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1 General review

1.1 General overview of agricultural and national economy developments

Slovenia's economic trends were favourable in 2004. The real GDP growth (4.2%) was the highest over the last five years. It was driven by enhanced foreign demand (a 12.5% rise in total exports) along with further relatively high growth in domestic consumption (4.6%). Inflation further dropped, first time to below 4%. For the first time in two years, employment picked up and the number of unemployed declined. The deficit on the current account of the balance of payments widened compared to 2003, largely as a consequence of deteriorated terms of trade and a rise in oil prices, but still it remained below 1% of GDP.

According to the latest (revised) national accounts data, agriculture together with hunting and forestry contributed 2.2% to gross domestic product, and 10.5% to total employment in 2004. Both shares have been narrowing, as well as the share of agro-food industry in total trade in goods. Its proportion in exports dropped to 2.8%, and its share in imports stood at 6.3% in 2004.

Since 2000, the gross agricultural output has been subject to strong oscillations, largely owing to very changeable weather conditions. 2004 was a relatively favourable year for agricultural production. The gross agricultural output was the highest so far, up by 16% compared to 2003, which was, however, a year severely struck by drought and therefore very unfavourable. The crop production soared by 38%, whilst the livestock production was down by 2% compared to the year before.

1.2 Overview of agricultural and rural sector development

1.2.1 Production

Slovenia has rather unfavourable natural conditions for agriculture. Around $\frac{3}{4}$ of agricultural land lies in the less-favoured areas, and permanent grasslands prevail in the structure of usable agricultural area (in 2004: 59%). The crop production contributes around 50% to total agricultural output. Main arable crops are cereals, in particular grain maize and wheat, green fodder, potatoes and sugar beet, in addition to grapes/wine and fruit production. Thanks to favourable weather conditions, the yields of most of crops were significantly higher in 2004 than in 2003, in some crops even the record high. Thus, total crop production increased considerably.

The volume of livestock production, having recorded a constantly upward trend since 1997, declined slightly in 2004 for the second year in a row. The downward trend was more marked only in egg production, whilst the production of beef, pig meat and poultry remained within the margins of the usual annual oscillations. Milk production – the leading sub-sector in Slovenia's agriculture – has been undergoing an intensive concentration and specialisation process recently, resulting in a decreased number of breeders, increased average size of herd and a rise in milk yields.

1.2.2 Prices

The farmgate prices of agricultural products have declined since 1997. In 2004 they dropped by 4.6% in real terms in comparison with 2003. They were down the most markedly in crop production (-12.7%), where prices had been rather high the year before on account of a poor harvest. Prices of potatoes, vegetables and fruit dropped the most. Also prices of cereals were lower, owing to a drop in these prices on the European market (a record harvest). Only the price of sugar beet rose, due to the minimum price of sugar beet under the EU sugar CMO being more than 20% higher than that under the national market organisation in place in 2003. A real drop in prices of livestock and livestock products was negligible (-0.4%). Prices of lambs and milk dropped the most, prices of pigs and cattle remained close to the 2003 level, whilst the prices of poultry and eggs rose.

1.2.3 Agricultural Trade

Total trade in agro-food products rose by 6% in 2004. Only imports were up (+15%), whilst the exports were much lower than the year before (-11%). The deficit stood at EUR -531 million, which was the highest so far. The 2004 imports rose in virtually all groups of commodities. The main reason for the decline in exports was smaller exports of beverages (-36%) and meat products (-2%) – the main export commodities of Slovenian agro-food sector apart from milk products. Exports of milk products again increased (+6%).

In 2004, trade was somewhat reorientated from other countries to EU Member States, but it resulted in no major structural change. Countries of the former Yugoslavia are still the main destination for exports (58% in 2004; 60% in 2003) with the EU-25 next (33% in 2004; 29% in 2003). EU-25 countries share of total imports into Slovenia rose from 70% in 2003 to 80% in 2004. (EU-15 rose from 54% to 65%.)

