

GENERAL AGREEMENT ON TARIFFS AND TRADE

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Group on Cereals

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The following paper has been received from the delegation of Switzerland in connexion with item (ii) of document TN.64/Ce/W/1.

The enclosed tables 1 to 6 on production, exports/imports and consumption give rise to the following comments:

Cultivated area

The cultivated area has been slightly expanded between 1950 and 1962/63. Since, it is somewhat decreasing. This tendency has continued in the 1964/65 crop year. For the seeding in 1965/66, the prospects are not very favourable at present owing to the delay of this year's grain crop.

Within the grain acreage, certain alterations have arisen. For bread grain, rye has somewhat increased on account of wheat, and for feed grain, barley and maize on account of oats. The latter mentioned tendency may also continue in future, whilst narrow limits exist for the replacement of wheat by rye.

The development of the total cultivated area during the next years may hardly expect a considerable expansion. The need of agricultural land for buildings of all kind, including roads, diminishes the agricultural area by at least 1,500 hectares annually, whereof a greater part represents land which is suitable for cereal growing. The increase of the cultivated area in the years between 1950 and 1960 was in particular the result of the mechanization possibilities in cereal growing. However, they are now gradually exhausted. We do expect that the total cultivated area in the following five years will remain within the range of 160,000 and 170,000 hectares.

Yields

The yields per hectare have been much increased in the average during the last fifteen years. Strongly affected by this development were especially wheat and maize, and somewhat less rye and barley. The rise in yield will further continue thanks to the breeding of varieties more resistant and giving larger yields, and to the improvement of the agricultural methods. However, we expect that this growth will rather be slower considering that the yields per hectare have already reached a high level.

Consumption

As in all industrialized countries, the development shows a decline in the per caput consumption of bread grain. We suppose it will continue during the coming years but certainly somewhat slower. In return, the total consumption of bread grain has slightly advanced. The rapid growth of population has therefore led to the result that in regard to the total consumption the decline in the per caput consumption has been more than compensated. This considerable growth of the population has taken place during the last years in consequence of a rapid rise in the number of foreign workers in Switzerland. For the next years, a considerable slower rise is expected, even perhaps a retrogression. On the other hand, the normal growth of the permanently present population remains, amounting to ca.1 per cent a year. For the following five years, we estimate that the total quantities for the consumption of bread grain will be about the same.

The consumption of feed grains has considerably increased, in particular during the past three years. This is due to an enlarged use of concentrated feeding stuffs for livestock and partly to a rise in the number of small and large livestock. We suppose that the consumption during the next years may be somewhat higher or at least remain on the actual level. However, greater changes can occur in connexion with the sensibility of conjuncture in regard to the use of animal food, in particular beef and veal.

We estimate that the total consumption of all grain for the coming five years will be on about the same level as the average of the last five years, possibly somewhat higher. On the other hand, it is most unlikely that feed grains may show an equal increase of consumption as it was the case from 1960 to 1963/64.

Imports

The grain imports have considerably increased during the reporting period and mainly depend on the further development of the consumption and production. For the latter, we have already pointed to the relative stability of the cultivated areas and the high yields per hectare, which however are subject to great changes. The hitherto realized increases in yields are not sufficient to cover the rise in consumption so that the imports have considerably increased. The further development of the consumption has to be estimated with precaution, and this also applies to the imports.

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION

Switzerland

1,000 metric tons

Table 1: Wheat

| Crop year | Production | | Change in stocks | Foreign trade | | Available supply | Utilization of available supply | | | | Kgs. per caput in terms of flour | | | |
|-----------|-------------|---|------------------|---------------|---------------|------------------|---------------------------------|----------|------------------|---------|----------------------------------|-------|-----|------|
| | Area hectar | Yield Winter Spring Quintals per. hectar. 1000mt. | | Gross exports | Gross imports | | Animal feed | Seed use | Industrial Waste | Food | | | | |
| | | | | | | | | | | (gross) | | (net) | | |
| 1950/55 | 88,944 | 21.7 | 251 | -13 | 389 | 59.5 | 653 | 80 | 14 | 6 | 11 | 542 | 431 | 88.5 |
| 1955/60 | 98,313 | 25.3 | 286 | -7 | 382 | 56.8 | 672 | 98 | 20 | 6 | 11 | 537 | 421 | 81.0 |
| 1960/61 | 104,651 | 26.7 | 362 | -21 | 309 | 45.0 | 686 | 91 | 22 | 6 | 11 | 556 | 423 | 77.5 |
| 1961/62 | 111,280 | 26.1 | 296 | +4 | 433 | 60.3 | 718 | 55 | 22 | 7 | 9 | 625 | 476 | 84.6 |
| 1962/63 | 103,500 | 35.0 | 408 | +72 | 393 | 54.4 | 722 | 137 | 21 | 6 | 13 | 545 | 415 | 72.2 |
| 1963/64 | 101,090 | 27.7 | 287 | -88 | 328 | 47.2 | 695 | 85 | 20 | 6 | 9 | 575 | 437 | 74.5 |

* Percentage gross imports of available supply.

