980 to early 1985 helped ease the financial burden imposed on the EEC budget by the CAP. The recent weakening of the U.S. dollar, and the fall in world prices of temperate food products, which is likely to continue given the provisions of the U.S. Farm Bill, will almost certainly increase the EEC's cost of subsidizing exports, possibly to unbearable levels.

Price reductions have been particularly difficult to introduce as shown by the problems faced by EEC member countries in agreeing to even a minor reduction in farm prices for 1985/86, even though spending was 11% over the budget ceiling in 1984. The fact that surpluses are now affecting virtually every line of production has made supply control measures even more difficult to apply because of interdependent production of various crop and livestock products. Consequently, supply control measures have to be part of an overall integrated agricultural policy.

A further complication for the EEC was the addition of Spain and Portugal as members, which will exacerbate budget problems in the short and long terms. The addition of these two Mediterranean countries to the Community will strengthen the political power of Greece, Italy and France in the EEC, thus ensuring continued over-production of "southern" products such as olives, wine and citrus fruit, in addition to the traditionally large surpluses of northern agricultural products.

The United States has also found itself in a deficit budgetary situation that restricts the use of government funds for farm relief. The U.S. farmer has been beset by debt problems, a loss of export markets, declining land values and low commodity prices. It is estimated that 35-45% of U.S. farmers will have to restructure their debt and 10-15% will simply have to abandon farming as an occupation. Farmers' interest payments on their debts amounted to $20 000 million in 1984.

Despite the fact that farmers were faced with a near crisis situation, the U.S. Farm Bill was passed in early 1986 without any drastic measures to ameliorate the underlying economic malaise. Target prices will remain largely intact for the next three years, but U.S. government loan rates will be allowed to fall, which would have the effect of lowering world prices for cereals and cotton. Funds to increase exports have been made available and government "buy-out" of some dairy herds will help to slow down milk production growth. Perhaps of equal importance is the enactment of a law (the "Gramm-Rudman-Hollings" Legislation) that will force a balanced budget by 1991. This could drastically affect U.S. farm programmes and could cause a further decline in world prices of cereals, vegetable proteins and cotton.

The ineffectiveness of measures to curtail excess supplies of agricultural products has had a broader effect because it has resulted in more protectionism, increased competition on world markets, and isolation of agricultural trade from underlying market forces. The tension that has developed in recent months among major OECD-exporting countries together with the high cost of existing agricultural programmes in the United States and the EEC has ensured agriculture's inclusion as an item in the deliberations of the preparatory committee for the proposed new round of Multilateral Trade Negotiations (MTN) under GATT in September 1986.

Developments in Other OECD Countries

As well as the United States and the EEC, nearly all of the OECD member countries that export significant amounts of agricultural products have recently adjusted their agricultural policies in order to remain competitive in the more constrained market conditions of the mid-1980s. Apart from the United States already discussed, legislation in Australia and New Zealand in 1984, typifies the approach being adopted to confront the surplus in agricultural markets, the squeeze on farm incomes and the deficits in public budgets.

In general, the trend is towards reduced support for farmers and more reliance on markets for adjustment through prices. In some countries such as New Zealand, input subsidies and producer prices have been lowered or abolished. Even Japan, a large net agricultural importer, has lowered producer prices and has scaled down government assistance to agriculture. In some cases, such as in the United States and Canada, however, where interest rates have severely restricted the farmers' ability to repay loans, easy credit terms have allowed many farmers to stay in business.

The most obvious outcome in the near future will be lower commodity prices, while production may or may not decrease. In some countries, farmers will be assisted to leave the business of farming rather than being abandoned. Thus, importing countries are likely to continue to benefit, at least in the short term, from a situation of ample supplies and low prices, but the outlook for the medium and long terms is clouded by rising protectionism. As with the United States and the EEC, the other OECD member countries are concerned about the continuing strain on the international trading system of agricultural products, and have supported the inclusion of agriculture in the agenda for the forthcoming MTN.

7. EASTERN EUROPE AND THE USSR 21/

The major goals of agricultural policies in Eastern Europe and the USSR have been to maintain stable food prices for basic foods and to improve the standards of living by increasing the quantity and quality of food supplies. While these goals have not changed over the past few decades, there have been important shifts in policies to achieve them in response to internal and external economic forces.

The difficult situation in international financial markets that confronted Eastern European countries during the late 1970s and early 1980s had a major impact on their agricultural policies. The world economic slow-down, the high costs of borrowing in Western capital markets and the increase in energy costs all contributed to balance of payments problems and to escalating hard currency debts, which for Eastern European countries (excluding the USSR) at the end of 1981 reached a peak of $60 300 million. By 1984, however, most countries in the region increased their hard currency reserves as their trade balances improved and were thus able to reduce their external debts to an estimated $50 100 million. While Poland rescheduled much of its debt, it continued to face hard currency debts of about $29 000 million in 1985, the highest in Eastern Europe. Improvements in the external financial situation of most countries were achieved by strict import controls and restraints on domestic aggregate demand. These measures included rationing of food stuffs and price increases.

Re-examination of Agricultural Policies

The deteriorating economic environment from the late 1970s also warranted a major re-examination of agricultural policies that included a recognition of the need to restrict imports such as agricultural inputs so as to curtail or reduce the growth in foreign debt. The implementation of this policy in Eastern European countries was facilitated by their satisfactory agricultural performance, with production growing 2.5% a year during 1980-84. Imports of agricultural products, including animal feed, fell 26% in 1982, remained at the same level in 1983 and declined a further 5% in 1984. Therefore, agricultural policies that focused on self-sufficiency and increased crop production to reduce food imports did meet with some success. In the USSR, the great importance given to the improvement of agricultural production achieved tangible results. During 1980-85, net food production rose 2.2% a year compared with 1.2% in the 1970s. Agricultural imports fell 14% between 1981 and 1983, and the total trade balance reached a surplus of $11 000 million in 1984.

There was a realization that, in the short run, reduced economic growth rates along with a stable or increasing standard of living must be accompanied by a slowing down of investment expenditure. In 1981 and 1982, in nearly every Eastern European country, investments were sharply reduced while aggregate consumption increased. Agricultural investment rose in response to the need to modernize plant and equipment. The USSR was able to expand investment and consumption expenditures, which together with large trade surpluses, resulted in an overall economic growth of about 3.5% a year, during 1981-85. A reappraisal of energy-intensive methods of agricultural production was also undertaken. This was forced by higher energy costs in Eastern Europe, which the energy pricing policy of the Council for Mutual Economic Assistance (CMEA) delayed but did not prevent. In addition, increased exports of energy to Western markets by the USSR, led to selective shortages of fuel and energy. More mechanization, increased oil production and fertilizers based on natural gas, and

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21/ Includes: Bulgaria, Czechoslovakia, the German Democratic Republic (GDR), Hungary, Poland, Romania, and the USSR (Albania is not included for lack of sufficient data).

the increased use of greenhouses have all led to increased fuel needs, which reflect the relatively heavy consumption of energy in the region in relation to agricultural output. The world energy situation, however, was helpful to the non-oil producing countries of Eastern Europe, when world prices and prices charged by the USSR were held down by the increase in non-OPEC (Organization of Petroleum Exporting Countries) oil production and the slow growth in oil demand. In the region, in addition to an overall increase in the output of energy supplies, there was some improvement in efficiency of energy use.

There was a recognition of the need to increase domestic production, especially of grains and livestock. Higher producer prices were therefore introduced, particularly in 1983. In that year, in Poland, wheat prices increased 34%, cattle prices, 20% and pig prices, 8%; in Czechoslovakia, producer prices for crops increased an average of 6.4%; in Hungary, all agricultural procurement prices were raised an average of 4.4%; in the GDR, the steepest price rise in 35 years took place as agricultural procurement prices increased 50-60%; and, in the USSR, procurement prices for meat rose 34% on a live-weight basis. Livestock production was disappointing in the early 1980s, due particularly to difficulties in Poland and Romania.

There was an awareness that continued subsidization of retail prices of food and agricultural products placed an unacceptably heavy burden on national budgets that could be resolved only through retail price increases. Therefore, several countries in the region increased retail prices in 1984 and 1985. For example, in Hungary, in early 1985 retail prices for meat and meat products rose an average of 21%. In Poland, in mid-1985, retail prices for a variety of food products were increased 11-82%. On the other hand, the GDR, Romania and the USSR kept retail food prices almost stable, and consequently continued to face heavy subsidy burdens.

Between 1965 and 1979, a group of Eastern European countries with predominantly decentralized agricultural sectors--Hungary, Poland and Romania--appeared better able to adjust to changes in the overall economic situation, as they showed better agricultural performances compared with Bulgaria, Czechoslovakia and the GDR. Hungary, in the late 1970s, rapidly adjusted its agricultural policies in response to both foreign and domestic pressures, followed by the remaining countries during 1981-83. The most severe adjustments took place in Poland where real national income fell 7.2% in 1980, 12% in 1981 and 5.5% in 1982. Production in agriculture and forestry fell 14.2% in 1980, but recovered during 1981-85. The response of Poland's predominantly private agricultural sector to increased financial incentives and favourable weather resulted in a total increase in crop production of about 18% between 1982 and 1985. Indeed, the record Polish harvest of 21.72 million tons of grain in 1984 contributed to the record grain production in Eastern Europe (excluding the USSR) of 114 million tons.

New Policy Measures Adopted

Other new policy measures adopted included reforms in Bulgaria, Hungary and the GDR that loosened central control of farm management to increase the efficiency of agricultural production. In Poland, agricultural reforms greatly expanded the maximum acreage allowed for private farmers, and the government approved in 1984 the establishment of a private foundation to aid small private farmers. While private farming is generally small-scale and has a low priority in receiving agricultural inputs, it is responsible for a significant amount of production of crops and livestock in the region (see Box 2-1).

Prices of agricultural inputs were increased to make their uses more efficient. For example, prices of fertilizers increased 60% in the GDR in

BOX 2-1

PRIVATE AGRICULTURE IN EASTERN EUROPE AND THE USSR

The importance of food production on private plots has been recognized in Eastern Europe and is becoming relatively more significant in assuring adequate food supplies. While private agriculture dominates in Poland, it is only meant to complement socialized production in countries such as Bulgaria, Czechoslovakia, Hungary, Romania, the GDR and the USSR. Nevertheless, incentives have been introduced for private farmers to contract for delivery with socialized sector organizations such as state or cooperative farms. In addition to guaranteed prices, the contracts may exempt from taxes income earned from these sales.

Hungary and Bulgaria have integrated private and socialized production to the greatest extent in the region. In Hungary, private producers provide 22% of marketed production. Hungary also has adopted the most extensive measures to encourage private or small-scale production, including permission for private producers to own small tractors, income tax breaks, higher procurement prices, and more favourable credit terms for the purchase of inputs. In Bulgaria, private producers provide more than a quarter of meat and eggs marketed by the socialized sector through the contract system. Socialized agriculture, however, remains dominant in the USSR and Eastern Europe, except in Poland, where it is still a long-term goal of the government.

SHARE OF THE PRIVATE SECTOR IN AGRICULTURAL LAND AND PRODUCTION, 1982

Item	Bulgaria	Czechos-lovakia	GDR	Hungary	Romania	Poland	USSR a/
	..... %						
Agricultural land	13	7	6	12	15	76	2
Gross farm output	25	...	...	28	14	81	...
Wheat	3	2	...	2	1	75	1 b/
Maize	29	21	...	17	25	37	...
Potatoes	51	12	6 a/	63	58	92	64
Sugar beets	-	-	...	2	6	83	...
Vegetables	33	40	11	62	42	92	33
Fruit	37	70	30	50	58	91	42
Meat	40	27	...	54	45	28	- c/
Milk	21	...	-1 a/	28	61	86	30
Eggs	56	...	...	62	58	90	...
Inventory:							
Cattle	21	4	4	21	38	77	...
Pig	20	9	20	52	25	86	...
Poultry	38	25	44	72	39	90	...

Note: Excludes Albania for lack of data.

a/ 1980 data.
b/ Cereals and pulses.
c/ Estimates for types of meat products are beef 18.9%, pork 40.3% and poultry 37.6%.

Sources: USDA, Eastern Europe: Outlook and Situation Report USDA: Economic Research Service RS-84, June 1984, p. 17; and Research Insitute for Agricultural Economics, Budapest, Bulletin No. 51, 1982, p. 45.

1984. In Hungary, farm costs were expected to rise 4-5% in 1985 due to higher prices for machinery, fertilizers and herbicides.

Special incentives were introduced and investments made to improve the production and utilization of animal feeds, including roughages. In the USSR, the Food Programme shifted investment policy in the feed-livestock sector away from constructing large livestock complexes towards guaranteeing adequate feed supplies. The labour brigade system was extended in 1983 to feed-crop lands in the hope of increasing labour productivity. This is a continuing concern since agriculture alone employs 27 million persons, or 21% of the total Soviet labour force. It also was aimed at stabilizing production by giving the labour brigade strict responsibility for feed-crop production for at least a one-year period. Further, the area devoted to forage rose from 29% to 33% of total area sown in 1984, reflecting the increased emphasis on roughages rather than concentrated feed.

Requirements for maintaining soil fertility and improving economic efficiency called for: (i) large increases in land improvement, particularly in the GDR, Bulgaria and Romania; (ii) expanded supplies of fertilizer and plant protection products, notably in Hungary, Poland and Romania; and (iii) better integration of crop and livestock units in the USSR.

The need for greater autonomy at the enterprise or farm level, however, is recognized in order to pursue efficiency and quality objectives. There are conflicting trends within Eastern Europe in this respect. On the one hand, economic reform legislation has been passed by the Polish parliament to allow greater autonomy, but on the other hand, reorganization of agricultural production units in the GDR consolidates farms into fewer larger units with decision-making authority resting in a new intermediate-level cooperative council rather than with individual cooperatives.

It is too early to fully assess the results of the shifts in policies and reform programmes, but the rate of growth of agricultural production was raised in the early 1980s in Eastern Europe and the USSR. Regional food production increased 2.7% a year during 1980-85 compared with 1.6% a year during the 1970s, but there was no increase in 1985. The GDR had its best cereal harvest of 11.5 million tons in 1984.

Agricultural imports were restrained with the volume of food imports for Eastern Europe and the USSR in 1983 no higher and feed imports 11-12% less than their levels in 1980. Eastern Europe also reduced its imports of wheat by one-quarter between 1982-83 and 1984-85. The region remains a net exporter of meat, but overall, continues as a net importer of agricultural products.

Despite the large quantities of cereal imports by the USSR in 1984 and 1985 (a record 45 million tons in the 1984 calendar year), the future impact on foreign trade of recent policy changes could further reduce imports of grains and meat products and increase the acquisition of technology, equipment and feed components such as soya protein and feed additives. For example, imports of agricultural technology by the USSR nearly trebled between 1975 to 1982 to $2.7 million.

The CMEA summit held in Moscow in June 1984, the first such summit in 15 years, resulted in a declaration that development of the agro-industrial complex and cooperation in this area should receive the highest priority. Further, CMEA members, as a group, are to support food and agricultural investment in the major agricultural-exporting countries of the region (Hungary, Bulgaria and Romania). Although joint agricultural development within CMEA is projected, no concrete plans for implementation of these broad policy goals have been formulated to date.

Annex tables

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
WORLD												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	1338658	1372714	1481670	1472531	1605239	1555565	1566682	1653339	1703052	1645435	1805034	2.62
WHEAT	364141	359905	425431	387290	451197	428527	446354	454601	485336	495241	524322	3.52
RICE PADDY	333320	359136	350648	372261	388145	377266	399025	412500	423927	451917	470996	3.19
BARLEY	152741	137897	172158	160259	179940	158215	160117	155190	162258	167728	172073	.93
MAIZE	307168	342342	351615	371502	394549	419650	396858	450024	448611	347600	453001	2.88
MILLET AND SORGHUM	86554	90344	90844	94982	97373	93128	83795	101680	95911	92202	97343	.75
ROOT CROPS	558924	553281	551402	572287	597659	587398	537866	555696	557667	561988	595288	.23
POTATOES	293910	284903	291860	298740	315621	320929	264165	288974	288494	287558	311559	.04
CASSAVA	104679	110186	114256	117731	121275	117201	124882	127941	127520	125250	133897	2.08
TOTAL PULSES	42650	40048	44836	42606	44552	40953	40559	42632	45300	46368	47812	1.00
CITRUS FRUIT	46542	48115	49090	50421	49761	51078	56117	56190	55001	58881	56082	2.22
BANANAS	33193	32989	34177	36343	36848	37859	39541	40862	40800	40764	41259	2.55
APPLES	27423	31284	31647	30445	32430	36556	34104	32742	41421	39301	39596	3.47
VEGETABLE OILS,OIL EQUIV	38810	42153	40069	45210	47419	51241	49779	53573	57177	53233	59205	4.18
SOYBEANS	52580	64278	57409	73784	75382	88797	81097	88184	92212	79434	90441	5.04
GROUNDNUTS IN SHELL	17293	19076	17061	17369	18252	18189	17018	20699	18362	18965	20326	1.18
SUNFLOWER SEED	10992	9626	10517	12303	13353	15311	13615	14261	16334	15584	16423	5.19
RAPESEED	7351	8788	7612	7904	10570	10542	10514	12340	15065	13998	16551	8.38
COTTONSEED	26091	22672	22070	25668	24426	26409	26648	28698	27939	27571	35134	3.03
COPRA	3478	4561	5286	4710	4861	4296	4530	4698	4786	4535	4082	.37
PALM KERNELS	1365	1389	1404	1479	1406	1679	1808	1865	2220	2139	2380	6.18
SUGAR (CENTRIFUGAL,RAW)	75714	79286	83574	89753	90439	88445	84127	93258	102501	97786	100096	2.63
COFFEE GREEN	4770	4596	3521	4408	4723	4949	4805	6041	4981	5651	5173	2.69
COCOA BEANS	1556	1561	1353	1465	1488	1677	1659	1736	1616	1589	1742	1.48
TEA	1476	1538	1582	1749	1792	1818	1872	1880	1948	2055	2190	3.65
COTTON LINT	13988	12337	11950	13972	13248	13932	13972	15277	14806	14319	18246	2.58
JUTE AND SIMILAR FIBRES	3139	3177	3389	3706	4490	4476	4102	4247	3756	3947	4306	2.71
SISAL	847	758	559	558	503	501	528	491	503	404	443	-5.55
TOBACCO	5259	5385	5700	5548	5979	5409	5300	5963	6893	5966	6457	1.86
NATURAL RUBBER	3410	3322	3628	3667	3735	3834	3776	3777	3786	4040	4185	1.84
TOTAL MEAT	111006	112789	115104	119198	123755	128539	132226	134794	136207	140470	143817	2.76
TOTAL MILK	421805	426120	434978	447532	454459	461222	467868	469858	480994	499586	500420	1.76
TOTAL EGGS	22255	22963	23372	24373	25566	26390	27179	27875	28628	29251	30132	3.16
WOOL GREASY	2622	2719	2673	2651	2635	2693	2761	2822	2855	2882	2891	1.00
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	7256	7467	7270	7469	7420	7675	8008	8595	8876	9654	10172	3.39
MARINE FISH	52196	51384	54730	53120	54774	55043	55319	57422	58271	57657	62612	1.58
CRUST+ MOLLUS+ CEPHALOP	6234	6615	6954	7492	7781	8111	8606	8694	9227	9157	9609	4.38
AQUATIC MAMMALS	1	1	2	2	2	18	18	12	8	1		
AQUATIC ANIMALS	134	139	131	237	199	202	131	222	282	421	444	11.69
AQUATIC PLANTS	2615	2480	2492	3080	3224	3187	3349	3061	3096	3252	3544	3.03
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	566038	542507	597348	611981	629674	635839	609580	574975	552424	608571	606172	.37
SAWLOGS NONCONIFEROUS	226470	210742	232325	236539	248752	250396	258611	244918	233188	242377	241820	.92
PULPWOOD+PARTICLES	358182	322668	323349	315552	332201	356937	370081	372677	361800	368924	376743	1.43
FUELWOOD	1257709	1281960	1314516	1327032	1365737	1417964	1474366	1515748	1545663	1570907	1597836	2.61
SAWNWOOD CONIFEROUS	321243	304700	329361	342700	346473	347052	333602	313534	310517	338078	338894	.26
SAWNWOOD NONCONIFEROUS	100564	96710	102837	103344	108209	110447	113724	111251	107024	108932	109843	1.13
WOOD-BASED PANELS	87986	84435	95211	101416	104234	106071	101062	100225	94694	103738	105680	1.53
PULP FOR PAPER	117575	103236	112890	114476	120557	125761	128516	127858	122812	130888	137722	2.09
PAPER+PAPERBOARD	150554	130840	147521	152319	160195	169301	170007	170446	166319	175733	186392	2.66
WESTERN EUROPE												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	158627	146629	141804	153145	168201	164364	177509	167185	181271	173782	211737	2.85
WHEAT	62617	52829	56722	53460	63943	60267	70024	66265	73690	73838	93073	4.30
RICE PADDY	1707	1684	1511	1311	1650	1831	1701	1597	1704	1515	1747	.44
BARLEY	47507	45657	42544	51197	55362	52830	57235	50625	53712	49813	62912	2.26
MAIZE	26235	27345	24098	29539	28202	32384	31280	32623	35495	34539	36373	3.73
MILLET AND SORGHUM	497	500	476	601	761	643	613	599	508	466	499	-.26
ROOT CROPS	58511	47519	45108	55022	53084	52002	49188	48584	48357	42454	50483	-1.18
POTATOES	58368	47380	44958	54872	52940	51857	49040	48446	48226	42332	50374	-1.18
TOTAL PULSES	2036	1880	1542	1650	1776	1790	1869	1634	1916	2112	2756	2.45
CITRUS FRUIT	6533	6656	6626	6603	6268	6458	6461	6772	6732	8651	6360	.95
BANANAS	426	385	362	422	430	436	511	522	492	499	484	2.94
APPLES	9908	11473	10200	7658	10637	10639	10674	7646	12696	9090	10926	.20
VEGETABLE OILS,OIL EQUIV	2241	2613	2128	2596	2737	2676	3309	2927	3764	3635	4243	6.24

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
SOYBEANS	59	47	57	78	85	102	66	118	233	300	389	21.73
GROUNDNUTS IN SHELL	16	19	17	19	20	21	19	15	15	17	15	-1.61
SUNFLOWER SEED	691	856	772	1010	1149	1276	1302	1219	1736	1877	2476	11.98
RAPE SEED	1611	1338	1388	1330	1731	1696	2543	2522	3296	3142	4207	12.01
COTTONSEED	351	332	300	337	326	284	333	366	285	329	384	.40
SUGAR (CENTRIFUGAL,RAW)	11181	12918	13810	15445	15603	15794	15733	19072	18015	14775	16603	3.46
COTTON LINT	175	165	148	173	165	146	175	196	156	176	200	1.27
TOBACCO	329	401	446	391	409	440	401	438	462	436	479	2.33
TOTAL MEAT	25184	25160	25653	26317	27215	28488	29342	29606	29661	30075	30904	2.28
TOTAL MILK	125584	126758	129359	132359	136901	139564	141870	142417	146255	150537	149074	1.92
TOTAL EGGS	4925	5053	5118	5191	5315	5394	5442	5535	5690	5602	5537	1.34
WOOL GREASY	167	150	154	152	157	157	159	159	161	163	169	.60
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	176	182	182	183	200	210	260	248	265	272	280	5.54
MARINE FISH	10143	9777	10888	10941	10283	10035	9956	10003	9500	9703	10073	-.62
CRUST+ MOLLUS+ CEPHALOP	981	1034	960	947	953	917	1036	1048	1131	1170	1122	1.79
AQUATIC MAMMALS						17	18	12	8	1		
AQUATIC ANIMALS	5	2	4	3	5	2	1	1	1	1	1	-19.74
AQUATIC PLANTS	262	228	217	280	295	290	258	217	233	231	253	-.50
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	93756	74687	83972	87161	89561	96073	97381	90791	89591	94371	92576	1.13
SAWLOGS NONCONIFEROUS	23841	20797	20736	21885	24084	23882	24240	23838	22270	21445	21381	-.03
PULPWOOD+PARTICLES	88077	86604	79816	73403	75913	83932	83788	86401	84016	82574	86439	.27
FUELWOOD	38307	36864	36847	35287	33891	35345	36965	38628	38413	38872	39145	.65
SAWNWOOD CONIFEROUS	51486	42871	47330	49222	49034	53617	54880	50555	49985	52349	53389	1.20
SAWNWOOD NONCONIFEROUS	12313	10508	11630	12385	12538	12724	12437	11472	11295	10637	10942	-.72
WOOD-BASED PANELS	24334	22687	25139	25131	25532	26598	26577	24932	23568	23831	23847	-.07
PULP FOR PAPER	27433	23018	24020	23196	24932	26693	26647	26489	25046	26895	29120	1.26
PAPER+PAPERBOARD	41271	33366	38628	39230	41472	45174	44736	44707	43738	45498	49817	2.66
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	263336	208405	293808	266091	312719	251009	264130	234582	261662	272492	259896	.22
WHEAT	111876	90542	126017	121253	151590	113566	127688	106325	116480	108417	112471	.07
RICE PADDY	2092	2228	2126	2381	2269	2584	2934	2576	2681	2818	2717	3.10
BARLEY	68374	49605	83290	67038	78108	62927	59219	54313	57740	70203	58351	-1.09
MAIZE	28245	27736	30909	30955	29062	32920	30619	30376	37348	35674	37351	2.75
MILLET AND SORGHUM	3180	1330	3513	2231	2408	1744	2077	1685	2178	2767	2479	-.41
ROOT CROPS	153757	151145	152736	145232	154405	163116	111251	135403	129664	135629	147334	-1.45
POTATOES	153754	151141	152734	145229	154403	163113	111249	135399	129661	135627	147332	-1.45
TOTAL PULSES	9588	6149	9328	8231	8620	5052	7132	6457	7478	9261	8452	-.30
CITRUS FRUIT	127	160	134	234	204	340	161	313	286	415	369	11.29
APPLES	7348	8744	10436	10946	8967	11301	8567	10002	13278	13125	11935	4.22
VEGETABLE OILS,OIL EQUIV	4790	4257	4455	4689	4472	4436	4330	4365	4676	4572	4501	-.05
SOYBEANS	710	1111	834	862	1012	1042	1118	907	1007	953	997	1.70
GROUNDNUTS IN SHELL	3	5	4	4	5	6	7	9	9	8	8	10.66
SUNFLOWER SEED	7983	6340	6666	7395	6794	7208	6328	6636	7350	6904	6529	-.60
RAPESEED	983	1312	1531	1285	1306	574	1129	1097	1064	1312	1718	1.13
COTTONSEED	5170	4863	5066	5366	5210	5615	6100	5901	5687	5742	5420	1.46
SUGAR (CENTRIFUGAL,RAW)	11817	12112	11603	13894	13621	12229	10861	10971	12450	13563	13617	.61
TEA	81	86	92	106	111	118	130	137	140	146	151	6.71
COTTON LINT	2497	2667	2597	2709	2744	2514	2816	2905	2800	2598	2354	-.01
JUTE AND SIMILAR FIBRES	39	36	49	47	44	48	52	45	50	55	58	3.61
TOBACCO	606	646	712	608	567	627	545	574	637	670	664	.10
TOTAL MEAT	23281	24094	22260	23833	25053	25259	25111	24866	24746	26050	26894	1.32
TOTAL MILK	129963	128588	127514	134505	135205	133850	131386	127756	129328	137330	140560	.52
TOTAL EGGS	4642	4825	4769	5174	5397	5498	5630	5818	5853	6053	6239	3.02
WOOL GREASY	558	566	534	567	578	573	559	574	571	584	595	.58
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	1064	1329	1060	1089	1037	1137	1078	1122	1178	1213	1209	.63
MARINE FISH	9395	10000	10329	9226	8818	8621	9060	9117	9306	9518	10365	-.01
CRUST+ MOLLUS+ CEPHALOP	130	158	109	248	207	437	565	540	732	428	368	17.21
AQUATIC ANIMALS										1		22.35
AQUATIC PLANTS	2	5	2	2	15	19	20	19	16	15	17	28.66
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	163360	171306	166669	164533	158643	154849	155724	155698	153520	156432	155522	-.89
SAWLOGS NONCONIFEROUS	34896	36349	35247	35079	34599	33545	33594	33619	33109	33368	33435	-.78
PULPWOOD+PARTICLES	62358	58856	57328	57068	55829	55277	55992	55666	56524	57323	57139	-.57

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
FUELWOOD	99342	96538	97125	94855	92055	91301	92415	96413	99294	96236	96329	-.06
SAWNWOOD CONIFEROUS	116371	117612	114640	110966	108612	102829	101494	100809	100153	100264	99242	-1.89
SAWNWOOD NONCONIFEROUS	20382	20492	20031	19551	19365	18638	18260	18269	18060	18255	18137	-1.40
WOOD-BASED PANELS	13690	14853	15524	16518	17095	17005	17464	17598	18023	18719	18937	2.90
PULP FOR PAPER	10669	11012	11598	11843	12161	11489	11607	11774	12054	12873	12991	1.53
PAPER+PAPERBOARD	12814	13495	14079	14428	14520	13989	14102	14264	14356	14993	15044	1.12
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	235557	286543	303102	308361	318607	338726	311336	381936	386628	255321	358193	2.55
WHEAT	61800	74967	82068	75529	69459	75277	84092	100608	101988	92363	91817	3.92
RICE PADDY	5098	5826	5246	4501	6040	5985	6629	8289	6969	4523	6296	2.03
BARLEY	15293	17765	18852	21115	20299	16821	19257	24033	25198	21289	23342	3.62
MAIZE	122040	152006	163511	169484	189092	206659	174400	212895	215693	111974	201951	2.30
MILLET AND SORGHUM	15817	19161	18055	19837	18575	20509	14716	22247	21212	12384	22004	.35
ROOT CROPS	18652	17398	19176	19186	19727	18895	16762	18681	19565	18253	19838	.31
POTATOES	18042	16810	18570	18642	19129	18285	16262	18097	18889	17702	19246	.33
TOTAL PULSES	1310	1155	1111	943	1304	1299	1676	1954	1717	1149	1357	2.92
CITRUS FRUIT	12167	13237	13415	13827	12932	12092	14954	13703	10938	12344	9787	-1.67
BANANAS	3	3	2	3	3	2	2	3	3	2	4	.41
APPLES	3391	3876	3345	3468	3898	4121	4553	3933	4162	4283	4193	2.32
VEGETABLE OILS,OIL EQUIV	8113	9967	8243	11852	12875	15756	11883	13251	14346	10906	13012	4.20
SOYBEANS	33383	42507	35321	48678	51376	62183	49612	54742	60459	45254	51589	3.93
GROUNDNUTS IN SHELL	1664	1745	1696	1685	1793	1800	1045	1806	1560	1495	1998	-.32
SUNFLOWER SEED	298	574	487	1411	1943	3528	1863	2201	2515	1503	1795	18.42
RAPESEED	1163	1839	837	1973	3497	3411	2483	1849	2225	2609	3382	8.72
COTTONSEED	4091	2919	3739	5009	3873	5242	4056	5803	4304	2791	4671	1.14
SUGAR (CENTRIFUGAL,RAW)	5048	6443	6170	5403	5482	5167	5438	5784	5384	5217	5476	-.65
COFFEE GREEN	1	1	1	1	1	1	1	1		1	1	-.20
COTTON LINT	2513	1807	2304	3133	2364	3185	2422	3406	2605	1692	2827	.81
TOBACCO	1019	1096	1051	973	1034	771	918	1048	975	758	875	-2.18
TOTAL MEAT	24492	23877	25825	26019	25869	26138	26993	27394	26829	27750	28050	1.41
TOTAL MILK	60062	60095	62205	63384	62716	63653	66153	68339	69857	71507	69916	1.84
TOTAL EGGS	4191	4128	4115	4125	4276	4417	4463	4473	4464	4380	4389	.84
WOOL GREASY	65	55	51	50	48	49	49	51	50	48	45	-2.25
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	309	263	328	356	396	433	476	502	485	499	495	6.53
MARINE FISH	2450	2492	2685	2581	3032	3106	3153	3122	3519	3656	3888	4.72
CRUST+ MOLLUS+ CEPHALOP	1057	1075	1130	1272	1347	1376	1350	1558	1378	1323	1643	3.74
AQUATIC ANIMALS	6	6	9	9	11	10	2	2	10	10	9	.30
AQUATIC PLANTS	224	198	189	195	196	195	191	78	103	29	63	-14.87
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	237683	222108	267372	278553	299879	298266	260961	238884	220996	269238	269238	.34
SAWLOGS NONCONIFEROUS	37932	32125	34953	36846	40908	42727	43206	39834	29093	34299	34299	-.53
PULPWOOD+PARTICLES	165000	132931	139779	136788	146956	157282	163894	164429	156026	161024	165064	1.44
FUELWOOD	21663	22907	23891	35679	51645	71933	95976	107410	107595	108119	108119	21.68
SAWNWOOD CONIFEROUS	96191	87609	106334	117151	122447	122145	109395	97815	95389	121161	121616	1.53
SAWNWOOD NONCONIFEROUS	17626	14831	16373	16614	17282	18432	18650	17087	12324	14410	14460	-1.65
WOOD-BASED PANELS	31038	28739	33860	37274	37288	36649	31026	32011	26790	33242	34688	-.05
PULP FOR PAPER	59779	50660	57186	58462	61368	63750	65241	65672	61372	65863	69902	2.15
PAPER+PAPERBOARD	65758	55315	63548	65498	68440	70896	70229	71502	67307	72157	76588	2.02
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	16977	18422	18376	15315	26087	24143	17159	24472	15066	31969	29719	4.58
WHEAT	11572	12162	12213	9724	18415	16483	11162	16686	9168	22317	18981	4.29
RICE PADDY	409	388	417	530	490	692	613	728	854	548	632	6.15
BARLEY	2755	3442	3132	2655	4265	3967	2910	3721	2295	5236	6125	4.68
MAIZE	194	291	316	355	305	348	307	325	382	282	392	3.52
MILLET AND SORGHUM	1096	923	1151	975	747	1162	936	1231	1355	987	1929	3.97
ROOT CROPS	870	977	953	1008	1027	1012	1091	1089	1168	1126	1327	3.24
POTATOES	857	967	945	999	1010	1001	1071	1075	1157	1116	1314	3.25
TOTAL PULSES	127	157	189	106	120	175	209	225	315	321	609	13.87
CITRUS FRUIT	434	458	428	461	496	489	566	509	534	527	590	2.84
BANANAS	118	103	115	98	113	125	124	130	140	146	145	3.39
APPLES	487	527	447	447	444	525	510	549	520	534	513	1.21
VEGETABLE OILS,OIL EQUIV	91	98	74	86	140	159	120	126	122	105	164	4.97
SOYBEANS	64	74	45	55	77	99	82	73	77	53	89	2.42
GROUNDNUTS IN SHELL	29	32	35	32	39	62	39	43	58	23	47	2.95