1.3 Agricultural and rural policy developments

Before 2004, Slovenia had implemented CAP-conforming reforms of agricultural policy instruments; therefore the adoption of the Common Agricultural Policy on Accession largely meant a continuation of the measures pursued under the national agricultural policy in the pre-Accession period. Malta and Slovenia are the only new Member States currently implementing the standard direct payments scheme and in Slovenia the level of the national top-up is high. The level of most direct payments under the CMO (from the EU and national sources), in Slovenia rose from 75% of the comparable level of payments in the EU-15 in 2003, to 85% in 2004 and to 90% in 2005.

With Slovenia's entry into the EU, the compensatory allowances for LFA and agricultural environmental payments became part of the Rural Development Programme 2004-2006. The level of allowances per unit virtually doubled compared to 2003 (it varied by measure), and the environmental payments were extended by the last 8 measures from the Slovene agricultural environmental programme (altogether 21 measures). In addition, the rural development programme introduced a new aid for early retirement and an aid for compliance with the EU standards. They started to be paid out in 2005.

The agricultural structural policy measures, which were in the pre-Accession period implemented under SAPARD programme and under the national part of the structural policy programme, have largely continued and form part of the Single Programming Document 2004-2006 with largely similar funding. The majority of funding is intended for improving processing and marketing of agricultural products, investments in agricultural holdings and diversification of agricultural activities. The first public call for tenders for all SPD measures was published in 2004, but the actual payment of funds has been largely put off to 2005. There are still some difficulties with the implementation of the SPD programme, mainly due to the severe conditions for the beneficiaries (especially for investments in the agricultural holdings) and the general problems with the institutional set-up for the structural funds in Slovenia. The Government is trying to speed up the process after the information that only a small part of the funds was used before 1. September 2005.

1.4 Issues related to the enlargement

As most of the domestic legislation had been harmonised with the *acquis* and also the agricultural policy had been brought into line with the EU already before the EU Accession, the very entry to the EU caused no greater shock for Slovenian agriculture. The analysis of trends and the main factors of income revealed no special changes that could be directly attributed to the EU Accession. Ignoring fluctuations in the volume of production, trends in other factors determining income typical for the period after 1999 continued also in 2004 (lowering of prices, rise in subsidies). In any event, the changes which took place during the period of real adjustment of Slovenian agricultural policy to the EU (the 1999/2000 reform) were more pronounced than the changes after the EU Accession.

However, the food-processing industry was under more serious pressure in the first year of Accession. Abolishing customs protection on the imports of agricultural and food products from the EU boosted a supply of cheaper products. Moreover, a rise in the customs duties levied on the exports of Slovenian agricultural and food products to the countries of former Yugoslavia worsened Slovenian exporters' position in these markets. All this resulted in a drop in production and export activity related to beverages, food and tobacco after the EU Accession, and consequently also in a decline in employment in those sectors. It remains to be seen if or when and how strongly the competitive pressure on the food industry may be passed on also to the primary production. The critical food sectors after Accession are especially the milk and beverage sectors.

2 Assessment and Outlook

2.1 Wine sector

Slovenia is a traditional wine-producing country and since 1997 also a net exporter of wine. The volume of trade in wine has been on the decline, dropping for the first time to below 10 million litres in 2004. Slovenia largely exports quality wines and imports table wines.

2.1.1 Wine consumption

As a result of a high share of small-sized grape and wine producers, there is no reliable data on wine consumption. According to estimates made using the official statistical data, the annual wine consumption in the period 1999-2004 amounted on average to 36 litres per head. These estimates do not include wine production and consumption for very small grape and wine growers (outside the definition of agricultural holdings). Own-wine consumption is widespread and is estimated to represent around 1/3 of the annual consumption of wine.

The larger producers reported that there has been a significant downward trend in wine consumption in the past decade. Additionally, there have been structural changes in the wine consumption pattern: decreasing consumption of table wine to the advantage of the quality wine and the increasing preference for red instead of white wine. So far, consumption remains predominantly of Slovene wine although there are small volume imports of foreign, in particular European, wines.

2.1.2 Wine imports

Over the last years, imports of wine to Slovenia have decreased and also the structure of imports has changed. Imports of table wine dropped the most, in particular white table wine. At the same time, imports of quality red wine rose. In 2004, 4 million litres of wine were imported, of which 62% was table wine (in 1999: 89%). The proportion of quality wine rose to 33%, the highest so far (in 1999: 6%). Most wines come from FYR of Macedonia (table wine) and EU member states (Italy, France, Austria and Spain).

