Statistics in focus

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Contents

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Preliminary Economic Accounts for Agriculture in twelve Candidate Countries [1] 1998-1999

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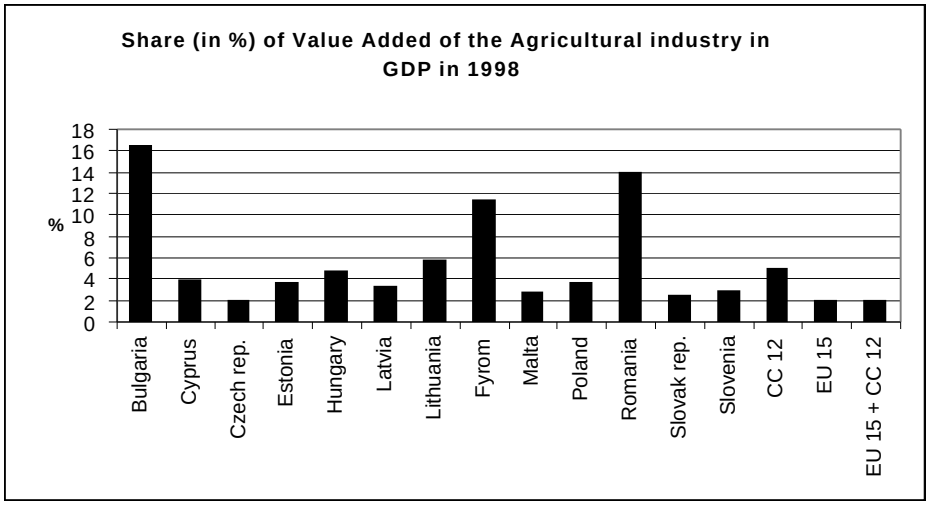


Agricultural industry of twelve Candidate Countries as a whole much smaller in economic terms than the fifteen EU Member States as a whole.

Preliminary Economic Accounts for Agriculture (EAA) for the Candidate Countries suggest that the combined Gross Value-Added of their agricultural industries was some 17.3 billion Euro in 1998, about 12% of that of the European Union figure of 144.5 billion Euro. In terms of Purchasing Power Standards (PPS), which facilitate comparisons between countries, this proportion would have been close to 36%.

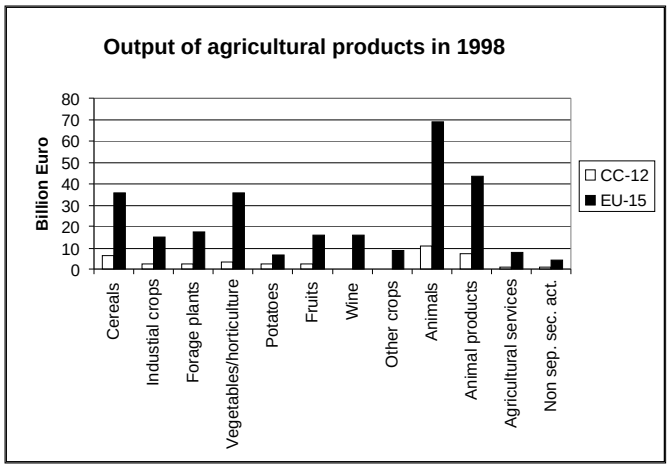
The proportion of GDP accounted for by agriculture in the Candidate Countries (CCs) was about 5% in 1998, compared with a little under 2% in the European Union. Generally, therefore, agriculture could be considered as relatively more important in the CCs than in the European Union. This relative importance is confirmed by the 1999 figures, that are 95% complete, although the proportion of GDP accounted for by the agricultural industry is estimated to have fallen back to 4.2%.

These averages for the Candidate Countries mask considerable differences between the proportions derived for individual countries. Agriculture is a greater contributor to GDP in Bulgaria (16%) and Romania (14%) at one end of the scale than in the Czech Republic (a little less than 2%) at the other (see Graph). Within the EU, the agricultural sector contributes little more than 2% of GDP in any Member State with the notable exceptions of Greece (7%) and Spain (4%).

The preliminary figures for 1998 suggest that the value of total agricultural output for the EU as a whole would have risen by about 14% with the inclusion of the CCs. Within this aggregate, the values of crop and animal output would have been 13% and 16% higher respectively, with the most eye-catching impacts being for potatoes (36%), pigs (29%) and poultry (21%). The value of intermediate consumption (of goods and services) would have been adjusted by a greater proportion (18%) than output under an enlarged EU in 1998, with the change in energy costs being particularly striking.