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
SUNFLOWER SEED	84	113	80	75	158	186	142	139	115	104	170	5.01
RAPESEED	9	12	9	16	24	41	18	15	7	17	33	6.46
COTTONSEED	50	54	41	46	72	79	136	161	219	164	230	20.28
SUGAR (CENTRIFUGAL,RAW)	2848	2855	3296	3318	2902	2963	3330	3435	3536	3170	3548	1.77
COTTON LINT	31	33	25	28	44	53	83	99	134	101	141	20.31
TOBACCO	20	18	18	19	19	19	18	17	15	15	16	-2.37
TOTAL MEAT	3189	3525	4032	4089	4307	4102	3799	3811	3855	3923	3583	.56
TOTAL MILK	12654	12773	12984	12582	11724	12202	12248	12079	12203	12592	13482	.03
TOTAL EGGS	259	268	263	264	274	268	264	277	272	272	267	.33
WOOL GREASY	986	1088	1066	1005	988	1025	1066	1082	1080	1073	1092	.65
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	4	5	4	5	5	5	4	4	4	4	5	-.86
MARINE FISH	123	98	105	122	130	138	167	200	189	199	203	7.88
CRUST+ MOLLUS+ CEPHALOP	79	70	72	81	81	93	113	121	150	157	166	9.83
AQUATIC PLANTS	4		1	1	1	1	1	1	1	1	1	
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	6537	6356	7595	7178	6913	7021	8443	8607	8357	7703	7177	1.91
SAWLOGS NONCONIFEROUS	7240	6490	6631	6518	6336	5846	5881	6077	5725	4569	4764	-3.70
PULPWOOD+PARTICLES	5006	7613	7191	8596	8335	8330	9890	10177	9513	9865	10997	5.91
FUELWOOD	1596	1609	1607	1619	1636	1447	1458	1818	2118	2524	2924	5.39
SAWNWOOD CONIFEROUS	2882	2821	3067	2917	2559	2743	3101	3370	3414	3141	3204	1.61
SAWNWOOD NONCONIFEROUS	2533	2505	2430	2340	2063	1986	2069	2145	2013	1790	1917	-3.11
WOOD-BASED PANELS	988	920	1054	1043	1059	1073	1166	1215	1228	1053	1199	2.18
PULP FOR PAPER	1505	1524	1660	1714	1699	1699	1824	1913	1896	1794	1991	2.52
PAPER+PAPERBOARD	1732	1697	1761	1890	1867	1942	2104	2151	2188	2101	2214	2.87
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	45529	47656	49646	44958	49398	48204	49360	48839	51843	45163	46295	.15
WHEAT	4996	5379	5760	3634	4789	4646	5423	4371	5644	4626	4719	-.41
RICE PADDY	5491	5732	5752	5726	5893	6005	6207	6492	6503	6630	6826	2.15
BARLEY	3669	3324	4699	2468	3894	3769	4464	3150	4435	2882	3150	-.80
MAIZE	14507	15569	15910	15490	15824	14394	14084	15815	16160	14415	15100	-.12
MILLET AND SORGHUM	15788	16363	16196	16412	17586	17691	17468	17539	17335	15182	15282	-.12
ROOT CROPS	75097	79732	80670	80272	80622	81316	84685	86630	90280	87909	95205	1.94
POTATOES	2231	2482	2673	2665	3044	3105	3211	3278	3543	3772	3725	5.17
CASSAVA	42511	46305	46844	46792	45451	45475	48342	49602	51482	50662	56062	2.02
TOTAL PULSES	4630	4962	5228	4639	5067	5199	4889	5037	5397	5038	4869	.49
CITRUS FRUIT	2636	2417	2394	2486	2696	2492	2618	2549	2517	2410	2574	.04
BANANAS	3845	3765	3995	3943	3990	4164	4476	4582	4602	4633	4641	2.40
APPLES	52	59	56	61	61	64	73	81	82	84	94	5.83
VEGETABLE OILS,OIL EQUIV	3902	4103	4040	3683	3788	3755	3861	3885	4021	3817	3898	-.17
SOYBEANS	112	123	147	152	182	193	216	198	217	192	200	6.15
GROUNDNUTS IN SHELL	4067	4199	4488	3327	3762	3487	3306	3817	3899	3016	3344	-2.32
SUNFLOWER SEED	85	101	125	149	157	150	140	134	130	149	171	4.49
RAPESEED	21	21	22	22	22	21	22	16	16	24	16	-2.21
COTTONSEED	1025	878	937	944	944	892	910	872	855	960	1089	.17
COPRA	148	145	167	161	170	180	178	173	187	193	196	2.81
PALM KERNELS	742	728	689	685	587	695	734	743	748	736	756	.70
SUGAR (CENTRIFUGAL,RAW)	2919	2824	3110	3045	3370	3522	3525	3728	3912	3936	3940	3.67
COFFEE GREEN	1267	1313	1165	1235	1064	1087	1162	1273	1198	1193	1160	-.53
COCOA BEANS	1025	1004	860	944	902	1034	1024	1068	875	860	1048	-.07
TEA	151	152	157	192	202	197	185	195	206	219	235	4.11
COTTON LINT	539	469	507	505	504	478	509	483	484	551	599	.87
JUTE AND SIMILAR FIBRES	11	11	8	7	8	8	8	8	9	9	9	-1.51
SISAL	350	260	223	204	175	156	168	146	142	124	119	-9.03
TOBACCO	193	220	245	223	223	252	269	213	241	265	305	2.83
NATURAL RUBBER	234	222	204	205	195	194	185	200	187	204	221	-.91
TOTAL MEAT	3709	3824	3979	4211	4378	4500	4630	4749	4861	4952	4970	3.13
TOTAL MILK	6255	6575	6806	7076	7393	7616	7627	7712	8082	8342	8202	2.79
TOTAL EGGS	449	474	508	548	571	612	646	677	728	767	791	5.97
WOOL GREASY	72	72	76	67	69	70	73	74	82	92	95	2.56
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	1232	1276	1334	1384	1336	1305	1269	1255	1316	1395	1389	.60
MARINE FISH	1720	1479	1434	1577	1620	1516	1538	1694	1675	1742	1599	.77
CRUST+ MOLLUS+ CEPHALOP	52	48	55	56	68	67	92	106	119	152	153	13.49
AQUATIC ANIMALS	1	1	1	1	1	1	1	1	1	1	1	-3.43
AQUATIC PLANTS	5	6	5	5	5	5	5	5	5	5	5	-.32

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	1087	1030	1137	1292	1316	1032	1286	1241	1434	1124	1219	1.39
SAWLOGS NONCONIFEROUS	14030	13697	15538	15862	16226	16714	17862	16762	16387	16349	16452	1.71
PULPWOOD+PARTICLES	1498	2137	2213	2255	2610	2171	2002	2008	2037	2050	2117	.75
FUELWOOD	255682	263006	270939	281511	289898	297814	307627	316846	326096	334483	343878	3.04
SAWNWOOD CONIFEROUS	429	445	506	525	457	492	508	570	586	535	555	2.52
SAWNWOOD NONCONIFEROUS	3210	3350	3244	3675	4460	4552	5702	5916	6283	6587	6914	9.24
WOOD-BASED PANELS	765	639	752	847	918	955	1067	1103	1156	1225	1207	6.43
PULP FOR PAPER	290	305	336	321	343	409	434	462	371	387	387	3.38
PAPER+PAPERBOARD	195	218	219	265	281	344	350	354	368	372	371	7.28
LATIN AMERICA												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	78411	80549	86259	86101	85308	84088	88507	104468	105185	99501	107096	3.16
WHEAT	13474	14971	19336	11540	14969	15103	14855	15179	22699	20077	21862	4.29
RICE PADDY	12244	14039	15418	15111	13425	14445	16477	15632	17525	14716	16972	2.28
BARLEY	1249	1556	1883	1376	1716	1330	1302	1263	1147	1161	1359	-2.41
MAIZE	39579	38273	37388	43729	40151	39751	45249	55372	47824	47012	51104	3.17
MILLET AND SORGHUM	10780	10510	10984	13216	13728	12264	9559	16038	14779	15070	14391	3.52
ROOT CROPS	45114	45733	45181	46034	46451	45603	43717	46077	45341	41268	43165	-.62
POTATOES	9969	9260	9738	10102	10903	10988	10360	11851	11746	10067	11924	1.89
CASSAVA	30926	32107	31326	31966	31580	30936	29880	30835	30100	27777	27607	-1.26
TOTAL PULSES	4640	4732	3911	4601	4719	4580	4313	5357	5648	4361	5493	1.68
CITRUS FRUIT	11287	11889	12795	13411	13812	14534	16932	17567	17948	18028	21012	6.12
BANANAS	17402	17027	17655	18412	18189	17813	18606	18811	19099	18343	19168	.99
APPLES	1297	1090	1198	1329	1449	1670	1651	1683	1688	1673	1864	4.80
VEGETABLE OILS,OIL EQUIV	4219	4388	4654	5389	5241	5823	6484	6276	6151	6507	7242	5.25
SOYBEANS	9180	11410	12643	14960	12927	15464	19814	20396	18727	20218	24203	8.88
GROUNDNUTS IN SHELL	979	1049	1058	1157	1014	1389	1099	984	938	813	844	-2.13
SUNFLOWER SEED	1033	804	1192	955	1717	1550	1756	1351	2066	2450	2266	10.27
RAPESEED	41	68	111	91	61	75	96	64	32	17	18	-11.65
COTTONSEED	3426	2771	2354	3369	3220	3098	2958	2779	2475	2284	2959	-1.64
COPRA	220	224	229	232	236	214	234	224	226	218	191	-.84
PALM KERNELS	289	275	297	311	298	324	326	309	306	307	287	.50
SUGAR (CENTRIFUGAL,RAW)	24468	23794	25946	27249	26929	26281	26421	27245	28853	28596	29407	1.79
COFFEE GREEN	3136	2854	1905	2673	3096	3262	2961	4072	3064	3774	3388	3.45
COCOA BEANS	476	497	432	459	520	573	552	563	612	583	532	2.49
TEA	44	51	44	52	39	44	51	39	49	56	57	1.62
COTTON LINT	1954	1565	1341	1898	1809	1728	1652	1556	1325	1329	1703	-1.68
JUTE AND SIMILAR FIBRES	90	108	127	114	100	114	112	132	95	104	113	.52
SISAL	478	481	321	342	316	333	346	335	351	270	313	-3.66
TOBACCO	670	676	727	740	768	797	732	690	757	709	733	.52
NATURAL RUBBER	29	33	35	38	40	43	42	48	52	54	55	6.51
TOTAL MEAT	11091	11719	12516	13165	13683	13793	14213	14916	14887	14885	14369	2.82
TOTAL MILK	28916	31053	32713	32023	32498	33765	35543	35878	36574	36682	34691	2.05
TOTAL EGGS	1657	1792	1889	1997	2204	2407	2596	2669	2702	2690	2896	5.83
WOOL GREASY	300	300	298	315	300	302	306	314	317	324	320	.75
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	250	266	226	249	279	235	296	322	339	434	456	6.35
MARINE FISH	6750	5897	7483	6017	8040	9203	8679	9590	10403	8103	10584	5.14
CRUST+ MOLLUS+ CEPHALOP	419	426	450	437	576	634	539	533	570	594	632	4.10
AQUATIC ANIMALS	38	51	25	71	52	54	54	50	36	30	34	-2.09
AQUATIC PLANTS	90	80	92	99	90	129	124	152	222	213	214	11.58
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	16315	19171	21677	23841	22869	25673	31933	26246	26020	26092	26763	4.44
SAWLOGS NONCONIFEROUS	19933	21948	23044	23694	23908	26284	29188	28056	27274	26901	27372	3.18
PULPWOOD+PARTICLES	9866	11556	12913	13667	19804	26631	29264	29764	28999	29868	30009	13.30
FUELWOOD	202953	208117	213272	218219	223733	230990	236051	241127	247621	254843	260289	2.54
SAWNWOOD CONIFEROUS	7430	9051	9695	10541	11289	12149	11552	11500	10886	11179	11432	3.27
SAWNWOOD NONCONIFEROUS	8807	9747	10843	11725	11531	12167	13736	14496	13697	13625	13909	4.58
WOOD-BASED PANELS	2616	2782	3119	3364	3514	3741	4295	4439	4283	4494	4548	5.98
PULP FOR PAPER	3011	2909	3291	3734	4180	4485	5485	5370	5684	6176	6222	8.80
PAPER+PAPERBOARD	5199	4787	5306	5637	6263	7026	7730	7451	7723	7982	8446	5.96
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	44503	51689	56018	51652	54595	53694	55598	59736	58561	55891	53955	1.57
WHEAT	24353	28386	31354	29206	30324	30634	30842	32145	32548	31001	30835	1.70
RICE PADDY	4304	4612	4754	4569	4807	4762	4439	4835	5040	4570	4708	.57
BARLEY	6252	7841	8935	7403	8197	8163	9536	10676	10601	10161	9557	4.23
MAIZE	4798	4979	5406	5052	5498	5309	5547	5539	5720	6003	5690	1.80

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
MILLET AND SORGHUM	3621	4472	4186	4132	4557	3625	4161	5503	3755	3330	2377	-2.80
ROOT CROPS	4616	4857	5690	5828	5897	6521	7243	7561	7836	7793	7892	5.86
POTATOES	4239	4428	5283	5435	5489	6032	6782	7094	7334	7314	7424	6.12
CASSAVA	92	130	99	95	103	127	122	125	125	125	125	2.57
TOTAL PULSES	1735	1631	1874	1878	1736	1682	1856	1925	2296	2487	2314	3.57
CITRUS FRUIT	3139	3104	3175	3288	3432	3742	3697	3746	4286	4422	4327	3.94
BANANAS	300	302	297	321	301	300	332	332	372	375	372	2.56
APPLES	1335	1393	1626	1685	1850	2359	2567	2513	2965	3206	3508	10.61
VEGETABLE OILS,OIL EQUIV	1551	1429	1536	1426	1551	1400	1673	1340	1552	1326	1426	-.67
SOYBEANS	47	82	123	119	197	195	145	209	319	340	297	18.45
GROUNDNUTS IN SHELL	984	1040	870	1145	923	977	814	842	611	523	496	-6.99
SUNFLOWER SEED	487	541	612	506	524	634	794	630	652	763	755	4.27
RAPESEED	1		6	14	13	43	12	6	2			-7.90
COTTONSEED	2961	2523	2329	2609	2471	2330	2284	2201	2311	2471	2566	-1.12
SUGAR (CENTRIFUGAL,RAW)	2323	2455	2846	2678	2512	2587	2492	3104	3748	3804	3715	4.85
COFFEE GREEN	4	4	4	4	5	5	5	5	4	4	4	.49
TEA	67	77	82	102	113	133	128	79	104	141	154	6.54
COTTON LINT	1763	1453	1364	1520	1446	1376	1360	1318	1379	1439	1499	-1.05
JUTE AND SIMILAR FIBRES	12	14	14	13	13	13	13	13	13	13	13	.01
TOBACCO	240	245	379	299	344	273	295	232	273	304	246	-.62
TOTAL MEAT	2721	2853	2919	3102	3215	3328	3441	3682	3899	4087	4306	4.66
TOTAL MILK	12593	12966	13494	13654	14583	15280	15767	16419	16674	16936	16234	3.16
TOTAL EGGS	467	540	597	694	761	710	747	851	916	968	1030	7.50
WOOL GREASY	156	161	161	163	157	162	167	174	177	184	173	1.40
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	123	135	134	132	140	161	175	176	183	183	186	4.68
MARINE FISH	546	554	607	487	557	699	771	803	816	887	901	6.19
CRUST+ MOLLUS+ CEPHALOP	27	25	39	40	28	36	40	35	39	41	49	4.69
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	4569	4770	4796	5265	5216	4718	4964	5218	2765	2777	2780	-5.62
SAWLOGS NONCONIFEROUS	1805	1287	1314	1442	1859	1523	1315	1366	1255	1125	1125	-3.13
PULPWOOD+PARTICLES	1363	869	907	984	1003	1043	672	714	712	714	713	-5.13
FUELWOOD	53775	55702	61224	37418	37453	40265	41374	40509	40986	41479	42050	-3.00
SAWNWOOD CONIFEROUS	2281	2278	2916	2932	4104	4114	4127	2972	3254	3787	3792	4.59
SAWNWOOD NONCONIFEROUS	733	693	646	871	1146	1146	1139	1121	917	910	909	3.44
WOOD-BASED PANELS	430	512	615	761	797	843	734	733	724	764	980	5.65
PULP FOR PAPER	394	337	317	340	273	463	494	487	487	517	588	5.90
PAPER+PAPERBOARD	606	675	587	629	560	737	774	832	821	674	771	2.85
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	211739	239075	233707	252248	267449	250642	273387	290098	275953	317188	319458	3.69
WHEAT	29932	32393	38288	38904	41013	46459	44140	49540	50449	57212	58444	6.58
RICE PADDY	143713	162936	152822	171767	181435	162613	186697	193619	184111	209619	211955	3.49
BARLEY	3943	5018	5127	3321	3820	3819	2593	3366	2938	2902	2811	-5.23
MAIZE	15439	17567	16234	15438	17938	16989	19187	20283	18108	22187	23776	3.74
MILLET AND SORGHUM	18479	21059	21152	22729	23157	20680	20682	23206	20254	25190	22393	1.35
ROOT CROPS	43616	45656	49915	51260	56377	55033	57908	60137	59105	60276	65568	3.71
POTATOES	6873	8614	9712	9454	10311	12458	10921	12346	12836	12975	15174	6.60
CASSAVA	27435	27805	31373	33408	37741	34125	39386	40179	39139	39789	42810	4.40
TOTAL PULSES	11666	12540	14639	13821	14017	13802	11227	12939	13494	14993	14868	1.22
CITRUS FRUIT	2943	2848	3302	2883	3073	3181	3497	3952	3975	4179	3875	3.92
BANANAS	9000	9444	9817	11090	11719	12775	13105	14040	13406	14049	13481	4.77
APPLES	948	859	891	989	1070	1208	1179	1462	1586	1684	1646	7.60
VEGETABLE OILS,OIL EQUIV	8866	10442	10561	10757	11212	11464	11665	13462	14140	13967	15229	4.87
SOYBEANS	1033	1167	1091	1095	1344	1455	1491	1553	1422	1623	2189	6.25
GROUNDNUTS IN SHELL	6353	8180	6576	7494	7711	7159	6445	8775	6975	8775	8395	1.82
SUNFLOWER SEED	1	1	218	140	174	114	41	91	211	282	372	54.68
RAPESEED	2130	2650	2350	1996	2042	2273	1822	2701	2763	2585	2969	2.33
COTTONSEED	3930	3412	3074	3711	3746	4229	4213	4419	4395	3349	5088	2.54
COPRA	2787	3847	4564	3963	4086	3500	3733	3899	3984	3752	3294	.19
PALM KERNELS	291	339	366	431	465	600	691	739	1087	1016	1248	16.09
SUGAR (CENTRIFUGAL,RAW)	9585	10628	11178	12443	13563	12895	9737	12094	18039	17005	14572	4.67
COFFEE GREEN	315	372	386	435	498	530	604	619	650	598	548	6.69
COCOA BEANS	19	22	26	30	34	40	48	70	97	113	128	22.14
TEA	794	804	820	889	897	890	911	923	888	922	1016	1.93
COTTON LINT	1965	1706	1538	1856	1874	2114	2107	2194	2198	1674	2543	2.52
JUTE AND SIMILAR FIBRES	2332	2278	2324	2630	3201	3173	2783	2747	2488	2703	2573	1.10
TOBACCO	932	850	851	1001	1060	1003	951	993	1079	1151	1058	2.24

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
NATURAL RUBBER	3054	2959	3262	3271	3331	3430	3380	3346	3342	3548	3650	1.60
TOTAL MEAT	3976	4121	4254	4333	4668	4973	5165	5404	5751	6012	6165	4.79
TOTAL MILK	34967	36275	38312	39787	40816	42128	43808	45501	47665	50680	52682	4.06
TOTAL EGGS	1243	1340	1421	1534	1699	1845	1979	1935	2048	2211	2297	6.36
WOOL GREASY	62	65	69	73	75	79	84	80	84	87	90	3.61
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	2474	2305	2311	2362	2365	2402	2537	2849	2804	3025	3090	2.98
MARINE FISH	6767	6924	7038	7823	7947	7859	7787	8242	8209	8725	8958	2.65
CRUST+ MOLLUS+ CEPHALOP	1213	1429	1670	1799	1801	1972	2087	2125	2211	2249	2321	5.97
AQUATIC ANIMALS	23	25	47	100	83	75	23	55	132	241	261	22.16
AQUATIC PLANTS	364	278	312	371	352	372	442	538	477	534	587	6.82
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	2771	3116	3119	3250	2920	3629	3367	3334	3275	3365	3289	1.38
SAWLOGS NONCONIFEROUS	68645	60337	75901	75645	80554	78777	81963	73879	76014	81513	80161	1.79
PULPWOOD+PARTICLES	3058	2810	2851	3033	3027	2957	3096	2831	2967	3206	3461	1.05
FUELWOOD	408176	417559	426736	436312	445989	455895	465910	475741	485727	495913	506033	2.18
SAWNWOOD CONIFEROUS	1972	1857	1953	2810	3006	3454	3148	3707	3704	4097	4099	8.87
SAWNWOOD NONCONIFEROUS	16829	18024	20545	22138	23557	23455	25928	25135	27005	27336	27258	4.89
WOOD-BASED PANELS	3370	3842	4288	5123	5666	5759	5601	6173	7103	7972	8396	8.88
PULP FOR PAPER	1334	1312	1462	1499	1647	1785	1756	1796	1852	1893	1899	4.05
PAPER+PAPERBOARD	2160	2185	2335	2915	3351	3766	3914	4084	4084	4431	4712	8.76
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS												
TOTAL CEREALS	253516	264245	272287	264823	293700	313601	303114	310134	341362	373296	394966	4.29
WHEAT	41421	45999	51006	41724	54471	63333	55823	60338	69362	82589	88918	7.39
RICE PADDY	142276	144566	147285	149330	156372	163368	161102	165874	185667	193991	204261	3.63
BARLEY	3385	3395	3404	3391	3809	4035	3125	3533	3678	3509	3888	.86
MAIZE	44992	49402	50501	51803	58522	62634	65434	62114	63492	71400	76822	4.95
MILLET AND SORGHUM	16558	15572	14820	14434	15218	14412	12859	13055	14226	16587	15488	-.52
ROOT CROPS	151370	152601	143917	160297	172262	155936	158121	143638	147710	159003	155899	.08
POTATOES	35829	39681	42640	46843	54145	49792	50982	47205	50123	52031	50153	2.96
CASSAVA	3503	3626	4398	5250	6178	6313	6925	6969	6444	6670	7063	7.32
TOTAL PULSES	6572	6574	6757	6436	6908	7131	7169	6879	6773	6492	6833	.29
CITRUS FRUIT	913	884	875	973	948	1150	1345	1464	1680	2067	2251	10.55
BANANAS	1088	922	883	986	1015	1128	1235	1281	1479	1585	1787	6.49
APPLES	1450	1912	2101	2519	2723	3331	2843	3501	2941	4083	3515	8.70
VEGETABLE OILS,OIL EQUIV	4354	4279	3824	4028	4644	5094	5720	7084	7724	7772	8821	8.89
SOYBEANS	7841	7611	7019	7646	7957	7844	8339	9748	9503	10257	10216	3.66
GROUNDNUTS IN SHELL	2509	2444	2070	2155	2568	2994	3788	3998	4097	4124	5021	8.76
SUNFLOWER SEED	70	80	100	170	279	340	910	1332	1286	1341	1705	44.12
RAPESEED	1383	1539	1353	1173	1871	2404	2386	4067	5657	4288	4206	16.37
COTTONSEED	4933	4772	4120	4112	4347	4424	5422	5945	7207	9286	12529	9.48
COPRA	31	30	32	40	46	61	58	63	64	65	66	9.73
PALM KERNELS	39	39	41	40	42	43	40	41	45	47	46	1.70
SUGAR (CENTRIFUGAL,RAW)	2877	2678	2675	3154	3303	3690	3763	4346	4839	5120	5221	7.66
COFFEE GREEN	12	13	18	21	14	14	16	19	22	24	27	6.52
TEA	237	255	277	295	313	325	350	391	446	453	467	7.34
COTTON LINT	2466	2386	2060	2055	2173	2212	2711	2973	3603	4643	6265	9.48
JUTE AND SIMILAR FIBRES	654	729	766	893	1122	1118	1133	1300	1100	1062	1539	7.18
SISAL	10	9	9	8	9	8	8	3	3	3	3	-12.82
TOBACCO	1064	1039	1060	1077	1338	1026	994	1591	2279	1485	1908	6.69
NATURAL RUBBER	87	103	123	149	166	162	164	178	201	229	257	9.98
TOTAL MEAT	9998	10239	10237	10376	11334	13650	15162	16017	17183	18048	19739	7.92
TOTAL MILK	2800	2893	3003	3094	3232	3376	3579	3759	4168	4467	4931	5.64
TOTAL EGGS	2397	2487	2592	2698	2840	2988	3151	3360	3614	3934	4253	5.84
WOOL GREASY	151	154	155	156	157	174	196	210	223	214	203	4.37
FISHERY PRODUCTS 1/												
FRESHWATER + DIADROMOUS	1347	1387	1401	1422	1376	1468	1605	1785	1978	2289	2724	6.73
MARINE FISH	4195	4333	4478	4646	4532	4327	4466	4512	4752	4762	5073	1.31
CRUST+ MOLLUS+ CEPHALOP	894	960	1051	1166	1237	1122	1144	1152	1338	1435	1580	4.72
AQUATIC MAMMALS	1	1	2	2	2	2						
AQUATIC ANIMALS	22	17	6	13	4	14	10	19	19	20	20	4.95
AQUATIC PLANTS	915	1013	965	1434	1606	1519	1601	1399	1393	1499	1639	5.16
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	18340	19145	19993	20917	21866	22846	23810	24215	25293	26584	26584	3.94
SAWLOGS NONCONIFEROUS	11702	12088	12999	13767	14378	14985	15464	16110	16778	17576	17576	4.35
PULPWOOD+PARTICLES	4000	4291	4476	4671	4876	5089	4847	4647	4795	5313	5313	2.27
FUELWOOD	163349	166741	169952	173126	176405	179815	183299	183796	184372	184984	185608	1.33
SAWNWOOD CONIFEROUS	11074	11166	11697	12271	12823	13403	14010	14650	15324	16032	16032	4.22
SAWNWOOD NONCONIFEROUS	6734	6739	7039	7451	7746	8049	8355	8700	9068	9459	9459	3.89

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 1. VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....				THOUSAND METRIC TONS							PERCENT
WOOD-BASED PANELS	1266	1276	1429	1516	2023	2160	2303	2388	2417	2443	2434	8.01
PULP FOR PAPER	2983	3275	3301	3648	4243	4643	4871	4871	4871	5033	5033	5.82
PAPER+PAPERBOARD	4167	4572	4655	5031	5806	6339	6752	6817	6917	7017	7017	5.86

1/ NOMINAL CATCH (LIVE WEIGHT) EXCLUDING WHALES
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 2. INDICES OF FOOD PRODUCTION

	TOTAL						PER CAPUT					
	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984
	1979-81=100					PERCENT	1979-81=100					PERCENT
FOOD PRODUCTION												
WORLD	99	102	106	106	111	4.84	99	100	102	101	104	3.11
DEVELOPED COUNTRIES	99	101	104	102	108	6.02	99	100	103	100	105	5.29
WESTERN EUROPE	102	100	105	104	110	6.04	102	99	104	103	109	5.77
EUROPEAN ECON COMMUNITY	102	100	105	103	110	6.39	102	99	104	102	109	6.15
BELGIUM-LUXEMBOURG	99	103	99	93	103	11.00	99	103	99	93	103	11.05
DENMARK	100	100	110	103	125	22.12	100	100	110	103	126	22.20
FRANCE	101	99	106	102	110	7.62	101	98	105	100	107	7.21
GERMANY FED.REP. OF	101	100	109	105	113	7.53	101	100	109	105	114	7.96
GREECE	105	105	108	103	103	-.05	105	104	107	100	100	-.66
IRELAND	110	92	98	101	113	11.32	110	91	96	98	108	10.10
ITALY	103	102	99	109	102	-6.47	102	101	99	108	101	-6.73
NETHERLANDS	96	108	109	107	115	7.65	96	107	108	105	113	7.22
UNITED KINGDOM	102	101	103	105	115	9.03	102	101	102	105	114	8.88
OTHER WESTERN EUROPE	101	100	109	106	110	3.99	101	99	108	105	108	3.55
AUSTRIA	103	99	112	106	110	4.27	104	99	112	106	110	4.23
FINLAND	103	93	105	118	114	-3.63	103	93	104	116	111	-4.18
ICELAND	102	102	100	98	99	1.86	102	101	98	95	96	1.01
MALTA	105	101	114	113	102	-9.82	105	100	112	111	99	-10.53
NORWAY	99	104	108	106	115	8.34	99	103	108	105	113	8.05
PORTUGAL	99	88	105	93	100	7.65	99	87	104	91	97	6.89
SPAIN	106	94	104	96	114	18.93	106	93	102	93	110	18.01
SWEDEN	100	103	106	106	116	9.75	100	103	106	106	116	9.67
SWITZERLAND	100	98	109	105	109	4.02	100	98	108	104	107	3.73
YUGOSLAVIA	100	101	110	104	107	3.37	100	100	108	102	104	2.65
USSR AND EASTERN EUROPE	99	99	104	109	111	1.83	99	98	102	107	108	1.03
EASTERN EUROPE	99	100	103	104	110	5.70	99	99	102	103	108	5.24
ALBANIA	100	99	102	109	109	-.35	100	97	98	102	100	-2.52
BULGARIA	97	103	110	101	106	5.47	97	102	109	100	105	5.22
CZECHOSLOVAKIA	102	102	109	114	120	5.16	102	102	109	113	118	4.86
GERMAN DEMOCRATIC REP.	98	102	95	98	105	7.99	98	102	95	98	106	8.19
HUNGARY	102	101	112	109	116	6.35	102	101	112	109	116	6.55
POLAND	95	96	99	104	107	2.49	95	95	98	101	103	1.54
ROMANIA	100	98	105	104	116	11.73	100	98	104	102	114	11.35
USSR	100	98	104	111	112	.13	100	98	103	109	108	-.79
NORTH AMERICA DEVELOPED	96	105	106	92	103	11.93	96	104	104	89	99	10.91
CANADA	99	109	117	110	108	-1.97	99	107	114	107	103	-2.92
UNITED STATES	96	105	105	90	102	13.81	96	104	103	87	98	12.78
OCEANIA DEVELOPED	93	101	91	113	108	-4.58	93	100	89	109	103	-5.73
AUSTRALIA	91	101	87	115	109	-5.41	91	99	85	111	103	-6.60
NEW ZEALAND	99	103	105	107	105	-1.39	99	103	104	105	102	-2.31
OTHER DEV.ED COUNTRIES	96	100	98	95	106	10.99	96	99	96	92	101	9.83
ISRAEL	100	96	108	118	114	-3.50	99	94	104	111	105	-5.50
JAPAN	96	98	99	98	109	11.45	96	97	97	96	106	10.75
SOUTH AFRICA	96	111	95	77	86	11.92	97	109	91	71	78	9.15
DEVELOPING COUNTRIES	99	104	108	111	115	3.59	99	102	103	104	106	1.54
AFRICA DEVELOPING	101	102	106	103	110	7.02	101	99	100	94	97	3.75
NORTH WESTERN AFRICA	107	95	103	104	106	1.59	107	92	97	95	93	-1.57
ALGERIA	108	100	95	100	101	1.72	108	97	89	90	89	-1.60
MOROCCO	106	89	113	107	109	2.17	106	86	106	97	96	-1.13
TUNISIA	106	102	92	106	105	-.66	106	99	87	98	95	-2.97
WESTERN AFRICA	100	103	105	99	114	15.15	100	100	99	90	100	11.62
BENIN	98	97	100	103	121	17.36	98	95	94	95	108	14.01
BURKINA FASO	97	102	102	104	103	-.43	97	99	98	97	94	-2.80
COTE D'IVOIRE	101	105	99	102	117	14.42	101	101	93	92	101	10.64
GAMBIA	91	120	143	100	110	9.92	92	118	138	95	102	7.83
GHANA	101	100	100	94	132	40.51	101	97	93	85	116	36.01
GUINEA	96	106	107	105	107	1.64	96	104	103	98	98	-.74
LIBERIA	98	104	104	112	115	3.01	98	101	98	102	102	-.19
MALI	98	108	113	106	103	-2.48	98	105	107	98	93	-5.24
MAURITANIA	99	105	99	92	94	2.58	99	102	94	84	84	-.39
NIGER	102	101	100	102	82	-19.88	102	98	95	94	73	-22.14
NIGERIA	101	104	108	99	109	9.84	101	100	101	90	95	6.24
SENEGAL	85	119	119	89	102	14.44	85	115	112	82	92	11.58
SIERRA LEONE	101	102	112	116	100	-13.67	101	100	108	110	93	-15.23
TOGO	100	102	99	98	105	6.95	100	99	94	90	94	3.86
CENTRAL AFRICA	100	103	106	108	110	1.85	101	100	101	100	99	-.85
ANGOLA	101	100	101	102	102	.11	101	97	96	94	92	-2.24
CAMEROON	99	102	103	103	106	2.85	99	100	98	96	96	.25
CENTRAL AFRICAN REP	101	102	104	102	105	2.94	101	99	100	96	96	.56
CHAD	102	96	98	102	93	-9.32	102	93	93	95	84	-11.39
CONGO	100	104	107	102	103	1.15	100	102	102	95	93	-1.48
GABON	102	100	104	107	107	-.02	102	98	101	102	100	-1.67
ZAIRE	101	103	108	110	113	2.45	101	100	102	101	101	-.53
EASTERN AFRICA	99	104	108	107	106	-1.18	99	100	101	97	93	-4.34
BURUNDI	96	107	107	107	106	-.51	97	105	102	99	96	-3.29