2.1.3 Vine production

Slovenia produces mostly wine grape varieties. The production of table grape varieties is negligible and is therefore not registered by official statistical sources.

2.1.4 Vineyard area

There is no reliable data about total vineyard area in Slovenia. According to the available official statistical data, vineyards total 16.6 thousand ha. (Very small grape and wine producers producing only for their own consumption are not included.) A Register of grape and wine producers was established in 1999 but it registers only market production.

Slovenia's wine-growing area is divided into three regions: 44% of vineyards lie in the Podravska (along the Drava river) region, 17% in Posavska (along the Sava river), and 39% in Primorska (Littoral area) wine-growing region. All three wine-growing regions are suitable for quality wine production. Only growing of *Vitis vinifera* is allowed. There are no interspecific varieties.

2.1.5 Structure of production

More than a third of farms in Slovenia have vineyards (in 2003: 37%). Small producers prevail in the structure of production. According to the structural survey of 2003, 28.705 farms were engaged in grape production (in 2000: 35.129), cultivating on average 0.58 ha of vineyards (in 2000: 0.47 ha).

According to the register of grape and wine producers, there are around 15 larger enterprises producing wine from their own grape production and partly from contractual purchase of grapes. There are also 5 larger wine-cooperatives. The rest are small producers (more than 1000), producing wine from their own grape production and selling the wine. They contribute almost 50% to total wine production.

2.1.6 Wine yields

According to the statistical data, the average yields in Slovenia have varied between 5.9 and 8.1 tonnes of grapes or from 41 to 57 hl of wine per ha in the last few years. They largely depend on weather conditions. The average yields on the vineyards intended for wine production for sale are lower and less variable. They are generally higher in the Primorska region and the lowest in Posavska region. The yields for production of quality wine are legally limited to 80 hl/ha and for table wine to 120 hl/ha.

2.1.7 Wine production

Because of only small changes in areas, the total wine production depends largely on the yield. In 2004, yield was again abundant after a more modest one in 2003. Quality wines prevail in the structure of production, on average representing more than 70% of production in all three wine-growing regions.

2.1.8 Production cost and competitiveness

Recently, the purchase prices of grapes have been relatively stable (around 0.40 EUR/kg), whereas the prices of wine show a downward trend. The import and export prices of wine have been on average considerably lower than the average prices on the domestic market. After the EU Accession, the grape and wine producers have been faced with the increasing competitive pressures which as for the all food industry is coming mainly from retailing channels.

2.1.9 Wine exports

Since 1999 the exports of wine have been decreasing. In 2004 they dropped to below 5 million litres. All the time quality wines have represented more than 90% in the structure of exports, in particular white wines. The main export markets are Bosnia and Herzegovina, USA, Croatia, Serbia and Montenegro and Germany.

2.1.10 Policy issues

The most significant change in the market after Accession is abolishing of direct supports for promotion on foreign markets aimed at increasing the exports of quality wine and better recognition of Slovenian wines on foreign markets. The new rules will only allow limited co-financing of promotion activities through programmes operated by producers' organisations. The consequences of this measure have already been seen in reduced wine exports in 2004.

Regarding the reform of the wine CMO, there is no public discussion for the moment on this issue. According to the available information, the representatives of the Slovene Government support abolition of the measures of compulsory distillation of by-products, strengthening of the role of producer organisations and the measures for vineyard restructuring. These measures have proved to be the most reasonable. The Government also favours introducing restructuring and modernisation of wine production capacities. Both restructuring measures should be directed at meeting the demands of the market, which implies as a precondition establishing effective producer organisations. This position seems to be in line with producer's interests and expectations.

2.2 Sugar sector

2.2.1 Sugar consumption

In Slovenia sugar consumption has varied from 34 to 39 kg per inhabitant in recent years (in the white sugar equivalent). After three years of decline, the consumption rose by 8% to 37 kg in 2004. By the assessment made on the basis of the data on average annual quantity of purchased sugar and honey per household member, around 40% is consumed in natural state and the rest in the form of processed products.