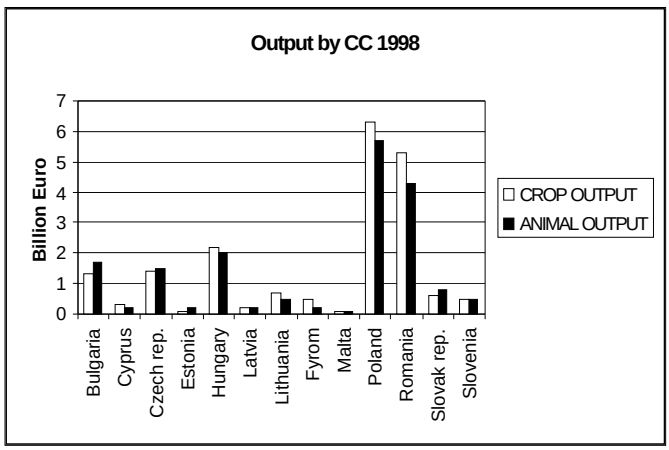
1) For readability reasons of this publications, the term "Candidate Countries" (CC) covers the initial twelve Candidate Countries (exclusive of Turkey being a candidate just before the end of the project). The Former Yugoslavian Republic of Macedonia however is included in the study.

Sharp decline in animal output values



The value of total agricultural output for the twelve CCs was a combined 38.8 billion Euro in 1998. This compares with a figure of 275.6 billion Euro for the European Union as a whole [2].

As within the EU, the structure of agriculture in Candidate Countries varies widely as do the size of economies. Among the Candidate Countries, Poland is by far the biggest producer of agricultural products, the value of output accounting for about 30% (some 12.5 billion Euro) of the CC total in 1998. This would have corresponded to the seventh largest producer nation, some way behind sixth-placed the Netherlands (18.8 billion Euro worth of agricultural output). In contrast, the values of agricultural output in Estonia, Latvia and Malta are similar or even less than that of Luxembourg.



Different structures are most clearly demonstrated on an agricultural commodity basis. Within the crop sector, for example, Romania is the principal potato producer in the CCs with Poland also being an important player. These two countries would be the fourth and fifth largest producers respectively. Similarly, Romania would also be sixth biggest fruit producer and Poland the sixth largest milk producer. Olive, tropical fruit and grape production, in contrast, are barely produced in the CCs. Within the animal sector, the 2.4 billion Euro worth of pig output would have placed Poland as the fourth largest pig producing nation in the Union, a little behind France (2.6 billion Euro), but ahead of Denmark and the Netherlands.

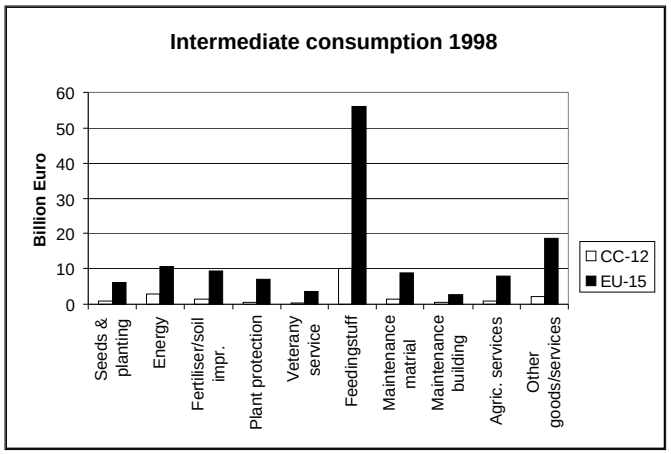
There is one particular feature of agricultural output that sets the Candidate Countries apart from the Member States ; this concerns the much greater incidence of subsistence farming. Consumption of own-produced goods, when for subsistence rather than leisure purposes, is measured within the EAA [3]. For some commodities, especially potatoes, fruit and vegetables, the output generated by subsistence farming can make a significant contribution to the value of total agricultural output in the CCs ; it is one of the factors that helps to explain the greater contribution of agriculture to GDP.