ANNEX TABLE 2. INDICES OF FOOD PRODUCTION

	TOTAL						PER CAPUT					
	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984
	1979-81=100					PERCENT	1979-81=100					PERCENT
FOOD PRODUCTION												
ETHIOPIA	99	98	107	100	94	-6.24	99	96	102	93	85	-8.80
KENYA	97	100	116	111	102	-8.37	97	95	107	98	86	-12.08
MADAGASCAR	102	104	104	110	111	1.41	102	101	98	101	100	-1.40
MALAWI	98	103	107	106	107	.39	98	100	101	97	94	-2.87
MAURITIUS	87	100	121	102	101	-1.80	87	98	116	96	93	-3.52
MOZAMBIQUE	101	102	102	97	97	-.43	100	98	95	88	85	-3.21
RWANDA	98	106	112	119	97	-18.52	98	102	104	108	85	-21.32
SOMALIA	101	102	107	102	102	.09	101	96	96	89	86	-2.75
TANZANIA	100	103	100	104	109	4.82	100	100	94	94	95	1.17
UGANDA	98	107	116	122	121	-.78	98	104	108	110	105	-4.22
ZAMBIA	103	100	98	103	101	-1.20	103	97	92	93	89	-4.46
ZIMBABWE	92	121	102	80	91	13.72	92	117	96	72	79	9.78
SOUTHERN AFRICA	99	103	102	99	99	.02	99	101	97	91	88	-2.83
BOTSWANA	88	105	105	98	92	-6.81	88	101	98	89	80	-9.94
LESOTHO	98	98	87	91	90	-1.05	98	96	82	84	81	-3.52
SWAZILAND	103	107	111	115	117	1.98	104	104	105	105	104	-1.10
LATIN AMERICA	99	103	106	105	107	2.03	99	101	101	98	97	-.27
CENTRAL AMERICA	99	105	100	105	103	-1.59	99	102	95	97	93	-4.16
COSTA RICA	99	99	93	98	104	5.22	99	96	88	91	93	2.56
EL SALVADOR	100	94	88	97	105	9.05	100	91	83	88	94	5.89
GUATEMALA	99	107	108	104	103	-1.23	99	104	102	95	91	-4.05
HONDURAS	101	107	102	98	104	6.31	101	104	95	89	91	2.82
MEXICO	100	106	101	106	104	-2.28	100	103	96	98	94	-4.74
NICARAGUA	86	91	92	92	87	-5.58	85	88	86	84	76	-8.75
PANAMA	97	104	99	103	101	-1.43	97	101	95	96	93	-3.51
CARIBBEAN	96	101	104	105	110	4.75	96	100	101	100	103	3.13
BARBADOS	108	96	85	81	86	6.41	108	95	84	79	84	5.60
CUBA	96	103	108	105	113	7.21	96	102	106	103	110	6.53
DOMINICAN REPUBLIC	99	101	108	113	114	.84	99	98	103	106	104	-1.48
HAITI	99	100	100	102	105	3.10	99	98	95	95	95	.51
JAMAICA	99	97	94	102	117	14.48	99	95	91	98	111	12.88
SOUTH AMERICA	99	103	108	105	108	2.86	99	101	103	98	98	.59
ARGENTINA	96	101	107	104	106	2.28	96	100	103	99	100	.69
BOLIVIA	100	106	110	82	100	22.36	100	103	104	75	90	19.68
BRAZIL	103	104	113	109	112	3.03	103	102	108	102	103	.79
CHILE	97	106	105	102	106	4.43	97	104	102	97	100	2.71
COLOMBIA	99	103	99	102	104	2.44	99	101	95	95	96	.27
ECUADOR	102	105	107	92	101	10.32	102	101	101	84	89	6.91
GUYANA	95	105	102	95	95	.11	95	103	98	89	88	-1.81
PARAGUAY	100	103	106	104	109	4.87	100	100	100	95	97	1.82
PERU	94	102	110	105	114	8.61	94	99	104	97	102	5.83
URUGUAY	95	115	111	114	103	-9.57	95	114	110	112	100	-10.21
VENEZUELA	100	100	99	99	97	-2.56	100	97	93	90	85	-5.63
NEAR EAST DEVELOPING	99	105	109	108	107	-1.10	99	102	104	100	97	-3.73
NEAR EAST IN AFRICA	99	106	108	110	107	-3.12	99	103	103	102	96	-5.66
EGYPT	99	101	110	113	113	.38	99	99	104	105	102	-2.69
LIBYA	99	96	144	142	141	-1.03	99	92	133	127	121	-4.70
SUDAN	98	112	101	102	95	-7.42	98	109	96	94	85	-9.59
NEAR EAST IN ASIA	100	105	109	108	107	-.60	100	102	104	100	97	-3.26
AFGHANISTAN	100	102	103	104	104	.23	99	103	104	106	106	-.22
CYPRUS	105	99	107	92	103	12.00	105	98	105	89	98	10.64
IRAN	96	110	113	110	110	-.55	96	107	107	101	97	-3.49
IRAQ	101	101	113	110	107	-2.85	101	97	106	99	93	-6.08
JORDAN	111	111	109	122	121	-.73	112	108	102	110	105	-4.50
LEBANON	113	93	119	106	108	2.55	113	94	121	107	110	2.20
SAUDI ARABIA	101	87	113	150	130	-13.53	100	83	104	132	110	-16.75
SYRIA	108	111	114	113	102	-10.46	108	108	107	102	88	-13.75
TURKEY	100	103	107	105	106	.99	100	100	102	98	97	-1.38
YEMEN ARAB REPUBLIC	100	105	107	97	103	6.85	100	103	102	90	94	4.28
YEMEN DEMOCRATIC	98	100	95	100	100	.30	98	98	90	92	90	-2.42
FAR EAST DEVELOPING	98	106	106	114	116	1.92	98	103	101	107	107	-.19
SOUTH ASIA	99	106	104	116	118	1.28	99	103	100	109	108	-.87
BANGLADESH	102	102	105	108	109	1.06	102	99	99	99	98	-1.64
INDIA	98	106	104	118	120	1.80	98	104	99	111	110	-.18
NEPAL	102	105	98	116	115	-.32	102	103	93	108	105	-2.60
PAKISTAN	99	104	110	113	114	.26	99	101	103	103	100	-2.70
SRI LANKA	107	96	93	101	85	-15.33	107	94	89	95	79	-17.06
EAST SOUTH-EAST ASIA	97	105	108	111	114	2.88	97	103	104	105	106	.90
BURMA	99	108	117	119	126	6.03	99	105	112	111	114	3.38
INDONESIA	100	108	108	117	116	-.32	100	106	104	111	108	-2.00
KOREA REP	89	99	102	103	110	6.61	89	97	99	99	104	5.15
LAO	101	110	111	116	130	12.20	102	108	105	107	117	9.45
MALAYSIA	99	106	114	109	118	7.74	99	104	109	102	107	5.33
PHILIPPINES	99	104	106	101	100	-1.28	99	101	101	94	90	-3.68
THAILAND	98	107	109	116	120	2.87	98	105	105	109	110	.80
ASIAN CENT PLANNED ECON	99	103	111	118	125	6.02	99	101	108	114	119	4.74
CHINA	99	102	111	119	126	6.16	99	101	108	115	120	4.96
KAMPUCHEA,DEMOCRATIC	114	105	118	139	154	10.72	115	105	115	130	139	6.68
KOREA DPR	100	103	105	110	116	4.79	100	101	100	103	106	2.41
MONGOLIA	97	101	107	112	107	-4.68	97	98	101	104	96	-7.35
VIET NAM	102	105	110	115	121	5.44	102	102	105	108	111	3.40
OTHER DEV.ING COUNTRIES	98	104	106	100	108	7.90	98	101	101	93	98	5.35

ANNEX TABLE 3. INDICES OF AGRICULTURAL PRODUCTION

	TOTAL						PER CAPUT					
	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984
	1979-81=100					PERCENT	1979-81=100					PERCENT
WORLD	99	102	106	106	111	5.13	99	101	102	101	104	3.39
DEVELOPED COUNTRIES	99	101	104	101	108	6.07	99	100	102	99	105	5.35
WESTERN EUROPE	102	100	105	104	110	6.10	102	99	104	103	109	5.83
EUROPEAN ECON COMMUNITY	102	100	105	103	110	6.45	102	99	104	102	109	6.21
BELGIUM-LUXEMBOURG	99	103	99	93	103	11.14	99	103	99	93	103	11.19
DENMARK	100	100	110	103	126	22.15	100	100	110	103	126	22.22
FRANCE	101	99	106	102	109	7.67	101	98	105	100	107	7.26
GERMANY FED.REP. OF	101	100	109	105	113	7.57	101	100	109	105	114	7.99
GREECE	104	105	108	103	103	.80	104	104	106	101	101	.19
IRELAND	110	93	98	101	113	11.19	110	91	96	98	108	9.97
ITALY	102	102	99	109	102	-6.32	102	101	99	108	101	-6.58
NETHERLANDS	96	108	109	107	115	7.80	96	107	108	105	113	7.36
UNITED KINGDOM	102	101	102	105	115	9.03	102	101	102	105	114	8.88
OTHER WESTERN EUROPE	101	100	109	106	110	4.06	101	100	108	105	109	3.62
AUSTRIA	103	99	112	106	110	4.27	104	99	112	106	110	4.23
FINLAND	103	93	105	118	114	-3.63	103	93	104	116	111	-4.18
ICELAND	101	102	100	98	100	1.86	101	101	98	95	96	1.01
MALTA	105	101	114	113	102	-9.82	105	100	112	111	99	-10.53
NORWAY	99	103	108	106	115	8.23	99	103	108	105	113	7.95
PORTUGAL	99	88	105	93	100	7.57	99	87	104	91	97	6.81
SPAIN	106	94	104	96	114	18.93	106	93	102	93	110	18.01
SWEDEN	100	103	106	106	116	9.75	100	103	106	106	116	9.67
SWITZERLAND	100	98	110	105	109	4.00	100	98	108	104	108	3.71
YUGOSLAVIA	99	101	110	104	107	3.58	99	100	108	102	104	2.85
USSR AND EASTERN EUROPE	99	99	104	109	110	1.45	99	98	102	106	107	.65
EASTERN EUROPE	98	100	103	104	110	5.98	98	99	102	102	108	5.52
ALBANIA	100	99	102	108	108	-.07	100	97	97	101	99	-2.25
BULGARIA	96	102	109	99	106	7.07	96	102	109	98	104	6.82
CZECHOSLOVAKIA	103	102	109	114	120	5.17	102	102	108	113	118	4.86
GERMAN DEMOCRATIC REP.	98	102	95	98	106	8.35	98	102	96	98	106	8.55
HUNGARY	102	101	112	109	115	6.26	102	101	112	109	116	6.46
POLAND	95	96	99	104	107	2.59	95	95	97	101	103	1.64
ROMANIA	100	98	105	103	116	11.87	100	97	104	102	114	11.49
USSR	100	99	104	111	110	-.45	100	98	103	108	106	-1.37
NORTH AMERICA DEVELOPED	96	106	105	90	102	13.21	96	105	103	88	98	12.18
CANADA	99	108	116	110	108	-1.96	99	107	113	106	103	-2.90
UNITED STATES	95	106	104	88	102	15.23	95	104	102	86	98	14.19
OCEANIA DEVELOPED	94	102	94	111	108	-3.10	94	100	91	107	103	-4.27
AUSTRALIA	93	101	90	113	109	-3.56	93	99	88	109	103	-4.77
NEW ZEALAND	100	104	104	106	105	-1.49	100	104	104	104	102	-2.41
OTHER DEV.ED COUNTRIES	96	100	98	95	105	9.76	96	98	96	92	100	8.61
ISRAEL	99	100	107	117	112	-3.81	99	98	103	110	104	-5.81
JAPAN	96	98	98	98	108	10.23	96	97	97	96	105	9.54
SOUTH AFRICA	97	110	95	78	87	10.93	97	108	91	73	78	8.17
DEVELOPING COUNTRIES	99	104	107	111	116	4.16	99	102	103	105	107	2.10
AFRICA DEVELOPING	100	102	106	103	110	6.92	100	99	99	94	98	3.66
NORTH WESTERN AFRICA	106	95	104	105	106	1.62	106	92	97	95	94	-1.55
ALGERIA	107	100	95	101	103	1.97	108	97	89	91	90	-1.37
MOROCCO	106	89	113	107	109	2.07	106	86	106	97	96	-1.23
TUNISIA	106	102	92	106	105	-.71	106	99	88	98	95	-3.02
WESTERN AFRICA	100	103	105	99	113	14.05	100	100	99	90	100	10.56
BENIN	98	97	100	105	124	18.85	98	95	95	96	111	15.46
BURKINA FASO	97	102	102	104	104	-.28	97	99	97	97	95	-2.65
COTE D'IVOIRE	98	108	97	101	100	-.23	98	105	90	91	88	-3.52
GAMBIA	91	120	143	100	110	10.30	91	118	137	94	102	8.20
GHANA	100	100	100	95	132	39.40	100	97	94	86	116	34.93
GUINEA	96	106	107	105	107	1.56	96	103	102	98	98	-.81
LIBERIA	101	103	101	107	116	7.95	101	99	94	97	102	4.60
MALI	98	107	111	106	104	-2.00	99	104	105	98	93	-4.77
MAURITANIA	99	105	99	92	94	2.58	99	102	94	84	84	-.39
NIGER	102	101	100	102	82	-19.84	102	98	95	94	73	-22.11
NIGERIA	101	104	108	99	109	9.69	101	100	101	90	95	6.10
SENEGAL	85	119	119	90	104	15.64	85	116	113	83	93	12.75
SIERRA LEONE	100	101	110	112	99	-11.33	100	99	107	106	93	-12.94
TOGO	101	102	100	98	104	5.55	101	99	95	90	93	2.50
CENTRAL AFRICA	101	103	107	108	111	2.31	101	100	101	100	100	-.41
ANGOLA	103	99	99	101	101	.93	103	96	94	93	92	-1.45
CAMEROON	99	102	104	100	108	8.08	99	100	99	92	97	5.35
CENTRAL AFRICAN REP	101	101	105	102	107	5.11	101	99	100	95	98	2.68
CHAD	103	95	99	107	94	-12.38	102	93	95	100	86	-14.39
CONGO	100	104	107	102	103	1.14	100	102	102	95	93	-1.49
GABON	102	100	104	107	107	-.05	102	98	101	102	100	-1.70
ZAIRE	101	103	108	111	113	2.37	101	100	102	102	101	-.61
EASTERN AFRICA	99	103	107	107	108	.57	99	100	101	97	95	-2.64
BURUNDI	93	111	103	108	105	-3.08	93	109	98	100	94	-5.79

ANNEX TABLE 3. INDICES OF AGRICULTURAL PRODUCTION

	TOTAL						PER CAPUT					
	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984	1980	1981	1982	1983	1984	CHANGE 1983 TO 1984
	1979-81=100					PERCENT	1979-81=100					PERCENT
ETHIOPIA	99	99	107	101	96	-4.62	99	96	102	94	87	-7.22
KENYA	99	102	112	110	110	-.45	99	98	104	97	93	-4.49
MADAGASCAR	102	104	104	109	111	1.64	102	101	98	100	99	-1.18
MALAWI	98	102	109	107	109	1.69	98	99	102	98	96	-1.60
MAURITIUS	88	101	119	103	104	.82	88	99	114	97	96	-.94
MOZAMBIQUE	101	102	101	96	96	.02	100	98	94	87	85	-2.77
RWANDA	97	107	111	119	99	-16.21	97	103	103	107	87	-19.09
SOMALIA	101	102	107	102	102	.06	101	96	96	89	86	-2.78
TANZANIA	100	103	99	102	107	5.01	100	100	92	92	93	1.35
UGANDA	98	107	116	123	123	.23	98	103	109	111	107	-3.24
ZAMBIA	103	100	97	104	103	-.34	103	97	91	94	90	-3.63
ZIMBABWE	97	111	100	85	105	22.82	98	108	93	77	91	18.57
SOUTHERN AFRICA	99	103	102	99	99	-.14	99	101	96	91	88	-2.99
BOTSWANA	88	105	105	98	92	-6.74	88	101	98	89	80	-9.87
LESOTHO	98	99	88	93	92	-.95	98	96	84	86	83	-3.42
SWAZILAND	105	108	111	114	116	1.79	105	105	105	104	103	-1.28
LATIN AMERICA	99	104	104	104	106	1.80	99	101	100	97	97	-.50
CENTRAL AMERICA	99	104	99	103	102	-1.10	99	101	93	95	92	-3.68
COSTA RICA	99	101	97	102	113	10.40	99	98	92	94	101	7.62
EL SALVADOR	103	90	85	91	95	4.90	103	88	80	83	85	1.86
GUATEMALA	100	104	105	96	94	-2.29	100	101	99	88	84	-5.08
HONDURAS	99	107	101	99	105	5.08	99	103	95	90	91	1.62
MEXICO	100	105	99	106	103	-2.27	100	102	94	98	93	-4.73
NICARAGUA	83	96	97	92	91	-1.09	83	93	91	83	80	-4.41
PANAMA	97	104	100	104	103	-.29	97	102	96	97	95	-2.40
CARIBBEAN	96	102	105	105	110	4.44	96	100	102	101	104	2.83
BARBADOS	108	96	85	81	86	6.41	108	95	84	79	84	5.60
CUBA	95	104	109	105	113	7.70	95	104	107	103	110	7.02
DOMINICAN REPUBLIC	99	99	108	113	114	1.14	99	97	103	105	104	-1.18
HAITI	98	99	102	104	106	1.92	98	97	97	96	96	-.64
JAMAICA	99	97	94	102	117	14.64	99	95	92	98	111	13.04
SOUTH AMERICA	99	104	106	104	107	2.45	99	102	101	98	98	.19
ARGENTINA	97	101	107	104	106	2.51	97	99	103	99	100	.91
BOLIVIA	99	105	109	82	98	19.97	99	103	103	76	88	16.76
BRAZIL	100	107	108	109	111	2.24	100	104	104	102	102	.01
CHILE	98	106	105	102	106	4.40	98	104	102	97	100	2.68
COLOMBIA	99	103	100	102	103	.52	99	101	96	96	94	-1.61
ECUADOR	101	105	106	92	102	11.67	101	101	100	83	90	8.21
GUYANA	95	105	102	95	95	.11	95	103	98	89	88	-1.81
PARAGUAY	98	106	106	103	109	5.65	98	103	99	94	96	2.58
PERU	95	101	105	102	111	8.47	94	99	99	95	100	5.69
URUGUAY	96	114	111	114	105	-8.23	96	113	110	112	102	-8.87
VENEZUELA	100	100	99	100	97	-2.72	100	97	92	90	85	-5.79
NEAR EAST DEVELOPING	100	104	109	109	107	-1.05	100	102	103	100	97	-3.68
NEAR EAST IN AFRICA	99	105	108	110	107	-2.53	99	102	102	101	96	-5.08
EGYPT	100	101	107	108	109	.30	100	98	102	100	98	-2.17
LIBYA	99	96	143	142	141	-1.00	99	93	132	126	120	-4.68
SUDAN	98	110	103	106	100	-5.90	98	107	97	97	89	-8.52
NEAR EAST IN ASIA	100	104	109	108	108	-.68	100	102	104	100	97	-3.33
AFGHANISTAN	99	101	101	103	104	.53	99	102	103	105	106	.08
CYPRUS	104	99	107	91	102	11.98	105	98	105	88	98	10.62
IRAN	96	109	113	110	110	-.08	96	106	106	101	98	-3.04
IRAQ	101	101	114	111	108	-2.49	101	98	106	100	94	-5.73
JORDAN	111	111	110	124	121	-2.90	112	108	103	112	105	-6.58
LEBANON	113	93	118	105	108	2.42	113	94	120	107	109	2.07
SAUDI ARABIA	101	87	113	149	129	-13.37	100	83	104	132	110	-16.59
SYRIA	107	111	115	116	104	-11.01	107	107	107	105	90	-14.28
TURKEY	100	102	107	106	106	.75	100	100	102	99	97	-1.61
YEMEN ARAB REPUBLIC	100	105	107	97	103	6.50	100	103	102	91	94	3.94
YEMEN DEMOCRATIC	98	100	95	101	102	.24	98	97	90	94	91	-2.47
FAR EAST DEVELOPING	98	105	105	113	115	2.35	98	103	101	106	106	.23
SOUTH ASIA	99	105	104	115	117	2.20	99	103	100	107	107	.03
BANGLADESH	101	101	104	107	108	.37	101	98	99	99	97	-2.31
INDIA	98	106	104	116	119	2.27	98	104	99	110	110	.29
NEPAL	102	105	97	115	114	-.63	102	102	93	107	104	-2.90
PAKISTAN	99	104	110	110	116	5.32	99	101	103	100	102	2.21
SRI LANKA	104	97	94	100	88	-11.96	104	95	90	94	81	-13.76
EAST SOUTH-EAST ASIA	97	105	107	110	113	2.58	97	103	103	104	104	.61
BURMA	99	107	116	119	126	6.04	99	105	110	110	114	3.40
INDONESIA	100	108	107	115	115	-.12	100	106	103	109	107	-1.80
KOREA REP	89	98	102	103	109	6.30	89	97	99	98	103	4.85
LAO	101	110	111	116	130	12.07	102	108	105	107	117	9.32
MALAYSIA	99	104	110	107	113	5.42	99	102	105	100	103	3.06
PHILIPPINES	99	104	107	100	98	-1.70	99	102	102	93	89	-4.09
THAILAND	99	106	109	116	119	2.55	99	104	105	109	109	.49
ASIAN CENT PLANNED ECON	99	103	112	120	130	7.83	99	102	109	116	123	6.52
CHINA	99	103	113	121	131	8.28	99	102	110	117	125	7.05
KAMPUCHEA,DEMOCRATIC	113	105	118	140	155	10.66	114	104	114	131	140	6.62
KOREA DPR	100	103	105	111	116	4.78	100	101	101	103	106	2.41
MONGOLIA	97	101	107	111	105	-4.73	97	98	101	102	95	-7.20
VIET NAM	102	105	110	115	121	5.57	102	102	105	108	112	3.53
OTHER DEV.ING COUNTRIES	99	104	103	101	107	5.33	99	101	98	94	97	2.83

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
WORLD												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	65400	73813	69063	74486	84921	81539	99499	105393	105145	111772	116127	6.23
RICE MILLED	8298	7724	8990	10874	9643	11712	12972	13085	12147	11591	12518	4.89
BARLEY	11693	12604	13927	13112	14585	14106	16231	20289	18472	17748	22487	6.05
MAIZE	49750	52085	62377	57764	68792	76093	80302	79442	69984	69042	68458	3.57
MILLET	216	207	303	272	315	296	224	242	226	220	174	-2.04
SORGHUM	10766	10155	11161	11936	10923	11365	11164	14473	13727	11728	12433	2.14
POTATOES	3877	3931	4411	4697	4038	4630	4919	4951	5205	4750	4759	2.37
SUGAR,TOTAL (RAW EQUIV.)	23347	21937	23185	28985	26140	26602	27619	29347	31011	29761	28587	2.94
PULSES	1655	1788	1906	1978	2116	2349	2816	3147	2956	3104	3203	7.58
SOYBEANS	17233	16479	19766	20025	24062	25489	26887	26219	28928	26585	25764	5.33
SOYBEAN OIL	1546	1365	1839	2106	2610	2953	3196	3488	3404	3647	4019	11.29
GROUNDNUTS SHELLED BASIS	853	899	1035	874	745	744	730	826	724	751	726	-2.45
GROUNDNUT OIL	382	402	561	581	418	502	474	320	447	495	348	-1.25
COPRA	526	1082	1147	941	703	443	461	415	431	240	285	-12.02
COCONUT OIL	667	1043	1374	1110	1334	1142	1216	1357	1264	1325	981	2.71
PALM NUTS KERNELS	360	308	391	279	181	160	201	138	111	141	122	-11.66
PALM OIL	1691	2043	2186	2333	2404	2843	3614	3227	3776	4007	4358	9.64
OILSEED CAKE AND MEAL	14709	14468	18820	19110	21873	23265	25688	27711	27629	31951	29068	8.16
BANANAS	6627	6370	6341	6658	7045	6948	6957	6909	7147	6301	6829	.48
ORANGES+TANGER+CLEMEN	4955	5165	5153	5404	5212	4958	5143	4998	5037	4847	5412	-.05
LEMONS AND LIMES	827	813	967	895	982	922	998	936	1013	951	1013	1.73
COFFEE GREEN+ROASTED	3407	3573	3655	2934	3441	3791	3716	3707	3937	4021	4235	2.14
COCOA BEANS	1197	1160	1148	972	1086	930	1063	1333	1251	1169	1285	1.15
TEA	805	813	852	905	885	938	966	958	921	974	1079	2.42
COTTON LINT	3816	3994	4049	3929	4471	4374	4831	4256	4416	4301	4231	1.20
JUTE AND SIMILAR FIBRES	891	590	668	565	496	562	517	573	508	564	432	-4.06
TOBACCO UNMANUFACTURED	1400	1251	1306	1280	1424	1355	1354	1483	1419	1344	1405	.73
NATURAL RUBBER	3199	3011	3249	3292	3317	3422	3329	3144	3101	3449	3635	.87
WOOL GREASY	834	853	1010	1103	890	937	907	952	873	892	873	-.28
BOVINE CATTLE 1/	5940	6831	6887	6785	7691	7569	7124	7317	7735	7512	7207	1.62
SHEEP AND GOATS 1/	10397	11830	10776	12430	14775	15221	18641	17657	18723	20399	20252	7.65
PIGS 1/	6071	6428	6945	6942	7951	8421	10745	9847	9331	9549	10169	5.65
TOTAL MEAT	5283	5548	6263	6814	7101	7821	8095	8861	8579	8905	8848	5.67
MILK DRY	386	391	457	585	602	661	874	868	858	750	846	9.10
TOTAL EGGS IN SHELL	508	535	518	573	606	656	745	807	826	810	826	5.96
FISHERY PRODUCTS												
FISH FRESH FROZEN	2788	2966	3032	3467	3851	4242	4228	4296	4524	4923	859	-1.92
FISH CURED	441	434	441	424	416	445	455	475	444	418	55	-8.90
SHELLFISH	704	760	875	829	990	1116	1026	1091	1227	1390	210	-1.83
FISH CANNED AND PREPARED	747	721	831	801	847	886	1007	1054	947	898	81	-7.97
SHELLFISH CANNED+PREPAR	89	88	94	108	106	109	126	124	161	182	46	1.47
FISH BODY AND LIVER OIL	558	597	565	565	694	740	738	724	733	722	98	-5.81
FISH MEAL	1951	2188	2114	2073	2175	2478	2410	2160	2995	2367	586	-3.99
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	26238	23898	28411	28657	29837	31817	27965	22870	26527	29372	29955	.70
SAWLOGS NONCONIFEROUS	44885	36239	45353	47081	48271	45948	41994	33081	33371	32456	29914	-3.78
PULPWOOD+PARTICLE	32980	31876	33858	35121	32616	36364	41048	39890	34785	35319	37976	1.54
FUELWOOD	2603	2229	1998	2423	1894	2243	2780	2248	2396	2719	2645	1.51
SAWNWOOD CONIFEROUS	51822	43250	56294	61793	65962	68826	66021	60730	61523	70663	73189	3.63
SAWNWOOD NONCONIFEROUS	8928	7918	11424	11168	11992	13380	12547	10967	11025	12520	12956	3.32
WOOD-BASED PANELS	12964	12436	14384	14971	16401	16680	16329	16733	15278	17121	18343	3.15
PULP FOR PAPER	17391	13660	15523	15594	17487	18706	19751	18733	17301	19606	20084	2.75
PAPER AND PAPERBOARD	30063	23074	27090	28292	30272	33320	35051	35442	33670	36738	39717	4.18
WESTERN EUROPE												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	12393	14406	14498	12860	13773	16114	19925	23885	22577	23810	27259	8.41
RICE MILLED	605	613	660	741	841	875	945	999	933	941	974	5.46
BARLEY	5966	5686	5075	4408	8634	7199	8057	10807	7548	8390	11019	7.09
MAIZE	6012	5666	5876	4458	4869	5050	5474	4820	5743	7705	7912	2.59
MILLET	7	15	11	12	12	13	15	20	20	26	20	9.83
SORGHUM	711	736	771	384	262	308	206	241	271	159	165	-14.89
POTATOES	2358	2589	2337	2708	2798	3016	3455	3544	3666	3517	3510	4.95
SUGAR,TOTAL (RAW EQUIV.)	2638	2249	3072	3924	4448	4632	5627	6147	6466	6078	5612	10.63
PULSES	253	323	226	302	353	450	458	448	419	606	799	10.68
SOYBEANS	16	111	189	120	237	353	327	160	207	127	87	9.72

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
SOYBEAN OIL	720	719	744	767	1099	1208	1204	1272	1380	1387	1434	8.56
GROUNDNUTS SHELLED BASIS	17	13	24	21	28	14	18	24	25	17	24	2.25
GROUNDNUT OIL	51	74	49	44	45	64	79	68	74	99	63	4.54
COPRA		1	17	3	4	1	2		1			-26.93
COCONUT OIL	78	203	269	163	119	61	43	58	87	60	57	-11.06
PALM NUTS KERNELS	5	1	1	1	1	2	3	1	2			-25.97
PALM OIL	68	86	98	111	97	92	123	114	94	123	132	4.54
OILSEED CAKE AND MEAL	2875	2257	2630	2518	3437	3957	4247	4921	5330	6418	6085	11.12
BANANAS	27	35	25	31	41	43	43	48	46	35	47	5.26
ORANGES+TANGER+CLEMEN	1933	1999	2056	2113	1921	1906	1799	1659	1880	1702	2418	-.31
LEMONS AND LIMES	444	461	525	464	505	483	512	430	571	449	531	.82
COFFEE GREEN+ROASTED	76	86	92	78	102	125	106	122	126	142	162	7.25
COCOA BEANS	6	11	15	30	34	32	44	48	52	52	65	23.27
TEA	61	43	46	60	50	46	43	44	43	51	56	-.64
COTTON LINT	79	65	89	70	71	60	57	55	75	69	70	-1.39
JUTE AND SIMILAR FIBRES	25	21	18	17	19	16	17	17	15	16	15	-4.12
TOBACCO UNMANUFACTURED	196	177	179	153	223	234	197	210	247	249	271	4.12
NATURAL RUBBER	40	29	32	27	21	21	16	14	15	16	23	-7.84
WOOL GREASY	43	55	64	57	60	65	69	61	57	69	64	2.60
BOVINE CATTLE 1/	2312	3416	3121	2979	3322	3340	3412	3620	3546	3493	3520	2.76
SHEEP AND GOATS 1/	575	1152	1183	1318	1732	1384	1418	927	784	1196	1102	1.16
PIGS 1/	2576	2596	3112	3106	3421	4004	4777	4749	4537	4737	4681	7.26
TOTAL MEAT	2215	2434	2393	2652	2825	3173	3673	3900	3788	4075	4279	7.32
MILK DRY	271	285	334	432	450	516	660	673	624	531	642	9.48
TOTAL EGGS IN SHELL	308	326	335	349	382	445	506	538	601	596	581	8.02
FISHERY PRODUCTS												
FISH FRESH FROZEN	1017	1054	1115	1146	1391	1686	1643	1791	1885	2009	859	4.05
FISH CURED	283	278	288	263	253	276	286	309	274	271	55	-7.04
SHELLFISH	225	250	274	232	263	275	277	326	336	346	210	2.13
FISH CANNED AND PREPARED	226	207	243	246	262	264	257	261	261	265	81	-3.44
SHELLFISH CANNED+PREPAR	24	27	32	34	36	38	42	47	57	72	46	9.17
FISH BODY AND LIVER OIL	196	249	319	327	270	296	332	335	273	257	98	-3.17
FISH MEAL	803	864	948	1040	945	951	978	918	1071	936	586	-1.00
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	2784	1704	2428	2590	1899	2395	2937	2735	2429	2492	2786	1.90
SAWLOGS NONCONIFEROUS	1943	1665	1833	2077	2017	2055	2257	2128	1928	2011	2285	1.72
PULPWOOD+PARTICLE	7920	8627	8173	7575	6846	8462	10718	11165	10038	9407	11002	3.54
FUELWOOD	1103	987	816	1033	551	797	965	745	1011	1172	1023	.78
SAWNWOOD CONIFEROUS	17248	12640	17061	16554	18051	20349	19783	17142	18334	20608	20350	2.91
SAWNWOOD NONCONIFEROUS	1858	1607	2801	2494	2756	2514	2395	2037	1896	2018	2232	.10
WOOD-BASED PANELS	5854	5171	6151	6194	6737	7386	7047	6690	6151	6258	6654	1.47
PULP FOR PAPER	7454	5199	5697	5578	6705	6852	6654	6210	5612	6727	7047	.83
PAPER AND PAPERBOARD	14964	10655	13098	13753	15659	17385	17423	18108	17770	19622	21843	5.52
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR+WHEAT EQUIV.	8372	5335	4164	5443	3969	5002	4170	4380	5092	4042	3780	-4.33
RICE MILLED	149	16	11	11	13	24	33	25	28	38	35	1.57
BARLEY	1158	1040	943	1725	222	232	336	247	276	276	269	-16.44
MAIZE	1727	983	1536	1318	1493	554	1325	1770	1326	860	844	-3.64
MILLET	4	3	7	3	3	5	6	3	5	4	3	.20
SORGHUM	8	10	11	5	7	7	5	9	6	4	4	-6.44
POTATOES	648	490	442	682	371	655	322	323	299	159	176	-11.82
SUGAR,TOTAL (RAW EQUIV.)	787	438	573	808	953	717	738	631	807	762	1057	3.67
PULSES	115	119	112	117	135	145	122	122	112	118	153	1.23
SOYBEANS	31	11	10	32	6	30	5	4	5	5	11	-12.20
SOYBEAN OIL	8	2	12	13	7	10	17	14	18	12	27	14.98
GROUNDNUTS SHELLED BASIS	1					1	1				2	
COCONUT OIL						1	1					
OILSEED CAKE AND MEAL	47	49	14	61	53	20	27	91	100	91	43	7.59
ORANGES+TANGER+CLEMEN							1	2	2	1	2	
COCOA BEANS										5	12	
TEA	14	17	15	22	17	17	20	18	17	26	30	5.08
COTTON LINT	740	801	887	976	865	807	863	928	970	824	651	-.34
TOBACCO UNMANUFACTURED	100	102	101	99	89	102	103	90	88	85	83	-1.91
WOOL GREASY	1	1	1	1	2	3	3	1		1	1	-2.96
BOVINE CATTLE 1/	630	686	498	540	544	676	577	460	607	702	724	1.02
SHEEP AND GOATS 1/	2875	3457	3025	3504	3800	4719	4597	3720	3654	4129	4480	3.52
PIGS 1/	628	944	720	720	1158	1152	1144	1713	1091	973	962	4.86
TOTAL MEAT	527	627	547	658	620	744	738	779	715	710	803	3.62