2.2.2 Sugar imports

In recent years, Slovenia imported around 70 thousand tonnes of sugar per year (in raw sugar equivalent). A solid third of imports were processed products. In 2004, total imports were 5% lower than the year before, with an almost halved proportion of white sugar. Only 11 thousand tonnes of sugar were imported in the form of white sugar (in 2003: 20 thousand tonnes), which was the least in the last ten years. Also the imports of raw sugar were smaller than the year before (-16%). On the other hand, for the first time since 1993 an important share of sugar (13 %) was imported in the form of sugar beet. Compared to 2003, the imports of sugar in processed products increased, which points to the continuation of the trend recorded since 1996. Most imports of sugar in natural state come from African countries (in 2004: around 70%) and the EU member states (in 2004: 27%).

2.2.3 Sugar beet area

Ever since 1999, when the expansion of sugar beet production reached its peak (almost 11 thousand ha), sugar beet area has stabilised at around 5 thousand ha in the last four years. Sugar beet area occupies less than 3 % of all arable land.

2.2.4 Structure of production

According to the structural survey of 2003, 1999 farms grew sugar beet that year, which was 2.6% of total number of farms. Compared to the survey year 2000, this number was almost halved (in 2000: 3772 farms). At the same time, the average sugar beet area per farm increased from 2.14 ha to 2.60 ha, i.e. by 21%. Since 2000, sugar beet has been cultivated only in the North-East of Slovenia, where the sole sugar mill is located. Sugar Mill Ormož is a joint stock company, majority owned by a Dutch company.

2.2.5 Yields

Yields of sugar beet and sugar vary considerably from year to year, mostly due to weather conditions. In the period 1999-2004, the average sugar beet yield was 44 tonnes/ha, and the yield of raw sugar 6.3 tonnes/ha. In the same period, the average sugar content was 14.4%. The years 2002 and 2003 deviated the most from usual yield levels, the former with the record

high yields (8 t sugar/ha), and the latter with the record low yields (5.3 t sugar/ha). In the year 2004 yields were slightly above average.

2.2.6 Sugar and isoglucose production

In the period 1999-2004, sugar production from domestically produced sugar beet in Slovenia more than halved (due to the area being halved after 2000) and year to year variations were considerable. In 2004, the Sugar Mill Ormož, in addition to domestically produced sugar beet, also processed 57.7 thousand tonnes of imported beet root, producing 8.6 thousand tonnes of white sugar. This sugar mill is also the only mill for processing of raw sugar. The annual production of white sugar from raw sugar ranges from 22 to 26 thousand tonnes, and total production in white sugar equivalent (from sugar beet and raw sugar) ranges from 48 to 61 thousand tonnes. There is no isoglucose production in Slovenia.

2.2.7 Production cost and competitiveness

After 1999, the prices of sugar beet for producers were lower than the minimum price set out under the CMO, and producers were eligible for area-based direct payments (2001: 193.4 EUR/ha, 2002: 247.5 EUR/ha, 2003: 239.6 EUR/ha). As a result, the prices of sugar on domestic market were lower, thus increasing the competitiveness of domestic sugar production. Adopting the sugar CMO resulted in a rise in minimum price of sugar beet for producers, abolition of area direct payments and considerable changes in foreign trade regime, which altogether contributed to a rise in prices of sugar on the domestic market. Several expert studies suggest that, under the existing sugar CMO, the production of sugar in Slovenia is competitive with that in other EU Member States.

2.2.8 Exports

In the last few years, the exports of sugar in raw sugar equivalent averaged at around 23 thousand tonnes, notably exports of processed products. In 2004, total exports of sugar were up by 11% from the year before. For the first time, larger quantity of sugar in natural state was exported (8 thousand tonnes in raw sugar equivalent), whilst the exports of processed sugar products were the lowest in the last five years (16 thousand ton in raw sugar equivalent), down by 22% from 2003.

2.2.9 Policy issues

Adoption of CMO for sugar has not caused any great problems in Slovenia. Quotas were not fulfilled. The proposed reform of the CMO for sugar was met with a wide response from the sugar beet producers, representatives of the sugar mill and representatives of the state in the EU institutions. Their common conclusion was that if the reform is implemented, sugar production in Slovenia had no real future prospects. They therefore proposed a smaller reduction of minimum prices, a longer period of reform introduction, the possibility of partial production coupling and a higher compensation for the loss of income. No detailed economic analysis of the effects of the reform has yet been made. Some expert assessments indicate that

as regards the level of sugar beet production, the reform could be carried through as the situation would be no worse than the economically least favourable level of the last 6 years.