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION

Switzerland

1,000 metric tons

Table 2: Rye

| Crop year | Production | | Change in stocks | Foreign trade | | Avail-able supply | Utilization of available supply | | | | Kgs. per caput in terms of flour | | | | | |
|-----------|---------------------|----------------|------------------|---------------|-----------------|-------------------|---------------------------------|----------|-----------------|-------|----------------------------------|--------|--------|---------|-------|-----|
| | Area hectar | Yield | | Gross exports | Gross imports * | | Animal feed | Seed use | Indus-trial use | Waste | | Food | | | | |
| | | | | | | | | | | | | Winter | Spring | (gross) | (net) | |
| | Quintals per hectar | total 1000 mt. | | % | | | | | | | | | | | | |
| 1950/55 | 15,329 | 26.7 | 21.0 | 40 | + 3 | --- | 6 | 13.9 | 43 | 11 | 3 | 1 | 1 | 27 | 22 | 4.5 |
| 1955/60 | 12,021 | 30.6 | 22.7 | 37 | - 1 | --- | 7 | 15.5 | 45 | 12 | 2 | 1 | 1 | 29 | 23 | 4.4 |
| 1960/61 | 14,341 | 33.0 | 21.7 | 47 | - 6 | --- | 15 | 22.0 | 68 | 30 | 2 | 1 | 1 | 34 | 26 | 4.7 |
| 1961/62 | 10,860 | 31.4 | 25.4 | 38 | - 2 | --- | 2 | 4.7 | 42 | 10 | 2 | --- | 1 | 29 | 22 | 3.9 |
| 1962/63 | 16,300 | 40.0 | 35.0 | 60 | +25 | --- | 2 | 2.7 | 37 | 3 | 3 | 1 | 2 | 28 | 22 | 3.8 |
| 1963/64 | 17,320 | 30.6 | 24.4 | 53 | -19 | --- | 2 | 2.7 | 74 | 22 | 3 | 1 | 1 | 47 | 36 | 6.1 |

* Percentage gross imports of available supply.

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION

Switzerland

1,000 metric tons

Table 3: Barley

| Crop year | Production | | Change in stocks | Foreign trade | | Avail-able supply | Utilization of available supply | | | | Kgs. per caput in terms of flour | | | | | |
|-----------|-------------|-------|------------------|---------------|----------------|-------------------|---------------------------------|----------|----------------|-------|----------------------------------|---------------|---|----|----|-----|
| | Area hectar | Yield | | Gross exports | Gross imports* | | Animal feed | Seed use | Industrial use | Waste | | Food | | | | |
| | | | | | | | | | | | | (gross) (net) | | | | |
| 1950/55 | 21,649 | 27.4 | 26.4 | 56 | -11 | --- | 156 | 69.9 | 223 | 196 | 4 | 7 | 3 | 13 | 6 | 1.2 |
| 1955/60 | 25,514 | 29.8 | 29.2 | 75 | +9 | --- | 230 | 77.7 | 296 | 258 | 5 | 18 | 3 | 12 | 7 | 1.3 |
| 1960/61 | 25,646 | 30.3 | 29.1 | 76 | -5 | --- | 296 | 78.5 | 377 | 284 | 5 | 64 | 3 | 21 | 17 | 3.1 |
| 1961/62 | 29,310 | 31.1 | 31.6 | 92 | -17 | --- | 218 | 66.6 | 327 | 228 | 6 | 74 | 3 | 16 | 11 | 2.0 |
| 1962/63 | 35,250 | 36.0 | 35.0 | 125 | +30 | --- | 398 | 80.7 | 493 | 378 | 8 | 83 | 4 | 20 | 15 | 2.6 |
| 1963/64 | 32,020 | 29.6 | 29.7 | 95 | -15 | --- | 309 | 73.7 | 419 | 305 | 5 | 88 | 3 | 18 | 14 | 2.4 |

* Percentage gross imports of available supply.

