

DIRECTORATE-GENERAL FOR INTERNAL POLICIES

POLICY DEPARTMENT
STRUCTURAL AND COHESION POLICIES **B**

Agriculture and Rural Development

Culture and Education

Fisheries

Regional Development

Transport and Tourism

**THE EU FRUIT AND
VEGETABLES SECTOR:
OVERVIEW AND POST
2013 CAP PERSPECTIVE**

ANNEXES



DIRECTORATE GENERAL FOR INTERNAL POLICIES
POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES

AGRICULTURE AND RURAL DEVELOPMENT

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Abstract:

This study provides an overview of recent economic and policy developments of the EU F&V sector, considering ongoing changes in supply chains and market dynamics and current profiles of domestic and trade policies. Findings suggest that current difficulties for EU producers, particularly for small farming, arises mainly from long-term changes at different levels of the global F&V sector: consumers, retail and multinational agribusiness. The preliminary assessment of the 2007 reformed CMO, derived from both National Strategies and a survey targeting POs of Italy, Spain and France, validate the cornerstones of the current EU policy schemes for the F&V sector. However plausible improvements are envisaged for support and trade protection measures in the framework of the CAP after 2013. Main proposals focus a strengthened role of POs, selecting and increasing effectiveness of crises and risk management measures, rebalancing bargaining power of POs in the supply chain, reducing fluctuations in producers' income, refining trade policy solutions in a context of increased trading openness and further integration with Mediterranean Partner Countries.

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ANNEX 1- TABLES AND FIGURES

Table A1.1 - Production of fresh F&V in the EU-27 (thousand tons), and share (%) on the value of total agricultural output (producer price), 2000-2009

item	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Vegetables&Melons	64,007	62,797	60,868	63,816	66,395	62,825	60,981	59,872	58,583	60,266
Fruit (excl citrus fruit)	58,562	55,470	52,310	52,132	56,938	52,835	53,499	48,844	50,660	50,001
Citrus Fruit	10,127	10,479	10,822	10,778	10,783	10,457	12,082	10,103	11,603	10,845
<i>EU-27- Total F&V</i>	<i>132,697</i>	<i>128,746</i>	<i>124,000</i>	<i>126,726</i>	<i>134,115</i>	<i>126,117</i>	<i>126,561</i>	<i>118,819</i>	<i>120,846</i>	<i>121,112</i>
<i>F&V/Agricultural output</i>	<i>17.2</i>	<i>17.3</i>	<i>17.8</i>	<i>19.4</i>	<i>18.1</i>	<i>18.5</i>	<i>19.7</i>	<i>18.3</i>	<i>17.6</i>	<i>18.2</i>

Source: FAOSTAT and Eurostat

Table A1.2 - Share (%) of fresh fruit, vegetables and citrus fruit in total EU-27 F&V production, 2000-2009

item	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Vegetables&Melons	48.2	48.8	49.1	50.4	49.5	49.8	48.2	50.4	48.5	49.8
Fruit (excl citrus fruit)	44.1	43.1	42.2	41.1	42.5	41.9	42.3	41.1	41.9	41.3
Citrus Fruit	7.6	8.1	8.7	8.5	8.0	8.3	9.5	8.5	9.6	9.0
<i>EU-27- Total F&V</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

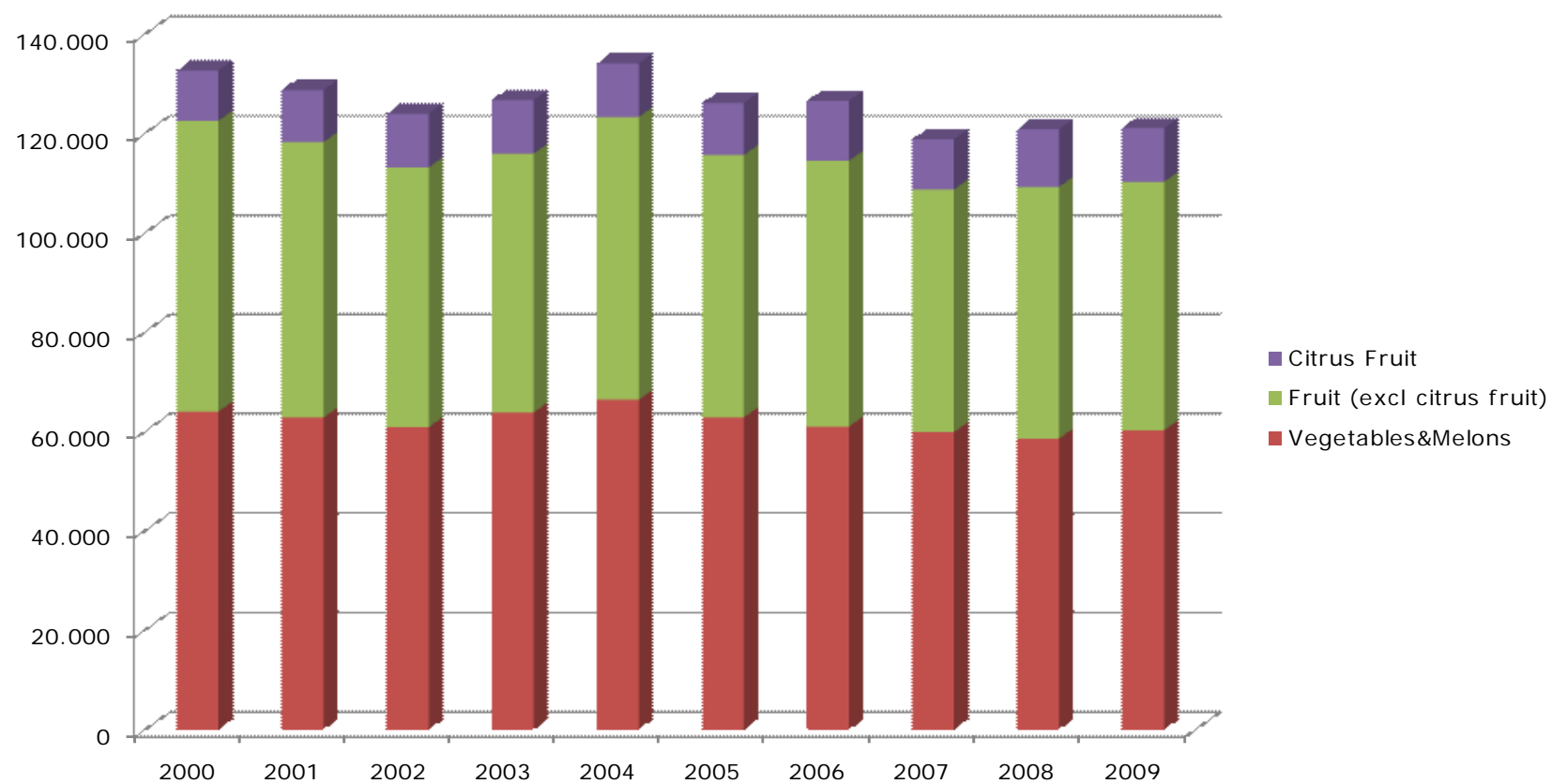
Source: FAOSTAT

Table A1.3 - Share (%) of EU-27 fresh F&V production in World production, 2000-2009

item	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Vegetables&Melons	9.2	8.6	8.0	8.1	8.4	7.8	7.3	7.1	6.8	6.9
Fruit excl citrus fruit	15.9	15.0	13.9	13.4	13.9	12.6	12.3	11.0	11.1	10.8
Citrus Fruit	9.6	10.0	10.1	10.2	9.6	9.5	10.4	8.5	9.3	8.7
<i>EU-27- Total F&V</i>	<i>11.3</i>	<i>10.7</i>	<i>10.0</i>	<i>9.9</i>	<i>10.2</i>	<i>9.4</i>	<i>9.1</i>	<i>8.5</i>	<i>8.4</i>	<i>8.3</i>