For the eleven Candidate Countries for which 1999 estimates are available it can be seen that for all but Cyprus, there was a sharp decline in the nominal-terms value of total agricultural output compared to 1998 ; among other CCs, Poland (-13%), Czech Republic (-14%), Romania (-20%) and Lithuania (-30%). An important factor appears to have been the imbalances on animal markets in particular, made all the more unstable by the sharp downturn in the Russian export market, following the devaluation of the rouble. The rates of decline in the nominal value of total animal output were particularly steep in Romania (-38%) and Lithuania (-44%).

2) In 1999, the corresponding preliminary figures for the CCs are 34.0 billion Euro compared to the 274 billion of the EU.

3) Subsistence farmers are also deemed to be part of the agricultural community at which the Common Agricultural Policy (CAP) is aimed; those carrying out this activity depend economically on the resulting generated income-in-kind (to varying degrees).

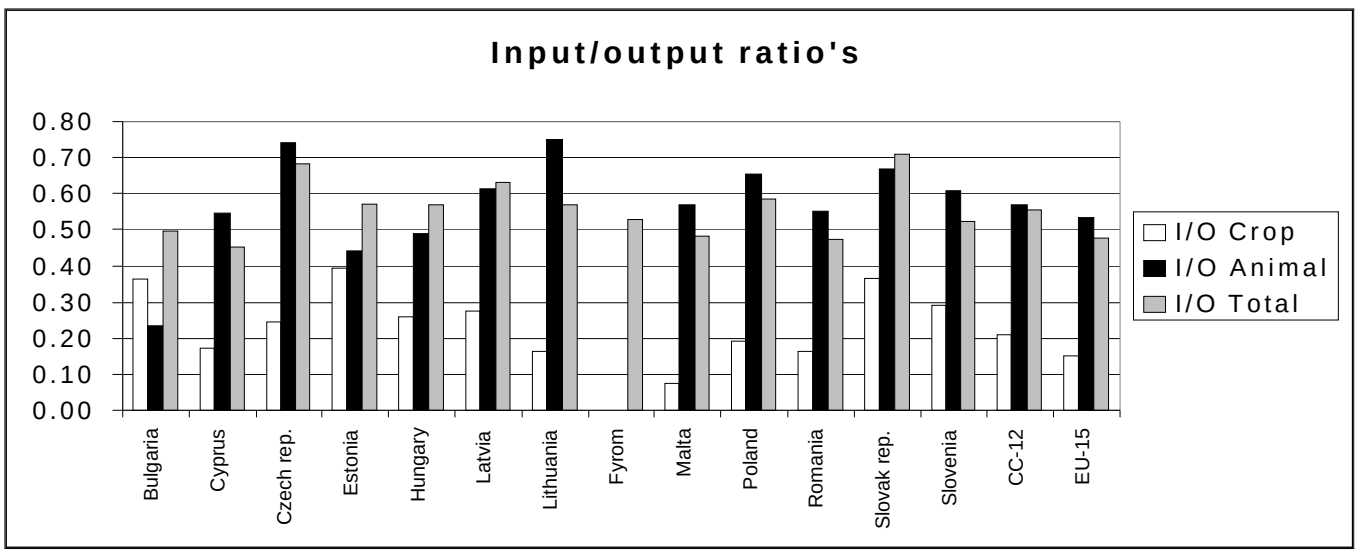
Intermediate consumption costs relatively high compared to the EU



The goods and services used by the agricultural industries of Candidate Countries are no different to those used in the European Union, but some items do account for a relatively greater or smaller proportion of total intermediate costs ; energy costs in the CCs account for an average 14% of all intermediate consumption costs (compared with 8% in the EU), feedingstuffs 46% (compared to 43%) and services 14% (compared to 23%). In some of the Candidate Countries these shares of total costs are even higher ; energy costs in Bulgaria and Estonia account for 27% and 22% respectively of total costs, and the costs of animal feedingstuffs are more than the half of all costs in five of the countries.