Switzerland

Table 4: Oats

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION

1,000 metric tons

| Crop year | Production | | Change in stocks | Foreign trade | | Available supply | Utilization of available supply | | | | | | |
|-----------|----------------|-------------------------------|------------------|------------------|------------------|------------------|---------------------------------|-------------|-------|-----------------------|---|----|-----|
| | Area hectar | Yield Quintals p.hectar | | Gross exports | Gross imports | | Animal feed | Seed use | Waste | Food (gross) (net) | Kgs. per caput in terms of flour | | |
| | | | | | | | | | | | | % | |
| 1950/55 | 23,846 | 28.5 | 66 | - 14 | --- | 118 | 59.5 | 198 | 5 | --- | 5 | 18 | 3.7 |
| 1955/60 | 19,333 | 29.6 | 57 | + 3 | --- | 124 | 69.6 | 178 | 5 | --- | 3 | 14 | 2.7 |
| 1960/61 | 14,190 | 30.9 | 44 | + 15 | --- | 156 | 84.3 | 185 | 5 | --- | 1 | 11 | 2.0 |
| 1961/62 | 15,086 | 31.3 | 47 | - 3 | --- | 102 | 67.1 | 152 | 6 | --- | 1 | 9 | 1.6 |
| 1962/63 | 14,387 | 34.2 | 49 | - 12 | 1 | 118 | 66.2 | 178 | 6 | --- | 2 | 7 | 1.2 |
| 1963/64 | 12,210 | 28.7 | 35 | + 20 | 1 | 168 | 92.3 | 182 | 5 | --- | 1 | 7 | 1.2 |

*Percentage gross imports of available supply.

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION

Switzerland

Table 5: Maize

1,000 metric tons

| Crop year | Production | | Change in Stocks | Foreign trade | | Available supply | Utilization of available supply | | | | Kgs. per caput in terms of flour | | | | | |
|-----------|-------------|-------------------------|------------------|---------------|---------------|------------------|---------------------------------|-------------|----------|------------------|----------------------------------|--------------------|------------|----|----|-----|
| | Area hectar | Yield Quintals p.hectar | | Gross exports | Gross imports | | % | Animal feed | Seed use | Industrial waste | | Food (gross) (net) | | | | |
| | | | | | | | | | | | | | 1,000 m.t. | | | |
| 1950/55 | 1,188 | 35.4 | 4 | - | 5 | --- | 80 | 89.8 | 89 | 64 | 1 | --- | 1 | 23 | 12 | 2.5 |
| 1955/60 | 918 | 35.1 | 4 | + | 1 | --- | 73 | 94.7 | 76 | 58 | 1 | --- | --- | 17 | 9 | 1.7 |
| 1960/61 | 1,092 | 32.6 | 4 | - | 3 | --- | 80 | 91.9 | 87 | 72 | --- | --- | --- | 15 | 7 | 1.3 |
| 1961/62 | 1,776 | 47.0 | 9 | --- | --- | --- | 96 | 91.4 | 105 | 90 | 1 | --- | --- | 14 | 7 | 1.2 |
| 1962/63 | 2,829 | 45.4 | 13 | - | 2 | --- | 142 | 90.4 | 157 | 141 | 1 | --- | --- | 15 | 7 | 1.2 |
| 1963/64 | 2,610 | 48.8 | 13 | + | 5 | --- | 162 | 95.2 | 170 | 155 | 1 | --- | --- | 14 | 7 | 1.2 |

*Percentage gross imports of available supply.

PRODUCTION, EXPORTS/IMPORTS AND CONSUMPTION Switzerland

Table 6: Cereals total

| Crop year | Production | | Change in stocks | Foreign trade | | Available supply | Utilization of available supply | | | | |
|-----------|-------------|----------------------|------------------|---------------|---------------|------------------|---------------------------------|-------------|----------|-------------------------------|-----|
| | Area hectar | Thousand metric tons | | Gross Exports | Gross Imports | | %* | Animal feed | Seed use | Industrial Waste Food (gross) | |
| 1950/55 | 150,956 | 417 | - 40 | --- | 749 | 62.1 | 502 | 27 | 14 | 21 | 642 |
| 1955/60 | 156,099 | 459 | + 5 | 3 | 816 | 64.4 | 569 | 33 | 25 | 18 | 622 |
| 1960/61 | 159,920 | 533 | - 20 | 6 | 856 | 61.0 | 636 | 34 | 71 | 16 | 646 |
| 1961/62 | 168,312 | 482 | - 18 | 7 | 851 | 63.3 | 514 | 37 | 81 | 14 | 698 |
| 1962/63 | 172,266 | 655 | +11 | 8 | 1,053 | 66.4 | 816 | 39 | 90 | 21 | 621 |
| 1963/64 | 165,250 | 483 | - 97 | 9 | 969 | 62.9 | 730 | 34 | 95 | 14 | 667 |

*Percentage gross imports of available supply.