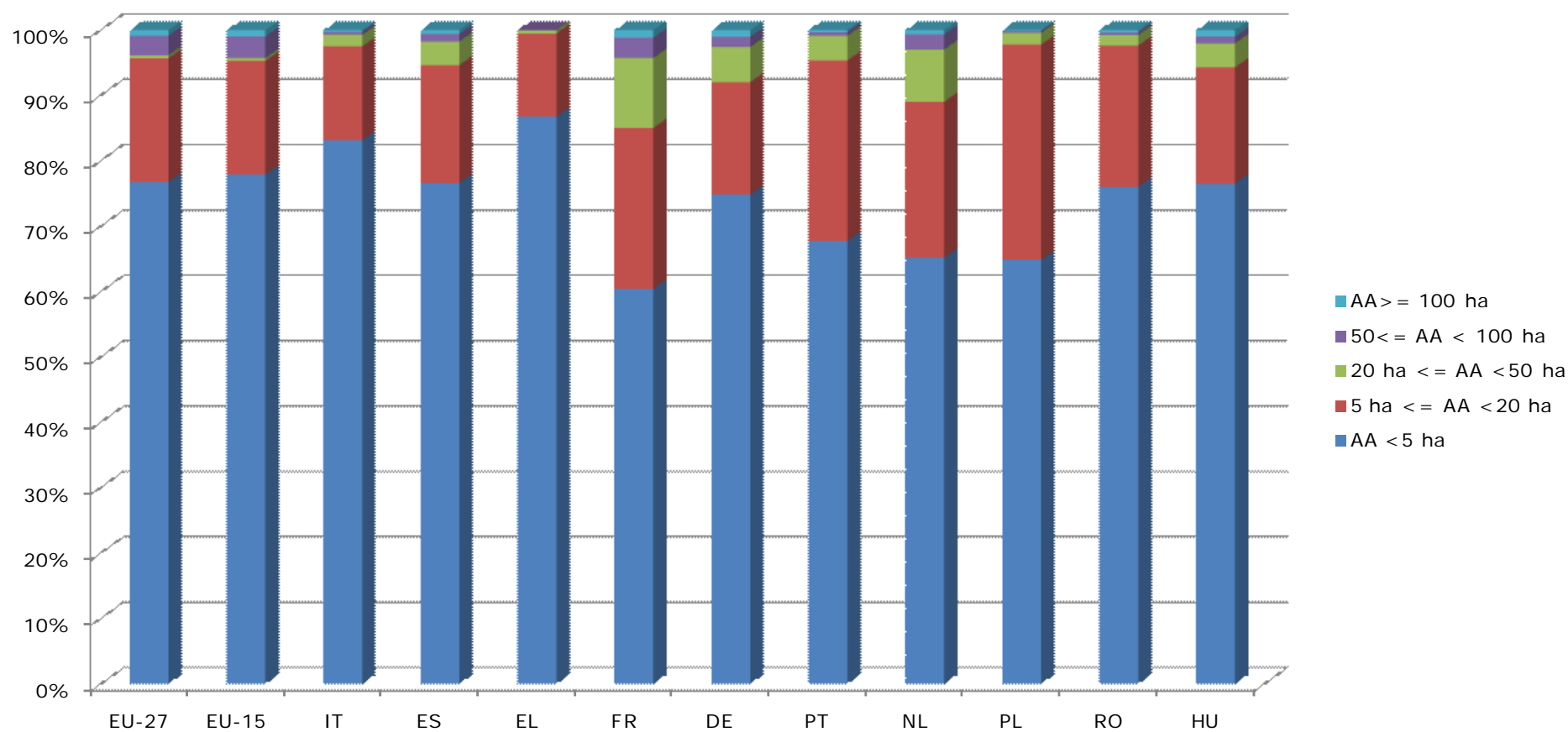
Source: FAOSTAT

Figure A1.1 - Production of fresh F&V in the EU-27 (thousand tons), 2000-2009



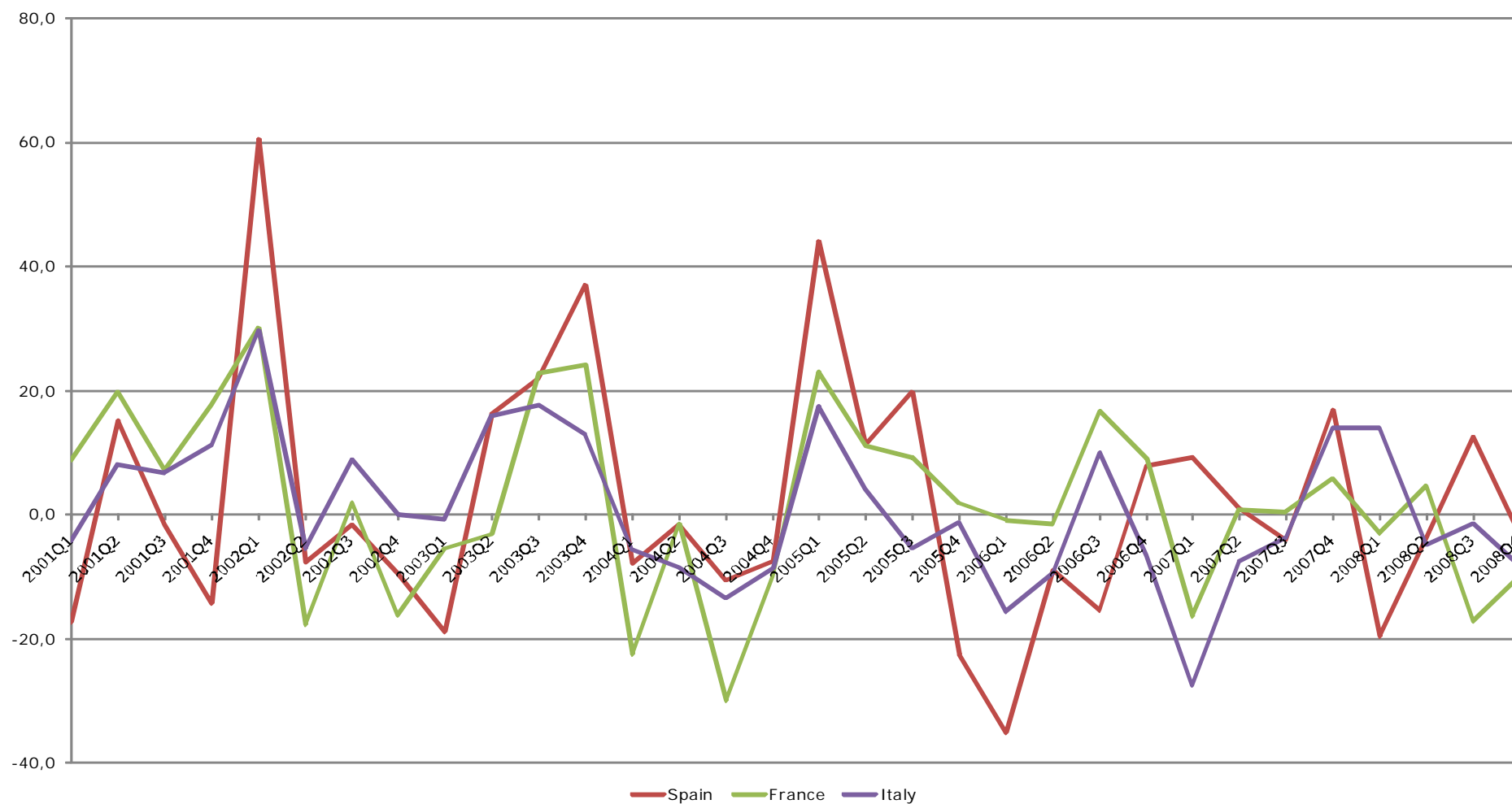
Source: FAOSTAT

Figure A1.2 – Percentage distribution of farms specialized in horticulture and fruit by size classes (ha of UAA) and MS, 2007



Source: Eurostat

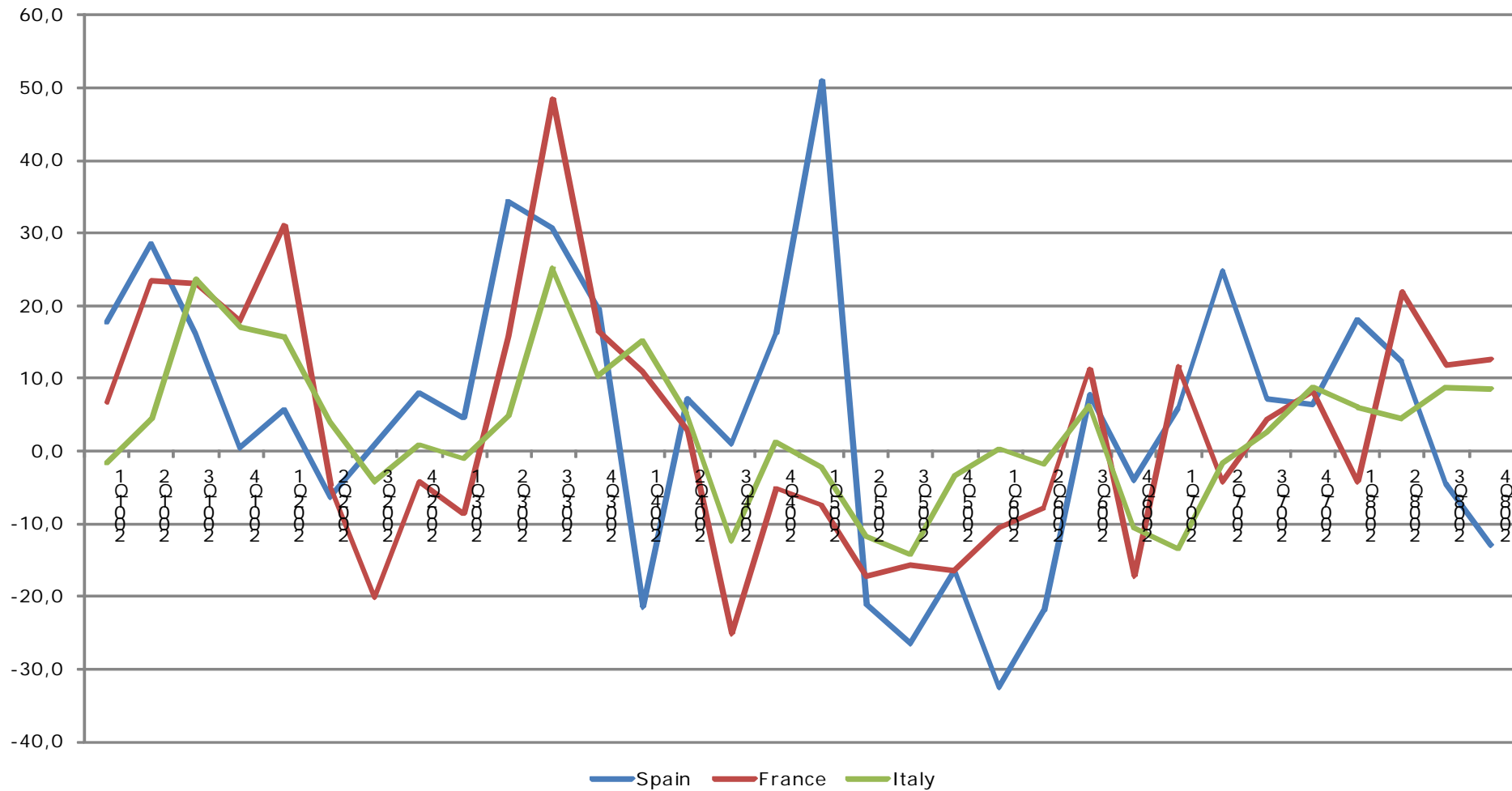
Figure A1.3 - Price indices of agricultural products, output: base 2000=100 – Fresh Vegetables, 2001-2008 (quarterly)