However, there is a serious question of whether the sugar mill would process enough to reach its break even point. As according to the available information, after the reform some sugar mills of similar size will be preserved in neighbouring countries, the issue of sugar production in Slovenia depends largely on the readiness of the owners to preserve the mill despite lower returns. The existing sugar mill has so far used to its advantage the capacity for raw sugar processing and its economic results have largely depended on this. As the reform will abolish many price-related advantages of raw sugar processing, the possibility of closing down the mill and thereby also of abolishing sugar beet production in Slovenia cannot be ignored. In the short term, although this would have little impact on the economic position of agriculture and the food-processing industry as a whole, it would no doubt have many negative effects at the regional level.

Annex

Table 1: Slovenia - Selected macro economic indicators, 1999-2004

	1999	2000	2001	2002	2003	2004
Population in 000 (30.6.)	1985.6	1990.3	1992.0	1995.7	1996.8	1997.0
GDP growth (%)	5.6	4.1	2.7	3.5	2.7	4.2
GDP per inhabitant (EUR)	10194	10543	11094	11866	12461	13103
Trade balance (mio EUR)	-835	-738	-149	347	-7	-168
Current account balance (mio EUR)	-664	-583	38	335	-91	-238
Unemployment rate - ILO (%)	7.6	7.0	6.4	6.4	6.7	6.3
Inflation, annual average (%)	6.1	8.9	8.4	7.5	5.6	3.6
Exchange rate, annual average (SIT/EUR)	193.6	205.0	217.2	226.2	233.7	238.9
General government budget deficit (% BDP)	-0.6	-1.3	-1.3	-2.9	-1.4	-1.4

Source: UMAR (Office for Macroeconomic Analyses and Development) (2004: preliminary data)

Table 2: Slovenia – General agricultural statistics, 1999-2004

	1999	2000	2001	2002	2003	2004
Utilised agricultural area (000 ha)		485.9			486.5	
Number of holdings (000)		86.5			77.1	
UAA per holding (ha)		5.6			6.3	
Share of agriculture, forestry and hunting in the GDP (%)	2.8	2.8	2.6	2.7	2.2	2.2
Share of agriculture, forestry and hunting in total employment (%)	12.4	11.9	11.4	11.0	10.8	10.5
Trade in food and agricultural products:						
- share in exports of all products (%)	3.9	3.8	3.7	3.7	3.6	2.8
- share in imports of all products (%)	6.8	6.4	6.6	6.6	6.3	6.3
- trade balance (mio EUR)	-327	-343	-361	-352	-370	-531
Share of household consumption expenditure for food, beverages and tobacco (%)	21.9	21.9	21.8	21.5	21.3	20.1
Change in GAO volume (%)	-1.5	0.8	-5.2	12.9	-12.3	16.3
Change in total crop output volume (%)	-5.2	0.9	-12.3	29.2	-23.8	38.5
Change in total livestock output volume (%)	2.3	0.9	1.1	0.8	-1.5	-1.7

Source: SURS (Statistical office of the Republic of Slovenia), KIS (Agricultural Institute of Slovenia)

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Table 3: Slovenia – Area and production of main crops, 1999-2004