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
TOTAL EGGS IN SHELL	111	121	101	120	114	104	90	78	59	71	70	-6.26
FISHERY PRODUCTS												
FISH FRESH FROZEN	494	606	607	540	569	605	621	514	434	537		
FISH CURED	13	19	12	11	15	21	17	11	6	18		
SHELLFISH	3	1	1	1	1	1	2	1	2	78		
FISH CANNED AND PREPARED	32	45	47	48	40	36	39	39	34	37		
SHELLFISH CANNED+PREPAR	2	3	2	1	1	1	2	1	2	2		
FISH BODY AND LIVER OIL	6	4	2	1	1	1	1					
FISH MEAL	11	19	18	14	21	20	22	12	9	12		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	9829	8884	9534	9919	10281	8774	7430	7104	7165	7681	7044	-3.66
SAWLOGS NONCONIFEROUS	397	354	201	315	296	404	384	285	303	292	302	-.77
PULPWOOD+PARTICLE	12480	12146	12401	12155	11375	12066	12162	12396	10693	12057	12750	-.24
FUELWOOD	308	235	92	115	141	143	183	94	70	92	121	-8.19
SAWNWOOD CONIFEROUS	9865	10362	11009	10592	10782	9956	9513	9363	9630	9692	9871	-.94
SAWNWOOD NONCONIFEROUS	767	749	714	702	752	600	597	539	487	536	545	-4.40
WOOD-BASED PANELS	1457	1588	1702	1791	1875	1842	1827	1683	1548	1610	1585	.04
PULP FOR PAPER	684	673	854	856	926	827	895	896	982	1038	1095	4.23
PAPER AND PAPERBOARD	1304	1295	1480	1653	1779	1664	1732	1697	1701	1707	1678	2.59
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	36782	43589	38974	40736	50841	47174	54495	61342	61264	63319	65239	6.19
RICE MILLED	1726	2139	2107	2288	2279	2301	3054	3133	2540	2385	2141	2.76
BARLEY	3547	4068	5432	4343	4249	4654	4195	6853	7097	7258	5876	6.13
MAIZE	29875	33526	44692	40580	50550	59414	63923	56067	49658	48099	49602	4.82
MILLET					23	15	60	24	28	41	55	
SORGHUM	5722	5848	5797	6139	5184	5950	8050	8032	6051	5325	6828	1.48
POTATOES	356	369	857	503	282	289	344	395	461	363	295	-2.82
SUGAR,TOTAL (RAW EQUIV.)	105	291	122	166	149	135	654	1187	154	323	399	12.77
PULSES	339	390	400	374	390	470	913	1141	854	680	635	10.25
SOYBEANS	13953	12506	15361	16234	20794	20951	21882	21980	25652	22791	19641	5.90
SOYBEAN OIL	766	355	506	768	916	1110	1081	809	911	786	1041	6.32
GROUNDNUTS SHELLED BASIS	255	241	130	302	381	356	285	146	201	224	266	-.47
GROUNDNUT OIL	21	12	48	45	40	5	18	20	10	2	7	-16.64
COCONUT OIL	5	8	26	17	9	5	19	14	13	11	21	6.00
OILSEED CAKE AND MEAL	5253	4105	5370	4740	6793	6845	8009	7471	6917	7517	5551	4.20
BANANAS	195	187	201	199	201	197	205	217	210	188	202	.47
ORANGES+TANGER+CLEMEN	328	481	461	410	356	318	482	443	353	497	374	.40
LEMONS AND LIMES	202	183	225	236	237	173	171	176	135	163	148	-4.00
COFFEE GREEN+ROASTED	85	55	69	106	59	79	79	70	60	43	63	-3.07
COCOA BEANS	23	9	10	14	9	9	7	14	14	16	12	-.03
TEA	3	4	3	4	5	5	5	4	4	5	5	4.31
COTTON LINT	1172	871	779	1017	1347	1527	1823	1269	1392	1205	1497	4.66
JUTE AND SIMILAR FIBRES	1	1	1	2	1							-26.78
TOBACCO UNMANUFACTURED	335	293	293	314	364	299	293	300	290	264	275	-1.56
NATURAL RUBBER	26	29	29	25	20	21	28	18	16	21	35	-1.79
WOOL GREASY		1						1	1	1	1	6.39
BOVINE CATTLE 1/	360	421	684	651	592	436	424	441	563	440	479	-.08
SHEEP AND GOATS 1/	293	344	250	214	153	135	144	225	287	226	332	-.53
PIGS 1/	213	47	56	54	201	145	254	171	342	483	1362	27.38
TOTAL MEAT	403	472	693	700	721	777	973	1073	987	926	946	8.70
MILK DRY	21	17	16	16	7	5	36	37	29	37	19	7.35
TOTAL EGGS IN SHELL	21	22	22	38	39	30	61	87	64	31	25	7.02
FISHERY PRODUCTS												
FISH FRESH FROZEN	200	236	250	352	383	414	418	499	546	495		
FISH CURED	49	47	62	65	63	64	76	87	89	70		
SHELLFISH	39	42	48	71	120	133	115	88	80	69		
FISH CANNED AND PREPARED	39	36	46	51	63	65	81	93	68	82		
SHELLFISH CANNED+PREPAR	8	8	9	9	11	11	11	11	11	4		
FISH BODY AND LIVER OIL	101	93	91	60	110	101	137	117	98	191		
FISH MEAL	85	35	63	61	82	40	108	75	42	95		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	12118	12196	14842	14362	15565	17865	15135	11676	15269	17395	18441	2.92
SAWLOGS NONCONIFEROUS	622	328	470	481	522	630	784	751	506	755	761	5.47
PULPWOOD+PARTICLE	8402	6867	8337	8710	8216	9463	9887	8382	6605	6422	5847	-2.40
FUELWOOD	110	206	162	200	170	98	63	108	85	85	90	-7.62
SAWNWOOD CONIFEROUS	22944	18553	26379	32305	34492	35407	33612	31770	31423	38296	40881	5.85
SAWNWOOD NONCONIFEROUS	705	807	814	847	1341	1025	1190	1209	1083	1340	1373	6.39

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
WOOD-BASED PANELS	1518	1507	1567	1774	2061	2053	2312	2533	2088	2401	2662	5.95
PULP FOR PAPER	8076	6672	7666	7723	8132	8906	9838	9261	8531	9428	9611	2.88
PAPER AND PAPERBOARD	12255	9726	10935	11232	11124	12326	13675	13134	11931	12918	13574	2.23
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	5326	8201	7875	8196	11134	6933	14955	10677	10998	8312	10672	4.99
RICE MILLED	137	174	218	255	277	241	457	281	596	405	246	9.55
BARLEY	808	1760	2022	2157	1375	1757	3047	1650	1599	852	3220	3.29
MAIZE	3	1	88	79	32	75	37	52	24	73	30	23.35
MILLET	31	21	20	23	15	18	14	11	25	19	18	-3.61
SORGHUM	748	856	815	829	385	516	580	463	1271	445	772	-1.69
POTATOES	16	21	25	29	20	18	23	21	23	26	21	1.60
SUGAR,TOTAL (RAW EQUIV.)	1784	1999	2002	2558	2481	1842	2203	2563	2502	2551	2361	2.70
PULSES	42	36	33	40	36	45	72	64	71	106	82	11.11
SOYBEANS	2	4	32									-40.30
SOYBEAN OIL										1		
GROUNDNUTS SHELLED BASIS	7	2	2	4	2	2	12	4	4	8		-8.81
GROUNDNUT OIL									1			
OILSEED CAKE AND MEAL		1	3	2		1	1		1	1		-3.91
ORANGES+TANGER+CLEMEN	24	15	19	11	22	25	38	32	28	32	25	6.91
LEMONS AND LIMES	1	1	1	1			4	1	2	1	1	10.75
COCOA BEANS	1									1	1	6.17
TEA	1	1	1		1							-15.61
COTTON LINT	3	8	16	6	10	24	49	59	79	129	81	42.37
TOBACCO UNMANUFACTURED					1		1	1		1		3.05
NATURAL RUBBER							1					-1.71
WOOL GREASY	634	588	750	826	630	705	650	680	642	660	659	-.16
BOVINE CATTLE 1/	34	13	33	45	71	107	74	109	121	120	96	19.81
SHEEP AND GOATS 1/	1159	1456	1847	3409	4143	3898	6172	5763	6097	7035	6350	19.76
PIGS 1/	1	1	1		1	1	2	1		1	3	7.04
TOTAL MEAT	1278	1183	1446	1643	1664	1814	1494	1602	1493	1666	1349	1.45
MILK DRY	81	70	67	113	125	123	161	137	175	154	171	9.94
TOTAL EGGS IN SHELL	2	2	2	1	1	1	1	1	1	2	5	5.81
FISHERY PRODUCTS												
FISH FRESH FROZEN	13	12	19	28	32	54	81	95	87	98		
FISH CURED							1	1	2	1		
SHELLFISH	16	16	14	17	20	32	56	57	70	68		
FISH CANNED AND PREPARED		1	1			1	3	2	4	5		
SHELLFISH CANNED+PREPAR	2	2	2	2	2	2	2	2	2	3		
FISH BODY AND LIVER OIL	8	4	8	5	4	3						
FISH MEAL								1				
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	1302	534	958	1027	936	1236	971	529	479	508	509	-7.24
SAWLOGS NONCONIFEROUS	12	3	1	3	2	1	4	4				-29.55
PULPWOOD+PARTICLE	2931	3061	3866	5326	5074	5357	7064	6647	6240	6105	7245	9.02
SAWNWOOD CONIFEROUS	245	160	232	295	367	509	617	546	515	401	402	9.81
SAWNWOOD NONCONIFEROUS	51	32	23	31	30	41	54	35	34	35	40	1.02
WOOD-BASED PANELS	52	61	28	32	52	104	142	138	99	113	107	13.37
PULP FOR PAPER	232	335	375	452	435	464	475	518	421	471	471	5.22
PAPER AND PAPERBOARD	214	204	269	302	332	359	418	447	340	361	346	6.00
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	42	27	21	20	46	31	17	19	22	2	1	-22.29
RICE MILLED	29	17	55	46	13	12	21	19	9	6		
BARLEY	2	5		1		2						-26.15
MAIZE	626	1009	472	434	652	364	69	249	361	727	251	-8.72
MILLET	59	10	79	13	31	78	56	41	36	30	20	-.16
SORGHUM	5	10	2			53	12	3	15	14	1	4.86
POTATOES	83	97	91	82	58	50	55	36	30	49	61	-8.13
SUGAR,TOTAL (RAW EQUIV.)	1473	1139	1365	1468	1296	1658	1586	1492	1738	1754	1528	2.64
PULSES	357	319	410	262	150	150	220	127	152	157	100	-11.35
SOYBEANS	2	21	3	13	36	1	1	1		1		
SOYBEAN OIL			2	1	2	1			1			
GROUNDNUTS SHELLED BASIS	189	166	286	192	64	82	86	36	56	91	43	-14.93
GROUNDNUT OIL	155	226	290	258	94	159	90	36	159	176	121	-7.02
COPRA	62	42	60	55	52	45	32	22	20	15	11	-15.28
COCONUT OIL	18	9	11	6	9	14	15	18	21	21	24	8.89
PALM NUTS KERNELS	320	269	353	239	152	123	140	107	71	105	86	-14.20

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
PALM OIL	196	209	155	118	96	63	138	84	88	70	74	-9.74
OILSEED CAKE AND MEAL	614	678	760	712	456	668	478	357	484	471	370	-5.89
BANANAS	465	351	317	308	344	292	243	205	187	193	213	-7.90
ORANGES+TANGER+CLEMEN	729	592	664	744	873	672	854	715	659	604	617	-.80
LEMONS AND LIMES	3	1	1	1	2	1	1	1	2	7	5	13.09
COFFEE GREEN+ROASTED	1174	1106	1147	877	926	1015	895	966	1052	932	922	-1.79
COCOA BEANS	868	818	862	691	778	601	757	974	820	749	807	-.19
TEA	138	135	148	165	182	197	180	169	191	195	200	3.80
COTTON LINT	317	271	351	300	312	339	336	325	301	325	342	.81
JUTE AND SIMILAR FIBRES						1						
TOBACCO UNMANUFACTURED	131	113	141	129	139	132	172	189	147	142	174	3.18
NATURAL RUBBER	203	186	159	153	145	142	138	146	140	156	167	-2.02
WOOL GREASY	6	4	3	4	4	3	4	4	4	4	4	-1.89
BOVINE CATTLE 1/	1207	1022	1126	1125	1181	1255	1398	1446	1403	1187	1214	1.80
SHEEP AND GOATS 1/	3161	3515	2548	2461	3066	3047	3645	3462	3741	3117	3263	1.54
PIGS 1/	13	13	15	2	1	2	1			1		
TOTAL MEAT	116	102	112	118	99	97	48	44	46	52	51	-10.49
MILK DRY	1		1		2	4						-33.28
TOTAL EGGS IN SHELL	1	1	1	1			1					-18.40
FISHERY PRODUCTS												
FISH FRESH FROZEN	106	76	76	98	109	107	161	185	287	379		
FISH CURED	24	29	20	21	20	16	19	19	15	9		
SHELLFISH	29	39	43	43	48	33	33	58	89	129		
FISH CANNED AND PREPARED	80	59	75	70	62	77	80	93	82	99		
FISH BODY AND LIVER OIL	18	12	7	7	7	7	5	5	3	10		
FISH MEAL	95	83	43	19	39	23	26	27	17	42		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	14	15	11	2	2	2						-34.91
SAWLOGS NONCONIFEROUS	6580	5012	6309	6434	6211	6175	6002	4745	4892	4834	4911	-2.70
PULPWOOD+PARTICLE	69	70	127	100	75	112	84	173	173	173	173	9.91
FUELWOOD	161	56	47	51	51	51	5					
SAWNWOOD CONIFEROUS	107	98	113	119	116	126	108	94	81	79	82	-3.29
SAWNWOOD NONCONIFEROUS	813	625	664	682	706	680	611	538	606	638	617	-1.98
WOOD-BASED PANELS	300	206	220	241	261	236	278	269	267	286	376	3.04
PULP FOR PAPER	234	136	235	173	216	242	241	216	182	182	182	-.28
PAPER AND PAPERBOARD	30	19	22	19	16	24	21	20	9	8	13	-8.65
LATIN AMERICA												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	1871	2054	3345	6095	1833	4427	4621	3960	4043	10410	7525	13.66
RICE MILLED	348	437	535	999	732	573	548	617	512	510	411	.07
BARLEY	110	28	43	130	18	58	72	32	24	59	95	-.79
MAIZE	6666	5088	4560	6864	5927	5990	3557	9199	5808	7318	5713	1.36
MILLET	78	94	124	172	196	139	63	136	101	96	54	-3.57
SORGHUM	3169	2180	3499	4295	4625	3899	1544	5081	5368	5339	4278	5.23
POTATOES	21	50	99	106	67	77	61	45	45	33	26	-4.31
SUGAR,TOTAL (RAW EQUIV.)	12085	11107	10533	13050	12429	12726	12031	12700	13049	12953	13002	1.41
PULSES	175	233	312	424	464	395	341	287	286	355	424	4.42
SOYBEANS	2831	3435	3934	3441	2845	3814	4503	3909	2877	3270	5167	2.38
SOYBEAN OIL	42	285	562	544	570	609	840	1353	1024	1369	1412	28.85
GROUNDNUTS SHELLED BASIS	52	60	24	53	52	97	97	86	55	101	92	8.46
GROUNDNUT OIL	101	38	140	181	155	209	207	80	113	104	57	-.76
COPRA	2	2	2			2			5			-17.08
COCONUT OIL	5	5	5	5	9	8	4	5	6	6	16	6.13
PALM NUTS KERNELS	5	4	2	3	9	7	5	1	4	1	1	-14.98
PALM OIL	6	3	5	3	4	5	1	5	11	8	9	6.98
OILSEED CAKE AND MEAL	3130	4299	5798	7354	7676	7497	8891	10912	10498	12411	12048	13.26
BANANAS	5055	4779	4839	5231	5520	5366	5358	5382	5586	5047	5377	.90
ORANGES+TANGER+CLEMEN	210	190	173	224	269	314	308	318	395	427	418	9.50
LEMONS AND LIMES	14	22	25	29	47	74	53	51	33	58	55	12.42
COFFEE GREEN+ROASTED	1826	2055	2032	1547	1960	2179	2210	2124	2230	2425	2532	3.07
COCOA BEANS	255	270	209	187	211	226	183	201	247	227	212	-1.02
TEA	30	23	32	34	41	39	44	35	43	53	53	6.71
COTTON LINT	664	806	607	689	903	733	641	608	597	539	487	-3.40
JUTE AND SIMILAR FIBRES	3	1	1		1	2	2		1			
TOBACCO UNMANUFACTURED	244	244	255	238	267	276	254	271	275	278	290	1.67
NATURAL RUBBER	5	6	7	5	6	4	4	2	3	4	3	-7.76
WOOL GREASY	64	108	92	108	107	80	104	125	108	87	75	.62

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....				THOUSAND METRIC TONS							PERCENT
BOVINE CATTLE 1/	1037	960	1103	1093	1662	1404	854	862	1054	1154	773	-1.81
SHEEP AND GOATS 1/	65	93	106	112	125	98	65	312	245	590	308	18.99
PIGS 1/	33	42	65	31	24	16	1		1	4	6	-32.37
TOTAL MEAT	504	449	775	778	840	816	749	999	1052	1002	867	6.78
MILK DRY	9	16	34	18	10	4	3	11	18	17	2	-9.86
TOTAL EGGS IN SHELL	1	1	3	3	2	4	12	14	6	2	3	15.57
FISHERY PRODUCTS												
FISH FRESH FROZEN	131	145	196	302	361	407	397	383	441	354		
FISH CURED	9	5	4	9	3	12	6	7	10	3		
SHELLFISH	90	93	99	99	140	171	125	125	165	165		
FISH CANNED AND PREPARED	20	16	28	48	72	76	135	164	102	54		
SHELLFISH CANNED+PREPAR	1	3	3	5	2	5	3	4	5	6		
FISH BODY AND LIVER OIL	93	148	39	46	70	128	100	79	179	25		
FISH MEAL	749	909	842	740	843	1147	1020	849	1566	1024		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	9	15	23	167	689	968	1029	377	906	1024	902	62.25
SAWLOGS NONCONIFEROUS	202	55	86	49	60	86	114	51	40	46	72	-6.52
PULPWOOD+PARTICLE	183	107	115	53								
FUELWOOD	5	13	21	106	152	214	167	71	23	57	16	10.38
SAWNWOOD CONIFEROUS	1131	1134	1050	1429	1477	1678	1718	1319	1102	1172	1217	.57
SAWNWOOD NONCONIFEROUS	835	590	629	838	727	1121	1130	993	885	856	928	3.54
WOOD-BASED PANELS	265	252	326	374	487	488	625	606	608	588	664	10.57
PULP FOR PAPER	318	332	382	443	715	1024	1318	1374	1302	1528	1487	20.35
PAPER AND PAPERBOARD	231	155	199	225	276	393	414	582	454	697	977	17.78
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	29	15	27	640	2131	876	540	648	706	1098	985	47.99
RICE MILLED	181	130	256	276	223	211	259	159	59	41	89	-11.57
BARLEY	7	12	366	302	50	88	229	424	1026	661	320	44.45
MAIZE	2	1	14	8	43	111	155	40	53	9	3	18.24
MILLET	5	4	6	3	4	2	2	3	8	2		
SORGHUM	98	48	75	137	66	196	286	256	423	186	50	9.48
POTATOES	300	209	382	438	292	315	454	394	483	448	493	6.07
SUGAR,TOTAL (RAW EQUIV.)	59	58	48	64	55	37	45	71	219	316	515	22.26
PULSES	106	109	121	176	256	303	299	500	573	657	550	22.52
SOYBEAN OIL			1				3	5	16	10	10	
GROUNDNUTS SHELLED BASIS	140	218	312	175	111	52	51	108	101	24	50	-15.90
GROUNDNUT OIL	6	7	2	26	35	16	33	16	18	2	17	6.06
COCONUT OIL				1				1				-2.30
PALM OIL									1			
OILSEED CAKE AND MEAL	401	452	368	252	225	214	261	145	105	102	54	-17.16
BANANAS	7	12	10	5	4	7	19	20	11	9	9	4.45
ORANGES+TANGER+CLEMEN	674	697	716	754	643	619	627	759	705	686	741	.32
LEMONS AND LIMES	133	118	162	131	151	149	202	206	208	216	220	6.42
COFFEE GREEN+ROASTED	6	4	3	3	3	3	2	6	5	3	5	-.31
TEA	19	4	8	7	10	16	15	17	5	3	3	-8.90
COTTON LINT	706	856	1004	710	768	669	608	532	584	623	601	-4.02
TOBACCO UNMANUFACTURED	123	75	86	71	83	77	94	138	110	76	74	-.28
WOOL GREASY	10	8	7	12	9	8	7	3	6	5	5	-8.13
BOVINE CATTLE 1/	77	18	11	16	12	21	13	60	114	77	54	13.29
SHEEP AND GOATS 1/	980	720	828	680	1209	1421	2028	2857	3505	3627	3928	21.17
PIGS 1/				1	1	3						
TOTAL MEAT	22	14	9	11	15	15	21	74	96	83	88	25.85
MILK DRY			1						1	1	2	43.30
TOTAL EGGS IN SHELL	17	12	1	3	7	10	13	18	27	42	69	26.72
FISHERY PRODUCTS												
FISH FRESH FROZEN	16	6	4	4	8	13	14	21	23	30		
FISH CURED	13	12	10	12	11	5	6		1	1		
SHELLFISH	10	7	9	10	8	11	11	7	7	9		
FISH CANNED AND PREPARED	1	1	3	4	4	5	9	6	3	2		
SHELLFISH CANNED+PREPAR	2	2	2	3	1	2	3	4	4	4		
FISH BODY AND LIVER OIL			1	2	1							
FISH MEAL	1				1		1	1				
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	5	4	3		1	1	1	2	7	11	31	20.06
SAWLOGS NONCONIFEROUS	8	17	10	9	5	3	4	36	36	35	100	22.59
FUELWOOD	20	21	22	31	22	20	31	24	20	28	28	2.28
SAWNWOOD CONIFEROUS	61	49	60	69	60	103	84	99	95	148	104	9.06
SAWNWOOD NONCONIFEROUS	21	1	1	1		2	3	6	12	7	8	16.62

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
WOOD-BASED PANELS	31	27	29	26	26	24	19	19	21	25	20	-3.93
PULP FOR PAPER	5	4	2									
PAPER AND PAPERBOARD	22	9	10	11	10	16	21	35	34	39	69	18.32
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	145	115	83	264	967	755	482	295	155	246	143	4.05
RICE MILLED	1993	1862	3608	4749	3083	5031	5323	6047	6158	5574	7087	12.92
BARLEY	95		32	39	13	73	259	275	901	252	1662	70.13
MAIZE	2551	2276	2483	1768	2196	2143	2340	2703	3014	2859	3468	3.65
MILLET	2			8	1	6	2	2	1		2	
SORGHUM	189	213	182	138	166	170	208	288	317	248	327	6.31
POTATOES	35	46	95	73	55	99	105	72	71	62	54	2.92
SUGAR,TOTAL (RAW EQUIV.)	2594	2900	3639	4511	2822	3185	2831	2930	4295	3762	2822	1.00
PULSES	167	170	191	181	245	291	312	338	381	318	321	8.87
SOYBEANS	18	32	38	47	30	27	27	27	27	26	23	-1.78
SOYBEAN OIL	7	4	2	4	7	6	27	32	49	76	83	42.79
GROUNDNUTS SHELLED BASIS	109	86	174	69	24	40	55	113	108	82	71	-1.80
GROUNDNUT OIL	7	9	10	5	6	16	5	5	6	28	9	3.97
COPRA	283	834	878	683	445	193	234	172	232	61	68	-20.33
COCONUT OIL	508	760	1004	845	1112	976	1061	1192	1064	1143	780	4.27
PALM NUTS KERNELS	29	33	33	30	13	23	45	24	15	14	12	-7.97
PALM OIL	1411	1726	1897	2067	2168	2636	3303	2963	3487	3709	3989	10.74
OILSEED CAKE AND MEAL	2007	2061	3353	2871	2582	3335	3055	3011	3240	3380	3076	3.96
BANANAS	705	872	846	738	832	921	972	924	985	686	832	.84
ORANGES+TANGER+CLEMEN	39	137	37	113	65	81	81	50	64	74	68	.50
LEMONS AND LIMES					1	2	1	7	2	3	2	65.59
COFFEE GREEN+ROASTED	203	226	262	267	339	335	369	369	410	409	488	8.37
COCOA BEANS	14	15	18	18	24	32	41	64	88	89	139	27.36
TEA	458	502	512	499	459	481	523	553	483	483	559	.91
COTTON LINT	96	244	218	56	128	134	394	416	329	379	205	11.44
JUTE AND SIMILAR FIBRES	860	566	646	543	467	522	464	516	448	501	375	-5.18
TOBACCO UNMANUFACTURED	212	198	210	232	215	194	200	252	226	205	192	-.04
NATURAL RUBBER	2869	2737	2967	3027	3080	3179	3101	2924	2886	3205	3347	1.15
WOOL GREASY	3	1	2		1							-22.73
BOVINE CATTLE 1/	114	74	73	98	78	66	59	36	51	67	69	-5.55
SHEEP AND GOATS 1/	28	28	80	215	70	54	120	60	96	84	103	8.90
PIGS 1/	5	11	23	11	15	19	18	24	102	132	123	34.09
TOTAL MEAT	26	33	44	60	68	86	90	103	102	96	103	14.66
MILK DRY	3	4	5	5	7	10	13	10	10	9	10	12.90
TOTAL EGGS IN SHELL	3	5	6	10	6	5	4	11	8	6	5	3.06
FISHERY PRODUCTS												
FISH FRESH FROZEN	285	418	289	543	561	553	555	523	460	570		
FISH CURED	36	32	30	29	31	28	29	26	31	28		
SHELLFISH	210	228	291	282	312	350	305	321	381	377		
FISH CANNED AND PREPARED	18	18	26	36	49	47	55	80	101	109		
SHELLFISH CANNED+PREPAR	26	27	21	32	29	30	42	33	61	68		
FISH BODY AND LIVER OIL	1	1	1	1	3	2	2	1		1		
FISH MEAL	63	57	84	116	142	165	153	153	142	162		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	9	356	423	394	270	396	327	291	127	109	90	2.41
SAWLOGS NONCONIFEROUS	34240	28203	35758	37017	38457	35843	31534	24005	24287	23128	19832	-5.09
PULPWOOD+PARTICLE	986	930	697	1033	860	736	1003	1033	909	1001	805	.20
FUELWOOD	892	706	810	841	731	799	1181	1164	1086	1229	1310	5.75
SAWNWOOD CONIFEROUS	117	134	251	258	425	481	410	254	197	138	153	.62
SAWNWOOD NONCONIFEROUS	3661	3298	5551	5374	5463	7236	6415	5511	5893	6968	7101	6.28
WOOD-BASED PANELS	2424	2512	3110	3198	3342	3159	2933	3584	3423	4690	5386	6.45
PULP FOR PAPER	9	2	3	2	2	6	6	10	8	9	15	15.80
PAPER AND PAPERBOARD	114	104	175	139	154	146	291	302	224	215	213	8.47
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	5	4	4	6	8	9	4	9	6	67	75	27.01
RICE MILLED	2818	2324	1540	1488	2096	1836	1637	948	988	1359	1426	-7.04
BARLEY		6	2		1	2	1			1		
MAIZE	130	315	430	356	230	240	104	141	96	92	595	-3.99
MILLET	30	56	52	37	30	20	5	1	2	2	2	-34.69
SORGHUM						10	1		3	4	4	
POTATOES	49	50	55	53	62	81	77	80	89	78	74	5.97

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 4. VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
SUGAR,TOTAL (RAW EQUIV.)	720	639	678	777	493	514	657	440	463	257	207	-10.23
PULSES	86	83	97	89	76	90	71	111	103	107	137	3.61
SOYBEANS	375	355	199	130	113	306	140	139	160	367	835	3.53
SOYBEAN OIL			1	2	6	4	4		1	2	8	33.10
GROUNDNUTS SHELLED BASIS	37	37	45	25	30	49	91	245	127	182	166	22.92
GROUNDNUT OIL	29	21	16	5	13	18	21	57	55	72	67	18.02
COPRA									1	2	2	
COCONUT OIL										4	4	
PALM NUTS KERNELS									1			
PALM OIL	1											
OILSEED CAKE AND MEAL	31	29	36	30	31	49	87	208	349	1124	1551	51.78
BANANAS	165	127	96	140	101	117	109	103	112	134	135	-.78
ORANGES+TANGER+CLEMEN	78	76	52	74	81	73	70	54	57	62	46	-3.51
COFFEE GREEN+ROASTED	6	4	12	4	5	5	4	1	10	14	13	6.10
TEA	73	77	77	104	109	126	125	107	126	148	161	7.81
COTTON LINT	22	43	65	71	33	22	2	1	17	131	196	.39
JUTE AND SIMILAR FIBRES	1		2	3	8	20	35	41	43	47	43	59.43
TOBACCO UNMANUFACTURED	51	42	33	37	35	35	32	28	30	35	37	-2.91
NATURAL RUBBER	49	17	49	50	41	50	39	34	38	45	56	2.68
WOOL GREASY	22	24	25	21	22	24	23	21	16	16	12	-5.40
BOVINE CATTLE 1/	147	199	195	195	181	224	272	263	257	252	257	5.19
SHEEP AND GOATS 1/	1225	1030	873	482	443	463	448	330	312	393	384	-11.54
PIGS 1/	2601	2775	2953	3016	3129	3079	4548	3189	3256	3217	3031	1.96
TOTAL MEAT	167	205	201	155	210	246	251	250	274	270	343	6.35
TOTAL EGGS IN SHELL	40	39	38	35	42	51	54	56	57	57	62	5.85
FISHERY PRODUCTS												
FISH FRESH FROZEN	153	182	174	207	130	134	49	54	165	184		
FISH CURED	4	5	4	3	6	9	2	3	6	10		
SHELLFISH	45	44	53	51	55	68	61	65	64	87		
FISH CANNED AND PREPARED	6	6	14	13	21	31	31	31	38	36		
SHELLFISH CANNED+PREPAR	7	7	11	11	14	10	8	9	9	11		
FISH MEAL	3	1			1					2		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	157	177	128	128	96	92	85	97	97	106	102	-5.04
SAWLOGS NONCONIFEROUS	3	17	12	33	42	45	45	33	37	39	61	22.42
SAWNWOOD CONIFEROUS	66	95	103	102	111	102	93	93	95	95	94	1.06
SAWNWOOD NONCONIFEROUS	118	133	136	85	103	48	34	26	56	55	53	-11.68
WOOD-BASED PANELS	687	770	872	949	1244	1096	885	957	834	884	614	-.42
PULP FOR PAPER	25	33	33	33	44	46	49	86	81	64	30	8.00
PAPER AND PAPERBOARD	107	132	122	119	116	89	149	174	165	139	111	2.11

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 5. WORLD AVERAGE EXPORT UNIT VALUES OF SELECTED AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	US $ PER METRIC TON	.....	.....	.....	.....	.....	.....	PERCENT
AGRICULTURAL PRODUCTS												
WHEAT	171	169	153	125	131	163	186	188	172	162	157	.83
WHEAT FLOUR	210	237	215	191	199	224	284	294	245	196	213	.86
RICE MILLED	399	374	277	263	346	323	382	444	335	302	291	-.63
BARLEY	135	140	138	132	137	145	175	175	160	143	147	1.61
MAIZE	128	136	123	111	117	128	150	154	128	143	149	1.83
POTATOES	111	149	246	197	157	188	185	178	186	168	211	2.58
SUGAR CENTRIFUGAL RAW	400	555	376	295	341	355	537	505	401	419	421	.78
SOYBEANS	246	225	216	272	250	271	264	282	243	256	280	1.50
SOYBEAN OIL	701	695	456	586	617	675	625	542	483	498	716	-1.08
GROUNDNUTS SHELLED	513	514	467	596	661	679	698	965	661	620	729	4.23
GROUNDNUT OIL	929	801	723	814	946	964	777	996	646	601	991	-.86
COPRA	508	237	183	314	369	569	393	306	260	356	557	2.90
COCONUT OIL	929	418	361	552	627	938	650	536	463	555	1021	2.15
PALM NUTS KERNELS	364	178	160	266	262	357	267	235	228	229	375	1.82
PALM OIL	529	462	362	514	554	617	564	529	441	441	664	1.48
PALM KERNEL OIL	820	458	393	554	617	896	662	546	453	583	932	1.90
OLIVE OIL	1791	1855	1314	1259	1363	1649	1959	1773	1748	1509	1329	-.38
CASTOR BEANS	329	207	251	334	332	345	364	351	304	299	370	2.61
CASTOR BEAN OIL	838	575	557	883	801	803	970	856	825	908	1111	4.21
COTTONSEED	136	135	147	168	177	182	179	199	144	145	187	2.02
COTTONSEED OIL	602	675	555	599	607	682	628	627	527	530	745	.06
LINSEED	426	336	291	273	216	281	311	326	286	273	286	-1.95
LINSEED OIL	900	762	520	500	379	542	611	662	533	416	523	-3.59
BANANAS	99	128	138	144	157	168	186	197	205	209	209	7.28
ORANGES	164	206	201	222	268	349	359	347	332	327	305	7.19
APPLES	241	316	273	352	410	399	436	411	438	339	343	3.54
RAISINS	907	716	677	965	1080	1563	1671	1479	1209	1079	886	4.22
OATES	214	246	242	320	387	414	418	609	653	714	704	14.16
COFFEE GREEN	1259	1180	2265	4229	3168	3158	3319	2259	2317	2332	2552	4.76
COCOA BEANS	1337	1404	1509	2800	3138	3283	2664	1773	1590	1636	2049	1.67
TEA	1088	1269	1240	2204	2055	1962	2025	1949	1789	2015	2702	6.81
COTTON LINT	1295	1120	1294	1536	1358	1527	1620	1717	1440	1504	1620	2.78
JUTE	247	237	267	277	338	382	380	312	282	242	305	1.51
JUTE-LIKE FIBRES	170	203	210	250	245	248	260	189	234	236	222	1.60
SISAL	716	469	342	376	375	467	584	536	469	410	390	-1.31
TOBACCO UNMANUFACTURED	1751	2079	2180	2361	2648	2773	2819	2958	3248	3127	2965	5.58
NATURAL RUBBER	822	556	749	806	919	1214	1304	1125	848	995	1037	4.53
RUBBER NATURAL DRY	712	548	723	796	916	1180	1312	1066	799	964	974	4.72
WOOL GREASY	2803	1765	1797	2160	2221	2464	2824	2959	2922	2520	2602	3.12
CATTLE 1/	269	308	291	309	355	416	438	421	397	380	356	3.71
BEEF AND VEAL	1503	1726	1638	1860	2157	2390	2513	2379	2486	2248	1966	3.98
MUTTON AND LAMB	1223	1071	1009	1143	1390	1590	1760	1863	1810	1595	1518	5.26
PIGS 1/	81	90	90	100	104	111	106	108	113	99	95	1.87
BACON HAM OF SWINE	1620	2069	1979	1849	2242	2624	2882	2736	2560	2280	2147	3.33
MEAT CHIKENS	1032	1132	1180	1232	1313	1386	1456	1354	1172	1031	1075	.09
MEAT PREPARATIONS	1735	1500	1530	1514	1602	2139	2599	2490	2173	2101	1871	3.94
EVAP COND WHOLE COW MILK	559	680	643	657	756	852	930	921	931	885	772	4.33
MILK OF COWS SKIMMED DRY	843	992	801	637	742	844	1047	1105	1073	867	805	1.43
BUTTER OF COWMILK	1318	1728	1676	1732	2244	2279	2466	2631	2704	2406	2027	5.45
CHEESE OF WHOLE COWMILK	1713	2021	1969	2146	2544	2803	3015	2753	2658	2485	2329	3.64
FISHERY PRODUCTS												
FISH FRESH FROZEN	669	746	895	1049	1127	1237	1220	1253	1243	1133	852	3.99
FISH CURED	1237	1300	1489	1640	1798	2072	2388	2536	2127	2018	2068	6.14
SHELLFISH	1854	2094	2580	2754	3107	3623	3797	3763	3847	3753	786	.06
FISH CANNED AND PREPARED	1342	1330	1448	1709	2042	2292	2272	2317	2304	2398	2072	6.22
SHELLFISH CANNED+PREPAR	2620	2861	3133	3403	4019	4743	4998	4692	4256	4412	3686	4.86
FISH BODY AND LIVER OIL	467	338	362	430	433	417	435	404	340	340	375	-1.25
FISH MEAL	377	243	324	425	410	391	472	464	359	425	431	3.27
FOREST PRODUCTS												
SAWLOGS CONIFEROUS 2/	53	51	52	59	62	83	89	81	73	63	63	3.48
SAWLOGS NONCONIFEROUS 2/	48	39	50	54	57	93	105	87	88	87	89	8.96
PULPWOOD+PARTICLE 2/	22	25	23	24	25	26	36	39	34	29	29	4.19
FUELWOOD 2/	18	20	23	21	21	27	34	34	29	27	27	4.86
SAWNWOOD CONIFEROUS 2/	96	89	93	101	108	131	138	127	114	114	110	2.72
SAWNWOOD NONCONIF. 2/	133	128	134	152	164	216	245	222	211	215	205	6.32
WOOD-BASED PANELS 2/	187	183	197	211	228	283	316	294	283	271	254	4.83
PULP FOR PAPER	279	351	335	313	282	361	444	451	411	357	415	3.55
PAPER AND PAPERBOARD	349	411	406	421	453	506	572	567	557	505	519	4.25