Source: Eurostat

Figure A1.4 - Price indices of agricultural products, output: base 2000=100– Fresh fruit (excluding citrus fruit and grapes), 2001-2008

(quarterly)



Source: Eurostat

Table A1.4 - Production of fresh Vegetables by EU Member States (thousand tons), 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	403	416	443	425	463	417	431	457	458	455
Belgium	1,526	1,568	1,632	1,729	1,810	1,749	1,759	1,721	1,720	750
Bulgaria	1,361	1,075	945	1,346	966	498	815	549	521	480
Cyprus	130	140	142	135	128	132	125	119	102	104
Czech Republic	383	336	273	253	256	234	232	209	208	182
Denmark	200	204	198	206	201	202	197	200	200	200
Estonia	59	60	43	63	59	61	59	69	62	69
Finland	222	214	217	218	213	239	217	223	213	229
France	5,973	5,925	6,039	5,838	5,835	5,532	4,990	4,894	5,041	4,735
Germany	3,563	3,469	3,410	3,366	3,481	3,284	3,407	3,281	3,071	3,100
Greece	4,098	4,064	3,773	3,902	4,052	3,780	3,542	3,451	3,275	3,287
Hungary	1,383	1,714	1,729	1,907	1,984	1,475	1,685	1,677	1,734	1,514
Ireland	213	219	213	207	233	228	222	216	216	0
Italy	15,949	14,582	13,729	14,781	15,947	15,435	14,335	14,170	13,293	11,951
Latvia	98	152	135	220	166	156	161	140	114	141
Lithuania	315	302	270	523	350	351	219	271	289	312
Luxembourg	1	1	1	1	1	1	1	1	1	1
Malta	78	76	73	70	78	74	78	76	78	71
Netherlands	2,792	2,866	2,903	2,963	3,221	3,159	3,162	3,224	3,242	0
Poland	5,269	5,025	4,237	4,533	4,874	4,904	4,807	5,142	4,770	5,078
Portugal	2,158	2,216	2,056	2,084	2,380	2,264	2,154	2,427	2,380	1,629
Romania	3,099	3,436	3,561	4,334	4,441	3,261	3,753	2,794	3,426	3,524
Slovakia	394	371	292	317	306	313	326	286	306	286
Slovenia	74	57	66	60	76	82	75	62	72	79
Spain	11,229	11,289	11,734	11,865	12,346	12,385	11,776	11,876	11,523	11,550
Sweden	245	273	279	284	304	295	310	274	268	287
United Kingdom	2,791	2,746	2,477	2,186	2,224	2,313	2,146	2,064	1,999	0
<i>EU-27</i>	<i>64,007</i>	<i>62,797</i>	<i>60,868</i>	<i>63,816</i>	<i>66,395</i>	<i>62,825</i>	<i>60,981</i>	<i>59,872</i>	<i>58,583</i>	<i>60,266</i>
<i>World</i>	<i>697,684</i>	<i>727,669</i>	<i>758,735</i>	<i>787,089</i>	<i>792,851</i>	<i>807,027</i>	<i>835,148</i>	<i>842,253</i>	<i>859,502</i>	<i>868,835</i>

Source: FAOSTAT

Table A1.5 – Share (%) of fresh Vegetable production by EU member countries, 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	0.6	0.7	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8
Belgium	2.4	2.5	2.7	2.7	2.7	2.8	2.9	2.9	2.9	1.2
Bulgaria	2.1	1.7	1.6	2.1	1.5	0.8	1.3	0.9	0.9	0.8
Cyprus	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Czech Republic	0.6	0.5	0.4	0.4	0.4	0.4	0.4	0.3	0.4	0.3
Denmark	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Estonia	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Finland	0.3	0.3	0.4	0.3	0.3	0.4	0.4	0.4	0.4	0.4
France	9.3	9.4	9.9	9.1	8.8	8.8	8.2	8.2	8.6	7.9
Germany	5.6	5.5	5.6	5.3	5.2	5.2	5.6	5.5	5.2	5.1
Greece	6.4	6.5	6.2	6.1	6.1	6.0	5.8	5.8	5.6	5.5
Hungary	2.2	2.7	2.8	3.0	3.0	2.3	2.8	2.8	3.0	2.5
Ireland	0.3	0.3	0.4	0.3	0.4	0.4	0.4	0.4	0.4	0.0
Italy	24.9	23.2	22.6	23.2	24.0	24.6	23.5	23.7	22.7	19.8
Latvia	0.2	0.2	0.2	0.3	0.2	0.2	0.3	0.2	0.2	0.2
Lithuania	0.5	0.5	0.4	0.8	0.5	0.6	0.4	0.5	0.5	0.5
Luxembourg	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Malta	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Netherlands	4.4	4.6	4.8	4.6	4.9	5.0	5.2	5.4	5.5	0.0
Poland	8.2	8.0	7.0	7.1	7.3	7.8	7.9	8.6	8.1	8.4
Portugal	3.4	3.5	3.4	3.3	3.6	3.6	3.5	4.1	4.1	2.7
Romania	4.8	5.5	5.8	6.8	6.7	5.2	6.2	4.7	5.8	5.8
Slovakia	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Slovenia	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Spain	17.5	18.0	19.3	18.6	18.6	19.7	19.3	19.8	19.7	19.2
Sweden	0.4	0.4	0.5	0.4	0.5	0.5	0.5	0.5	0.5	0.5
United Kingdom	4.4	4.4	4.1	3.4	3.3	3.7	3.5	3.4	3.4	0.0
<i>EU-27</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>
<i>EU-27/World</i>	<i>9.2</i>	<i>8.6</i>	<i>8.0</i>	<i>8.1</i>	<i>8.4</i>	<i>7.8</i>	<i>7.3</i>	<i>7.1</i>	<i>6.8</i>	<i>6.9</i>

Source: FAOSTAT

Table A1.6 - Production of fresh Fruit by EU Member States (thousand tons), 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	1,092	1,026	1,061	1,109	1,148	1,031	1,118	1,179	1,204	1,156
Belgium	786	474	571	546	641	590	680	682	683	3
Bulgaria	740	639	554	612	540	384	444	500	477	409
Cyprus	283	251	244	248	295	235	230	206	182	181
Czech Republic	556	417	508	448	526	389	295	284	326	72
Denmark	55	50	48	58	71	73	71	71	71	71
Estonia	27	27	28	10	8	17	6	7	5	9
Finland	18	20	18	15	15	17	17	16	17	19
France	11,265	10,952	10,653	9,584	11,064	10,297	10,143	9,313	8,502	8,984
Germany	5,291	3,713	3,448	2,777	2,766	2,818	2,656	2,956	2,802	2,696
Greece	4,142	4,318	3,955	3,169	3,634	3,760	3,680	3,410	3,213	3,208
Hungary	1,727	1,735	1,211	1,322	1,840	1,225	1,397	1,282	1,466	1,493
Ireland	25	25	24	23	32	52	49	52	52	0
Italy	17,989	17,961	16,086	15,262	18,073	18,216	18,015	16,806	17,646	18,041
Latvia	54	56	66	48	21	58	50	40	36	15
Lithuania	113	170	95	115	47	121	126	57	90	70
Luxembourg	34	24	35	23	35	24	28	23	28	28
Malta	8	8	8	8	10	9	13	9	11	11
Netherlands	711	531	575	569	698	608	640	709	603	0
Poland	2,247	3,413	3,010	3,291	3,505	2,954	3,251	1,731	3,881	3,677
Portugal	1,922	1,738	2,018	1,816	2,007	1,855	1,977	1,685	1,653	1,402
Romania	2,596	2,474	2,029	3,166	2,975	2,147	2,399	1,959	2,195	2,247
Slovakia	253	212	177	207	169	170	146	127	156	96
Slovenia	298	211	301	237	321	260	260	271	235	240
Spain	16,114	15,138	16,082	17,939	16,949	15,584	17,428	15,114	16,278	13,990
Sweden	38	33	32	35	34	36	42	39	40	40
United Kingdom	308	333	296	271	295	364	422	420	412	0
<i>EU-27</i>	<i>68,689</i>	<i>65,950</i>	<i>63,132</i>	<i>62,910</i>	<i>67,721</i>	<i>63,293</i>	<i>65,581</i>	<i>58,947</i>	<i>62,263</i>	<i>60,846</i>
<i>World</i>	<i>473,082</i>	<i>475,249</i>	<i>482,244</i>	<i>495,498</i>	<i>520,706</i>	<i>528,765</i>	<i>550,090</i>	<i>561,069</i>	<i>579,926</i>	<i>587,670</i>