	1999	2000	2001	2002	2003	2004
Land use (000 ha):						
Utilized agricultural area, total	498.6	509.0	509.6	505.5	509.7	490.5
- arable land	172.1	170.8	172.7	168.4	172.8	175.1
- permanent crops	29.9	29.9	29.9	29.9	28.6	28.6
- permanent grassland	296.6	308.2	307.0	307.2	308.3	286.8
Harvested area (000 ha):						
Total grain	91.7	102.5	104.5	99.4	99.3	99.8
Of which - Wheat	31.6	38.3	39.3	35.7	35.6	32.4
- Corn/Maize	44.4	48.0	47.6	45.5	44.1	46.0
- Barley	10.9	11.6	12.7	12.4	13.8	15.3
Potatoes	9.8	9.0	7.8	7.1	6.8	6.8
Sugar beet	10.8	8.1	4.7	4.5	5.4	4.7
Oilseeds	2.4	2.3	2.6	5.8	6.6	5.8
Vegetables (total)	3.4	3.2	3.5	3.2	4.0	3.6
Fruit (total)	12.5	12.6	12.5	12.3	11.1	11.1
Wine grapes	16.6	16.6	16.6	16.6	16.6	16.6
Yield (t/ha):						
Total grain	5.217	4.817	4.745	6.143	4.015	5.845
- Wheat	3.709	4.249	4.604	4.894	3.454	4.534
- Corn/Maize	6.937	5.882	5.414	8.157	5.080	7.775
- Barley	3.791	3.263	3.513	3.884	2.881	3.898
Potatoes	19.726	20.795	19.047	23.332	15.751	25.099
Sugar beet	43.106	43.009	39.517	52.182	37.708	45.748
Vegetables (total)	26.584	24.307	17.322	21.783	16.149	22.602
Fruit (total)	10.170	13.948	8.531	14.189	12.184	17.126
Wine grapes	5.927	7.629	6.423	7.408	6.306	8.142
Production (000 t):						
Total grain	478.6	493.8	496.0	610.7	398.7	583.2
- Wheat	117.3	162.6	181.1	174.9	122.9	146.8
- Corn/Maize	308.0	282.4	257.5	371.4	224.2	357.6
- Barley	41.5	37.8	44.5	48.1	39.7	59.7
Potatoes	194.2	186.2	148.3	166.0	107.6	171.5
Sugar beet	467.1	349.1	185.7	232.2	202.1	213.1
Oilseeds	2.5	1.8	3.0	8.5	8.1	8.1
Vegetables (total)	89.7	78.8	61.2	70.3	64.3	82.1
Fruit (total)	127.2	175.1	107.0	174.4	135.7	190.8
Wine grapes	98.3	126.7	106.6	123.0	104.4	134.8

Source: SURS

Table 4: Slovenia – Livestock number and production, 1999-2004

	1999	2000	2001	2002	2003	2004
Animal numbers, December of current year (000)						
- cattle	471.4	493.7	477.1	473.2	450.2	451.1
of which cows	185.6	194.1	188.6	195.0	185.9	182.1
of which dairy cows	149.1	140.2	135.8	140.0	130.7	134.0
- pigs	558.5	603.6	599.9	655.7	620.5	534.0
- sheep and goats	87.2	118.3	114.0	129.4	129.0	142.3
Gross internal meat production (000 t)						
- beef/veal	44.1	39.3	48.0	44.6	50.1	44.8
- pig meat	66.5	58.1	66.4	61.9	70.3	71.2
- poultry meat	52.7	54.1	58.6	53.1	56.8	52.9
- sheep and goat meat	1.0	1.2	1.4	1.5	1.8	1.7
Milk production						
- total cow's milk production (000 t)	633.8	648.6	652.8	727.6	661.7	650.4
- average milk yield (kg/cow)	4.327	4.351	4.655	5.358	4.727	4.976
Production of eggs (000 t)						
	21.9	22.1	21.3	20.1	16.1	14.5

Source: SURS

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Table 5: Producer prices for main agricultural products, 1999-2004 (EURO/t)

	1999	2000	2001	2002	2003	2004
Crop products						
- common wheat	123.9	151.8	131.3	136.3	140.3	119.0
- grain maize	105.5	122.8	112.3	101.0	120.3	116.9
- fodder barley	122.7	132.9	166.2	152.6	120.0	98.2
- potatoes	158.0	132.3	139.3	155.7	220.1	128.6
- sugar beet	42.3	30.2	31.1	35.5	35.1	44.2
- tomatoes	503.8	402.8	487.5	427.1	617.5	485.0
- dessert apples	311.6	294.7	322.2	323.9	375.0	303.2
- wine (000 l)	1727.1	1698.5	1724.8	1657.5	1538.9	1610.9
Livestock products						
- adult male bovines (slaughter weight)	2700.1	2576.3	2411.4	2492.5	2472.3	2429.6
- pig meat (carcass weight)	1405.8	1562.1	1813.6	1484.7	1371.1	1389.6
- chickens (65%)	1713.6	1670.8	1775.5	1724.2	1784.5	1899.0
- lambs (carcass weight aprox. 13 kg)	4146.9	3818.7	3792.3	3850.6	3933.5	3455.6
- raw cow's milk (farm-gate, actual fat content)	281.6	281.7	289.9	281.6	274.7	266.1
- eggs, all classes (000 pieces)	68.9	76.0	66.3	76.3	71.6	75.5