1/ U.S. DOLLARS PER HEAD
2/ U.S. DOLLARS PER CUBIC METRE

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
WORLD												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	67708	73952	72258	70922	80086	85424	97904	103891	108634	106683	115601	5.92
RICE MILLED	8400	7557	9160	9971	10253	12270	12937	13802	11535	12117	11750	4.78
BARLEY	12422	12512	13703	12355	14749	14767	15019	18633	18670	17664	22549	5.73
MAIZE	49533	51708	61873	55050	67879	74671	79204	80177	69256	69260	68114	3.71
MILLET	448	318	313	359	346	331	263	202	229	217	203	-6.90
SORGHUM	10199	9242	10481	10928	10428	10208	10995	13749	13476	10994	12749	2.84
POTATOES	3825	3758	4329	4724	3906	4569	4673	4711	5115	4747	4752	2.48
SUGAR,TOTAL (RAW EQUIV.)	22719	22080	22671	27531	24525	26479	27138	28393	29546	28357	28322	2.82
PULSES	1678	1863	1876	2052	2064	2355	2925	3102	2902	3026	3255	7.29
SOYBEANS	17515	16313	19983	19623	23411	26125	27015	26294	28530	26778	24801	5.14
SOYBEAN OIL	1514	1374	1616	2076	2404	2873	3245	3252	3603	3718	4079	12.08
GROUNDNUTS SHELLED BASIS	864	889	1030	815	805	777	708	720	813	763	744	-2.20
GROUNDNUT OIL	387	428	512	596	475	474	513	358	415	516	336	-1.38
COPRA	545	1033	1215	919	804	458	464	393	484	252	306	-11.58
COCONUT OIL	625	955	1411	1096	1255	1198	1124	1399	1297	1301	1048	3.65
PALM NUTS KERNELS	343	278	349	292	169	161	182	161	122	137	98	-11.43
PALM OIL	1560	1884	2018	2471	2318	2701	3411	3225	3555	3876	3948	9.66
OILSEED CAKE AND MEAL	14829	14911	18475	19336	22083	23964	25490	27198	28566	32495	30471	8.38
BANANAS	6345	6308	6346	6582	6875	7039	6736	6765	6760	6082	6597	.25
ORANGES+TANGER+CLEMEN	4871	4991	5119	5288	4970	5067	5236	5023	5159	5119	5269	.42
LEMONS AND LIMES	837	830	936	912	961	965	991	971	1050	1028	1015	2.14
COFFEE GREEN+ROASTED	3463	3676	3776	3126	3435	3912	3797	3812	3878	3984	4058	1.55
COCOA BEANS	1155	1192	1159	1006	1096	1026	1068	1242	1269	1258	1318	1.41
TEA	822	806	846	899	829	887	916	884	889	907	1032	1.67
COTTON LINT	4091	4083	4103	4018	4506	4520	5069	4416	4519	4386	4435	1.18
JUTE AND SIMILAR FIBRES	859	579	682	572	492	572	573	534	556	511	421	-4.15
TOBACCO UNMANUFACTURED	1283	1301	1298	1258	1423	1394	1405	1441	1411	1381	1414	1.13
NATURAL RUBBER	3348	3130	3274	3388	3351	3493	3390	3280	3121	3417	3669	.56
WOOL GREASY	748	844	1034	870	883	918	853	872	836	843	841	-.07
BOVINE CATTLE 1/	5957	6410	6698	6774	7335	7344	6799	6971	7299	7132	6841	1.24
PIGS 1/	5985	6375	6802	6688	7744	8084	10497	9713	9010	9296	9930	5.54
TOTAL MEAT	5045	5538	6023	6617	6930	7568	7892	8403	8657	8713	8660	5.81
MILK DRY	314	268	338	465	475	509	585	592	573	520	623	7.90
TOTAL EGGS IN SHELL	505	529	516	574	636	674	742	766	815	806	828	5.85
FISHERY PRODUCTS												
FISH FRESH FROZEN	2917	2835	2971	3167	3485	3832	4287	4387	4325	4338	717	-2.98
FISH CURED	373	377	366	327	339	374	390	367	352	352	58	-8.16
SHELLFISH	770	822	939	876	1051	1193	1078	1119	1237	1340	293	-1.38
FISH CANNED AND PREPARED	764	713	857	797	891	934	1025	1065	1003	902	129	-5.97
SHELLFISH CANNED+PREPAR	129	129	145	154	160	161	170	179	198	216	78	.77
FISH BODY AND LIVER OIL	624	631	613	569	654	762	815	706	989	728	747	3.29
FISH MEAL	1908	2288	2193	2212	2058	2419	2250	1992	3255	2296	727	-3.35
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	26831	24330	27708	29283	29839	31497	28035	23784	26918	28951	29558	.56
SAWLOGS NONCONIFEROUS	45228	35772	44190	46214	47651	48228	42216	35102	33065	33446	30830	-3.33
PULPWOOD+PARTICLE	33914	31445	31886	36158	33914	38657	42328	42384	36574	36638	37997	1.96
FUELWOOD	3170	3015	2921	3082	2769	2908	3112	2552	3129	3506	3811	1.35
SAWNWOOD CONIFEROUS	52077	42394	54302	60762	65293	67383	63101	58152	59431	67142	68701	3.11
SAWNWOOD NONCONIFEROUS	9563	7982	10400	11243	11672	13259	12665	11279	10800	11660	11845	2.57
WOOD-BASED PANELS	13711	12380	14559	14548	15847	16762	15632	16398	15171	16860	17610	2.61
PULP FOR PAPER	17553	13666	15497	15533	17611	18799	19329	18615	17340	19571	20439	2.76
PAPER AND PAPERBOARD	29024	23005	26576	27815	30466	32285	33585	33911	33588	35865	39639	4.21
WESTERN EUROPE												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	12558	12460	13184	12602	13383	12980	14123	13334	13960	10574	12692	-.24
RICE MILLED	794	797	1214	1310	1466	1299	1287	1488	1687	1559	1711	7.18
BARLEY	6345	5477	6329	6136	6567	5105	5255	5966	6194	6665	5003	-.68
MAIZE	24324	25301	26440	26733	24757	24817	23455	21740	21103	18873	16029	-3.92
MILLET	108	112	90	182	195	150	98	109	122	110	116	-.47
SORGHUM	2800	2669	2893	2216	1453	1196	1254	1103	2149	685	1122	-10.70
POTATOES	2235	2372	3149	2999	2565	2808	3051	3026	3228	3167	3217	2.99
SUGAR,TOTAL (RAW EQUIV.)	5335	5263	4608	4237	3521	3448	3137	3074	3195	3148	3700	-5.09
PULSES	786	794	821	886	907	1054	1014	924	1067	1306	1424	5.55
SOYBEANS	11275	10524	11719	11612	14201	15311	16217	14414	16454	15009	13647	3.66

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
SOYBEAN OIL	545	575	532	502	559	580	675	643	681	743	700	3.43
GROUNDNUTS SHELLED BASIS	614	603	726	558	541	528	413	389	431	385	393	-5.81
GROUNDNUT OIL	327	338	351	355	325	407	446	296	349	396	259	-.54
COPRA	354	816	961	670	515	294	252	184	280	113	132	-16.48
COCONUT OIL	177	281	427	331	395	390	414	561	537	512	374	7.48
PALM NUTS KERNELS	329	260	327	271	153	137	147	140	106	106	77	-13.22
PALM OIL	698	797	860	829	781	856	833	722	735	859	713	-.25
OILSEED CAKE AND MEAL	9927	10101	12778	12863	15318	16705	17391	18205	19297	21471	19761	8.05
BANANAS	2427	2329	2256	2430	2525	2460	2221	2172	2178	2018	2184	-1.41
ORANGES+TANGER+CLEMEN	3200	3198	3176	3322	3143	3227	3222	2969	3185	3118	3308	-.12
LEMONS AND LIMES	386	398	432	408	428	432	429	416	452	451	442	1.24
COFFEE GREEN+ROASTED	1642	1747	1810	1543	1703	1955	1929	1997	1997	2061	2000	2.38
COCOA BEANS	574	564	565	561	590	569	616	664	721	649	736	2.68
TEA	313	289	297	336	250	278	297	244	287	266	306	-.92
COTTON LINT	1145	1188	1318	1135	1216	1150	1258	1018	1147	1246	1239	-.01
JUTE AND SIMILAR FIBRES	356	177	232	216	157	182	132	120	97	85	80	-12.23
TOBACCO UNMANUFACTURED	661	677	695	677	785	743	701	679	670	682	669	-.11
NATURAL RUBBER	958	875	941	950	861	925	892	838	844	830	860	-1.17
WOOL GREASY	370	391	528	418	437	444	399	394	353	316	394	-1.76
BOVINE CATTLE 1/	2691	3444	3306	3175	3472	3529	3404	3210	3478	3401	3326	1.06
PIGS 1/	3009	3314	3629	3284	3870	4382	5202	5496	4681	4888	4918	5.70
TOTAL MEAT	2877	3103	3316	3461	3762	3788	3760	3504	3770	3889	3829	2.52
MILK DRY	85	92	117	98	115	128	147	130	142	146	141	5.33
TOTAL EGGS IN SHELL	318	311	307	327	366	400	430	431	445	441	467	4.79
FISHERY PRODUCTS												
FISH FRESH FROZEN	1231	1147	1132	1230	1332	1471	1602	1603	1709	1609	717	.55
FISH CURED	181	158	158	157	163	187	188	164	172	167	58	-4.47
SHELLFISH	261	295	328	271	344	366	411	407	473	514	293	4.54
FISH CANNED AND PREPARED	288	274	307	299	290	315	339	338	325	353	129	-2.19
SHELLFISH CANNED+PREPAR	56	60	63	68	73	80	87	86	90	98	78	4.94
FISH BODY AND LIVER OIL	551	558	537	510	584	666	666	637	910	613	747	3.75
FISH MEAL	1086	1204	1187	1083	1070	1215	1155	1007	1894	1250	727	-.48
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	4756	3221	4417	4890	4094	4547	5103	4507	4660	4497	4419	1.08
SAWLOGS NONCONIFEROUS	8928	6985	8858	8793	7715	8044	8424	6888	6139	6174	6358	-3.30
PULPWOOD+PARTICLE	18155	17920	17252	16718	15294	17885	20907	24780	20515	19770	23124	2.97
FUELWOOD	2118	1963	1956	1940	1673	1784	2016	1539	1851	2216	2430	.66
SAWNWOOD CONIFEROUS	23709	17176	23111	22096	23684	27274	25507	21514	22724	23796	23167	1.06
SAWNWOOD NONCONIFEROUS	4033	3620	5435	5521	5620	6724	6088	4938	4898	5393	5384	2.38
WOOD-BASED PANELS	6952	6076	7564	7524	8440	9652	8951	8956	8459	8979	9402	3.53
PULP FOR PAPER	9679	7293	8441	8270	9435	10034	10013	9531	8809	9585	10030	1.60
PAPER AND PAPERBOARD	13523	9907	12368	12631	13602	15046	15107	15740	15755	17320	18779	4.79
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	7448	13457	13099	11996	13101	16167	21293	24583	27256	26830	30484	13.49
RICE MILLED	441	543	647	725	710	940	994	1599	1127	601	503	4.31
BARLEY	2368	3283	4118	2225	4137	4559	4311	6007	3247	3531	3332	3.06
MAIZE	6927	9131	17664	7493	17809	20175	18863	22075	14959	7837	13686	4.19
MILLET					1	1	1	1	1	1		
SORGHUM	322	310	1041	705	830	229	1567	3967	2709	2078	1990	24.01
POTATOES	642	514	368	664	301	512	297	330	481	158	149	-10.83
SUGAR,TOTAL (RAW EQUIV.)	2920	3951	4606	5652	4667	4945	5841	6443	8156	7043	6967	8.39
PULSES	49	59	39	33	39	41	62	85	60	35	25	-1.67
SOYBEANS	265	520	2089	1544	1409	2360	1707	1653	1906	1938	1163	12.24
SOYBEAN OIL	38	31	72	94	103	126	154	198	316	260	210	23.68
GROUNDNUTS SHELLED BASIS	66	59	54	59	57	46	54	61	67	53	77	.89
GROUNDNUT OIL	4	4	2	2		2	1		1	1		-21.04
COPRA	29	29	25	38	26	18	20	10	14	14	3	-15.83
COCONUT OIL	27	42	93	48	66	58	89	77	99	79	70	8.29
PALM NUTS KERNELS	3	4	4	4	4	3	4					
PALM OIL	22	17	28	67	58	113	112	184	384	302	258	36.65
OILSEED CAKE AND MEAL	3404	3541	3592	3704	3699	4033	4599	5331	5179	6088	5255	5.97
BANANAS	198	267	224	281	299	298	269	232	155	167	160	-4.05
ORANGES+TANGER+CLEMEN	762	715	693	727	719	690	750	688	645	618	636	-1.59
LEMONS AND LIMES	308	310	330	314	326	309	333	308	363	308	300	.10
COFFEE GREEN+ROASTED	183	205	199	201	178	201	228	203	207	214	240	1.76
COCOA BEANS	250	280	256	175	202	198	201	199	178	243	242	-1.40
TEA	69	88	82	80	71	79	102	116	107	110	128	5.49
COTTON LINT	748	769	679	720	681	718	743	638	694	766	779	.08

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
JUTE AND SIMILAR FIBRES	67	83	80	68	70	79	93	111	122	93	49	1.26
TOBACCO UNMANUFACTURED	142	147	126	133	135	133	178	196	201	189	201	4.83
NATURAL RUBBER	548	473	485	409	433	437	441	418	360	446	411	-2.26
WOOL GREASY	151	162	162	161	182	188	182	174	173	219	135	.94
BOVINE CATTLE 1/	232	506	195	224	84	176	180	169	167	190	248	-3.44
PIGS 1/	103	185	59	291	507	442	479	844	565	637	498	21.80
TOTAL MEAT	597	545	416	757	267	646	956	1228	1091	1132	944	9.86
MILK DRY	28	23	28	43	29	42	71	78	90	47	58	11.64
TOTAL EGGS IN SHELL	51	52	37	43	43	47	43	34	36	31	28	-5.03
FISHERY PRODUCTS												
FISH FRESH FROZEN	132	141	159	147	224	241	273	163	107	383		
FISH CURED	18	24	28	18	16	17	19	28	21	40		
FISH CANNED AND PREPARED	26	41	52	41	38	38	41	43	39	40		
FISH BODY AND LIVER OIL	28	34	4	7	6	5	26	15	4	16		
FISH MEAL	458	498	445	407	389	454	303	221	342	218		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	1248	830	787	885	960	720	1050	960	500	659	633	-4.81
SAWLOGS NONCONIFEROUS	541	588	556	556	442	416	454	487	385	367	369	-4.57
PULPWOOD+PARTICLE	1533	1722	1548	1440	1345	1446	1583	1390	1248	1286	1264	-2.41
FUELWOOD	31	32	31	31	27	25	25	25	20	25	25	-3.62
SAWNWOOD CONIFEROUS	3438	3599	2702	3157	3228	2644	2665	2884	2774	2642	2712	-2.44
SAWNWOOD NONCONIFEROUS	441	442	366	363	326	268	274	331	213	226	220	-7.12
WOOD-BASED PANELS	1117	1245	1386	1314	1132	1045	1137	1115	942	829	796	-4.27
PULP FOR PAPER	861	1106	1040	1027	1053	1021	1173	1093	1031	1082	1067	1.09
PAPER AND PAPERBOARD	1507	1713	1706	1712	1709	1784	2044	1969	1967	1951	1930	2.43
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR, WHEAT EQUIV.	83	17	23	35	1	5	6	1	57	53	101	3.02
RICE MILLED	71	74	80	80	82	91	94	106	126	128	141	7.26
BARLEY	328	307	195	180	108	157	140	127	198	141	146	-6.62
MAIZE	1320	818	838	623	476	849	1228	1276	807	352	541	-4.93
MILLET				1								-5.45
SORGHUM					1				2		7	30.81
POTATOES	239	208	213	301	235	242	212	340	344	278	303	3.66
SUGAR, TOTAL (RAW EQUIV.)	6140	4492	5054	6383	4835	5406	4595	5459	3471	3665	4163	-3.79
PULSES	66	44	34	53	43	39	43	61	47	48	55	.60
SOYBEANS	391	385	422	318	325	351	483	382	468	315	285	-1.18
SOYBEAN OIL	34	23	31	28	35	22	12	9	4	35	16	-9.78
GROUNDNUTS SHELLED BASIS	60	61	62	55	66	63	55	72	61	67	70	1.36
GROUNDNUT OIL	6	7	8	7	6	5	5	4	4	6	5	-4.99
COPRA	27											
COCONUT OIL	271	435	603	495	503	527	422	476	427	475	400	.91
PALM OIL	217	483	416	282	173	163	137	138	132	168	161	-9.35
OILSEED CAKE AND MEAL	300	301	386	374	426	491	431	443	457	525	690	6.82
BANANAS	2268	2179	2411	2410	2543	2659	2669	2794	2935	2708	2942	2.86
ORANGES+TANGER+CLEMEN	259	264	339	380	303	294	320	333	317	329	307	1.21
LEMONS AND LIMES	20	23	24	27	34	36	38	43	38	40	51	8.79
COFFEE GREEN+ROASTED	1246	1324	1290	986	1195	1277	1190	1104	1150	1089	1178	-1.07
COCOA BEANS	238	248	252	186	226	179	162	264	213	233	218	-.72
TEA	105	96	106	117	91	101	107	107	103	97	109	.12
COTTON LINT	72	61	73	53	59	61	65	63	52	61	59	-1.42
JUTE AND SIMILAR FIBRES	31	23	25	14	17	23	10	18	18	16	11	-6.74
TOBACCO UNMANUFACTURED	163	177	161	142	173	188	191	176	167	163	214	1.51
NATURAL RUBBER	759	747	818	903	846	862	695	759	713	773	906	.06
WOOL GREASY	8	13	17	12	15	11	14	20	16	20	22	7.27
BOVINE CATTLE 1/	716	516	1183	1184	1337	758	731	815	1084	1003	790	1.41
PIGS 1/	197	30	46	44	204	137	248	146	296	449	1322	29.52
TOTAL MEAT	637	718	862	755	875	912	854	766	866	808	866	1.86
TOTAL EGGS IN SHELL	15	12	13	19	18	21	12	12	11	22	30	3.90
FISHERY PRODUCTS												
FISH FRESH FROZEN	689	611	709	727	800	776	699	735	676	700		
FISH CURED	31	30	37	30	34	31	26	35	33	32		
SHELLFISH	148	139	157	158	146	155	146	156	175	213		
FISH CANNED AND PREPARED	131	82	103	78	89	95	99	104	114	126		
SHELLFISH CANNED+PREPAR	33	27	35	41	40	41	39	47	54	69		
FISH BODY AND LIVER OIL	8	7	11	8	9	9	12	10	8	9		
FISH MEAL	62	108	128	74	40	82	45	56	79	68		

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	1737	1728	2025	2174	2043	2458	2146	1674	1772	2683	2887	3.16
SAWLOGS NONCONIFEROUS	492	318	291	294	409	502	471	415	335	424	585	3.01
PULPWOOD+PARTICLE	2187	1859	2039	2273	2516	2504	2249	2348	2000	2409	2173	.82
FUELWOOD	191	209	181	303	352	377	268	137	113	113	161	-5.83
SAWNWOOD CONIFEROUS	16639	14175	19583	25061	28675	26582	22839	22542	21694	28483	31316	5.43
SAWNWOOD NONCONIFEROUS	1412	963	1287	1351	1431	1571	1422	1557	912	1246	1358	.07
WOOD-BASED PANELS	3245	3147	3645	3546	3956	3336	2378	2851	2283	3366	3572	-1.44
PULP FOR PAPER	3587	2712	3271	3393	3522	3857	3528	3563	3245	3645	4085	1.75
PAPER AND PAPERBOARD	7602	6165	6982	7017	8387	8322	8118	7595	7303	8291	10387	2.77
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	50	134	112			32	54	53	51	71	126	18.30
RICE MILLED	7	7	6	9	8	8	8	9	10	12	15	7.10
BARLEY	5											
MAIZE	1	1	1	2	3	3	4	5	11	14	9	33.38
MILLET						1	1	1	1	1	1	
SORGHUM									4			
POTATOES	1										1	
SUGAR,TOTAL (RAW EQUIV.)	153	192	174	185	166	172	151	120	147	157	169	-1.58
PULSES	16	20	13	12	13	12	14	13	16	16	23	1.71
SOYBEANS	35	16	10	21	15		13	41	10	23	36	2.65
SOYBEAN OIL	10	18	38	33	29	26	32	29	45	53	39	11.07
GROUNDNUTS SHELLED BASIS	6	4	8	5	12	4	5	9	12	6	13	6.36
GROUNDNUT OIL	4	4	2	4	2	3		1	1	1	1	-17.30
COPRA	20	12	10	11	5	7	4	6	6	4		-36.19
COCONUT OIL	13	11	18	20	18	19	17	16	20	20	22	4.58
PALM OIL	14	16	17	23	23	28	26	24	20	4	7	-7.39
OILSEED CAKE AND MEAL	21	15	3	6	30	7	12	19	10	52	11	5.76
BANANAS	37	43	29	35	38	35	37	36	36	40	30	-.60
ORANGES+TANGER+CLEMEN	18	18	15	17	18	14	16	16	17	18	24	1.35
LEMONS AND LIMES						1	1	1	1	3	3	28.29
COFFEE GREEN+ROASTED	32	35	32	34	26	35	41	38	42	39	37	2.46
COCOA BEANS	21	25	16	20	17	15	14	15	13	13	10	-6.86
TEA	34	35	33	35	30	30	32	28	30	28	28	-2.26
COTTON LINT	9	4	4	5	4	2	2	2	1	1	1	-18.72
JUTE AND SIMILAR FIBRES	26	17	14	12	11	12	9	11	8	8	6	-10.88
TOBACCO UNMANUFACTURED	17	17	17	13	16	13	15	15	14	14	14	-1.77
NATURAL RUBBER	74	53	61	55	52	53	54	50	48	41	40	-4.41
WOOL GREASY	6	1	1	1	1	1						-15.49
BOVINE CATTLE 1/	3	1	1	2	1	1	1				1	-15.90
TOTAL MEAT	4	2	2	2	1	2	4	4	4	5	11	13.60
MILK DRY	1	1	1	1	1	1		1		1		-13.53
FISHERY PRODUCTS												
FISH FRESH FROZEN	22	19	19	20	21	22	29	24	32	36		
FISH CURED	5	4	4	5	3	5	4	4	4	4		
SHELLFISH	1	1	3	3	2	4	4	6	7	11		
FISH CANNED AND PREPARED	27	23	19	25	26	22	28	27	28	16		
SHELLFISH CANNED+PREPAR	6	5	6	7	7	6	5	6	7	3		
FISH BODY AND LIVER OIL	1	1	1	1	1	1			1	1		
FISH MEAL	14	24	13	8	3	4	13	8	8	9		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	3		5	2	2					1		
SAWLOGS NONCONIFEROUS	106	41	46	26	17	11	2	1	7	1	1	-38.60
FUELWOOD	1	9	4	2	2	2	1	1	1	1		
SAWNWOOD CONIFEROUS	886	637	693	754	638	682	697	781	881	642	818	.46
SAWNWOOD NONCONIFEROUS	449	282	346	445	311	304	317	306	290	210	276	-4.34
WOOD-BASED PANELS	131	123	137	121	89	99	88	104	111	79	101	-3.62
PULP FOR PAPER	352	302	234	277	239	280	281	286	262	220	238	-2.39
PAPER AND PAPERBOARD	678	683	470	652	584	671	739	736	794	558	671	1.09

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	4733	5367	5350	6362	7946	7744	9076	9059	9455	9900	10868	8.68
RICE MILLED	972	602	887	1584	1885	2246	2264	2552	2869	2858	2821	15.88
BARLEY	114	173	68	219	647	419	302	459	679	390	801	20.64
MAIZE	830	864	685	880	1154	1287	2321	2395	2292	1774	2941	13.16
MILLET	218	137	123	112	83	101	106	35	41	41	39	-15.64
SORGHUM	195	42	118	97	145	132	106	153	140	236	313	9.87
POTATOES	208	189	149	211	233	307	245	217	270	450	350	7.52
SUGAR,TOTAL (RAW EQUIV.)	1354	1329	1496	1888	2043	2105	2251	2364	2168	2573	2466	6.86
PULSES	53	89	77	91	118	209	217	145	146	208	167	12.15
SOYBEANS	10	9	16	50	22	31	25	11	35	16	22	4.94
SOYBEAN OIL	147	156	121	256	312	357	336	336	444	404	397	12.86
GROUNDNUTS SHELLED BASIS	15	35	17	25	27	12	16	9	12	8	4	-14.24
GROUNDNUT OIL	6	8	30	23	11	10	16	16	20	28	18	8.38
COPRA	2	3	3	3	4	4	3	2	2	3	3	1.44
COCONUT OIL	13	9	18	20	10	9	7	14	12	14	9	-2.08
PALM NUTS KERNELS		1										
PALM OIL	39	29	68	81	106	98	165	244	291	262	207	24.57
OILSEED CAKE AND MEAL	50	58	54	102	122	157	188	242	237	218	277	20.50
BANANAS	43	38	41	47	31	17	18	28	59	23	35	-3.15
ORANGES+TANGER+CLEMEN	10	12	10	12	12	12	10	9	9	9	10	-2.10
LEMONS AND LIMES	1			1	1		1	1	1	1	1	2.74
COFFEE GREEN+ROASTED	61	65	78	59	83	76	80	103	69	114	96	4.86
COCOA BEANS	2	2	1	3	1	1	1	1	1	1	2	-4.93
TEA	42	45	42	46	56	70	57	69	56	56	60	4.13
COTTON LINT	51	54	46	51	42	48	43	65	86	105	115	8.60
JUTE AND SIMILAR FIBRES	94	80	61	73	58	58	64	52	51	54	41	-6.05
TOBACCO UNMANUFACTURED	57	53	46	49	62	62	53	48	49	52	42	-1.51
NATURAL RUBBER	21	17	18	22	21	20	21	26	23	23	26	3.18
WOOL GREASY	1	1	3	3	4	3	2	2	1	2	2	1.29
BOVINE CATTLE 1/	756	626	632	687	781	845	838	829	758	865	899	2.90
PIGS 1/		1	1	1	1	1	1	2	2	1		.31
TOTAL MEAT	43	57	84	110	139	137	142	152	214	212	247	17.17
MILK DRY	26	21	23	23	27	24	34	32	27	31	41	5.06
TOTAL EGGS IN SHELL	4	8	13	21	44	35	50	52	71	77	49	30.10
FISHERY PRODUCTS												
FISH FRESH FROZEN	367	342	349	338	374	487	905	907	725	479		
FISH CURED	40	46	55	39	32	39	55	49	32	34		
SHELLFISH	3	11	14	18	19	6	8	8	1	1		
FISH CANNED AND PREPARED	64	62	114	108	159	160	151	152	105	57		
SHELLFISH CANNED+PREPAR									2	1		
FISH BODY AND LIVER OIL	4	1	3	2	3	2						
FISH MEAL	18	12	13	17	20	24	35	32	30	35		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	17	38	43	31	32	73	94	85	107	166	166	23.54
SAWLOGS NONCONIFEROUS	311	153	172	286	197	204	326	232	156	238	238	.19
FUELWOOD	5	26						1	1			
SAWNWOOD CONIFEROUS	954	764	829	1251	763	1019	905	1402	1531	1918	1742	8.46
SAWNWOOD NONCONIFEROUS	218	153	168	157	205	206	197	226	198	203	194	1.60
WOOD-BASED PANELS	197	183	192	310	263	316	359	320	257	290	285	4.59
PULP FOR PAPER	73	56	95	97	102	104	120	129	114	161	168	9.19
PAPER AND PAPERBOARD	583	460	456	498	521	531	533	549	540	510	483	.18
LATIN AMERICA												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	8612	7164	8981	8152	10777	10603	12071	11977	11037	11773	12446	4.96
RICE MILLED	621	563	489	428	432	1344	1055	787	616	875	650	4.45
BARLEY	319	262	207	203	358	323	479	413	351	474	515	7.61
MAIZE	2584	3897	2438	3590	4714	3954	8887	7022	3330	8128	5494	9.14
MILLET	4	4	6	2	4	6	3	2	3	4	1	-8.26
SORGHUM	1048	1348	554	1440	1442	1902	2943	3639	3161	3825	3154	17.22
POTATOES	192	196	173	198	205	252	337	207	195	162	162	-.59
SUGAR,TOTAL (RAW EQUIV.)	257	113	286	646	882	717	1572	1489	1354	1742	1011	25.18
PULSES	274	308	299	400	291	284	820	876	520	368	558	8.06
SOYBEANS	600	127	444	628	971	952	1205	2235	2026	1298	1823	22.33
SOYBEAN OIL	254	141	243	245	351	372	431	432	587	541	670	13.79

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....				THOUSAND METRIC TONS							PERCENT
GROUNONUTS SHELLED BASIS	13	46	38	8	14	11	13	14	18	9	15	-5.96
GROUNONUT OIL	13	41	64	136	85	9	2	4	1	2	5	-30.57
COPRA	1	21	1									
COCONUT OIL	26	40	88	26	39	15	25	19	22	16	15	-10.22
PALM NUTS KERNELS	2	2	2	1		2	1	1	1	3		
PALM OIL	9	3	16	16	8	6	16	12	11	5	5	-1.94
OILSEED CAKE AND MEAL	398	340	413	593	647	708	963	957	1092	1195	1299	14.82
BANANAS	286	233	184	228	287	391	435	430	316	226	236	2.05
ORANGES+TANGER+CLEMEN	18	17	19	26	22	44	57	36	25	20	18	2.93
LEMONS AND LIMES	2	2	3	4	6	4	2	3	2	3	2	-1.46
COFFEE GREEN+ROASTED	96	82	86	54	58	93	57	64	59	49	56	-4.95
COCOA BEANS	20	15	7	3	3	2	3	10	13	3	4	-9.18
TEA	18	10	13	14	16	19	16	14	13	15	12	-.08
COTTON LINT	67	69	56	85	71	91	80	93	77	76	104	3.58
JUTE AND SIMILAR FIBRES	55	45	30	15	12	18	35	34	17	16	15	-8.36
TOBACCO UNMANUFACTURED	23	15	17	18	16	17	28	24	20	19	16	.81
NATURAL RUBBER	166	144	165	170	182	182	187	184	162	165	199	1.45
WOOL GREASY	4	6	8	6	7	9	13	12	13	9	9	8.80
BOVINE CATTLE 1/	624	564	632	607	697	1046	540	584	546	512	495	-2.08
PIGS 1/	41	47	59	36	32	21	10	25	59	16	6	-13.27
TOTAL MEAT	232	160	183	197	373	365	336	413	341	289	351	7.24
MILK DRY	95	50	73	181	138	120	155	158	141	117	182	8.01
TOTAL EGGS IN SHELL	6	7	9	14	11	18	20	18	30	15	14	11.61
FISHERY PRODUCTS												
FISH FRESH FROZEN	70	126	97	91	93	115	110	97	98	90		
FISH CURED	55	67	56	49	54	63	56	55	52	45		
SHELLFISH	10	7	4	5	5	10	7	9	7	7		
FISH CANNED AND PREPARED	36	41	44	49	67	76	85	83	84	67		
SHELLFISH CANNED+PREPAR	1	1	1	1	1	2	2	2	1			
FISH BODY AND LIVER OIL	23	20	44	27	36	66	103	37	35	68		
FISH MEAL	61	143	75	70	109	138	161	118	103	78		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	27	7	43	26	34	54	128	154	164	162	162	32.19
SAWLOGS NONCONIFEROUS	128	134	73	69	105	65	57	30	29	30	42	-13.97
PULPWOOD+PARTICLE						31	35	24	16	16	16	
FUELWOOD	27	9	6	12	4	4	5	7	5	5	5	-11.55
SAWNWOOD CONIFEROUS	1235	1235	1467	1481	1710	1519	1994	1693	1358	1370	1399	1.12
SAWNWOOD NONCONIFEROUS	685	742	427	520	679	692	917	641	619	542	641	.23
WOOD-BASED PANELS	182	169	184	234	285	374	469	475	434	424	432	12.02
PULP FOR PAPER	806	544	536	462	577	653	753	852	763	686	691	2.49
PAPER AND PAPERBOARD	2148	1650	1760	2159	1867	1857	2384	2444	2288	1973	2031	1.57
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	8742	8758	7658	9207	10320	10703	12768	14000	14128	16858	19850	9.13
RICE MILLED	946	939	1106	1456	1548	1887	1790	2020	1991	2302	2487	10.50
BARLEY	530	473	465	991	852	1493	2361	3290	5002	3854	8808	34.97
MAIZE	803	791	1009	1492	1850	2369	2685	3745	3805	4050	4285	21.14
MILLET	30	3	10	6	4	4	2	2	3	4	4	-12.65
SORGHUM	4	91	197	189	254	109	101	132	339	59	52	10.10
POTATOES	176	168	164	230	231	281	352	424	402	367	418	11.30
SUGAR,TOTAL (RAW EQUIV.)	1788	2098	1694	2266	2400	3461	3353	3499	3898	3568	3883	9.22
PULSES	128	243	234	202	213	258	257	357	332	301	302	7.08
SOYBEANS	62	28	29	63	138	180	99	116	108	87	213	15.22
SOYBEAN OIL	232	270	332	233	281	381	442	504	519	701	609	11.50
GROUNONUTS SHELLED BASIS	8	9	8	15	6	8	16	9	7	6	6	-3.08
GROUNONUT OIL	1	1	2	2	1	1	3	1	1			-15.03
COPRA		8	7		1							
COCONUT OIL	8	22	31	8	7	4	14	12	16	17	14	.78
PALM NUTS KERNELS		1	5									
PALM OIL	78	137	76	148	164	187	148	291	376	409	470	19.32
OILSEED CAKE AND MEAL	117	100	237	379	459	442	406	543	674	782	1070	23.26
BANANAS	167	255	308	277	289	319	300	316	263	272	255	2.02
ORANGES+TANGER+CLEMEN	408	532	636	555	472	512	547	618	624	623	624	2.82
LEMONS AND LIMES	27	32	54	52	45	77	79	79	80	93	86	12.13
COFFEE GREEN+ROASTED	56	49	51	53	42	40	46	56	74	77	77	4.38
COCOA BEANS	2	4	4	2	4	1	1	5	5	6	4	5.59
TEA	144	132	157	148	202	184	176	171	167	190	224	3.71
COTTON LINT	12	26	7	37	21	41	22	24	27	27	24	6.22
JUTE AND SIMILAR FIBRES	31	31	40	31	24	41	20	25	37	44	37	1.34