Source: FAOSTAT

Table A1.7 - Share (%) of fresh Fruit production by EU Member States, 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	1.6	1.6	1.7	1.8	1.7	1.6	1.7	2.0	1.9	1.9
Belgium	1.1	0.7	0.9	0.9	0.9	0.9	1.0	1.2	1.1	0.0
Bulgaria	1.1	1.0	0.9	1.0	0.8	0.6	0.7	0.8	0.8	0.7
Cyprus	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3
Czech Republic	0.8	0.6	0.8	0.7	0.8	0.6	0.4	0.5	0.5	0.1
Denmark	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Estonia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Finland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
France	16.4	16.6	16.9	15.2	16.3	16.3	15.5	15.8	13.7	14.8
Germany	7.7	5.6	5.5	4.4	4.1	4.5	4.0	5.0	4.5	4.4
Greece	6.0	6.5	6.3	5.0	5.4	5.9	5.6	5.8	5.2	5.3
Hungary	2.5	2.6	1.9	2.1	2.7	1.9	2.1	2.2	2.4	2.5
Ireland	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.0
Italy	26.2	27.2	25.5	24.3	26.7	28.8	27.5	28.5	28.3	29.7
Latvia	0.1	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.1	0.0
Lithuania	0.2	0.3	0.1	0.2	0.1	0.2	0.2	0.1	0.1	0.1
Luxembourg	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Malta	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Netherlands	1.0	0.8	0.9	0.9	1.0	1.0	1.0	1.2	1.0	0.0
Poland	3.3	5.2	4.8	5.2	5.2	4.7	5.0	2.9	6.2	6.0
Portugal	2.8	2.6	3.2	2.9	3.0	2.9	3.0	2.9	2.7	2.3
Romania	3.8	3.8	3.2	5.0	4.4	3.4	3.7	3.3	3.5	3.7
Slovakia	0.4	0.3	0.3	0.3	0.3	0.3	0.2	0.2	0.3	0.2
Slovenia	0.4	0.3	0.5	0.4	0.5	0.4	0.4	0.5	0.4	0.4
Spain	23.5	23.0	25.5	28.5	25.0	24.6	26.6	25.6	26.1	23.0
Sweden	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.1	0.1	0.1
United Kingdom	0.4	0.5	0.5	0.4	0.4	0.6	0.6	0.7	0.7	0.0
<i>EU-27</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>
<i>EU-27/World</i>	<i>14.5</i>	<i>13.9</i>	<i>13.1</i>	<i>12.7</i>	<i>13.0</i>	<i>12.0</i>	<i>11.9</i>	<i>10.5</i>	<i>10.7</i>	<i>10.4</i>

Source: FAOSTAT

Table A1.8 - Production of Citrus fruit by EU Member States (thousand tons), 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Cyprus	128	123	138	126	147	143	137	123	112	116
France	29	27	30	25	29	25	32	22	28	35
Greece	1,185	1,433	1,500	1,211	866	1,154	1,104	1,029	1,016	1,014
Italy	3,103	2,895	2,789	2,781	3,336	3,518	3,654	3,368	3,866	3,917
Malta	3	4	3	3	2	3	3	3	3	3
Portugal	312	283	347	353	325	290	307	270	255	278
Spain	5,367	5,717	6,014	6,278	6,077	5,324	6,846	5,288	6,323	5,426
<i>EU-27</i>	<i>10,127</i>	<i>10,479</i>	<i>10,822</i>	<i>10,778</i>	<i>10,783</i>	<i>10,457</i>	<i>12,082</i>	<i>10,103</i>	<i>11,603</i>	<i>10,845</i>
<i>World</i>	<i>105,288</i>	<i>104,889</i>	<i>107,064</i>	<i>105,617</i>	<i>112,320</i>	<i>109,923</i>	<i>116,092</i>	<i>118,211</i>	<i>124,578</i>	<i>124,414</i>

Source: FAOSTAT

Table A1.9 - Share (%) of Citrus production by EU Member States, 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Cyprus	1.3	1.2	1.3	1.2	1.4	1.4	1.1	1.2	1.0	1.1
France	0.3	0.3	0.3	0.2	0.3	0.2	0.3	0.2	0.2	0.3
Greece	11.7	13.7	13.9	11.2	8.0	11.0	9.1	10.2	8.8	9.3
Italy	30.6	27.6	25.8	25.8	30.9	33.6	30.2	33.3	33.3	36.1
Malta	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portugal	3.1	2.7	3.2	3.3	3.0	2.8	2.5	2.7	2.2	2.6
Spain	53.0	54.6	55.6	58.2	56.4	50.9	56.7	52.3	54.5	50.0
<i>EU-27</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>
<i>EU-27/World</i>	<i>9.6</i>	<i>10.0</i>	<i>10.1</i>	<i>10.2</i>	<i>9.6</i>	<i>9.5</i>	<i>10.4</i>	<i>8.5</i>	<i>9.3</i>	<i>8.7</i>

Source: FAOSTAT

Table A1.10 - EU import of F&V 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	15,726	21,329	18,782	22,924	21,291	25,182	22,247	26,183
EXTRA-EU	6,656	9,144	8,244	10,672	9,687	12,099	10,377	12,671
<i>Total EU</i>	<i>22,382</i>	<i>30,473</i>	<i>27,026</i>	<i>33,597</i>	<i>30,978</i>	<i>37,280</i>	<i>32,625</i>	<i>38,853</i>

Source: EUROSTAT Comext

Table A1.11 - EU export of F&V 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	15,525	21,558	18,905	23,014	21,011	24,919	22,652	26,313
EXTRA-EU	1,542	2,475	1,978	2,798	2,578	3,585	3,035	4,329
<i>Total EU</i>	<i>17,067</i>	<i>24,033</i>	<i>20,882</i>	<i>25,812</i>	<i>23,589</i>	<i>28,504</i>	<i>25,687</i>	<i>30,643</i>

Source: EUROSTAT Comext

Table A1.12 - EU import of fresh Vegetables 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	7,014	8,416	8,441	9,737	9,697	10,585	9,872	11,187
EXTRA-EU	852	839	1,118	1,249	1,525	1,480	1,773	1,825
<i>Total EU</i>	<i>7,866</i>	<i>9,255</i>	<i>9,559</i>	<i>10,987</i>	<i>11,222</i>	<i>12,065</i>	<i>11,646</i>	<i>13,012</i>

Source: EUROSTAT Comext

Table A1.13 - EU export of fresh Vegetables 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	6,666	8,367	8,425	9,627	9,156	10,198	9,894	10,961
EXTRA-EU	618	869	877	1,160	986	1,256	1,097	1,513
<i>Total EU</i>	<i>7,284</i>	<i>9,236</i>	<i>9,302</i>	<i>10,788</i>	<i>10,141</i>	<i>11,454</i>	<i>10,990</i>	<i>12,474</i>

Source: EUROSTAT Comext

Table A1.14 - EU import of Fruit 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	8,712	12,913	10,341	13,187	11,594	14,596	12,375	14,995
EXTRA-EU	5,804	8,305	7,126	9,423	8,162	10,619	8,604	10,845
<i>Total EU</i>	<i>14,516</i>	<i>21,218</i>	<i>17,467</i>	<i>22,610</i>	<i>19,756</i>	<i>25,215</i>	<i>20,979</i>	<i>25,841</i>

Source: EUROSTAT Comext

Table A1.15 - EU export of Fruit 2000-2009 (value in € million, volume in thousand tons)

	2000		2003		2006		2009	
	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY
INTRA-EU	8,859	13,191	10,480	13,387	11,855	14,721	12,758	15,352
EXTRA-EU	924	1,606	1,100	1,637	1,592	2,329	1,938	2,816
<i>Total EU</i>	<i>9,783</i>	<i>14,797</i>	<i>11,580</i>	<i>15,024</i>	<i>13,448</i>	<i>17,050</i>	<i>14,696</i>	<i>18,168</i>

Source: EUROSTAT Comext

Table A1.16 - EU imports of Citrus fruit, intra-EU and extra-EU (thousand tons), 2000-2009

PARTNER	2000	2003	2006	2009
INTRA-EU	4,201	4,265	4,332	4,469
EXTRA-EU	1,757	1,924	2,045	2,046
<i>Total EU</i>	<i>5,959</i>	<i>6,189</i>	<i>6,377</i>	<i>6,515</i>