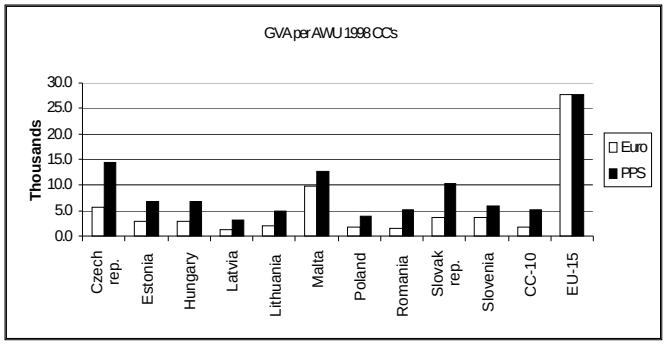
As a share of the value of total agricultural output, average intermediate consumption costs in the CCs were significantly more than in the EU (55% compared to 48%). In other terms, every Euro of intermediate input produced less by way of output in the CCs than in the EU. To a considerable degree such comparisons, particularly on a country-country basis, depend on the structure of agriculture, topography, climate and geology. Just as in the EU with the contrasts between Spain, Italy and Greece on the one hand and Finland and Sweden on the other (the ratio being above 60%), so there are differences in the Candidate Countries (Malta with a ratio of 39% and the Slovak Republic with 71%).

Analyses of simple input – output ratios for animal and crop production, where intermediate consumption costs can be assigned to one sector or the other[4)], indicate that like the EU animal output generates less value added than crop output. Indeed, in Lithuania, the Czech Republic and the Slovak republic, animal output generates very little value added ; animal feedingstuffs and veterinary costs were the equivalent of almost between two-thirds (Slovenia) to three quarters (Lithuania, Czech rep.) of the value of animal output in 1998 and it should be noted that these shares do not take into account other costs like energy, maintenance of materials and buildings, as well as other goods and services that in such simple analyses have not been assigned to either of the two sectors (animal or crop). In comparison, the value added for the crop sectors in the CCs is greater than for animal output. Those CCs where the primary costs take the largest share of the value of crop output are Estonia (39%), Bulgaria (36%) and the Slovak republic (37%). Again though, these ratios do not take into account those other non-allocated intermediate consumption costs.



4) The costs of animal feedingstuffs and veterinary services have been assigned as animal output costs and fertilisers and soil improvers, seeds and seedlings, plant protection products and pharmaceutical products, services to crop products.

Average agricultural income in the CCs much lower than in the EU and even negative in some countries



Gross Value Added (at basic prices), which is derived from subtracting intermediate consumption costs from the value of agricultural output, is the main indicator of economic growth over time, when expressed in volume terms. Unfortunately, constant price data are unavailable for the time being.

Nevertheless, using the implicit GDP deflator, it is possible to make a comparison of the deflated 1999 data with that of 1998. In all but one Candidate Country, there was a strong decline in real-terms (deflated) gross value added, ranging from a decline of 10% (Romania) to 25% (Lithuania). Only in Cyprus was there an increase in Gross Value Added (+2.5%). These figures compare with an average decline of 2.5% for the EU as a whole. A similar picture of developments is obtained when looking at the net value added component of income (i.e. after the deduction of the depreciation costs).

As in the EU, the remuneration (« compensation ») of employees accounts for almost a quarter of net value added (at basic prices). However, it is worth underlining that these employees are different in nature to those in the EU, in large part being members of large co-operatives rather than hired workers on family farms.

Net entrepreneurial income of the agricultural industry is derived by balancing net value added at basic prices with the compensation of employees, other subsidies and taxes on production and interest and rents paid and received. Figures for the two year's worth of account available indicate sharp contrasts between the Candidate Countries ; entrepreneurial income for the agricultural industries of the Czech republic particularly, but also just Slovakia, is actually negative, compared to relatively large positive income in Romania, Poland and Bulgaria. A common feature among the CCs, however, was the decline in net entrepreneurial income between 1998 and 1999 (an estimated 17% in PPS terms).

For income analyses, these trends in income are compared with the trends in agricultural labour input, so that indicative incomes per full-time labour equivalent can be used in a general way for appraising the health of the agricultural industry and the impact of agricultural policy. In the absence of fully detailed accounts for all the Candidate Countries, Gross Value Added per unit of full-time labour equivalent (measured in Annual Work Units) is used as the most basic form of income. They indicate a considerable disparity in average agricultural income levels ; an average GVA/AWU income figure of 10,100 Euro for Malta in 1998 being the highest level in the CCs, compared with an average EU figure of 27,700 Euro. Corrected for different costs of living (and therefore measured in Purchasing Power Standard terms) much higher levels are reached for all countries with now the Czech republic at the top with a figure of 14,600 PPS.