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	THOUSAND METRIC TONS											PERCENT
TOBACCO UNMANUFACTURED	32	44	45	45	52	60	47	61	75	80	74	8.16
NATURAL RUBBER	57	51	50	49	46	37	40	50	65	86	82	4.33
WOOL GREASY	23	26	27	32	17	18	18	19	13	18	20	-4.60
BOVINE CATTLE 1/	153	160	184	389	390	386	503	736	713	670	655	18.42
PIGS 1/				5								
TOTAL MEAT	142	251	334	482	582	673	980	1302	1294	1264	1292	24.48
MILK DRY	4	3	5	10	11	20	14	24	28	23	23	26.31
TOTAL EGGS IN SHELL	56	81	77	83	84	75	108	139	139	138	147	9.56
FISHERY PRODUCTS												
FISH FRESH FROZEN	30	41	60	55	74	59	79	113	117	123		
FISH CURED	4	3	3	4	8	3	6	4	4	2		
SHELLFISH	1	1	1	2	2	3	3	4	2	2		
FISH CANNED AND PREPARED	27	33	45	47	57	54	73	66	71	62		
SHELLFISH CANNED+PREPAR						1	1	2	3	2		
FISH BODY AND LIVER OIL	2	2	2	2	1	1	1	1	1			
FISH MEAL	28	27	51	136	56	52	80	145	113	111		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	59	167	196	231	176	126	173	218	288	332	335	12.02
SAWLOGS NONCONIFEROUS	37	66	86	55	68	42	57	46	5	6	9	-21.02
PULPWOOD+PARTICLE	26	8	9	13	36	40	14	4	9	9	9	-7.69
FUELWOOD	172	172	180	159	163	119	126	151	188	188	188	.52
SAWNWOOD CONIFEROUS	1685	1744	2202	3063	2441	2689	3242	3498	3802	3875	3869	9.06
SAWNWOOD NONCONIFEROUS	350	294	406	659	620	469	630	562	642	657	658	7.00
WOOD-BASED PANELS	419	465	597	749	804	931	1072	1404	1542	1622	1633	15.86
PULP FOR PAPER	64	136	159	135	127	113	121	125	123	145	167	3.81
PAPER AND PAPERBOARD	572	696	725	866	889	905	975	1035	1012	1013	1075	5.70
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR+WHEAT EQUIV.	11676	15063	13644	7213	8060	8808	8887	8664	10547	11530	10554	-1.70
RICE MILLED	3053	3023	3698	3848	3550	3493	4511	4385	2111	3216	2444	-1.84
BARLEY	497	539	8	327	107	106	206	270	916	450	1597	19.66
MAIZE	1250	1440	1971	2517	3125	4114	3888	4491	4842	6274	4959	16.56
MILLET	43	13	29	10	1	2	3	3	6	4	3	-19.13
SORGHUM	727	204	398	21	49	144	62	178	439	223	418	2.16
POTATOES	98	87	93	104	117	143	155	145	171	138	126	5.48
SUGAR, TOTAL (RAW EQUIV.)	1098	1127	1117	1435	1866	1935	2613	2807	2301	2132	2334	9.68
PULSES	94	93	90	89	165	207	207	288	348	366	373	18.86
SOYBEANS	135	153	433	370	489	728	874	1093	1219	1137	1338	25.94
SOYBEAN OIL	184	87	194	527	583	841	1004	981	887	917	1362	26.40
GROUNDNUTS SHELLED BASIS	24	18	43	23	28	39	67	93	152	144	80	21.98
GROUNDNUT OIL	24	23	48	64	42	36	38	34	37	55	37	3.34
COPRA	19	55	96	99	163	74	115	110	88	47	91	6.30
COCONUT OIL	41	34	55	87	158	91	58	149	88	89	88	8.67
PALM NUTS KERNELS	4	4	5	5	6	10	15	6	3	12	4	3.84
PALM OIL	358	277	372	842	847	1058	1757	1436	1424	1677	1933	21.55
OILSEED CAKE AND MEAL	271	333	533	833	917	1076	1129	1155	1382	1578	1762	19.18
BANANAS	50	56	45	48	57	69	59	49	59	50	70	2.07
ORANGES+TANGER+CLEMEN	170	208	199	215	222	208	238	273	249	286	247	4.05
LEMONS AND LIMES					4	6	7	8	8	9	10	84.65
COFFEE GREEN+ROASTED	34	31	42	32	19	27	19	36	51	72	96	8.82
COCOA BEANS	9	9	9	8	12	17	27	45	60	61	51	27.06
TEA	52	64	70	81	77	84	86	97	94	110	126	7.48
COTTON LINT	559	790	794	843	863	827	888	771	793	863	981	2.77
JUTE AND SIMILAR FIBRES	71	80	123	57	64	80	119	109	143	142	125	7.05
TOBACCO UNMANUFACTURED	71	53	59	69	64	69	82	88	71	63	68	1.65
NATURAL RUBBER	125	123	142	160	193	215	182	207	214	198	269	6.99
WOOL GREASY	16	26	27	32	29	30	33	39	36	36	29	5.34
BOVINE CATTLE 1/	286	286	279	293	324	356	343	361	357	355	291	1.99
PIGS 1/	2629	2796	3004	3023	3123	3095	4552	3194	3399	3297	3179	2.27
TOTAL MEAT	125	149	173	212	279	297	227	266	352	360	321	10.12
MILK DRY	66	68	84	99	143	159	152	153	128	139	162	9.02
TOTAL EGGS IN SHELL	54	58	57	64	68	75	76	75	80	78	90	4.82
FISHERY PRODUCTS												
FISH FRESH FROZEN	132	148	156	163	185	230	223	268	274	300		
FISH CURED	32	32	21	19	22	22	29	23	26	23		
SHELLFISH	80	68	89	79	103	161	102	97	132	138		
FISH CANNED AND PREPARED	97	114	112	83	83	79	95	86	114	49		
SHELLFISH CANNED+PREPAR	15	14	16	15	16	14	17	16	21	21		
FISH BODY AND LIVER OIL	2	2	7	3	4	5	2	2	3	3		

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 6. VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	THOUSAND METRIC TONS	.....	.....	.....	.....	.....	.....	PERCENT
FISH MEAL	60	99	84	94	131	164	149	152	251	210		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	773	461	750	1200	2426	2128	1536	1186	1548	2116	2084	12.29
SAWLOGS NONCONIFEROUS	5686	6180	7505	8558	9371	9355	6526	5985	5417	5789	4974	-2.68
PULPWOOD+PARTICLE	61	61		1		2	2	1		3	1	
FUELWOOD	450	473	462	546	489	519	560	602	747	754	716	5.56
SAWNWOOD CONIFEROUS	65	179	214	228	235	80	87	71	51	52	59	-11.21
SAWNWOOD NONCONIFEROUS	1108	981	1463	1741	1829	2345	1850	1765	1808	1791	1597	4.56
WOOD-BASED PANELS	339	392	472	495	575	610	724	821	680	793	647	7.92
PULP FOR PAPER	471	286	423	555	696	735	728	815	791	1090	1076	11.70
PAPER AND PAPERBOARD	1320	1133	1459	1494	1829	1994	2072	2257	2358	2509	2581	8.45
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS												
WHEAT+FLOUR,WHEAT EQUIV.	7990	5287	3798	9164	10271	11756	13243	15688	15565	12643	11364	10.33
RICE MILLED	1241	737	784	214	250	619	593	459	566	174	417	-8.54
BARLEY	321	174	333	265	336	704	402	354	509	481	482	7.66
MAIZE	3427	1729	2150	2222	3064	5412	4438	3287	4117	5569	3012	6.70
SORGHUM	73	152	255	394	473	517	417	840	767	534	597	20.20
SUGAR,TOTAL (RAW EQUIV.)	643	760	952	1895	1587	1368	1114	1294	2373	2126	1448	9.31
PULSES	32	33	39	49	68	58	72	91	124	88	96	13.75
SOYBEANS	1181	854	829	985	1172	1696	1529	1682	1516	1420	1349	5.45
SOYBEAN OIL	34	42	27	149	137	143	136	56	63	36	25	-1.36
GROUNDNUTS SHELLED BASIS	4				2	1			6			
GROUNDNUT OIL										20	1	
COPRA	4					1	3	3	7	1	3	
COCONUT OIL	21	47	29	22	19	27	31	26	31	26	27	.03
PALM NUTS KERNELS								2	1			
PALM OIL	11	12	3	30	14	48	63	26	24	18	21	12.05
OILSEED CAKE AND MEAL	1	1	29	41	55	1	9	14	15	33	50	28.21
BANANAS	4	10	15									
ORANGES+TANGER+CLEMEN					1		2	1	1	5	2	
COFFEE GREEN+ROASTED			7	6	6	5	6	7	16	26	22	48.57
COCOA BEANS	6	8	11	12	15	17	17	4	23	10	13	4.39
TEA	7	6	5	5	6	5	5	4	4	5	6	-2.40
COTTON LINT	599	412	428	422	818	835	1235	1021	837	538	383	2.80
JUTE AND SIMILAR FIBRES	69	22	27	34	39	36	47	25	44	36	41	.35
TOBACCO UNMANUFACTURED	23	11	13	15	19	22	32	54	46	21	22	8.68
NATURAL RUBBER	274	298	248	316	300	333	358	220	225	326	309	.10
WOOL GREASY	17	13	22	22	28	51	60	94	112	116	111	27.30
BOVINE CATTLE 1/	4	8	1				2		1	1	4	
PIGS 1/	3		2	1	4	3	3	5	3	3	2	12.00
TOTAL MEAT	2	29	10	4	11	18	16	23	27	28	31	19.16
FISHERY PRODUCTS												
FISH FRESH FROZEN	8	4	6	7	5	5	1	1	3	3		
FISH CURED	2	7	1	1	1	1						
SHELLFISH	3	4	4	8	9	14	2	2	7	6		
FISH CANNED AND PREPARED	4	2	4	4	3	4	4	4	5	2		
SHELLFISH CANNED+PREPAR										1		
FISH BODY AND LIVER OIL	3	3	2	2	3	3	1	1	2	1		
FISH MEAL	40	95	129	124	145	170	164	165	383	210		
FOREST PRODUCTS 2/												
SAWLOGS CONIFEROUS	610	614	618	400	370	403	611	1112	3046	3922	5060	25.89
SAWLOGS NONCONIFEROUS	3801	3887	4437	6236	7127	6760	6481	5491	4837	5975	4704	2.48
PULPWOOD+PARTICLE	7	88	199	199	199	56	56	235	246	363	344	25.27
SAWNWOOD CONIFEROUS		21	29	29	29	29	31	37	33	38	42	27.47
SAWNWOOD NONCONIFEROUS	27	23	30	38	56	96	139	200	296	425	522	40.60
WOOD-BASED PANELS	1	3	12	13	24	36	51	70	97	100	232	57.31
PULP FOR PAPER	253	219	235	175	208	210	427	525	440	683	672	13.81
PAPER AND PAPERBOARD	189	174	217	297	411	427	650	649	490	615	569	14.63

1/ THOUSAND HEAD
2/ EXCEPT FOR PULP FOR PAPER AND PAPER AND PAPERBOARD, ALL FOREST PRODUCTS ARE EXPRESSED IN THOUSAND CUBIC METRES

ANNEX TABLE 7. INDICES OF VALUE OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
WORLD												
AGRICULTURAL PRODUCTS	96	99	105	120	133	156	181	180	162	159	166	6.64
FOOD	95	104	101	110	127	150	178	183	162	156	163	6.64
FEED	94	84	122	151	165	195	227	255	237	262	231	11.92
RAW MATERIALS	107	88	105	121	129	148	161	155	139	140	148	4.68
BEVERAGES	82	86	132	191	183	207	215	169	174	177	204	7.72
FISHERY PRODUCTS	88	93	119	140	170	208	215	222	229	234	24	.32
FOREST PRODUCTS	101	90	109	118	132	171	194	178	162	166	177	7.21
DEVELOPED COUNTRIES												
AGRICULTURAL PRODUCTS	96	101	103	113	132	157	187	190	171	163	166	7.13
FOOD	94	104	103	109	129	154	187	191	170	161	162	7.10
FEED	109	82	109	129	161	192	224	237	225	250	208	10.94
RAW MATERIALS	109	90	101	127	131	153	167	164	155	145	157	5.38
BEVERAGES	89	98	113	145	167	212	218	201	201	196	205	9.10
FISHERY PRODUCTS	93	93	114	134	163	193	209	211	199	203	37	1.22
FOREST PRODUCTS	101	91	107	116	130	163	187	176	159	161	174	6.92
WESTERN EUROPE												
AGRICULTURAL PRODUCTS	90	104	106	120	147	178	206	202	188	182	183	8.41
FOOD	89	105	106	119	145	174	207	204	187	179	179	8.29
FEED	111	82	107	131	163	203	227	271	279	309	279	14.19
RAW MATERIALS	99	93	107	106	136	161	141	126	126	131	146	3.83
BEVERAGES	89	99	113	139	169	218	221	205	205	199	210	9.50
FISHERY PRODUCTS	93	93	114	136	156	189	211	204	188	193	65	3.46
FOREST PRODUCTS	104	90	106	113	129	166	194	176	159	158	173	6.86
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS	102	100	98	119	114	132	139	135	128	112	108	1.82
FOOD	106	100	94	112	107	127	133	129	117	101	102	.94
FEED	70	70	161	161	140	136	115	109	130	110	64	-.17
RAW MATERIALS	91	99	109	141	131	139	150	151	154	136	112	3.34
BEVERAGES	89	107	104	124	143	165	163	150	155	163	154	5.75
FISHERY PRODUCTS	84	107	109	105	121	156	155	135	117	165		
FOREST PRODUCTS	97	98	105	119	125	137	147	141	136	139	139	4.15
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS	100	99	101	104	126	148	181	191	164	162	169	7.20
FOOD	97	101	101	98	121	143	175	190	161	159	166	7.12
FEED	110	80	110	124	160	189	230	224	198	227	177	9.38
RAW MATERIALS	113	91	96	127	145	165	194	180	164	155	184	6.72
BEVERAGES	96	73	131	298	202	253	295	256	243	215	243	10.42
FISHERY PRODUCTS	86	93	122	158	236	275	261	301	292	285		
FOREST PRODUCTS	97	91	112	120	133	168	190	184	164	173	188	7.76
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS	100	98	102	114	111	134	176	188	173	148	152	6.37
FOOD	91	105	104	107	111	131	165	195	178	149	154	6.91
FEED	118	88	94	214	204	217	126	171	177	163	125	3.46
RAW MATERIALS	124	79	97	130	110	140	155	171	161	143	148	5.26
BEVERAGES	92	103	106	100	108	117	149	210	220	248	281	12.67
FISHERY PRODUCTS	93	97	110	155	170	243	318	333	383	391		
FOREST PRODUCTS	101	94	105	125	136	193	245	258	219	193	204	10.14

ANNEX TABLE 7. INDICES OF VALUE OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
DEVELOPING COUNTRIES												
AGRICULTURAL PRODUCTS	95	96	108	132	136	154	169	163	146	152	167	5.77
FOOD	99	104	97	112	121	140	157	163	142	144	160	5.50
FEED	75	87	137	178	171	198	231	278	251	275	258	13.32
RAW MATERIALS	104	87	109	116	126	143	155	146	123	135	139	3.93
BEVERAGES	78	81	141	212	191	205	214	153	161	169	203	7.12
FISHERY PRODUCTS	78	95	127	152	184	235	226	244	287	293		
FOREST PRODUCTS	103	80	118	129	144	222	239	194	181	194	196	6.94
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS	99	92	109	143	138	147	147	126	116	108	122	1.54
FOOD	103	99	98	117	133	133	138	120	104	92	103	-.02
FEED	98	90	112	143	88	148	108	89	92	92	64	-2.98
RAW MATERIALS	113	83	104	108	108	123	138	151	127	134	146	4.39
BEVERAGES	85	83	132	208	164	185	170	129	135	129	152	3.55
FISHERY PRODUCTS	100	98	102	109	126	150	196	212	264	311		
FOREST PRODUCTS	114	79	108	112	123	144	195	132	120	120	120	2.83
LATIN AMERICA												
AGRICULTURAL PRODUCTS	90	98	112	138	143	159	176	171	151	165	172	6.42
FOOD	95	107	98	114	121	140	157	166	139	155	161	5.76
FEED	66	88	146	211	198	220	264	348	289	339	306	16.06
RAW MATERIALS	100	94	106	127	148	145	153	157	137	124	128	3.29
BEVERAGES	74	75	152	205	199	210	228	150	166	176	199	7.72
FISHERY PRODUCTS	89	90	121	130	186	238	254	258	295	265		
FOREST PRODUCTS	109	96	95	117	143	243	329	329	273	290	346	15.94
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	100	90	110	112	120	124	136	156	153	143	141	5.00
FOOD	95	91	114	128	156	168	195	240	250	228	222	11.28
FEED	117	95	87	86	59	72	92	63	47	37	25	-11.69
RAW MATERIALS	102	89	109	100	93	91	92	94	83	83	83	-2.00
BEVERAGES	118	79	103	147	171	224	183	240	159	102	112	2.89
FISHERY PRODUCTS	92	98	110	162	135	173	198	227	239	301		
FOREST PRODUCTS	122	81	97	110	90	154	170	268	268	344	379	16.63
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	98	94	107	133	135	167	191	188	164	167	200	7.67
FOOD	100	101	98	116	115	149	172	189	169	156	200	7.73
FEED	80	85	135	148	162	188	214	218	227	201	196	10.06
RAW MATERIALS	106	83	112	122	141	179	204	176	136	165	164	6.24
BEVERAGES	79	95	126	244	202	212	239	197	177	209	300	10.11
FISHERY PRODUCTS	71	100	129	172	190	250	232	266	291	294		
FOREST PRODUCTS	99	75	125	136	148	241	237	180	176	192	187	6.48
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS	105	105	90	87	105	118	134	126	124	141	166	5.04
FOOD	106	109	85	75	95	104	124	118	105	108	126	2.42
FEED	79	89	132	114	83	196	799	1539	1584	2940	3687	54.86
RAW MATERIALS	103	89	109	119	126	150	140	108	154	208	230	7.94
BEVERAGES	93	96	110	207	236	270	268	227	273	295	401	14.39
FISHERY PRODUCTS	47	91	162	186	219	261	139	149	300	338		
FOREST PRODUCTS	93	90	117	134	175	215	204	218	186	198	160	7.90

ANNEX TABLE 8. INDICES OF VOLUME OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	.....	.....	.....	.....	1974-76=100	.....	.....	.....	.....	.....	.....	PERCENT
WORLD												
AGRICULTURAL PRODUCTS	97	98	106	110	117	123	132	137	136	137	141	4.23
FOOD	96	98	106	113	120	126	136	143	141	141	146	4.66
FEED	92	90	118	122	147	148	165	162	188	202	186	8.59
RAW MATERIALS	101	96	103	104	109	108	112	108	107	106	110	1.01
BEVERAGES	95	100	105	95	103	115	114	117	120	124	132	3.18
FISHERY PRODUCTS	94	99	107	114	122	130	129	136	122	102	17	-6.63
FOREST PRODUCTS	108	88	104	108	115	123	124	119	115	126	132	2.81
DEVELOPED COUNTRIES												
AGRICULTURAL PRODUCTS	96	98	105	111	122	129	142	146	144	143	148	4.90
FOOD	95	99	105	111	123	129	144	149	146	145	151	5.15
FEED	103	88	109	106	141	149	167	173	182	198	172	8.04
RAW MATERIALS	103	95	103	112	113	118	123	117	117	114	118	1.79
BEVERAGES	94	99	108	115	111	132	130	138	140	145	157	5.06
FISHERY PRODUCTS	95	98	107	111	121	128	132	138	128	108	26	-4.43
FOREST PRODUCTS	109	88	104	107	114	123	125	121	116	128	135	3.03
WESTERN EUROPE												
AGRICULTURAL PRODUCTS	97	99	105	108	118	131	141	151	151	157	167	6.11
FOOD	97	99	104	108	119	132	143	154	151	157	167	6.17
FEED	105	89	106	105	142	157	165	198	233	255	245	11.75
RAW MATERIALS	99	97	104	93	107	111	109	108	110	120	131	2.50
BEVERAGES	92	99	109	112	109	132	127	138	140	146	160	5.24
FISHERY PRODUCTS	94	98	108	110	114	124	127	137	121	113	46	-1.88
FOREST PRODUCTS	114	84	103	105	117	128	127	125	122	136	147	3.90
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS	107	98	95	108	96	99	100	101	102	97	99	-.29
FOOD	112	97	91	105	93	97	96	97	97	92	100	-.65
FEED	79	80	142	129	119	112	96	94	97	72	56	-3.63
RAW MATERIALS	93	100	107	115	103	99	104	107	112	97	81	-.73
BEVERAGES	97	101	102	117	117	126	128	129	132	145	148	4.28
FISHERY PRODUCTS	86	109	106	94	91	96	99	86	69	22		
FOREST PRODUCTS	98	98	104	107	110	102	100	97	97	100	101	-.21
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS	95	98	107	112	133	138	156	157	152	147	149	5.38
FOOD	91	99	110	112	133	138	156	161	156	150	152	5.74
FEED	103	87	110	104	141	146	175	164	157	174	140	6.06
RAW MATERIALS	117	93	90	109	128	131	146	124	124	115	127	2.41
BEVERAGES	110	86	104	155	122	154	178	168	154	134	150	4.68
FISHERY PRODUCTS	92	97	110	144	181	181	185	198	197	176		
FOREST PRODUCTS	106	89	105	109	113	122	129	122	114	128	132	2.87
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS	91	97	112	124	121	116	137	125	126	121	125	2.74
FOOD	90	99	110	123	129	115	148	129	132	122	129	3.10
FEED	74	92	134	159	151	170	78	95	119	115	77	-.87
RAW MATERIALS	92	92	117	126	103	117	112	117	113	117	116	1.82
BEVERAGES	100	99	102	89	86	89	105	125	125	155	163	5.39
FISHERY PRODUCTS	102	102	97	116	123	156	199	209	248	77		
FOREST PRODUCTS	98	91	111	135	139	158	187	181	155	155	164	6.17

ANNEX TABLE 8. INDICES OF VOLUME OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
DEVELOPING COUNTRIES												
AGRICULTURAL PRODUCTS	97	97	106	109	110	114	114	121	123	128	130	2.98
FOOD	99	95	106	117	112	119	117	127	130	134	136	3.47
FEED	78	93	129	141	154	146	162	193	195	207	202	9.38
RAW MATERIALS	99	97	104	96	105	99	100	99	97	103	102	.17
BEVERAGES	96	101	103	85	99	107	107	107	111	114	121	2.18
FISHERY PRODUCTS	93	99	108	119	122	135	125	132	112	91		
FOREST PRODUCTS	100	89	111	114	121	127	122	110	105	114	115	1.33
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS	104	95	101	88	88	88	87	91	90	85	86	-1.50
FOOD	104	95	101	91	87	84	86	90	88	83	83	-1.90
FEED	92	94	114	106	86	103	72	55	69	74	54	-5.89
RAW MATERIALS	106	90	103	89	95	95	104	107	94	95	105	.32
BEVERAGES	103	97	100	82	87	92	82	88	95	85	86	-1.33
FISHERY PRODUCTS	106	95	99	97	101	98	116	143	82	97		
FOREST PRODUCTS	111	85	104	103	102	102	98	82	83	84	87	-2.21
LATIN AMERICA												
AGRICULTURAL PRODUCTS	98	98	104	116	120	124	119	129	127	139	137	3.60
FOOD	101	96	103	126	121	127	117	131	128	142	138	3.54
FEED	70	96	133	165	171	165	192	238	225	262	253	12.37
RAW MATERIALS	97	106	97	103	131	108	106	105	97	93	90	-.97
BEVERAGES	92	104	103	79	101	112	114	109	114	124	130	3.21
FISHERY PRODUCTS	94	103	103	114	126	153	144	148	116	69		
FOREST PRODUCTS	109	92	99	121	146	194	216	220	198	236	270	11.51
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	97	93	111	97	99	93	94	110	119	118	119	2.24
FOOD	97	88	115	118	116	112	117	151	172	171	178	6.96
FEED	105	107	88	57	50	38	45	29	27	22	13	-17.90
RAW MATERIALS	96	96	108	83	86	80	79	79	82	82	77	-2.43
BEVERAGES	124	76	100	102	114	149	130	183	123	97	127	2.77
FISHERY PRODUCTS	121	88	91	108	92	102	119	109	109	78		
FOREST PRODUCTS	123	84	93	96	81	139	123	175	181	220	300	11.48
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	90	95	115	119	115	125	133	138	148	142	149	4.95
FOOD	85	95	120	131	118	138	146	155	173	162	171	6.86
FEED	84	86	130	125	154	137	143	159	177	142	149	5.81
RAW MATERIALS	100	95	104	100	103	104	109	107	102	112	109	1.10
BEVERAGES	91	100	108	106	110	113	124	130	124	123	144	3.75
FISHERY PRODUCTS	86	100	114	132	137	140	131	137	134	111		
FOREST PRODUCTS	97	88	115	116	119	121	111	95	90	96	92	-1.01
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS	106	99	95	90	96	101	103	92	100	120	133	1.98
FOOD	109	101	90	83	90	94	99	85	87	95	108	-.24
FEED	78	90	132	94	83	154	502	1041	1099	2102	2095	46.52
RAW MATERIALS	94	91	115	117	117	117	98	96	129	183	200	5.92
BEVERAGES	95	97	108	132	140	158	157	132	170	202	215	8.02
FISHERY PRODUCTS	94	94	112	111	90	105	58	61	56	76		
FOREST PRODUCTS	82	106	112	113	139	119	104	113	106	110	86	-.09

ANNEX TABLE 9. INDICES OF VALUE OF IMPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
WORLD												
AGRICULTURAL PRODUCTS	94	101	105	120	133	157	181	181	164	159	166	6.71
FOOD	94	105	101	109	126	151	176	184	165	157	163	6.79
FEED	96	88	117	149	158	192	219	246	232	247	228	11.40
RAW MATERIALS	104	90	105	119	130	148	163	151	135	137	146	4.50
BEVERAGES	82	90	127	195	186	208	219	176	175	178	198	7.55
FISHERY PRODUCTS	92	93	116	135	163	202	209	215	226	222	30	1.03
FOREST PRODUCTS	103	90	108	121	134	172	194	174	169	164	174	7.04
DEVELOPED COUNTRIES												
AGRICULTURAL PRODUCTS	93	100	107	121	133	156	172	165	152	147	153	5.58
FOOD	92	105	103	109	126	149	166	165	149	142	147	5.38
FEED	96	88	117	145	154	188	213	237	222	235	208	10.58
RAW MATERIALS	105	90	105	115	124	141	149	136	123	127	138	3.45
BEVERAGES	82	90	128	197	186	208	220	173	175	177	196	7.45
FISHERY PRODUCTS	93	92	116	136	162	202	203	209	219	219	34	1.39
FOREST PRODUCTS	103	89	107	117	131	169	187	163	158	152	164	6.19
WESTERN EUROPE												
AGRICULTURAL PRODUCTS	94	100	106	125	139	161	173	155	150	143	142	4.81
FOOD	94	105	102	114	133	153	165	149	144	133	131	4.11
FEED	92	87	120	148	163	202	229	247	239	243	217	11.30
RAW MATERIALS	105	88	107	116	129	143	150	131	122	123	136	3.15
BEVERAGES	84	90	126	197	186	214	225	177	176	178	189	7.31
FISHERY PRODUCTS	97	95	108	126	154	192	222	200	210	192	77	4.58
FOREST PRODUCTS	105	88	108	116	125	164	192	167	156	146	154	5.81
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS	77	107	116	116	127	160	196	221	188	178	184	9.08
FOOD	66	112	122	110	130	168	213	251	211	189	202	10.97
FEED	105	93	102	129	122	144	167	219	182	217	184	8.82
RAW MATERIALS	108	97	95	111	108	130	144	130	119	132	122	2.87
BEVERAGES	81	100	119	174	157	169	198	162	160	166	179	6.55
FISHERY PRODUCTS	95	97	108	113	114	123	126	109	107	129		
FOREST PRODUCTS	85	113	102	108	109	113	138	140	131	126	125	3.57
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS	100	93	107	125	135	152	160	151	133	140	163	4.89
FOOD	108	97	95	99	111	130	140	143	119	126	143	3.80
FEED	93	88	118	133	144	170	152	167	149	175	215	7.63
RAW MATERIALS	98	87	115	120	132	161	156	157	123	143	180	5.54
BEVERAGES	81	85	134	196	198	207	214	167	174	173	204	7.53
FISHERY PRODUCTS	94	87	119	132	140	169	168	189	198	227		
FOREST PRODUCTS	95	91	113	131	165	177	165	171	174	196	232	8.86
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS	99	106	95	121	139	136	162	157	165	143	161	5.57
FOOD	91	117	93	106	127	129	146	151	178	148	167	6.39
FEED	171	102	26	47	207	53	97	182	83	376	108	7.81
RAW MATERIALS	121	84	95	97	110	111	139	133	116	97	111	1.47
BEVERAGES	88	107	105	202	215	195	247	207	200	189	220	8.48
FISHERY PRODUCTS	109	99	93	127	135	149	182	209	216	195		
FOREST PRODUCTS	103	104	93	117	113	137	167	177	195	133	163	6.32

ANNEX TABLE 9. INDICES OF VALUE OF IMPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
DEVELOPING COUNTRIES												
AGRICULTURAL PRODUCTS	99	104	98	114	134	161	211	232	204	196	208	9.87
FOOD	99	106	95	108	128	156	209	235	207	197	207	10.08
FEED	94	88	118	198	210	243	297	355	361	400	475	18.88
RAW MATERIALS	101	92	108	136	152	174	216	208	179	174	186	7.92
BEVERAGES	82	96	123	175	189	204	204	201	174	189	217	8.54
FISHERY PRODUCTS	86	99	115	127	170	205	251	260	279	238		
FOREST PRODUCTS	100	91	109	140	155	186	231	243	235	233	235	11.38
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS	91	111	98	123	145	163	215	232	203	191	200	9.47
FOOD	92	112	96	117	143	163	221	240	211	195	206	10.00
FEED	94	95	111	221	287	376	463	585	525	428	564	22.21
RAW MATERIALS	101	102	97	122	131	151	157	159	161	163	171	6.32
BEVERAGES	71	101	128	183	179	167	190	189	133	156	139	4.95
FISHERY PRODUCTS	78	95	127	138	194	242	340	337	253	190		
FOREST PRODUCTS	105	96	99	126	123	141	161	182	175	182	174	7.35
LATIN AMERICA												
AGRICULTURAL PRODUCTS	105	97	99	106	130	160	226	230	179	176	183	8.61
FOOD	104	98	98	102	127	152	228	234	180	177	182	8.76
FEED	106	85	109	190	184	242	303	345	339	371	387	17.21
RAW MATERIALS	119	86	95	118	133	173	196	179	150	145	183	6.42
BEVERAGES	90	89	121	149	147	281	203	190	142	112	116	3.18
FISHERY PRODUCTS	90	110	100	110	148	191	222	208	189	159		
FOREST PRODUCTS	110	91	99	115	117	137	204	214	210	165	166	8.03
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	90	111	98	119	139	167	229	281	264	255	288	13.88
FOOD	91	113	96	113	132	167	234	289	271	256	288	14.19
FEED	90	66	144	250	283	285	315	448	470	560	756	24.40
RAW MATERIALS	84	106	111	140	133	135	142	164	168	215	206	8.72
BEVERAGES	88	95	117	184	249	201	229	219	218	238	307	11.57
FISHERY PRODUCTS	83	90	127	199	268	256	403	487	451	387		
FOREST PRODUCTS	80	101	119	173	167	174	229	264	257	258	262	12.71
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	92	104	104	109	121	141	171	188	163	170	184	7.75
FOOD	94	107	99	97	113	134	165	184	158	163	172	7.30
FEED	89	99	112	177	183	222	267	285	314	351	414	16.89
RAW MATERIALS	85	95	120	151	150	162	187	194	170	174	205	8.11
BEVERAGES	76	96	128	173	157	179	183	204	212	257	341	13.01
FISHERY PRODUCTS	90	98	113	113	141	170	196	214	290	277		
FOREST PRODUCTS	101	85	114	135	171	239	245	243	231	237	238	11.58
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS	128	90	82	120	144	192	238	242	227	183	163	8.52
FOOD	131	93	76	118	130	184	210	231	230	185	162	8.49
FEED	46	101	152	217	298	106	237	413	302	378	496	20.22
RAW MATERIALS	121	82	98	124	178	214	315	269	216	175	158	8.42
BEVERAGES	82	55	163	362	243	302	302	343	194	313	282	13.31
FISHERY PRODUCTS	61	107	132	158	254	320	191	197	542	370		
FOREST PRODUCTS	104	78	118	182	249	282	406	394	383	477	501	20.69