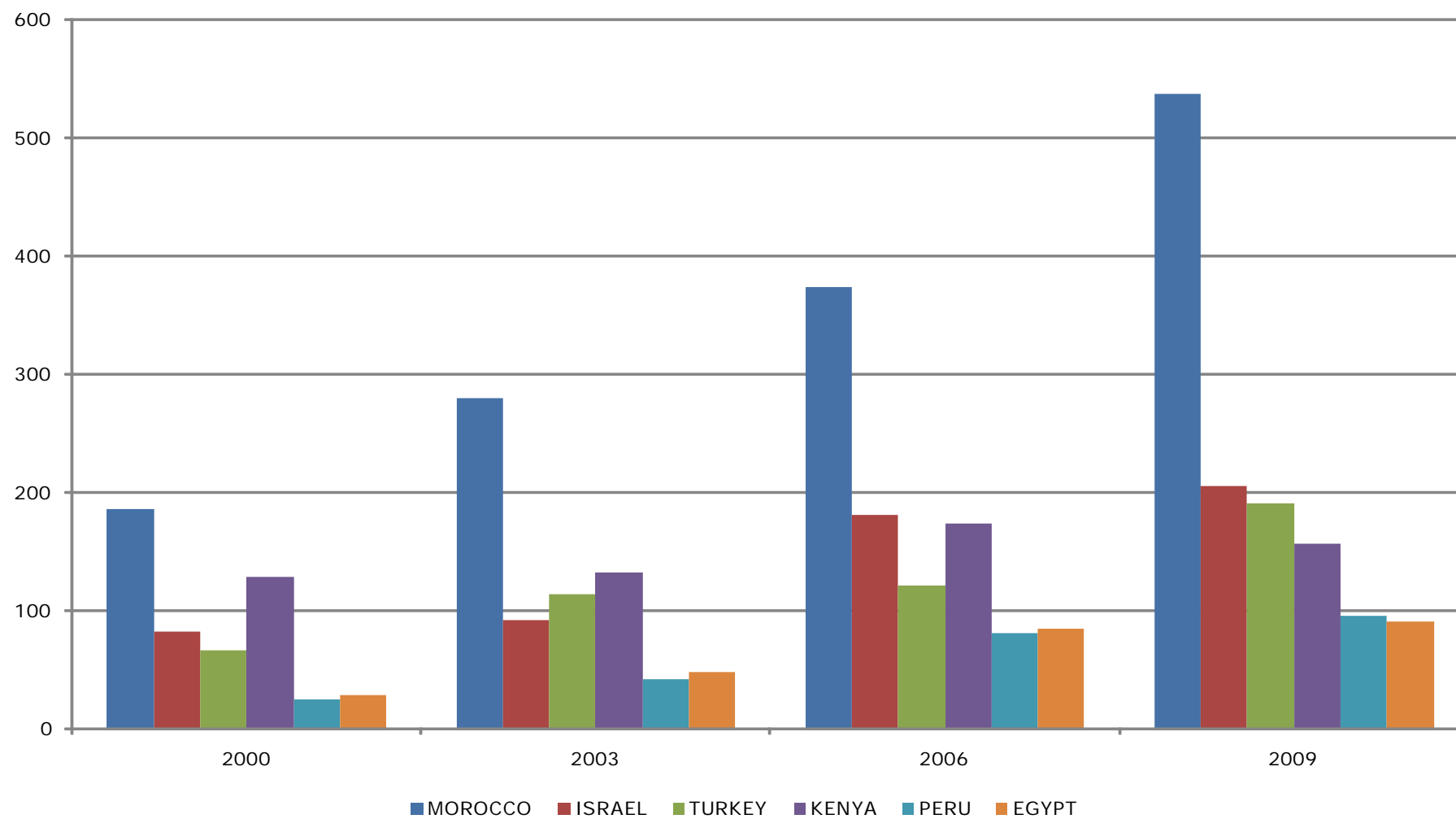
Source: Eurostat

Table A1.17 - Share (%) of Citrus imports, intra-EU and extra-EU, 2000-2009

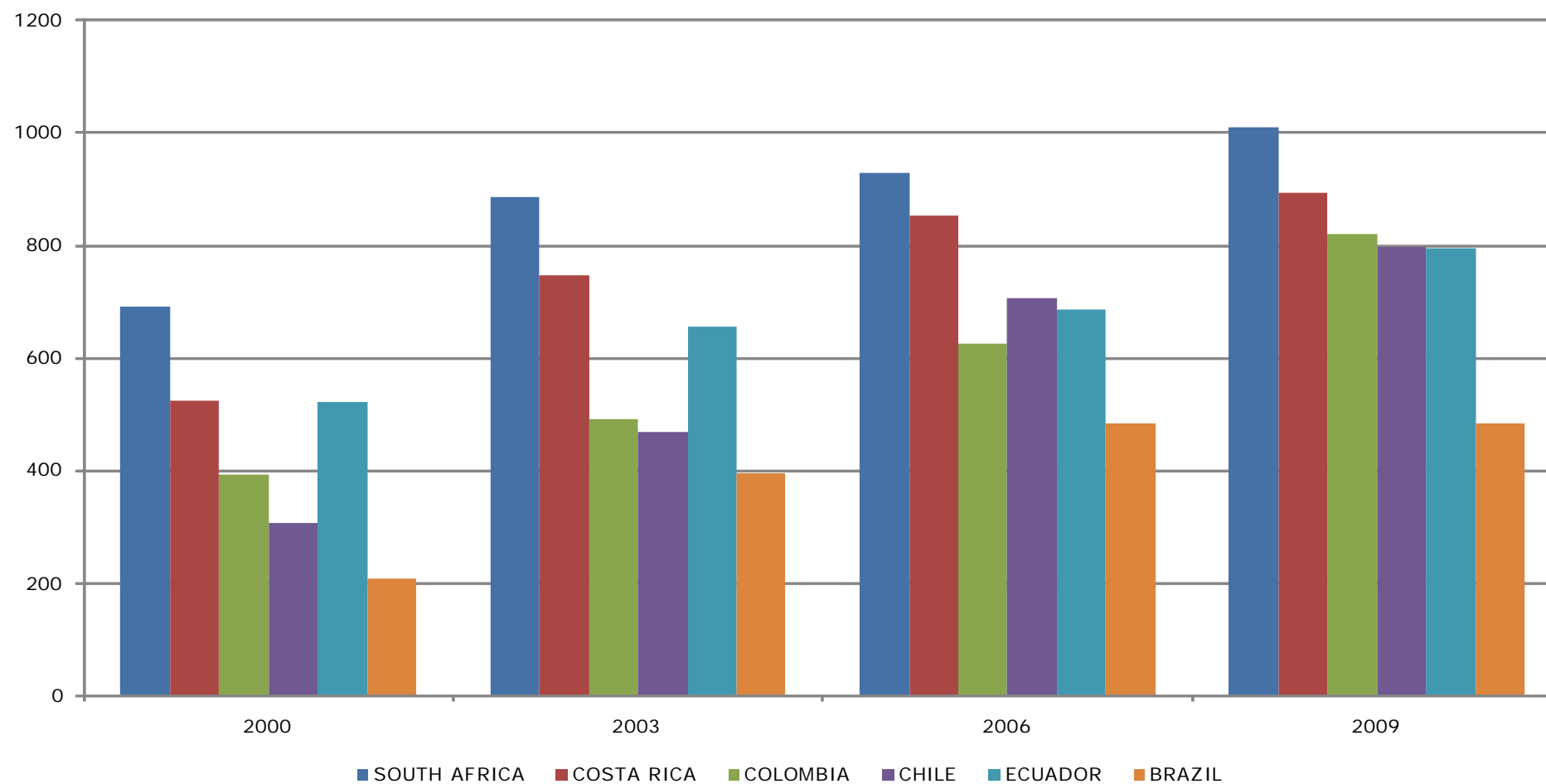
PARTNER	2000	2003	2006	2009
INTRA-EU	70.5	68.9	67.9	68.6
EXTRA-EU	29.5	31.1	32.1	31.4
<i>Total EU</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: Eurostat

Figure A1.5 - EU imports of fresh Vegetables from leading suppliers (Million EUR), 2000-2009



Source: EUROSTAT Comext

Figure A1.6 - EU imports of fresh Fruit from leading suppliers (Million EUR), 2000-2009

Source: EUROSTAT Comext

Table A1.18 - EU imports of Vegetables from MPCs (Value in Million EUR), 2000-2009

