

Qualitatively an important increase in ham imports can be noted during the last ten years. It has probably been encouraged by an increasing, per capita, of ham consumption and also by progressive specialization of the slaughtering, carcass cutting and meat processing sectors and may mean that French pork consumption is beginning to change.

French foreign trade in pork also shows conjunctural variations mainly due to seasonal production fluctuations.

The competitive power of the countries supplying France has been studied by comparing the different prices, where the advantage for the French market of Belgian and Dutch carcass exporters appeared.

Analysis of the E.E.C. foreign trade in pork

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Pork trade within the E.E.C. has materially increased between 1968 and 1977 on the one hand because of the accomplishment of the Common Market which abolished impediments to free trade and on the other hand because more or less important changes in production and consumption in the different countries.

Self-supply in E.E.C. with 6 countries, then E.E.C. with 9, slightly fluctuated around index of 100 for the last ten years. This fact however conceals important differences between the pork importing countries (FRG, France, Italy, U.K.), the structural deficit of which increased—except for the U.K. at the expense of a consumption decrease—and the exporting countries (Netherlands, Belgium) which have strengthened their position or maintained a considerable, even though diminished, surplus—as Ireland and Denmark.

E.E.C. import from other countries have followed fluctuations of the production: the maximum being reached in 1975, slack season in the E.E.C. production (self-supply: 99 p. 100). Since 1973, imports mainly come from Central Europe and Russia—with a preference for G.D.R.—because of their commercial relations with F.R.G.

E.E.C. export to other countries remain low for the products in the present survey (only 5 p. 100 of trade quantities inside E.E.C.). Denmark alone stands for 50 p. 100 of export.

Trade structures between different countries has also changed. Each exporting country has a privileged customer, more so in Denmark than in Holland or in Belgium, according to the specificity of the exported goods—here bacon.

Among importing countries, F.R.G., Italy and the United Kingdom have more specific supplier (Netherlands for F.R.G. and Italy and Denmark for the United Kingdom). France shares its import between Belgium and Holland. The F.G.R. Italy, United Kingdom and France import between 10 and 15 p. 100 of their supply from other countries.

Monetary fluctuations and pig production

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Since a few years, monetary fluctuations have been a very important factor in competition between E.E.C. pork producers.

The « monetary-agricultural policy » adopted to avoid distortions between the different countries proved to be a handicap for countries having depreciated currency and an advantage for countries with a high currency. Distortions due to the use of « green » exchange rates and to M.C.M. concern pork prices as well as production costs.