ANNEX TABLE 10. INDICES OF VOLUME OF IMPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
WORLD												
AGRICULTURAL PRODUCTS	96	98	106	108	116	125	130	134	135	135	139	4.07
FOOD	96	98	106	111	118	128	134	139	140	140	144	4.54
FEED	91	93	116	124	145	151	157	172	181	186	188	8.00
RAW MATERIALS	99	98	103	100	108	109	112	107	106	107	110	1.02
BEVERAGES	95	101	104	96	102	115	113	116	117	120	125	2.68
FISHERY PRODUCTS	95	98	107	108	115	126	126	130	122	112	21	-5.51
FOREST PRODUCTS	109	88	104	109	117	125	125	119	117	126	132	2.81
DEVELOPED COUNTRIES												
AGRICULTURAL PRODUCTS	95	98	107	104	109	115	115	118	120	119	123	2.47
FOOD	95	98	107	106	110	116	117	120	122	119	124	2.59
FEED	91	93	116	122	143	149	154	167	173	177	174	7.28
RAW MATERIALS	99	98	103	97	102	102	100	96	96	99	102	-.07
BEVERAGES	95	102	103	94	101	114	113	115	117	118	123	2.56
FISHERY PRODUCTS	96	97	107	108	115	126	124	129	121	116	23	-4.89
FOREST PRODUCTS	109	87	104	106	115	123	121	113	111	120	127	2.22
WESTERN EUROPE												
AGRICULTURAL PRODUCTS	97	98	105	104	110	114	114	112	117	117	117	1.96
FOOD	97	99	104	105	109	112	113	110	116	114	114	1.64
FEED	89	92	119	125	153	159	164	181	198	197	188	8.65
RAW MATERIALS	98	96	107	100	106	103	100	93	93	95	100	-.49
BEVERAGES	96	101	103	96	100	117	112	117	118	120	120	2.50
FISHERY PRODUCTS	96	99	105	101	108	121	128	124	111	100	53	-1.98
FOREST PRODUCTS	110	85	105	106	113	126	124	119	117	126	132	2.91
USSR AND EASTERN EUROPE												
AGRICULTURAL PRODUCTS	84	103	114	105	111	125	136	152	147	136	146	5.25
FOOD	77	102	121	109	118	136	149	173	168	148	161	6.88
FEED	97	100	103	106	108	114	122	134	104	110	134	2.41
RAW MATERIALS	101	103	96	95	96	101	105	100	100	115	104	.62
BEVERAGES	92	106	102	98	89	97	111	109	104	105	115	1.43
FISHERY PRODUCTS	92	105	103	92	102	115	115	78	45	65		
FOREST PRODUCTS	95	106	100	102	101	97	111	109	102	102	101	.44
NORTH AMERICA DEVELOPED												
AGRICULTURAL PRODUCTS	101	94	105	101	104	107	101	106	100	104	115	.88
FOOD	103	91	105	106	101	104	96	103	94	100	108	.12
FEED	94	93	113	109	128	135	116	117	121	128	163	3.94
RAW MATERIALS	97	98	105	102	105	109	100	105	95	102	120	.83
BEVERAGES	96	101	103	89	109	115	113	112	117	116	128	2.68
FISHERY PRODUCTS	101	92	108	106	105	108	101	108	112	109		
FOREST PRODUCTS	106	88	106	113	129	128	117	114	105	126	148	2.79
OCEANIA DEVELOPED												
AGRICULTURAL PRODUCTS	104	101	96	96	94	91	97	94	118	109	114	1.31
FOOD	98	107	95	100	98	95	99	96	139	126	135	3.06
FEED	158	116	26	47	213	41	75	116	46	330	38	-.51
RAW MATERIALS	118	85	97	83	87	76	82	80	78	70	76	-3.32
BEVERAGES	97	104	99	107	90	102	111	107	119	108	113	1.51
FISHERY PRODUCTS	110	96	94	111	106	100	116	119	140	51		
FOREST PRODUCTS	116	99	84	103	88	99	104	108	117	87	103	.08

ANNEX TABLE 10. INDICES OF VOLUME OF IMPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS

	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	ANNUAL RATE OF CHANGE 1974-84
	1974-76=100											PERCENT
DEVELOPING COUNTRIES												
AGRICULTURAL PRODUCTS	99	99	102	121	138	154	175	183	181	187	193	6.19
FOOD	99	99	102	122	140	158	180	190	188	195	200	6.71
FEED	87	94	119	153	176	180	199	228	281	295	361	14.80
RAW MATERIALS	98	99	102	112	129	134	155	151	143	138	139	4.50
BEVERAGES	94	96	110	112	112	119	114	128	122	134	144	3.76
FISHERY PRODUCTS	88	101	110	108	117	129	136	139	123	81		
FOREST PRODUCTS	104	92	104	124	131	138	151	156	156	163	164	5.97
AFRICA DEVELOPING												
AGRICULTURAL PRODUCTS	96	100	104	134	155	160	181	188	192	202	209	8.89
FOOD	97	99	103	137	164	169	195	199	206	214	223	9.73
FEED	94	102	104	172	184	212	225	307	315	329	448	16.90
RAW MATERIALS	99	105	96	101	105	109	106	109	116	129	131	2.71
BEVERAGES	82	102	116	129	102	94	98	123	98	117	110	1.27
FISHERY PRODUCTS	81	91	127	125	132	145	165	161	143	102		
FOREST PRODUCTS	113	91	96	118	107	114	117	130	126	139	132	3.32
LATIN AMERICA												
AGRICULTURAL PRODUCTS	105	94	101	113	145	157	196	190	160	174	170	7.16
FOOD	105	94	101	115	150	160	205	197	164	181	173	7.53
FEED	100	91	110	139	151	161	197	211	255	268	296	12.96
RAW MATERIALS	111	95	93	108	113	128	139	141	128	121	147	3.72
BEVERAGES	106	94	100	85	97	142	113	122	102	88	92	-.02
FISHERY PRODUCTS	88	113	99	95	122	155	146	150	69	38		
FOREST PRODUCTS	120	90	89	101	98	105	137	133	122	108	111	1.94
NEAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	91	104	104	131	138	167	184	214	224	233	269	11.71
FOOD	91	105	104	133	139	173	192	222	233	241	278	12.20
FEED	85	70	146	218	270	259	242	343	422	402	660	21.32
RAW MATERIALS	83	111	106	106	93	99	101	138	129	157	153	5.28
BEVERAGES	99	92	108	107	136	124	124	130	137	145	167	5.01
FISHERY PRODUCTS	79	91	130	189	166	160	220	265	151	109		
FOREST PRODUCTS	87	98	115	151	144	148	169	184	196	201	204	8.82
FAR EAST DEVELOPING												
AGRICULTURAL PRODUCTS	92	101	107	108	118	128	139	145	142	154	157	5.57
FOOD	93	101	106	104	115	127	140	147	142	155	154	5.60
FEED	82	104	114	133	152	168	184	179	248	276	292	12.95
RAW MATERIALS	84	103	113	127	128	127	132	132	132	138	150	4.27
BEVERAGES	90	95	114	118	106	121	119	142	156	184	223	8.10
FISHERY PRODUCTS	93	102	104	87	92	94	97	96	140	105		
FOREST PRODUCTS	99	87	113	129	156	167	156	161	160	177	174	6.67
ASIAN CENT PLANNED ECON												
AGRICULTURAL PRODUCTS	124	90	87	129	152	180	197	199	209	177	151	7.04
FOOD	126	90	84	139	150	184	185	197	219	188	161	7.49
FEED	42	109	149	178	225	77	143	249	185	207	229	11.41
RAW MATERIALS	119	89	92	100	158	167	234	204	182	142	117	5.27
BEVERAGES	82	53	165	163	150	216	222	235	327	525	453	20.91
FISHERY PRODUCTS	84	112	104	131	142	156	140	145	153	8		
FOREST PRODUCTS	96	93	110	136	164	164	188	191	201	259	268	11.34

ANNEX TABLE 11. THE IMPORTANCE OF AGRICULTURE IN THE ECONOMY

COUNTRY	AGRICULTURAL GDP AS % TOTAL GDP 1982	AGRIC.POPULATION AS % TOTAL POPULATION 1984	AGRIC.EXPORTS AS % TOTAL EXPORTS 1984	AGRIC.IMPORTS AS % TOTAL IMPORTS 1984	SHARE OF TOTAL IMPORTS FINANCED BY AGR.EXPORTS % 1984
ALGERIA	7	45		21	1
ANGOLA	26	55	5	16	6
BENIN	41	44	81	11	6
BOTSWANA	14	77	9	14	8
BURKINA FASO	34	79	104	27	21
BURUNDI	45	81	95	15	51
CAMEROON	29	79	47	9	43
CAPE VERDE	18	54	14	31	1
CENTRAL AFRICAN REPUBLIC	40	85	38	20	40
CHAD	60	80	74	16	91
COMOROS	42	62	63	32	36
CONGO	11	31	1	9	2
COTE D'IVOIRE	24	77	77	21	99
DJIBOUTI	3	45		40	
EGYPT	18	49	24	35	7
EQUATORIAL GUINEA	44	72	72	11	34
ETHIOPIA	45	77	88	18	38
GABON	8	74		14	1
GAMBIA	29	76	53	37	24
GHANA	46	48	36	23	41
GUINEA	40	78	6	19	6
GUINEA-BISSAU	46	80	95	45	32
KENYA	27	76	70	16	46
LESOTHO	22	81	61	39	5
LIBERIA	24	67	26	26	26
LIBYA	3	11		17	
MADAGASCAR	48	80	84	15	58
MALAWI	41	81	98	7	114
MALI	27	85	93	39	56
MAURITANIA	16	81	12	65	19
MAURITIUS	17	26	56	25	45
MOROCCO	16	49	16	26	9
MOZAMBIQUE	39	60	49	28	9
NAMIBIA	12	46			
NIGER	44	85	20	20	19
NIGERIA	24	50	2	13	2
REUNION	8	25	61	21	6
RWANDA	51	88	81	15	24
SAO TOME AND PRINCIPE	73	50	38	23	45
SENEGAL	31	72	32	27	15
SEYCHELLES	7	45	7	22	2
SIERRA LEONE	22	62	37	32	28
SOMALIA	31	78	88	37	24
SOUTH AFRICA	6	27	6	7	7
SUDAN	22	75	87	17	37
SWAZILAND	24	69	52	7	29
TANZANIA	34	79	85	13	38
TOGO	27	66	33	35	18
TUNISIA	13	37	7	16	4
UGANDA	75	78	74	5	101
ZAIRE	32	72	42	18	22
ZAMBIA	13	64	2	8	2
ZIMBABWE	14	56	39	8	41
BARBADOS	9	15	12	16	7
BELIZE	40	26	48	22	35
BERMUDA	10	5	1	19	
CANADA	5	4	10	7	11
COSTA RICA	19	32	67	7	58
CUBA		21	74	15	67
DOMINICA	49	32	46	23	25
DOMINICAN REPUBLIC	22	54	64	16	44
EL SALVADOR	23	49	60	17	51
GRENADA	19	32	61	23	17
GUADELOUPE	8	14	89	21	11
GUATEMALA	25	52	61	10	55
HAITI	33	63	37	23	14
HONDURAS	24	61	71	9	54
JAMAICA	7	18	22	20	14
MARTINIQUE	10	13	46	18	10
MEXICO	7	33	7	21	14
NICARAGUA	20	38	81	14	40
PANAMA	9	32	63	9	11
TRINIDAD AND TOBAGO	2	15	2	16	2
UNITED STATES	2	2	19	6	12
ARGENTINA	12	12	73	7	148
BOLIVIA	19	48	3	20	4
BRAZIL	10	35	39	11	72
CHILE	5	17	12	13	12
COLOMBIA	25	24	76	10	50
ECUADOR	15	42	20	12	30
FRENCH GUIANA	42	20	5	16	1
GUYANA	31	19	55	19	44
PARAGUAY	33	47	94	17	48

ANNEX TABLE 11. THE IMPORTANCE OF AGRICULTURE IN THE ECONOMY

COUNTRY	AGRICULTURAL GDP AS % TOTAL GDP 1982	AGRIC.POPULATION AS % TOTAL POPULATION 1984	AGRIC.EXPORTS AS % TOTAL EXPORTS 1984	AGRIC.IMPORTS AS % TOTAL IMPORTS 1984	SHARE OF TOTAL IMPORTS FINANCED BY AGR.EXPORTS % 1984
PERU	14	37	7	19	9
SURINAME	9	16	12	9	8
URUGUAY	10	11	45	10	62
VENEZUELA	6	15	1	14	1
AFGHANISTAN		76	24	11	21
BANGLADESH	45	82	28	33	13
BHUTAN	92	93			
BRUNEI DARUSSALAM	1	6		14	
BURMA	48	49	64	11	78
CHINA (EXC TAIWAN)	26	56	17	12	17
CYPRUS	10	32	39	14	16
HONG KONG	1	2	5	12	4
INDIA	30	60	29	17	18
INDONESIA	25	56	11	6	13
IRAN		35	1	32	1
IRAQ		38		17	
ISRAEL	4	6	16	11	11
JAPAN	4	8	1	14	1
JORDAN	5	23	20	20	5
KAMPUCHEA,DEMOCRATIC		72	75	6	8
KOREA DPR		42	8	9	5
KOREA REP	17	34	2	11	2
KUWAIT		2	1	15	2
LAOS		72	15	14	7
LEBANON		7	16	17	4
MALAYSIA	24	44	36	12	35
MALDIVES	105	79		23	
MONGOLIA		44	33	8	27
NEPAL	66	92	17	9	14
OMAN	2	59	1	16	1
PAKISTAN	26	51	23	18	11
PHILIPPINES	23	43	28	7	22
QATAR		59		20	
SAUDI ARABIA KINGDOM OF	1	58		13	
SINGAPORE	1	2	9	10	8
SRI LANKA	24	52	64	12	50
SYRIA	18	46	20	18	9
THAILAND	21	73	50	6	36
TURKEY	21	49	31	7	21
UNITED ARAB EMIRATES	1	59	1	10	1
VIET NAM		68	44	23	20
YEMEN ARAB REPUBLIC	27	73	26	35	1
YEMEN DEMOCRATIC	10	56	1	15	1
AUSTRIA	4	7	5	7	4
BELGIUM-LUXEMBOURG	3	3	11	13	11
BULGARIA		28	10	7	9
CZECHOSLOVAKIA		8	3	11	4
DENMARK	4	6	28	11	27
FINLAND	10	11	5	7	6
FRANCE	5	7	17	12	15
GERMAN DEMOCRATIC REP.		8	2	10	2
GERMANY, FED. REP. OF	3	3	6	13	6
GREECE	14	34	33	13	16
HUNGARY		14	23	9	24
ICELAND	21	10	3	12	3
IRELAND	13	19	26	13	26
ITALY	7	9	7	15	6
MALTA	4	4	4	15	2
NETHERLANDS	6	5	22	16	23
NORWAY	5	6	2	7	2
POLAND		27	8	14	9
PORTUGAL	11	24	10	21	7
ROMANIA		44	7	7	9
SPAIN	9	14	14	12	12
SWEDEN	3	5	3	7	3
SWITZERLAND	7	4	4	9	3
UNITED KINGDOM	2	2	7	13	6
USSR		14	2	24	3
YUGOSLAVIA	15	33	11	10	9
AUSTRALIA	5	5	34	5	36
FIJI	27	37	53	18	30
FRENCH POLYNESIA	7	54	11	18	1
KIRIBATI	58	54	93	23	28
NEW CALEDONIA	3	58		20	
NEW ZEALAND	12	8	61	7	63
PAPUA NEW GUINEA	41	81	46	15	38
SOLOMON ISLANDS	63	58	37	13	52
TOKELAU	60	54			
TONGA	55	54	80	23	20
VANUATU	55	58	71	12	47

ANNEX TABLE 12A. RESOURCES AND THEIR USE IN AGRICULTURE

COUNTRY	ARABLE LAND AS % OF TOTAL LAND 1983	IRRIGATED LAND AS % OF ARABLE LAND 1983	FOREST LAND AS % OF TOTAL LAND 1983	AGRIC.POPULATION PER HA OF ARABLE LAND 1983	AGRIC.LAB.FORCE AS % OF AGRIC.POPULATION 1984
ALGERIA	3	4	2	1.3	22
ANGOLA	3		43	1.3	26
BENIN	16	1	35	.9	45
BOTSWANA	2	1	2	.6	45
BURKINA FASO	10		26	2.0	52
BURUNDI	51		2	2.7	46
CAMEROON	15		54	1.1	45
CAPE VERDE	10	5		4.2	32
CENTRAL AFRICAN REPUBLIC	3		64	1.1	53
CHAD	3		16	1.2	38
COMOROS	42		16	2.9	36
CONGO	2	1	62	.8	34
COTE D'IVOIRE	13	2	26	1.8	49
DJIBOUTI					30
EGYPT	2	100		8.9	28
EQUATORIAL GUINEA	8		61	1.2	29
ETHIOPIA	13	1	24	1.9	40
GABON	2		78	1.9	47
GAMBIA	16	21	20	3.0	48
GHANA	12		37	2.2	36
GUINEA	6	4	42	2.6	43
GUINEA-BISSAU	10		38	2.4	30
KENYA	4	2	4	6.2	37
LESOTHO	10			3.9	51
LIBERIA	4	1	39	3.9	36
LIBYA	1	11		.2	25
MADAGASCAR	5	33	22	2.5	48
MALAWI	25	1	44	2.3	44
MALI	2	16	7	3.2	53
MAURITANIA		4	15	7.4	30
MAURITIUS	58	16	31	2.5	38
MOROCCO	19	6	12	1.3	27
MOZAMBIQUE	4	2	19	2.7	36
NAMIBIA	1	1	13	1.0	31
NIGER	3		2	1.4	31
NIGERIA	33	4	15	1.5	37
REUNION	22	9	35	2.6	32
RWANDA	40	1	10	5.0	51
SAO TOME AND PRINCIPE	38			1.3	25
SENEGAL	27	3	31	.9	40
SEYCHELLES	22		19	5.5	30
SIERRA LEONE	25	1	29	1.2	36
SOMALIA	2	12	14	3.9	37
SOUTH AFRICA	11	8	4	.6	36
SUDAN	5	14	20	1.2	31
SWAZILAND	8	43	6	3.0	45
TANZANIA	6	3	47	3.2	40
TOGO	26		28	1.3	40
TUNISIA	30	4	4	.6	24
UGANDA	32		30	1.8	40
ZAIRE	3		78	3.5	41
ZAMBIA	7		27	.8	35
ZIMBABWE	7	6	62	1.7	32
BARBADOS	77			1.2	44
BELIZE	2	4	44	.8	30
BERMUDA			20		46
CANADA	5	1	35		43
COSTA RICA	13	4	32	1.3	34
CUBA	29	32	17	.7	31
DOMINICA	23		41	1.4	33
DOMINICAN REPUBLIC	30	12	13	2.2	26
EL SALVADOR	35	15	6	3.6	31
GRENADA	41		9	2.5	33
GUADELOUPE	23	5	40	1.1	37
GUATEMALA	17	4	40	2.3	30
HAITI	33	8	4	4.5	49
HONDURAS	16	5	34	1.4	29
JAMAICA	25	12	28	1.6	37
MARTINIQUE	18	26	26	2.2	37
MEXICO	13	21	24	1.0	29
NICARAGUA	11	6	35	.9	31
PANAMA	8	5	54	1.2	34
TRINIDAD AND TOBAGO	31	13	44	1.1	40
UNITED STATES	21	10	29		46
ARGENTINA	13	5	22	.1	38
BOLIVIA	3	5	52	.9	33
BRAZIL	9	3	67	.6	32
CHILE	7	23	21	.4	33
COLOMBIA	5	6	49	1.2	30
ECUADOR	9	22	51	1.5	32
FRENCH GUIANA			82	2.9	36
GUYANA	3	26	83	.4	34
PARAGUAY	5	3	51	.9	32

ANNEX TABLE 12A. RESOURCES AND THEIR USE IN AGRICULTURE

COUNTRY	ARABLE LAND AS % OF TOTAL LAND 1983	IRRIGATED LAND AS % OF ARABLE LAND 1983	FOREST LAND AS % OF TOTAL LAND 1983	AGRIC.POPULATION PER HA OF ARABLE LAND 1983	AGRIC.LAB.FORCE AS % OF AGRIC.POPULATION 1984
PERU	3	34	55	2.0	28
SURINAME		78	96	1.0	26
URUGUAY	8	6	4	.2	39
VENEZUELA	4	9	39	.7	31
AFGHANISTAN	12	33	3	1.4	33
BANGLADESH	68	20	16	9.7	34
BHUTAN	2		70	12.9	48
BRUNEI DARUSSALAM	1	14	79	2.6	29
BURMA	15	10	49	1.9	39
CHINA (EXC TAIWAN)	11	45	14	5.8	46
CYPRUS	47	22	19	.5	44
HONG KONG	8	38	12	14.5	47
INDIA	57	23	23	2.7	38
INDONESIA	11	27	67	4.4	34
IRAN	8	29	11	1.1	28
IRAQ	13	32	3	1.0	24
ISRAEL	21	50	6	.6	36
JAPAN	13	67	68	2.2	53
JORDAN	4	9		1.8	24
KAMPUCHEA,DEMOCRATIC	17	3	76	1.6	38
KOREA DPR	19	46	74	3.6	46
KOREA REP	22	55	67	6.4	39
KUWAIT		50		13.6	25
LAOS	4	13	55	3.4	46
LEBANON	29	29	7	.7	26
MALAYSIA	13	8	66	1.5	35
MALDIVES	10		3	44.3	42
MONGOLIA	1	3	10	.6	37
NEPAL	17	29	33	6.3	47
OMAN		95		15.8	25
PAKISTAN	26	76	4	2.5	27
PHILIPPINES	38	12	40	2.0	35
QATAR				56.1	25
SAUDI ARABIA KINGDOM OF	1	36	1	5.4	25
SINGAPORE	11		5	8.0	40
SRI LANKA	34	25	37	3.8	36
SYRIA	30	10	3	.8	25
THAILAND	38	18	30	1.9	44
TURKEY	34	8	26	.9	41
UNITED ARAB EMIRATES		33		47.8	25
VIET NAM	23	23	40	5.2	45
YEMEN ARAB REPUBLIC	7	18	8	3.4	27
YEMEN DEMOCRATIC	1	31	7	5.4	25
AUSTRIA	18		39	.4	46
BELGIUM-LUXEMBOURG	25		21	.3	39
BULGARIA	37	29	35	.6	52
CZECHOSLOVAKIA	41	4	37	.3	50
DENMARK	62	15	12	.1	49
FINLAND	8	3	76	.2	47
FRANCE	34	6	27	.2	44
GERMAN DEMOCRATIC REP.	47	3	28	.3	54
GERMANY, FED. REP. OF	30	4	30	.3	48
GREECE	30	25	20	.9	42
HUNGARY	57	3	18	.3	44
ICELAND			1	3.0	43
IRELAND	14		5	.7	38
ITALY	42	24	22	.4	38
MALTA	41	8		1.3	35
NETHERLANDS	26	59	9	.8	39
NORWAY	3	9	27	.3	38
POLAND	49	1	29	.7	56
PORTUGAL	39	18	40	.7	39
ROMANIA	46	24	28	1.0	55
SPAIN	41	15	31	.3	36
SWEDEN	7	2	64	.1	39
SWITZERLAND	10	6	26	.7	50
UNITED KINGDOM	29	2	9	.1	47
USSR	10	8	41	.2	50
YUGOSLAVIA	31	2	36	1.0	46
AUSTRALIA	6	4	14		42
FIJI	13		65	1.1	35
FRENCH POLYNESIA	20		31	1.1	33
KIRIBATI	51		3	.9	36
NEW CALEDONIA	1		51	5.2	38
NEW ZEALAND	2	49	38	.6	40
PAPUA NEW GUINEA	1		71	7.6	49
SOLOMON ISLANDS	2		93	2.9	38
TOKELAU					36
TONGA	81		12	1.1	33
VANUATU	6		1	.8	38

ANNEX TABLE 12B. RESOURCES AND THEIR USE IN AGRICULTURE

COUNTRY	AGRICULTURAL GFCF $ PER HA ARABLE LAND 1982	AGRICULTURAL GFCF $ PER CAPUT OF AGRIC.LAB.FORCE 1982	FERTILIZER USE PER HA ARAB.LAND KG/HA 1983	NOS. OF TRACTORS PER 000 HA ARABLE LAND 1983	OFFICIAL COMMIT. TO AGRICULTURE $ PER CAPUT 1983
ALGERIA			22	7	.1
ANGOLA			2	3	1.3
BENIN			3		13.6
BOTSWANA	2.8	12.6	1	2	44.9
BURKINA FASO			5		
BURUNDI			2		3.0
CAMEROON			5		7.7
CAPE VERDE					9.9
CENTRAL AFRICAN REPUBLIC					13.0
CHAD			2		2.8
CONGO			2	1	20.8
COTE D'IVOIRE			11	1	10.4
DJIBOUTI					4.6
EGYPT	204.0	83.8	361	17	3.7
ETHIOPIA			3		4.0
GABON	48.1	108.0	5	3	29.6
GAMBIA			16		31.2
GHANA			8	1	3.6
GUINEA			1		1.6
GUINEA-BISSAU			8		11.4
KENYA	34.3	16.1	38	3	7.0
LESOTHO	42.3	22.1	15	5	11.6
LIBERIA			8	1	7.4
LIBYA	609.1	11338.4	43	13	
MADAGASCAR			5	1	9.1
MALAWI			18	1	5.7
MALI			7		6.5
MAURITANIA			2	2	23.3
MAURITIUS	115.9	125.3	254	3	7.7
MOROCCO			29	3	7.1
MOZAMBIQUE			8	2	1.8
NAMIBIA				4	
NIGER			1		11.6
NIGERIA			9		4.5
REUNION			321	29	
RWANDA					6.9
SAO TOME AND PRINCIPE				3	33.7
SENEGAL			5		22.3
SEYCHELLES			66	6	46.5
SIERRA LEONE			1		2.5
SOMALIA			2	2	5.3
SOUTH AFRICA	74.3	325.5	65	13	
SUDAN			7	1	14.6
SWAZILAND	78.3	79.6	138	20	11.5
TANZANIA			4	4	3.5
TOGO			2		24.9
TUNISIA	65.8	528.5	16	6	25.0
UGANDA				1	
ZAIRE			1		8.7
ZAMBIA			13	1	9.1
ZIMBABWE	52.1	96.2	58	8	9.3
BARBADOS			197	17	.4
BELIZE			32	25	81.7
CANADA	79.7	7616.1	49	14	
COSTA RICA	30.2	72.5	132	10	22.7
CUBA			164	21	
DOMINICA			135	5	7.9
DOMINICAN REPUBLIC			29	2	11.0
EL SALVADOR	11.0	10.6	113	5	3.0
GRENADA				2	14.5
GUADELOUPE			217	24	12.9
GUATEMALA	37.1	52.8	51	2	3.6
HAITI			4	1	12.5
HONDURAS			16	2	23.2
JAMAICA			47	11	24.4
MARTINIQUE			669	46	
MEXICO			59	6	1.6
NICARAGUA			56	2	18.8
PANAMA			40	7	5.0
TRINIDAD AND TOBAGO			49	16	.9
UNITED STATES	83.8	7661.7	104	25	
ARGENTINA			3	6	.2
BOLIVIA			2		16.4
BRAZIL			30	10	8.9
CHILE			25	6	.2
COLOMBIA			47	5	3.0
ECUADOR			21	3	5.2
FRENCH GUIANA			199	30	35.7
GUYANA			21	7	21.5
PARAGUAY			5	4	16.0
PERU			22	5	13.9
SURINAME			216	27	
URUGUAY			26	23	20.4
VENEZUELA	132.2	576.7	38	11	

ANNEX TABLE 128. RESOURCES AND THEIR USE IN AGRICULTURE

COUNTRY	AGRICULTURAL GFCF $ PER HA ARABLE LAND 1982	AGRICULTURAL GFCF $ PER CAPUT OF AGRIC.LAB.FORCE 1982	FERTILIZER USE PER HA ARAB.LAND KG/HA 1983	NOS. OF TRACTORS PER 000 HA ARABLE LAND 1983	OFFICIAL COMMIT. TO AGRICULTURE $ PER CAPUT 1983
AFGHANISTAN			7		
BANGLADESH			64	1	6.2
BHUTAN			3		10.6
BRUNEI DARUSSALAM				10	
BURMA			16	1	2.5
CHINA (EXC TAIWAN)			178	8	.1
CYPRUS	94.0	441.3	46	26	24.6
HONG KONG				1	
INDIA	39.4	40.1	39	3	1.1
INDONESIA			74	1	4.9
IRAN	78.0	302.5	76	5	
IRAQ			17	6	
ISRAEL	414.0	1890.2	183	63	
JAPAN	141.9	115.2	437	330	
JORDAN			39	12	19.1
KAMPUCHEA,DEMOCRATIC			2		
KOREA DPR			345	27	
KOREA REP	641.8	251.6	331	3	4.1
KUWAIT			420	13	
LAOS			1	1	3.1
LEBANON			119	10	1.6
MALAYSIA			107	2	11.3
MONGOLIA			12	8	
NEPAL			14		9.9
OMAN			32	2	
PAKISTAN	25.0	39.1	59	7	4.5
PHILIPPINES			30	2	3.5
QATAR			279	27	
SAUDI ARABIA KINGDOM OF			217	1	
SINGAPORE			783	8	
SRI LANKA			77	12	10.6
SYRIA	53.9	270.5	32	7	
THAILAND	33.2	38.0	24	6	8.1
TURKEY			63	19	4.0
UNITED ARAB EMIRATES	7628.6		299		
VIET NAM			47	5	.2
YEMEN ARAB REPUBLIC	30.1	69.7	12	2	.4
YEMEN DEMOCRATIC			10	5	32.4
AUSTRIA			252	216	
BELGIUM-LUXEMBOURG	616.2	4232.8	547	139	
BULGARIA			244	14	
CZECHOSLOVAKIA			344	26	
DENMARK	336.5	5160.7	267	67	
FINLAND	394.6	3333.7	222	99	
FRANCE	258.6	2527.9	312	82	
GERMAN DEMOCRATIC REP.			290	31	
GERMANY, FED. REP. OF	517.8	3707.9	421	198	
GREECE	1844.3	4948.0	161	42	
HUNGARY			300	11	
ICELAND			4413	1750	
IRELAND	565.6	2131.0	697	152	
ITALY	351.2	2024.1	168	95	
MALTA	249.3	581.7	68	34	
NETHERLANDS	1516.5	4753.5	788	217	
NORWAY	1042.1	8040.4	257	169	
POLAND			231	51	
PORTUGAL			66	23	6.6
ROMANIA			158	16	
SPAIN			71	29	
SWEDEN	242.7	4319.8	160	63	
SWITZERLAND			430	258	
UNITED KINGDOM	244.9	3466.9	375	76	
USSR			99	12	
YUGOSLAVIA	167.0	359.8	118	90	1.4
AUSTRALIA			25	7	
FIJI			46	19	9.0
FRENCH POLYNESIA			13	2	3.2
NEW CALEDONIA			50	69	57.0
NEW ZEALAND	1228.3	5154.5	1147	197	
PAPUA NEW GUINEA			18	4	15.2
TONGA			3	1	42.3
VANUATU				1	94.7

ANNEX TABLE 13. MEASURES OF OUTPUT AND PRODUCTIVITY IN AGRICULTURE

COUNTRY	AGRICULTURAL GDP $ PER CAPUT AGRIC.POPULATION 1982	AGRICULTURAL GDP GROWTH RATE 1973-82 %	INDEX OF FOOD PRODUC.PER CAPUT 1974-76=100 1982-84	INDEX OF TOT.AGR. PRODUC.PER CAPUT 1974-76=100 1982-84	PER CAPUT DIETARY ENERGY SUPPLIES AS % OF REQUIREM. 1983	INDEX OF VALUE OF AGRIC.EXPORTS 1974-76=100 1982-84
ALGERIA	326	18.3	79	80	115	217
ANGOLA	185	1.0	81	64	82	288
BENIN	253	13.2	97	98	83	224
BOTSWANA	249	7.4	61	62	93	207
BURKINA FASO	73	9.4	94	96	85	145
BURUNDI	143	13.8	106	106	102	232
CAMEROON	225	10.5	83	84	88	185
CAPE VERDE	91	7.4	83	83	100	147
CENTRAL AFRICAN REPUBLIC	127	11.0	94	91	91	121
CHAD	90	7.0	95	92	59	87
COMOROS	199	12.9	88	87	91	199
CONGO	248	8.1	96	96	109	289
COTE D'IVOIRE	270	15.3	110	102	112	232
DJIBOUTI	74	18.0				262
EGYPT	282	4.7	91	90	126	216
EQUATORIAL GUINEA	47					68
ETHIOPIA	88	6.1	100	101	84	402
GABON	276	5.7	103	103	102	211
GAMBIA	159	7.2	77	78	95	346
GHANA	1929	26.0	73	73	66	106
GUINEA	218	4.4	93	93	84	174
GUINEA-BISSAU	117	6.0	92	92	82	97
KENYA	107	9.0	82	87	83	217
LESOTHO	67	8.3	78	79	104	201
LIBERIA	162	8.9	91	88	102	206
LIBYA	2166	19.8	94	94	155	185
MADAGASCAR	182	10.4	89	88	112	240
MALAWI	127	13.0	100	103	95	67
MALI	62	16.8	101	102	68	183
MAURITANIA	97	8.3	95	95	92	197
MAURITIUS	610	.7	88	88	118	128
MOROCCO	219	8.0	91	90	105	142
MOZAMBIQUE	278	1.6	73	71	71	185
NAMIBIA	410	4.9	74	73	82	147
NIGER	193	16.6	113	113	97	139
NIGERIA	383	13.0	96	95	86	376
REUNION	937	10.0	107	105	125	128
RWANDA	144	15.6	112	112	98	79
SAO TOME AND PRINCIPE	507	7.9	76	76	97	135
SENEGAL	155	6.4	66	66	82	143
SEYCHELLES	267	5.2				126
SIERRA LEONE	170	9.2	95	95	91	126
SOMALIA	177	24.9	69	69	89	206
SOUTH AFRICA	574	9.1	83	83	118	179
SUDAN	108	4.2	93	90	90	159
SWAZILAND	339	9.9	114	116	105	112
TANZANIA	119	15.4	100	92	98	92
TOGO	127	8.7	92	92	94	751
TUNISIA	399	8.1	84	84	121	187
UGANDA	249	16.9	98	97	101	115
ZAIRE	74	13.5	92	92	96	87
ZAMBIA	110	8.2	74	76	83	189
ZIMBABWE	213	8.0	69	79	82	185
BARBADOS	2336	13.1	99	99	132	120
BELIZE	1524	10.4	117	117	117	89
BERMUDA	17638	12.8				116
CANADA	13564	8.8	118	118	130	102
COSTA RICA	644	9.0	87	95	114	124
CUBA			129	127	126	118
DOMINICA	1323	11.1	95	95	100	143
DOMINICAN REPUBLIC	542	13.3	99	99	105	128
EL SALVADOR	334	11.7	88	81	91	185
GRENADA	514	12.2	92	92	93	140
GUADELOUPE	1894	4.1	96	96	107	145
GUATEMALA	532	12.7	101	91	95	166
HAITI	146	12.4	90	90	83	190
HONDURAS	283	12.1	99	102	94	137
JAMAICA	546	3.3	89	89	111	101
MARTINIQUE	2843	9.0	97	97	114	147
MEXICO	487	9.6	104	100	126	324
NICARAGUA	502	7.3	78	74	102	225
PANAMA	564	9.5	99	101	98	153
TRINIDAD AND TOBAGO	978	12.0	60	60	129	160
UNITED STATES	15895	5.6	105	104	137	107
ARGENTINA	2152	10.8	109	107	119	152
BOLIVIA	459	18.3	84	87	82	142
BRAZIL	658	15.5	115	112	106	150
CHILE	629	14.3	102	102	105	99
COLOMBIA	1658	16.3	104	106	110	235
ECUADOR	470	13.0	89	88	89	201
FRENCH GUIANA	5447	10.5				187
GUYANA	974	7.2	91	91	104	54
PARAGUAY	1161	19.3	105	105	122	117