PARTNER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
MOROCCO	186.6	205.8	287.7	280.5	304.6	388.4	373.5	701.6	499.2	537.1
ISRAEL (GAZA and JERICHO- >1994)	82.4	100.3	91.5	92.2	126.0	151.1	180.8	280.1	178.3	206.2
TURKEY	66.9	84.4	98.4	114.0	97.0	134.3	121.4	183.4	181.1	191.6
EGYPT	28.4	33.1	39.6	48.8	55.9	69.8	84.6	97.7	81.0	91.4
TUNISIA	4.0	2.9	3.5	3.7	4.1	6.1	6.5	11.0	11.2	16.4
JORDAN	5.2	3.5	4.3	6.1	3.7	4.7	7.7	10.2	12.5	13.1
SYRIAN ARAB REPUBLIC (SYRIA)	1.4	1.3	1.9	1.9	2.8	4.8	6.2	11.1	2.6	4.8
ALGERIA	0.0	0.0	0.0	0.2	0.1	0.2	0.6	1.7	2.7	3.4
LEBANON	0.2	0.1	0.1	0.1	0.1	0.3	0.2	0.4	0.4	0.2
LIBYAN ARAB JAMAHIRIYA (LIBYA)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
<i>MPCs TOTAL</i>	<i>375.0</i>	<i>431.3</i>	<i>527.0</i>	<i>547.5</i>	<i>594.3</i>	<i>759.7</i>	<i>781.5</i>	<i>1297.2</i>	<i>969.1</i>	<i>1064.2</i>

Source: EUROSTAT Comext

Table A1.19 - EU imports of Citrus fruit from leading suppliers (thousand tons), 2000-2009

PARTNER	2000	2003	2006	2009
SOUTH AFRICA (incl. NA - >1989)	450	473	468	527
ARGENTINA	199	359	331	308
TURKEY	215	203	338	290
MOROCCO	309	289	229	180
EGYPT	13	40	119	137
ISRAEL (GAZA and JERICHO- >1994)	159	88	95	116
URUGUAY	50	95	115	104
CHINA (PEOPLE'S REPUBLIC OF)	0	0	17	75
BRAZIL	76	89	96	73
UNITED STATES	112	108	56	63

Source: Eurostat

Table A1.20 - EU imports of fresh or dried Oranges from leading suppliers (thousand tons), 2000-2009

PARTNER	2000	2003	2006	2009
SOUTH AFRICA (incl. NA - >1989)	291	313	297	334
EGYPT	12	38	115	135
MOROCCO	176	171	142	91
ARGENTINA	32	68	82	82
URUGUAY	27	56	65	59
TURKEY	22	34	55	31
ISRAEL (GAZA and JERICHO- >1994)	56	24	19	23
TUNISIA	25	17	19	20
BRAZIL	65	53	48	17
ZIMBABWE (RHODESIA - >1980)	28	33	13	14

Source: Eurostat

Table A1.21 - EU imports of Citrus fruit from MPCs (thousand tons), 2000-2009

PARTNER_LAB	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
TURKEY	215	267	290	203	251	334	338	255	233	290
MOROCCO	309	257	226	289	248	245	229	180	233	180
EGYPT	13	17	30	40	76	122	119	112	115	137
ISRAEL	158	143	95	88	93	124	94	117	105	114
TUNISIA	25	22	22	17	19	18	19	17	27	20
Others MPC Countries	0	0	1	1	1	2	0	2	4	0
<i>Total MPC Countries</i>	<i>720</i>	<i>707</i>	<i>663</i>	<i>639</i>	<i>687</i>	<i>846</i>	<i>798</i>	<i>681</i>	<i>718</i>	<i>742</i>

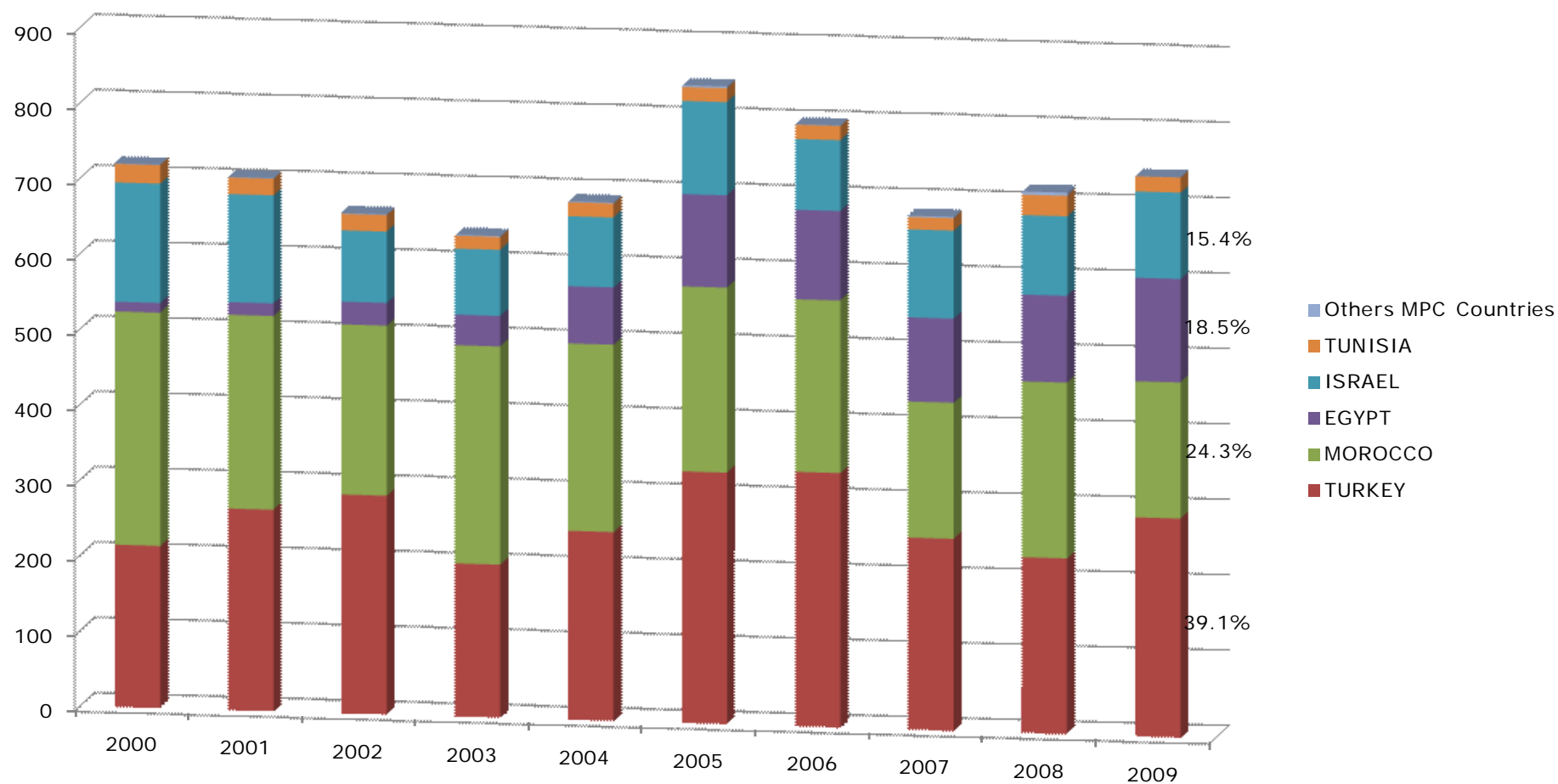
Source: Eurostat

Table A1.22 - Share (%) of EU-27 imports of Citrus fruit from MPCs, 2000-2009

PARTNER_LAB	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
TURKEY	29.8	37.8	43.8	31.8	36.5	39.5	42.3	37.4	32.5	39.1
MOROCCO	42.9	36.4	34.0	45.3	36.2	29.0	28.7	26.5	32.5	24.3
EGYPT	1.8	2.4	4.6	6.3	11.0	14.5	14.9	16.4	16.0	18.5
ISRAEL (GAZA and JERICHO- >19 ^c	22.0	20.3	14.3	13.7	13.5	14.6	11.8	17.1	14.7	15.4
TUNISIA	3.4	3.1	3.3	2.7	2.7	2.2	2.4	2.4	3.8	2.7
Others MPC Countries	0.1	0.1	0.1	0.2	0.2	0.3	0.0	0.2	0.6	0.0
<i>Total MPC Countries</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: Eurostat