More detailed analyses will be available soon when more comprehensive data become available.

Ø ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Technical notes:

In order to facilitate a comprehensive comparison between the EU-15 and the Candidate Countries in this publication, all figures were converted into a common currency: the Euro.

The data measured in real-terms were obtained by deflating the corresponding nominal data with the implicit price index of gross domestic products (GDP).

Purchasing Power Parities (PPP's) were obtained using the price ratios between the different countries for a basket of goods and services, which are both comparable and representative. The individual price ratios are aggregated, according to well-defined criteria, up to the GDP global parity level. Eurostat, the Statistical Office of the European Communities, has calculated purchasing power parities for the 15 Member States as well as for most of the Candidate Countries. For cross-country comparison, the Purchasing Power Standard (PPS) is introduced. It is a fictitious unit (currency) based on the principles of the PPP. In this PPS for each country, inflation and exchange rates are already taken into account as well as a correction factor for the cost of living.

An Annual Work Unit (AWU) corresponds to a unit of full-time labour equivalent. The considerable amount of part-time work in agriculture makes the use of this unit more objective for income analyses than the use of figures on numbers of persons working in agriculture.

Background information

In the framework of the Phare multi country statistical programme, Eurostat launched a Pilot Project in the domain of Agri-Monetary Statistics (AMS). The main aim of this programme was to give technical and financial support to the Phare Candidate Countries in preparing their statistics to a level of quality and sustainability for accession. The AMS Pilot Project covered four modules, of which the Economic Accounts for Agriculture (EAA) comprised one part. Apart from the ten Phare Candidate Countries, Cyprus, Malta and the FYROM also took the opportunity to participate. With its own staff fully engaged with work in the Member States, the field work for this Pilot Project was carried out by an external enterprise partner (for the EAA this being ASA-Bonn).

The Economic Accounts for Agriculture (EAA) are a satellite system of the National Accounts (NA) which, whilst ensuring methodological consistency, have been adapted to the particular nature of the agriculture. The EAA are based on a sequence of four inter-related accounts: the Production Account (output, intermediate consumption, value added), the Generation of Income Account (compensation of employees, taxes/subsidies on production, operating surplus), the Entrepreneurial Income Account (property income, rent, interest) and the Capital Account (gross fixed capital formation, changes in inventories, capital transfers). It applies the same rules as the NA concerning valuation at basic prices (although hardly any subsidy/tax linked to products exists in CC's which means that no distinction is made between basic and producer prices), current and constant price time series, nominal- and real-terms values and the accruals principle.

The NA system comprises more accounts but this is not feasible for the Agriculture industry. The main deviations of the EAA vis-à-vis the NA concern levels of detail and a slightly different interpretation of what should be headed under the agricultural industry; intra-unit consumption, the recording of wine and olive oil production and the valuation of seasonal output are examples of this.

Against a background of limited human resources and a restricted timetable (a maximum of 18 months), Eurostat placed priority on establishing a balanced and compliant EAA system that could generate current price accounts for one benchmark year (1998), rather than also forcing through the establishment of longer time series from 1995 that would enable constant price calculations (although these will subsequently be pursued). All the Candidate Countries succeeded in supplying 1998 data, even though there were particular problems for finding adequate data sources for Gross Fixed Capital Formation within the Capital Account. Only in Hungary has it not been possible to calculate the consumption of fixed capital, the same country for which it has not yet been possible to provide the Generation of Income Account. This explains why a complete comparison of the average entrepreneurial income in the CCs compared with that in the EU-15 was not possible.

In addition to the benchmark 1998 data, eleven Candidate Countries provided provisional 1999 accounts, that although sometimes less detailed, nevertheless provided some possibilities for year on year comparison.

One of the other four Pilot Projects was aimed at establishing Agricultural Labour Input figures. These data are used primarily for comparing trends in the volume of agricultural labour with the trends in agricultural income (derived from the EAA) but also in productivity analyses. The absence of complete figures from this other Project, where an absence of suitable data sources has sometimes been acute, means that it has not yet been possible to derive Income Indicators for all the Candidate Countries.

The fact that it has only been partially possible to deflate the nominal euro values and convert them into PPS, reflects the fact that this was not the main aim of the Pilot Project. Furthermore, it is necessary to underline that the remaining gaps in figures do not affect the key messages that this analysis sends out.