Source: SURS, TIS (Market Information System)

Table 6: Slovenia – Trade in agricultural and food products; 1999-2004 (mio EURO)

	1999	2000	2001	2002	2003	2004
Total trade	961.8	1057.0	1134.0	1166.6	1176.1	1245.8
Export	317.2	356.8	386.3	407.5	403.4	357.4
Import	644.7	700.1	747.7	759.1	772.9	888.5
Trade balance	-327.5	-343.3	-361.3	-351.7	-369.7	-531.1

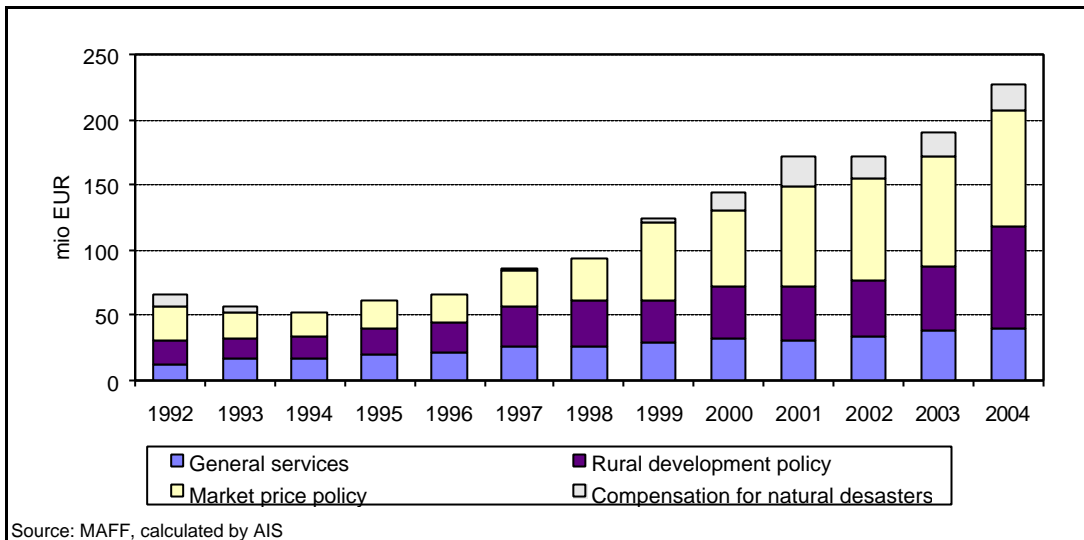
Source: SURS

Table 7: Slovenia - Trade in agricultural and food products by groups of countries; 2003 and 2004 (mio EURO)

	Total trade			Export			Import			Trade balance	
	2003	2004	Change (%)	2003	2004	Change (%)	2003	2004	Change (%)	2003	2004
EU-15	522.5	681.4	130.4	104.0	105.2	101.1	418.5	576.2	137.7	-314.5	-471.0
EU-10	138.3	149.7	108.3	13.9	14.2	102.1	124.4	135.5	109.0	-110.5	-121.4
EU-25	660.8	831.1	125.8	117.9	119.4	101.2	542.9	711.7	131.1	-425.0	-592.4
Former Yugoslavia	328.3	286.3	87.2	244.0	208.0	85.2	84.2	78.3	93.0	159.8	129.6
Other countries	187.1	128.4	68.6	41.3	30.0	72.6	145.8	98.4	67.5	-104.5	-68.4
Total	1176.1	1245.8	105.9	403.2	357.4	88.6	772.9	888.5	115.0	-369.7	-531.1

Source: SURS

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Graph 1: Slovenia – Budgetary expenditure for agro-food sector