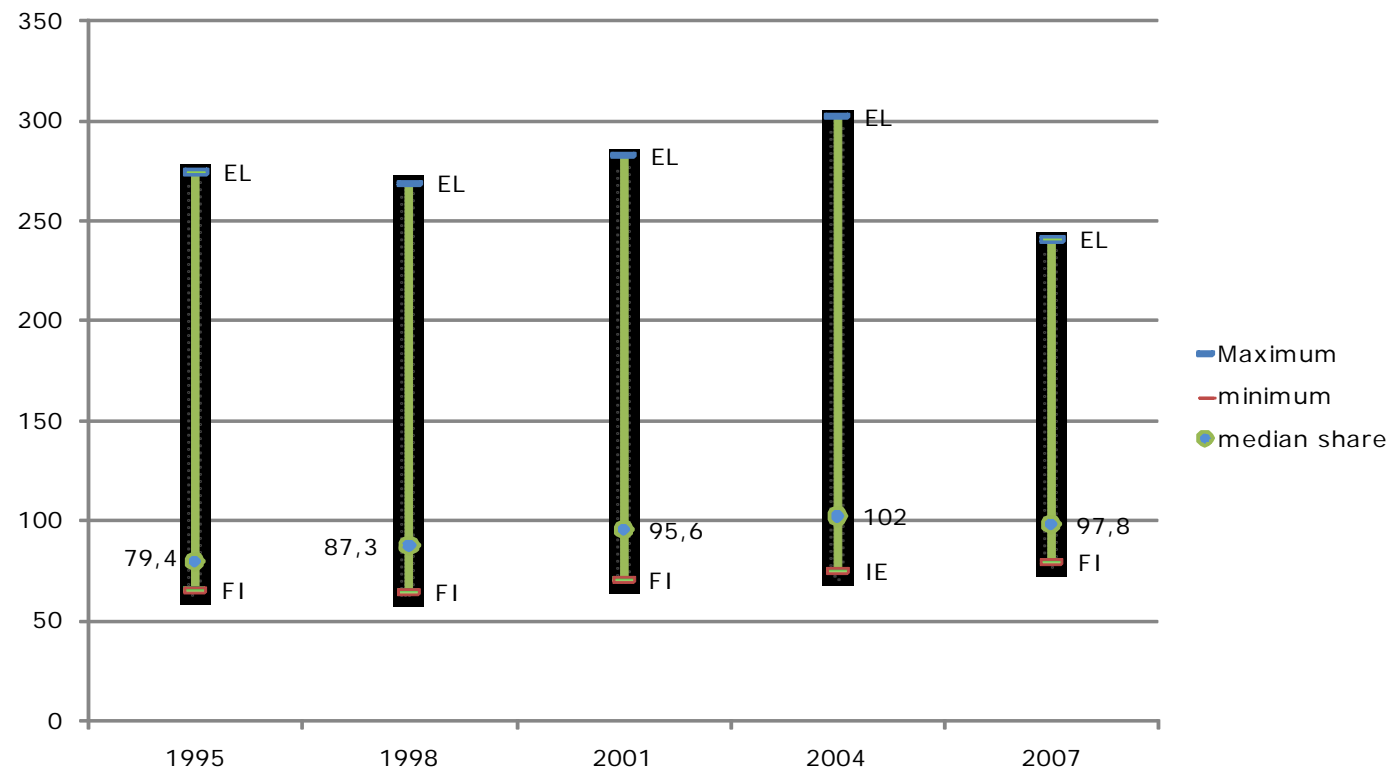
Figure A1.7 - EU imports of Citrus fruit from MPCs (thousand tons), 2000-2009



Source: Eurostat

Figure A1.8 - Gross human apparent consumption (availability for human consumption) of Vegetables, EU-15 Member States (Kg per head)

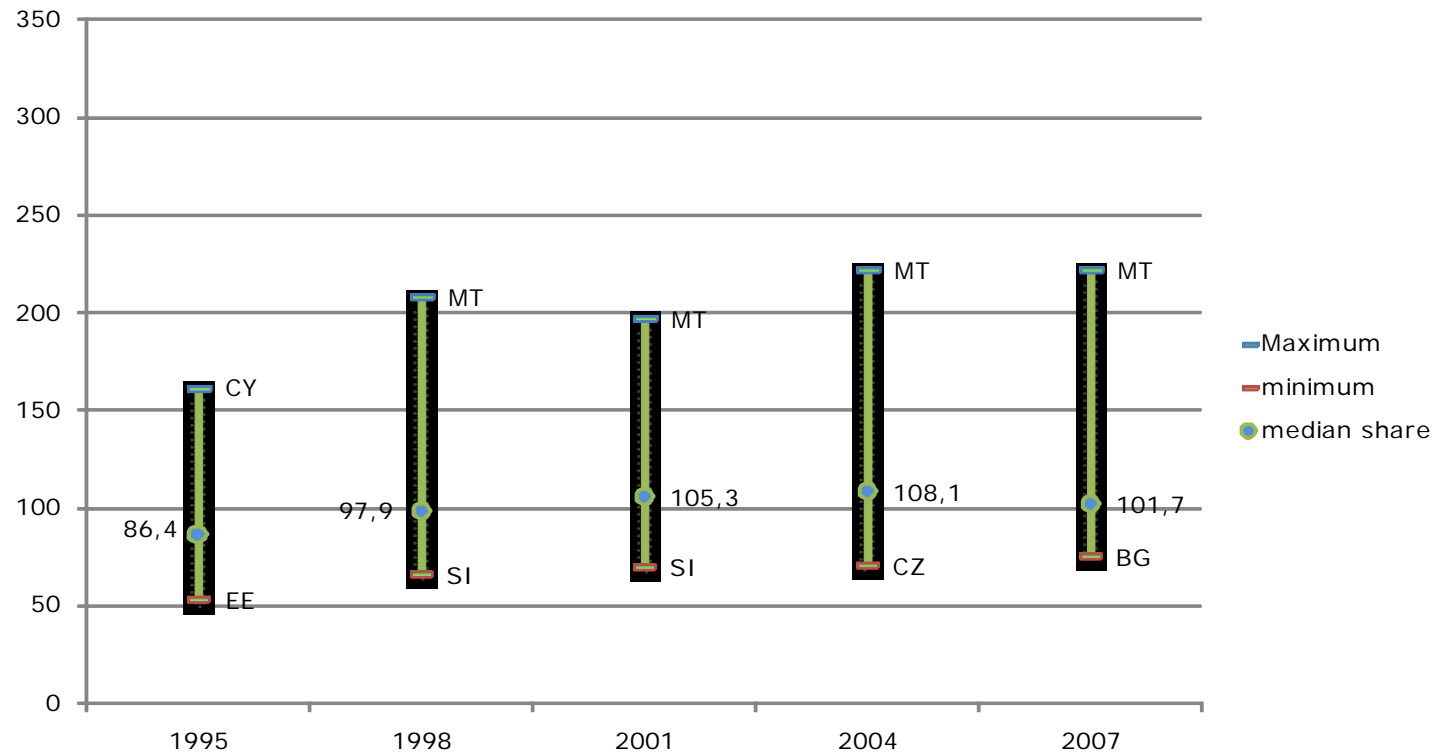
Minimum and maximum levels (either end of vertical line), median share (circle)



Source: Eurostat

Figure A1.9 - Gross human apparent consumption (availability for human consumption) of Vegetables, EU-12 New Member States (Kg per head)

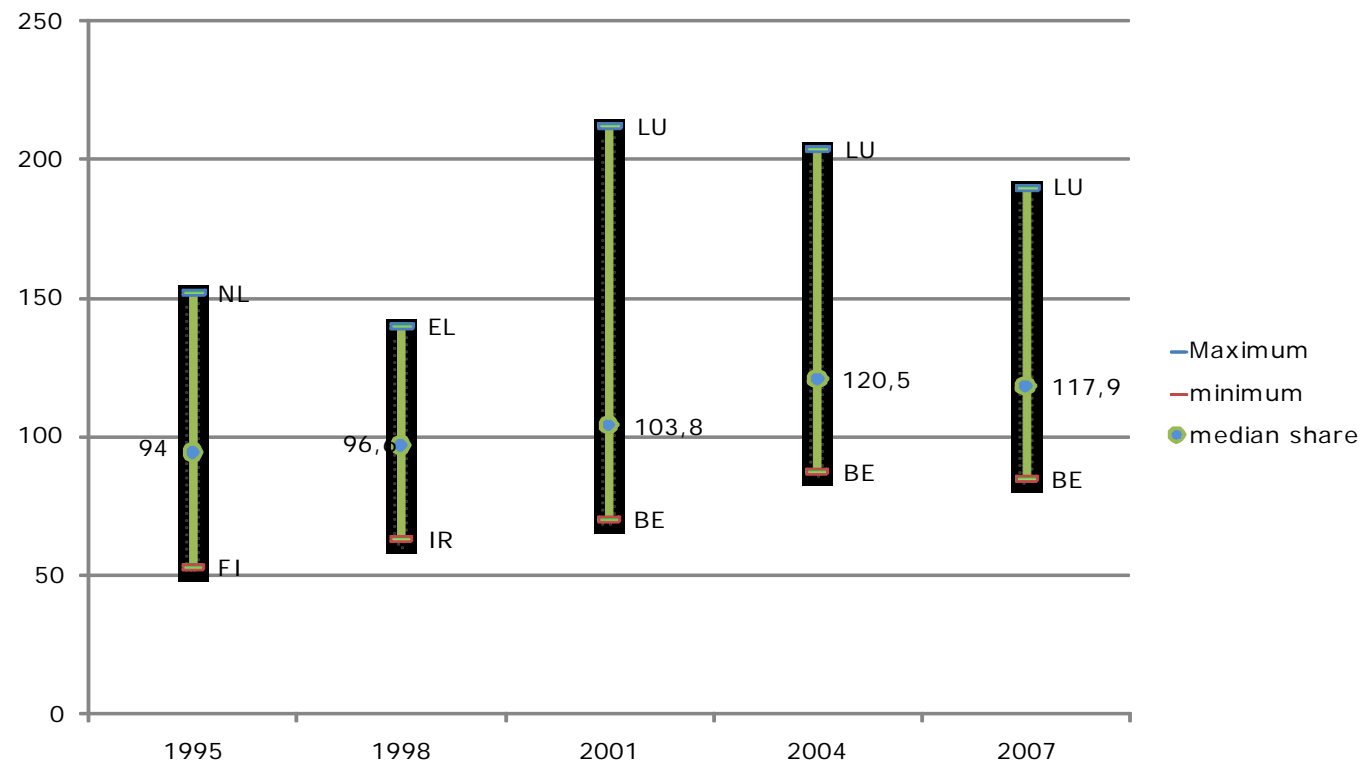
Minimum and maximum levels (either end of vertical line), median share (circle)