Further reading

For further information on the concepts and methods of the EAA please refer to the Manual of Economic Accounts for Agriculture and Forestry, EAA/EAF 97 (Rev.1.1), ISBN: 92-828-2996-0

Table 1. 1998 Current prices nominal values, million Euro

	CROP OUTPUT	ANIMAL OUTPUT	AGRIC. SERV. OUTPUT	NON-AGRIC. SEC. ACT.	OUTPUT AGRIC. IND.	TOT. INT. CONS.	GROSS VALUE ADDED	FIXED CAP. CONS.	NET VALUE ADDED	COMP. OF EMPL.	ENTREPR. INCOME	GDP MARKET PRICES
Bulgaria	1315	1658	193	389	3555	1761	1794	149	1645	162	1485	10958
Cyprus	312	239	:	27	579	262	316	16	301	275	19	8104
Czech Republic	1366	1519	48	:	2933	1999	935	307	627	622	-112	50368
Estonia	125	233	26	24	408	233	175	:	:	:	:	4655
Hungary	2291	2075	159	:	4525	2568	1956	:	:	:	:	41931
Latvia	214	247	10	3	474	299	175	42	132	35	91	5437
Lithuania	701	508	15	77	1301	741	560	94	466	102	344	9587
Malta	67	67	:	1	135	65	70	4	66	8	56	3132
Poland	6292	5654	245	288	12479	7301	5178	1131	4047	688	2919	141292
Romania	5319	4293	171	:	9784	4631	5152	1151	4001	483	3475	36882
Slovakia	629	815	71	132	1647	1168	479	229	250	373	-19	18987
Slovenia	454	486	34	90	1064	555	509	230	280	58	240	17497
CC-12	19085	17794	972	1031	38884	21583	17299	:	:	:	:	348829
Fyrom	499	210	13	29	751	396	356	32	323	40	284	3125
EU-15	151570	111802	7935	4283	275591	131099	144492	35066	109426	25096	74074	7616891

1998 in prices of 1997, million Euro

CC-12	15790	14862	819	910	32384	18199	14184	:	:	:	:
EU-15	148890	109826	7795	4208	270718	128781	141937	34446	107491	24653	72764

1998 Levels in PPS

CC-12							47165		:	:	:
EU-15							144492		109426	25096	74074

Table 2. 1999 Current prices nominal values, million Euro

	CROP OUTPUT	ANIMAL OUTPUT	AGRIC. SERV. OUTPUT	NON-AGRIC. SEC. ACT.	OUTPUT AGRIC. IND.	TOT. INT. CONS.	GROSS VALUE ADDED	FIXED CAP. CONS.	NET VALUE ADDED	COMP. OF EMPL.	ENTREPR. INCOME	GDP MARKET PRICES
Bulgaria	1400	1344	195	420	3359	1706	1654	92	1562	148	1412	11645
Cyprus	308	240	:	36	584	257	327	17	310	285	19	8539
Czech Republic	1172	1319	31	:	2522	1800	722	326	396	569	-261	49693
Estonia	111	178	26	24	340	190	150	:	:	:	:	4812
Hungary	2296	1922	177	:	4395	2638	1756	:	:	:	:	45245
Latvia	206	198	11	28	443	281	162	44	117	27	81	6247
Lithuania	559	286	12	66	923	464	458	:	:	:	:	9978
Malta	69	68	:	1	138	66	71	4	67	8	57	3398
Poland	5494	4899	258	231	10882	6624	4258	1156	3102	691	1997	145612
Romania	4976	2687	117	:	7780	3560	4220	1227	2992	434	2552	31920
Slovakia	569	661	58	91	1379	988	392	187	205	308	-2	18479
CC-11	17160	13802	885	897	32745	18574	14170	:	:	:	:	335568
EU-15	151944	109186	8247	4645	274022	129975	144047	35626	108421	25466	73697	7998201

1999 in prices of 1998, million Euro

CC-11	14852	12324	805	857	28838	16592	12247	:	:	:	:
EU-15	148383	106627	8053	4536	267599	126929	140670	34791	105880	24869	71970

Volume change 1999 (1998=100)

CC-11	94	81	94	93	88	89	86	:	:	:	:
EU-15	98	95	101	106	97	97	97	99	97	99	97

1999 Levels in PPS

CC-11							41104		:	:	:
EU-15							144047		108421	25466	73697

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