ANNEX TABLE 13. MEASURES OF OUTPUT AND PRODUCTIVITY IN AGRICULTURE

COUNTRY	AGRICULTURAL GDP $ PER CAPUT AGRIC.POPULATION 1982	AGRICULTURAL GDP GROWTH RATE 1973-82 %	INDEX OF FOOD PRODUC.PER CAPUT 1974-76=100 1982-84	INDEX OF TOT.AGR. PRODUC.PER CAPUT 1974-76=100 1982-84	PER CAPUT DIETARY ENERGY SUPPLIES AS % OF REQUIREM. 1983	INDEX OF VALUE OF AGRIC.EXPORTS 1974-76=100 1982-84
PERU	465	4.0	84	84	85	131
SURINAME	1779	12.4	136	136	109	135
URUGUAY	2633	3.7	105	106	99	102
VENEZUELA	1553	16.2	88	86	99	203
AFGHANISTAN			102	98	95	175
BANGLADESH	64		99	99	84	116
BHUTAN	115	6.4	104	103		170
BRUNEI DARUSSALAM	1454	12.4	106	105	110	182
BURMA	159	8.4	124	124	116	164
CHINA (EXC TAIWAN)	134	7.5	128	131	111	239
CYPRUS	987	7.9	110	109	137	176
HONG KONG	2018	10.5	99	99	117	136
INDIA	114	6.0	110	110	96	96
INDONESIA	254	13.9	120	118	110	126
IRAN			99	97	128	174
IRAQ			85	85	121	363
ISRAEL	3794	8.1	98	103	121	127
JAPAN	3817	6.9	91	90	113	119
JORDAN	261	14.8	136	137	125	193
KAMPUCHEA,DEMOCRATIC			107	106	85	72
KOREA DPR			113	113	127	84
KOREA REP	806	14.6	109	107	118	226
KUWAIT	2874	18.0				215
LAOS			129	129	88	60
LEBANON			145	140	120	142
MALAYSIA	932	12.9	112	106	111	174
MALDIVES	138	7.4	92	92	88	247
MONGOLIA			90	89	117	132
NEPAL	114	7.2	91	91	93	93
OMAN	219	13.5				326
PAKISTAN	190	14.3	104	105	95	161
PHILIPPINES	413	12.7	107	108	104	145
QATAR						253
SAUDI ARABIA KINGDOM OF	309	24.7	98	98	134	559
SINGAPORE	3429	8.3	68	67	115	211
SRI LANKA	139	1.8	125	112	104	98
SYRIA	745	22.0	123	118	127	222
THAILAND	213	10.4	115	115	105	178
TURKEY	440	6.9	103	101	123	144
UNITED ARAB EMIRATES	372	24.4				244
VIET NAM			123	123	99	35
YEMEN ARAB REPUBLIC	189	13.3	84	84	92	373
YEMEN DEMOCRATIC	71	5.4	83	82	94	234
AUSTRIA	4716	8.1	118	118	132	120
BELGIUM-LUXEMBOURG	9207	4.7	104	103	139	141
BULGARIA			119	112	146	112
CZECHOSLOVAKIA			118	118	145	95
DENMARK	6839	3.6	122	122	128	125
FINLAND	8118	9.9	102	102	111	110
FRANCE	6359	6.7	111	111	138	128
GERMAN DEMOCRATIC REP.			107	107	142	102
GERMANY, FED. REP. OF	8963	6.4	116	116	129	121
GREECE	1541	8.5	104	104	143	135
HUNGARY			126	125	135	87
ICELAND	20816	13.4	99	99	113	132
IRELAND	3317	8.7	101	101	143	128
ITALY	4525	8.6	111	112	140	121
MALTA	2841	9.6	126	126	108	110
NETHERLANDS	12135	7.9	120	119	129	136
NORWAY	10550	11.2	117	117	115	98
POLAND			94	94	127	87
PORTUGAL	1053	2.8	86	96	124	148
ROMANIA			119	118	126	88
SPAIN	2739	8.3	107	107	132	112
SWEDEN	7527	5.4	112	112	117	86
SWITZERLAND	21238	12.9	117	117	129	100
UNITED KINGDOM	8359	9.0	124	124	128	87
USSR			101	100	132	182
YUGOSLAVIA	983	9.0	109	109	141	102
AUSTRALIA	9779	8.0	105	102	115	113
FIJI	1311	12.5	119	119	105	149
FRENCH POLYNESIA	769	17.2	79	79	105	144
KIRIBATI	796	6.9				113
NEW CALEDONIA	438	7.8	98	93	104	116
NEW ZEALAND	10558	8.7	108	110	132	117
PAPUA NEW GUINEA	351	12.7	95	96	75	171
SOLOMON ISLANDS	552	16.3	129	128	73	157
TOKELAU	816	5.3				
TONGA	831	7.3	80	80	117	108
VANUATU	736	8.8	85	85	81	100

ANNEX TABLE 14. CARRY-OVER STOCKS OF SELECTED AGRICULTURAL PRODUCTS

	Date	Crop year ending in 1980	1981	1982	1983	1984	1985a/	1986b/
		..... million tons						
CEREALS								
Developed countries		158.4	137.3	179.4	218.7	143.5	178.4	238.5
Canada		15.4	14.0	16.3	18.7	13.3	11.6	13.4
United States		78.1	62.1	101.8	141.0	71.2	90.9	153.9
Australia		5.0	2.7	5.4	2.6	6.3	8.9	7.6
EEC		15.7	15.8	13.7	18.4	12.4	23.6	22.8
Japan		10.7	8.8	7.1	5.1	4.5	4.7	5.5
USSR		16.0	14.0	14.0	14.0	19.0	20.0	20.0
Developing countries		101.7	102.0	107.9	105.0	120.4	129.1	120.0
Far East		82.2	77.0	78.0	79.1	96.1	103.9	91.6
Bangladesh		0.8	1.3	0.7	0.6	0.8	1.1	0.9
China		54.0	48.0	46.0	51.0	57.0	63.0	50.0
India		10.9	7.4	7.7	8.1	13.7	17.0	17.0
Pakistan		1.3	1.5	2.4	2.1	2.2	1.5	1.8
Near East		8.7	10.1	12.7	11.15	13.4	12.7	13.7
Turkey		0.8	0.5	1.1	0.9	0.3	0.6	0.4
Africa		2.9	3.4	4.5	4.4	2.9	2.4	4.0
Latin America		7.9	11.4	12.7	10.0	8.0	10.1	10.7
Argentina		1.5	1.0	1.6	2.3	1.3	1.0	0.8
Brazil		2.1	2.8	3.3	2.1	1.1	2.3	2.5
World total								
of which:		260.0	239.3	287.3	323.7	263.9	307.5	358.5
Wheat		104.9	98.7	106.6	119.8	128.7	141.3	148.3
Rice (milled basis)		44.1	43.7	45.3	42.2	46.3	52.1	47.7
Coarse grains		111.0	96.9	135.3	161.7	88.9	114.1	162.5
SUGAR (raw value)								
World total	1 Sept.	25.7	25.5	33.6	39.3	40.3	41.2	38.2
COFFEE								
Exporting countries c/		1.99	1.86	2.60	2.70	2.60	2.70	2.55
DRIED SKIM MILK		..... thousand tons						
United States	31 Dec.	266	404	582	633	566	485	...
EEC	31 Dec.	289	368	678	1 000	866	605	...
Total of above		555	772	1 260	1 633	1 432	1 090	...

a/ Estimate.
b/ Forecast.
c/ Gross opening stocks at the commencing of the coffee years.

Source: FAO, Commodities and Trade Division.

ANNEX TABLE 15. ANNUAL CHANGES IN CONSUMER PRICES: ALL ITEMS AND FOOD

Region and country	All items				Food			
	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984
	..... %/Yr							
DEVELOPED COUNTRIES								
Western Europe								
Austria	7.4	3.8	3.3	5.6	6.7	4.4	2.5	5.6
Belgium	8.3	6.4	7.7	6.3	7.5	4.6	8.4	7.9
Denmark	9.5	10.4	6.9	6.3	10.7	...	4.8	9.3
Finland	2.0	10.6	8.5	7.0	12.4	10.8	7.2	7.4
France	8.8	10.4	9.6	7.4	9.6	10.0	9.3	7.9
Germany, Fed. Rep. of	6.2	4.0	3.3	2.4	5.6	3.3	2.7	1.5
Greece	13.1	16.3	20.5	18.2	14.7	17.6	18.1	18.2
Iceland	24.8	42.0	84.2	29.2	28.3	41.0	93.6	...
Ireland	13.0	84.9	10.5	8.7	14.3	13.7	8.0	9.8
Italy	11.4	3.0	14.6	10.8	11.6	15.6	12.3	8.7
Netherlands	8.6	6.1	2.7	3.3	6.9	...	...	4.1
Norway	8.3	8.4	8.4	6.2	8.3	7.4	8.3	6.9
Portugal	15.3	...	25.5	28.8	16.3	21.0	25.1	25.1
Spain	12.0	18.6	12.1	11.3	12.1	16.0	10.7	12.6
Sweden	7.8	10.5	8.9	8.0	7.9	10.7	11.6	11.6
Switzerland	7.9	2.4	2.9	2.9	7.3	2.9	2.1	3.8
United Kingdom	12.3	14.4	4.6	5.0	15.1	13.9	3.2	5.6
Yugoslavia	19.3	18.2	41.2	41.2	19.1	19.4	45.0	47.3
North America								
Canada	7.4	8.4	5.8	4.8	11.1	9.9	3.7	5.6
United States	6.7	8.9	3.2	4.2	9.5	7.6	2.3	3.7
Oceania								
Australia	10.2	10.6	10.1	3.9	9.8	12.0	10.1	5.4
New Zealand	9.8	14.8	7.4	6.1	9.4	16.8	4.1	5.8
OTHER DEVELOPED COUNTRIES								
Israel	23.9	60.0	145.7	374.2	25.1	65.0	157.0	370.6
Japan	12.0	6.5	1.8	2.2	13.0	5.5	2.1	2.8
South Africa	9.3	12.0	12.3	11.1a/	11.7	13.0	11.7	10.5a/

(continued)

ANNEX TABLE 15. ANNUAL CHANGES IN CONSUMER PRICES: ALL ITEMS AND FOOD

Region and country	All items				Food			
	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984
	..... %/Yr							
DEVELOPING COUNTRIES								
Latin America								
Argentina	59.5	100.0	343.7	623.5	58.0	...	338.5	638.9
Bahamas	9.5	6.9	4.1	4.6	11.8	7.7	1.4	1.5
Barbados	18.6	10.0	5.2	4.6	21.0	9.1	2.6	4.0
Bolivia	23.7	17.0	275.7	1 300.0	27.2	16.4	303.8	1300.0
Brazil	23.5b/	46.0	135.5	172.5	25.9b/	49.0	168.8	183.2
Chile	225.4	70.0	27.3	2.04	245.5	70.0	25.8	20.8
Colombia	19.5	23.0	19.5	16.3	24.0	25.0	19.8	16.0
Costa Rica	13.7	8.1	32.7	1.9	3.7	9.6	32.2	8.8
Dominican Republic	11.1	8.3	4.1	28.5	13.3	3.4	3.8	25.5
Ecuador	13.7	11.7	48.4	31.2	18.4	11.2	78.0	37.0
El Salvador	8.4	...	13.2	11.7	8.8	...	13.4	14.1
Guatemala	2.9	10.7	...	2.5	3.3	9.4	...	0.9
Guyana	8.2	12.8	15.0	...	12.2	14.1	20.9	...
Haiti	13.7	8.0	10.2	7.0c/	15.5	9.3	11.0	7.0c/
Honduras	6.5	9.2	8.9	4.8	8.0	9.6	5.3	0.3
Jamaica	14.9	22.0	10.3	28.6	17.2	24.0	8.0d/	26.7d/
Mexico	12.4	21.0	102.0	65.5	13.9	19.5	91.1	74.9
Panama	7.8	6.9	2.1	1.6	9.9	6.6	2.3	1.5
Paraguay	12.6	14.7	...	...	15.4	14.9	...	...
Peru	12.1	37.0	111.0	110.2	13.9	50.0	25.7	106.3
Puerto Rico	8.8	5.6	0.6	1.8	12.6	5.5	1.0	2.1
Suriname	8.2	11.5	4.4	...	9.5	12.2	4.5	...
Trinidad & Tobago	13.7	12.9	16.7	13.3	17.1	11.1	23.3	10.0
Uruguay	73.4	55.0	14.9	55.3	76.0	55.0	54.1	68.8
Venezuela	5.5	11.4	6.3	12.2	8.5	15.7	7.8	17.2
Far East								
Bangladesh	39.0e/	7.6	8.0	12.1	42.0e/	5.0	6.9	16.7
Burma	17.8	3.8	5.5	5.0	21.0	2.6	11.2	2.3
India	13.2	1.3	11.5	2.0	14.2	0.8	12.0	1.0
Indonesia	21.3	...	11.8	10.4	25.2	...	9.1	10.0
Korea, Rep. of	14.3	17.2	3.3	2.3	16.8	17.2	1.3	1.5
Malaysia	6.7	4.6	3.7	4.5d/	10.4	3.7	0.9	4.9d/
Nepal	10.3	6.7	12.0	2.4	9.8	6.1	13.2	3.4d/
Pakistan	15.2	9.0	7.4	7.1	16.6	8.0	6.1	7.2
Philippines	18.7	12.0	10.0	50.3	20.1	11.0	8.6	53.8
Sri Lanka	8.0	9.9	13.9	16.6	9.1	10.7	12.4	18.1
Thailand	9.8	10.4	3.4	0.7	11.9	10.6	5.2	-1.1

(continued)

ANNEX TABLE 15. ANNUAL CHANGES IN CONSUMER PRICES: ALL ITEMS AND FOOD

Region and country	All items				Food			
	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984	1970 to 1975	1975 to 1980	1982 to 1983	1983 to 1984
	..... %/Yr							
Africa								
Algeria	5.1	12.4	4.5	...	7.2	15.7	2.7	
Botswana	...	12.4	22.4	8.5	...	13.8	12.0	8.6
Cameroon	10.2	10.7	16.4	12.7f/	11.5	11.8	12.4	...
Ethiopia	3.7	15.7	10.0	8.2	2.7	19.2	4.3	11.0
Gabon	11.4	12.9	10.4	5.9	2.7	...	...	...
Gambia	10.5	10.2	10.8	22.1	12.8	9.7	13.7	21.3
Ghana	17.4	70.0	172.5	63.5	20.3	45.0	44.5	30.8
Cote d'Ivoire	8.2	16.7	5.9	4.3	9.3	19.3	4.3	4.9
Kenya	13.9e/	9.8	15.2	8.9c/	14.7e/	10.2	10.7	9.5c/
Lesotho	14.7e/	15.1	17.4	10.1	16.4e/	18.6	19.2	10.5
Liberia	12.1	8.8	2.7	...	13.7	8.1	2.7	...
Madagascar	9.7	9.2	19.5	9.8	12.0	9.0	16.2	10.9
Malawi	8.9	9.2	15.3	...	10.7	9.5	15.1	...
Mauritius	13.1	16.9	5.6	7.3	14.7	16.3	7.3	9.0
Morocco	5.4	9.7	7.0	11.6	7.2	9.3	4.8	13.0
Niger	7.9	14.6	...	...	10.6	14.8	...	...
Nigeria	11.5	14.4	23.2	42.6e/	13.1	20.0	23.2	43.6c/
Senegal	13.0	6.8	11.6	11.8	16.5	6.4	11.3	11.5
Sierra Leone	8.4	13.8	68.5	66.4	11.0	12.9	65.6	52.6
Swaziland	9.3	13.2	11.7	12.4	9.8	14.0	12.0	14.5
Tanzania	13.1	14.5	27.0	...	17.7	13.4	27.2	...
Togo	8.9	8.1	9.7	-3.8	9.7	9.9	11.3	-10.3
Tunisia	4.8	...	9.0	8.4	5.2	...	8.1	8.8
Zaire	18.6	...	...	...	21.2	...	...	...
Zambia	7.1	15.2	19.6	20.0	7.4	13.7	20.7	18.6
Zimbabwe	...	9.8	23.2	...	...	8.4	28.6	...
Near East								
Cyprus	8.0	...	5.1	6.0	10.2	...	4.3	8.4
Egypt	5.8	12.9	16.1	17.1	8.6	14.4	18.6	16.1
Iran	9.6	16.1	19.8	12.5	10.0	18.9	18.4	9.0
Iraq	11.3	...	...	...	18.1	...	...	...
Jordan	6.0	11.6	...	3.9	9.2	9.8	...	2.5
Kuwait	10.1	7.1	4.4	1.2	15.4	6.1	2.6	-0.2
Saudi Arabia	...	11.3	0.8	...	...	9.5	0.2	...
Sudan	11.6	16.8	30.6	30.8d/	12.0	14.2	29.6	57.1d/
Syria	16.7	10.9	6.0	9.5	18.2	...	3.5	7.3
Turkey	6.2	50.0	28.1	48.8	7.7	47.0	29.6	57.1

a/ January-November.
b/ 1972-75.
c/ January-June.
d/ January-August.
e/ 1973-75.
f/ January-September

Source: ILO, Bulletin of Labour Statistics, 1983-85.

ANNEX TABLE 16. PER CAPUT DIETARY ENERGY SUPPLIES IN SELECTED DEVELOPED AND DEVELOPING COUNTRIES

COUNTRY	1969-71	1972-74	1975-77	1978-80	1981-83
	CALORIES PER CAPUT PER DAY				
ALGERIA	1826	2010	2252	2553	2652
ANGOLA	2031	2008	2019	2161	2028
BENIN	2057	2081	2052	2227	2081
BOTSWANA	2138	2119	2135	2132	2184
BURKINA FASO	2119	1999	2192	2163	2112
BURUNDI	2363	2203	2397	2375	2438
CAMEROON	2136	2208	2362	2220	2053
CAPE VERDE	2000	2146	2321	2519	2425
CENTRAL AFRICAN REPUBLIC	2159	2296	2191	2135	2115
CHAD	2118	1788	1788	1789	1541
COMOROS	2219	2193	2009	2008	2147
CONGO	2178	2255	2309	2415	2470
EGYPT	2507	2586	2740	2958	3179
ETHIOPIA	2042	1874	1847	2104	2099
GABON	1891	1869	2037	2163	2314
GAMBIA	2249	2151	2142	2166	2257
GHANA	2234	2234	2131	1899	1635
GUINEA	2040	2045	2064	2003	1951
GUINEA-BISSAU	1932	1821	1775	1748	1909
COTE D'IVOIRE	2389	2340	2372	2533	2631
KENYA	2240	2261	2247	2130	2023
LESOTHO	2025	1962	2171	2367	2320
LIBERIA	2209	2234	2329	2428	2399
LIBYA	2366	2970	3533	3661	3673
MADAGASCAR	2494	2476	2524	2501	2531
MALAWI	2261	2278	2293	2279	2246
MALI	1950	1727	1893	1808	1684
MAURITANIA	1970	1763	1861	1975	2111
MAURITIUS	2300	2427	2622	2714	2694
MOROCCO	2425	2546	2620	2688	2614
MOZAMBIQUE	2074	1961	1916	1817	1718
NAMIBIA	1960	1972	1929	1934	1920
NIGER	2004	1948	2039	2342	2378
NIGERIA	2197	2146	2180	2295	2195
REUNION	2497	2603	2707	2792	2803
RWANDA	1967	1832	2008	2021	2202
SAO TOME AND PRINCIPE	2149	2046	2058	2313	2281
SENEGAL	2445	2347	2326	2330	2245
SEYCHELLES	1991	2200	2153	2300	2295
SIERRA LEONE	1967	1940	1958	2049	2067
SOMALIA	2163	2091	2108	2007	2052
SOUTH AFRICA	2717	2839	2905	2908	2925
SUDAN	2114	2075	2202	2292	2246
SWAZILAND	2222	2340	2468	2481	2497
TANZANIA	1949	1977	2369	2404	2346
TOGO	2202	2133	2070	2181	2215
TUNISIA	2259	2566	2611	2770	2809
UGANDA	2445	2433	2238	2164	2294
ZAIRE	2218	2257	2247	2105	2136
ZAMBIA	2192	2251	2346	2224	2008
ZIMBABWE	2036	2206	2055	2051	2120
ANTIGUA AND BARBUDA	2293	2131	2020	2002	2019
BAHAMAS	2674	2455	2230	2398	2518
BARBADOS	2895	2959	2977	3071	3124
BELIZE	2490	2618	2684	2730	2656
BERMUDA	2934	2782	2559	2544	2540
CANADA	3368	3422	3404	3406	3413
COSTA RICA	2404	2494	2601	2576	2548
CUBA	2575	2654	2651	2773	2874
DOMINICA	2174	2129	2216	2187	2370
DOMINICAN REPUBLIC	2078	2194	2238	2285	2330
EL SALVADOR	1850	1926	2086	2127	2112
GRENADA	2347	2267	2145	2265	2292
GUADELOUPE	2315	2371	2414	2416	2554
GUATEMALA	2059	2063	2089	2080	2080
HAITI	1920	1933	1936	1903	1901
HONDURAS	2152	2098	2124	2177	2143
JAMAICA	2531	2626	2682	2603	2504
MARTINIQUE	2371	2446	2563	2673	2757
MEXICO	2641	2670	2727	2842	2962
NETHERLANDS ANTILLES	2448	2531	2679	2809	2839
NICARAGUA	2424	2367	2370	2277	2287
PANAMA	2349	2314	2315	2229	2306
ST CHRISTOPHER AND NEVIS	2145	2210	2245	2278	2190
SAINT LUCIA	2132	2138	2128	2279	2363
ST VINCENT GRENADINES	2250	2210	2207	2254	2338
TRINIDAD AND TOBAGO	2386	2441	2552	2830	3012
UNITED STATES	3493	3502	3528	3609	3636
ARGENTINA	3318	3180	3261	3262	3195
BOLIVIA	1971	1978	2033	2074	2061
BRAZIL	2472	2471	2513	2569	2564
CHILE	2697	2708	2579	2620	2642
COLOMBIA	2152	2266	2382	2462	2543
ECUADOR	1986	2009	2090	2098	2068
FRENCH GUIANA	2565	2515	2485	2676	2811
GUYANA	2292	2321	2384	2320	2334
PARAGUAY	2753	2724	2722	2817	2816

ANNEX TABLE 16. PER CAPUT DIETARY ENERGY SUPPLIES IN SELECTED DEVELOPED AND DEVELOPING COUNTRIES

COUNTRY	1969-71	1972-74	1975-77	1978-80	1981-83
	CALORIES PER CAPUT PER DAY				
PERU	2294	2254	2241	2176	2122
SURINAME	2337	2302	2345	2477	2476
URUGUAY	3002	2915	2879	2745	2695
VENEZUELA	2335	2257	2450	2581	2528
AFGHANISTAN	2210	2206	2227	2244	2296
BANGLADESH	2034	1851	1800	1840	1874
BRUNEI DARUSSALAM	2282	2375	2422	2429	2459
BURMA	2050	2063	2104	2247	2466
CHINA	2092	2183	2223	2392	2547
CYPRUS	3088	3118	3100	3279	3368
HONG KONG	2690	2703	2693	2738	2741
INDIA	1996	1951	1917	2065	2073
INDONESIA	1917	2018	2078	2265	2392
IRAN	2217	2469	2853	2807	3013
IRAQ	2257	2245	2409	2664	2877
ISRAEL	3009	3048	3078	2961	3060
JAPAN	2751	2820	2785	2838	2789
JORDAN	2616	2422	2373	2622	2921
KAMPUCHEA,DEMOCRATIC	2286	2154	1857	1817	1945
KOREA DPR	2501	2635	2823	3047	3024
KOREA REP	2528	2685	2776	2787	2794
KUWAIT	2778	2739	2912	3207	3331
LAOS	1989	1903	1796	1889	1945
LEBANON	2476	2591	2568	2880	2934
MACAU	2181	2192	2270	2396	2469
MALAYSIA	2417	2479	2492	2543	2528
MALDIVES	1745	1734	1870	1990	2007
MONGOLIA	2442	2499	2607	2750	2787
NEPAL	1956	1883	1885	1888	1992
PAKISTAN	2019	2025	2112	2151	2226
PHILIPPINES	2028	2066	2159	2364	2397
SAUDI ARABIA KINGDOM OF	1904	1956	2065	2782	3087
SINGAPORE	2559	2622	2630	2640	2646
SRI LANKA	2303	2091	2129	2274	2230
SYRIA	2360	2487	2501	2773	3095
THAILAND	2169	2194	2273	2324	2341
TURKEY	2829	2905	2992	3087	3113
UNITED ARAB EMIRATES	3130	3391	3648	3616	3519
VIET NAM	2179	2117	2038	2025	2136
YEMEN ARAB REPUBLIC	1841	1995	2165	2231	2259
YEMEN DEMOCRATIC	2092	1980	1907	2124	2262
ALBANIA	2541	2577	2800	2955	2911
AUSTRIA	3302	3338	3328	3410	3476
BELGIUM-LUXEMBOURG	3482	3509	3528	3587	3678
BULGARIA	3500	3483	3545	3594	3660
CZECHOSLOVAKIA	3429	3474	3445	3467	3552
DENMARK	3385	3396	3362	3538	3671
FAEROE ISLANDS	2700	2902	3148	3120	3079
FINLAND	3128	3157	3096	3065	3048
FRANCE	3391	3400	3428	3519	3523
GERMAN DEMOCRATIC REP.	3317	3408	3512	3612	3702
GERMANY, FED. REP. OF	3207	3217	3217	3360	3393
GREECE	3178	3396	3491	3554	3637
HUNGARY	3336	3375	3452	3498	3534
ICELAND	2955	3049	2958	3092	3108
IRELAND	3482	3531	3486	3575	3639
ITALY	3442	3549	3454	3594	3524
MALTA	3059	2910	2855	2782	2668
NETHERLANDS	3430	3474	3473	3563	3527
NORWAY	3083	3146	3137	3280	3234
POLAND	3335	3420	3481	3487	3288
PORTUGAL	3107	3100	3078	3135	3128
ROMANIA	3068	3199	3380	3395	3316
SPAIN	2870	3125	3302	3350	3289
SWEDEN	3038	3063	3160	3156	3169
SWITZERLAND	3492	3458	3389	3481	3494
UNITED KINGDOM	3356	3298	3226	3236	3217
USSR	3331	3326	3380	3368	3370
YUGOSLAVIA	3324	3379	3512	3536	3600
AUSTRALIA	3225	3157	3182	3055	3064
FIJI	2439	2591	2677	2871	2849
FRENCH POLYNESIA	2840	2762	2697	2861	2849
KIRIBATI	2170	2393	2460	2653	2685
NEW CALEDONIA	3040	2847	2757	2825	2797
NEW ZEALAND	3466	3491	3447	3422	3504
PAPUA NEW GUINEA	2047	2060	2020	2029	2032
SAMOA	2075	2093	2358	2514	2471
SOLOMON ISLANDS	2117	2019	2090	2080	2009
TONGA	2579	2893	3089	3175	3112
VANUATU	2568	2559	2382	2264	2180

ANNEX TABLE 17. ANNUAL AGRICULTURAL SHARES OF TOTAL OFFICIAL COMMITMENTS TO ALL SECTORS (BROAD DEFINITION), BY MULTILATERAL AND BILATERAL SOURCES, 1977-84

	1977	1978	1979	1980	1981	1982	1983a/	1984a/
	..... %							
Concessional and non-concessional commitments								
Multilateral agencies b/	36	39	36	38	36	35	35	29
World Bank c/	39	41	37	33	33	31	36	27
Regional development banks c/	35	31	33	45	44	43	27	30
OPEC multilateral c/	13	30	7	16	16	17	21	22
Bilateral sources	10	9	..	..	..	..	..	..
DAC/EEC	11	11	12	11	11	11	11	10
OPEC bilateral	6	3	..	..	..	..	..	..
All sources (multilateral + bilateral)	17	17	..	..	..	..	..	..
Concessional commitments only (ODA)								
Multilateral agencies b/	44	49	49	49	53	49	47	47
World Bank c/	54	52	52	45	58	43	51	48
Regional development banks c/	50	48	53	62	65	57	39	33
OPEC multilateral c/	11	29	7	15	14	30	26	46
Bilateral sources	14	13	16	13	14	16	14	13
DAC/EEC	16	17	18	16	18	17	17	15
OPEC bilateral	7	3	7	1	4	12	5	2
All sources (multilateral + bilateral)	18	19	21	19	21	22	20	18

a/ Preliminary.
b/ Including UNDP, CGIAR, FAO/TF, FAO/TCP (from 1977) and IFAD (from 1978).
c/ Excluding commitments to CGIAR.

Sources: FAO and OECD.

ANNEX TABLE 18. PERCENTAGE DISTRIBUTION OF OFFICIAL COMMITMENTS TO AGRICULTURE (BROAD DEFINITION), BY MULTILATERAL AND BILATERAL SOURCES, 1977-84

	1977	1978	1979	1980	1981	1982	1983a/	1984a/
	..... %							
Concessional and non-concessional commitments								
Multilateral agencies	57	58	52	59	58	59	63	57
World Bank b/	38	43	34	35	34	35	44	31
Regional development banks b/	14	10	12	15	17	15	11	18
OPEC multilateral b/	2	2	-	1	1	2	2	2
Other c/	3	3	6	8	6	7	6	6
Bilateral sources	43	42	48	41	42	41	37	43
DAC/EEC	38	40	44	40	40	35	35	44
OPEC bilateral	5	2	4	1	2	6	2	1
All sources (multilateral + bilateral)	100	100	100	100	100	100	100	100
Concessional commitments only (ODA)								
Multilateral agencies	36	41	37	45	43	40	41	40
World Bank b/	19	26	18	21	21	20	18	21
Regional development banks c/	11	8	11	12	12	7	11	7
OPEC multilateral b/	2	2	-	1	1	2	2	2
Other c/	4	5	8	11	9	11	10	10
Bilateral sources	64	59	63	55	57	60	59	60
DAC/EEC	56	56	59	53	54	51	56	60
OPEC bilateral	8	3	4	2	3	9	3	2
All sources (multilateral + bilateral)	100	100	100	100	100	100	100	100

a/ Preliminary.
b/ Excluding commitments to CGIAR.
c/ Including UNDP, CGIAR, FAO/TF, FAO/TCP (from 1977) and IFAD (from 1978).

Sources: FAO and OECD.

ANNEX TABLE 19. DAC COUNTRIES: BILATERAL ODA COMMITMENTS FROM INDIVIDUAL COUNTRIES AND PROPORTION TO AGRICULTURE (BROAD DEFINITION)

	Bilateral ODA to all sectors					Proportion of ODA to agriculture				
	1980	1980	1982	1983	1984a/	1980	1981	1982	1983	1984a/
	..... $ million					..... %				
Australia	522	590	545	536	649	8	14	11	5	10
Austria	140	265	291	183	72	47	10	1	2	1
Belgium	512	432	320	362	260	4	4	3	2	9
Canada	512	1 011	807	1 139	1 575	31	39	15	25	22
Denmark	260	225	282	260	288	37	44	51	22	38
Finland	112	111	123	96	171	15	19	11	24	7
France	4 766	4 431	4 358	4 380	3 893	6	8	8	11	8
Germany	4 617	3 467	2 713	2 271	2 809	16	13	18	15	14
Italy	138	481	641	882	903	24	6	17	20	20
Japan	3 369	3 437	3 622	3 483	3 968	16	24	18	17	19
Netherlands	1 592	1 066	934	901	902	24	27	22	22	22
New Zealand	54	52	47	40	41	24	33	30	15	15
Norway	247	262	309	288	353	28	26	25	17	35
Sweden	611	518	579	526	576	34	39	32	24	26
Switzerland	139	253	207	239	218	33	46	31	55	22
UK	1 459	1 000	1 112	927	981	7	8	8	12	14
USA	5 378	5 135	6 112	6 989	8 140	20	16	14	14	9
Total DAC countries	24 426	22 736	23 002	23 502	25 844	16	17	15	15	14

a/ Preliminary.

Source: OECD.

ANNEX TABLE 20. PERCENTAGE DISTRIBUTION OF OFFICIAL COMMITMENTS TO AGRICULTURE (EXCLUDING TECHNICAL ASSISTANCE GRANTS), BY PURPOSE 1977-84

	1977	1978	1979	1980	1981	1982	1983a/	1984a/
	.....				%			.....
Land and water development b/	25	26	18	25	17	22	20	21
Agricultural services	12	12	10	13	7	12	15	17
Supply of inputs	4	5	3	6	5	4	6	5
Crop production	5	8	7	7	6	8	6	8
Livestock	3	4	3	2	2	1	2	2
Fisheries c/	3	3	3	3	3	2	2	2
Research, extension, training d/	4	4	3	5	5	5	6	9
Forestry	2	2	3	2	2	3	2	3
Agriculture, unallocated	11	12	17	9	14	11	9	11
TOTAL NARROW DEFINITION	69	76	67	72	61	68	68	78
Rural development/infrastructure	16	15	16	19	22	23	21	13
Manufacturing of inputs e/	5	4	11	2	10	4	1	5
Agro-industries	9	5	6	7	5	4	7	3
Regional development	1	-	-	-	2	1	3	1
TOTAL BROAD DEFINITION	100	100	100	100	100	100	100	100

Note: This table now includes forestry in the narrow definition.

a/ Preliminary, including partial estimates.
b/ Including river development.
c/ Including inputs such as fishing trawlers, fishing gear.
d/ Including commitments to CGIAR.
e/ Mostly fertilizers.

Sources: FAO Computerized Data Bank on External Assistance to Agriculture.

ANNEX TABLE 21. DISTRIBUTION OF OFFICIAL COMMITMENTS TO AGRICULTURE, EXCLUDING TECHNICAL ASSISTANCE GRANTS (BROAD DEFINITION) FROM ALL SOURCES, BY REGION AND ECONOMIC GROUPS, 1977-84

	1977	1978	1979	1980	1981	1982	1983a/	1984a/
	..... %							
Concessional and non-concessional commitments								
Far East and Pacific	40	49	46	46	42	49	41	47
Africa	29	22	24	22	28	28	26	28
Latin America	24	21	22	24	23	18	24	18
Near East	7	8	8	8	7	5	9	7
Total 4 developing regions:	100	100	100	100	100	100	100	100
of which:								
Low-income food deficit countries b/	62	60	65	66	64	65	62	69
Least developed countries c/	18	13	18	19	19	19	21	17
Concessional commitments								
Far East and Pacific	43	53	55	50	48	46	48	53
Africa	33	26	23	26	32	39	31	34
Latin America	14	14	13	14	12	9	12	6
Near East	10	7	9	10	8	6	9	7
Total 4 developing regions	100	100	100	100	100	100	100	100
of which:								
Low-income food deficit countries b/	76	70	75	78	78	78	78	83
Least developed countries c/	28	21	24	27	28	30	36	27
Non-concessional commitments								
Far East and Pacific	34	41	24	37	31	53	33	38
Africa	23	17	27	12	20	11	19	17
Latin America	41	33	42	47	44	33	40	38
Near East	2	9	7	4	5	3	8	7
Total 4 developing regions	100	100	100	100	100	100	100	100
of which:								
Low-income food deficit countries b/	38	43	41	36	38	44	40	45
Least developed countries c/	1	1	3	1	2	1	1	1

a/ Preliminary, including partial estimates.
b/ 65 countries with per caput GNP of US$790 in 1984.
c/ 36 countries.

Sources: FAO computerized Data Bank on External Assistance to Agriculture.

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ISBN 92-5-102390-5
ISSN 0081-4359