Source: Eurostat

Figure A1.10 - Gross human apparent consumption (availability for human consumption) of Fruit, EU-15 Member States (Kg per head)

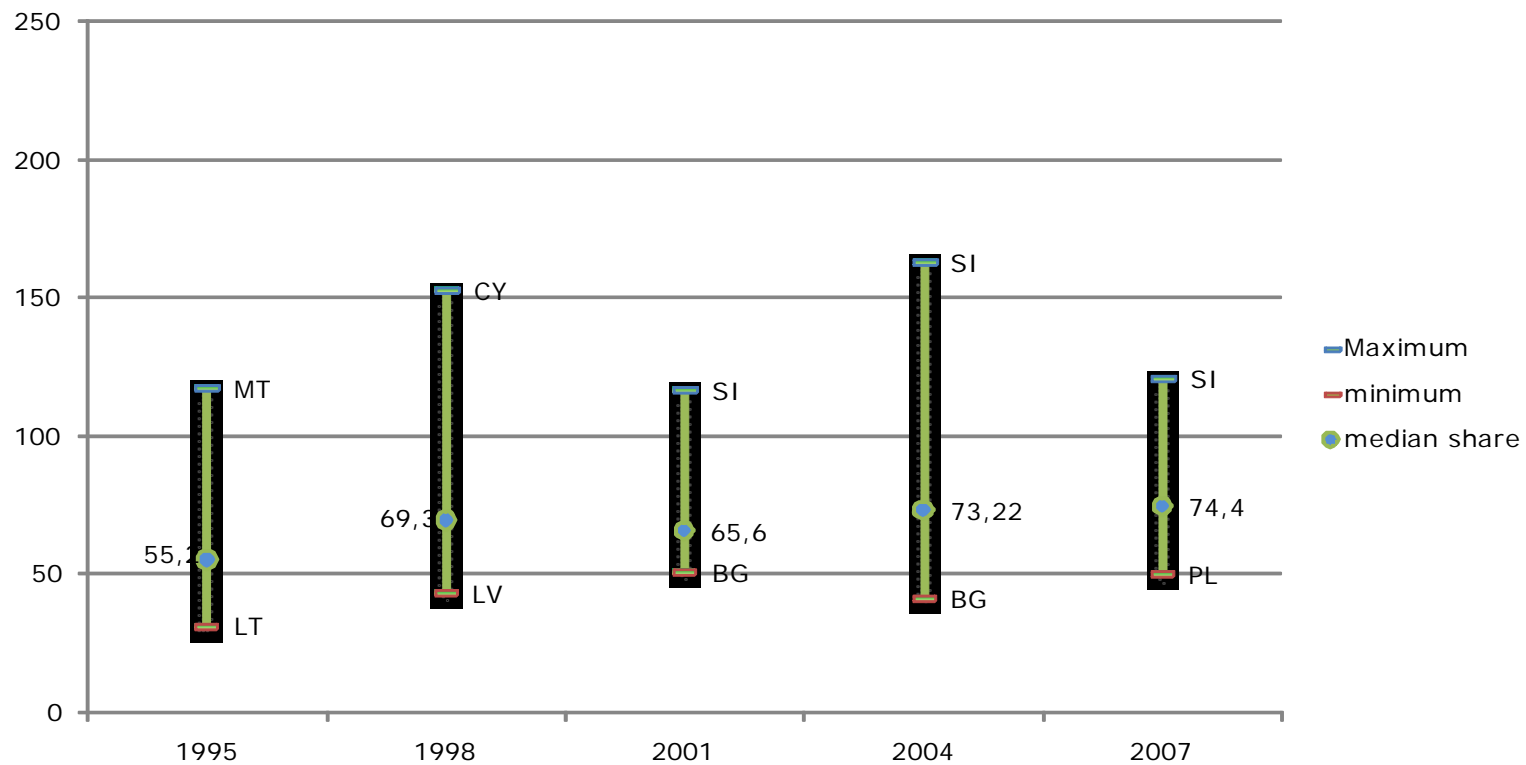
Minimum and maximum levels (either end of vertical line), median share (circle)



Source: Eurostat

Figure A1.11 - Gross human apparent consumption (availability for human consumption) of Fruit, EU-12 New Member States (Kg per head)

Minimum and maximum levels (either end of vertical line), median share (circle)



Source: Eurostat

Table A1.23 - Harmonized indices of consumer prices (HICP) (2005=100) - Vegetables - Annual average index, 1996-2010

GEO/TIME	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
European Union (27 countries)	77.57	81.29	85.69	86.96	87.24	91.87	97.27	100.51	98.72	100.00	105.60	110.24	112.56	113.91
European Union (15 countries)	85.00	83.61	86.89	88.96	88.75	94.49	98.91	101.05	99.44	100.00	103.89	:	:	:
Belgium	86.14	86.18	88.97	92.17	88.77	96.22	100.23	101.24	98.07	100.00	110.06	111.58	108.62	108.40
Bulgaria	:	68.38	80.74	72.58	80.40	79.04	85.75	86.57	88.73	100.00	106.59	114.86	120.22	119.51
Czech Republic	:	:	:	:	102.30	104.00	109.10	108.90	107.60	100.00	111.60	118.70	111.10	108.70
Denmark	108.20	105.20	104.20	101.50	94.80	93.60	97.10	103.60	98.70	100.00	103.10	114.00	120.30	119.40
Germany (including former GDR from 1991)	102.70	101.90	102.30	102.30	101.40	106.40	105.10	103.60	99.90	100.00	108.20	111.50	110.40	105.70
Estonia	79.65	76.84	89.39	85.42	74.66	79.90	106.55	100.79	98.02	100.00	110.64	126.60	128.85	111.50
Ireland	76.00	74.30	88.80	96.70	93.70	104.20	106.90	106.80	101.70	100.00	103.30	106.70	107.00	102.10
Greece	69.58	78.55	83.52	87.44	90.36	94.12	105.47	112.29	102.45	100.00	100.57	98.51	98.04	105.11
Spain	67.60	66.87	72.03	74.60	76.80	80.98	89.51	93.13	98.00	100.00	103.17	110.07	113.72	113.55
France	84.63	84.55	86.80	89.37	90.24	95.17	100.92	103.32	98.04	100.00	104.18	107.08	107.88	108.23
Italy	76.60	75.80	76.80	80.10	81.80	86.80	96.10	100.70	102.00	100.00	100.50	102.50	105.30	107.60
Cyprus	82.02	91.36	90.91	78.64	93.23	95.40	96.93	102.34	99.75	100.00	108.79	119.16	131.71	128.66
Latvia	55.54	51.53	55.36	56.49	56.91	61.87	76.88	82.79	85.14	100.00	114.93	131.27	138.47	126.59
Lithuania	118.25	109.44	126.66	118.65	104.23	107.08	118.49	104.18	92.34	100.00	117.86	134.09	137.57	123.76
Luxembourg	74.13	71.21	77.09	81.54	84.28	89.73	98.10	94.80	97.80	100.00	104.90	110.50	109.55	109.30
Hungary	:	:	:	:	:	80.19	89.89	111.21	103.86	100.00	142.85	166.89	158.79	171.11
Malta	96.74	88.85	92.39	89.55	88.09	96.35	94.62	106.78	96.80	100.00	101.92	106.16	116.95	134.08
Netherlands	82.52	82.41	87.42	93.13	89.56	98.38	103.50	105.89	99.47	100.00	109.87	115.60	117.69	117.70
Austria	93.12	90.76	93.38	93.12	92.54	95.50	99.17	100.13	98.30	100.00	102.38	108.16	110.73	111.81
Poland	91.70	83.20	92.10	94.10	100.50	96.70	103.00	98.70	97.20	100.00	114.30	117.50	113.10	122.20
Portugal	71.92	75.06	89.07	86.49	88.58	104.91	102.79	103.58	102.86	100.00	107.82	114.09	108.44	104.15
Romania	:	:	:	:	:	54.57	70.87	96.85	91.48	100.00	111.73	112.13	124.27	126.34
Slovenia	:	:	:	:	89.74	94.62	99.91	108.42	101.76	100.00	111.59	129.21	124.27	121.36
Slovakia	81.58	82.85	92.02	94.13	97.86	94.55	101.60	102.29	100.24	100.00	124.14	136.52	132.73	126.85
Finland	87.78	87.66	93.50	93.31	92.49	96.17	103.28	102.48	103.55	100.00	102.55	111.45	113.46	113.82
Sweden	89.29	86.24	89.12	95.46	92.20	99.70	103.76	104.83	101.97	100.00	101.61	105.22	109.38	111.03
United Kingdom	93.30	85.20	91.20	92.00	88.70	97.00	96.30	97.80	97.00	100.00	102.20	111.20	120.80	128.50

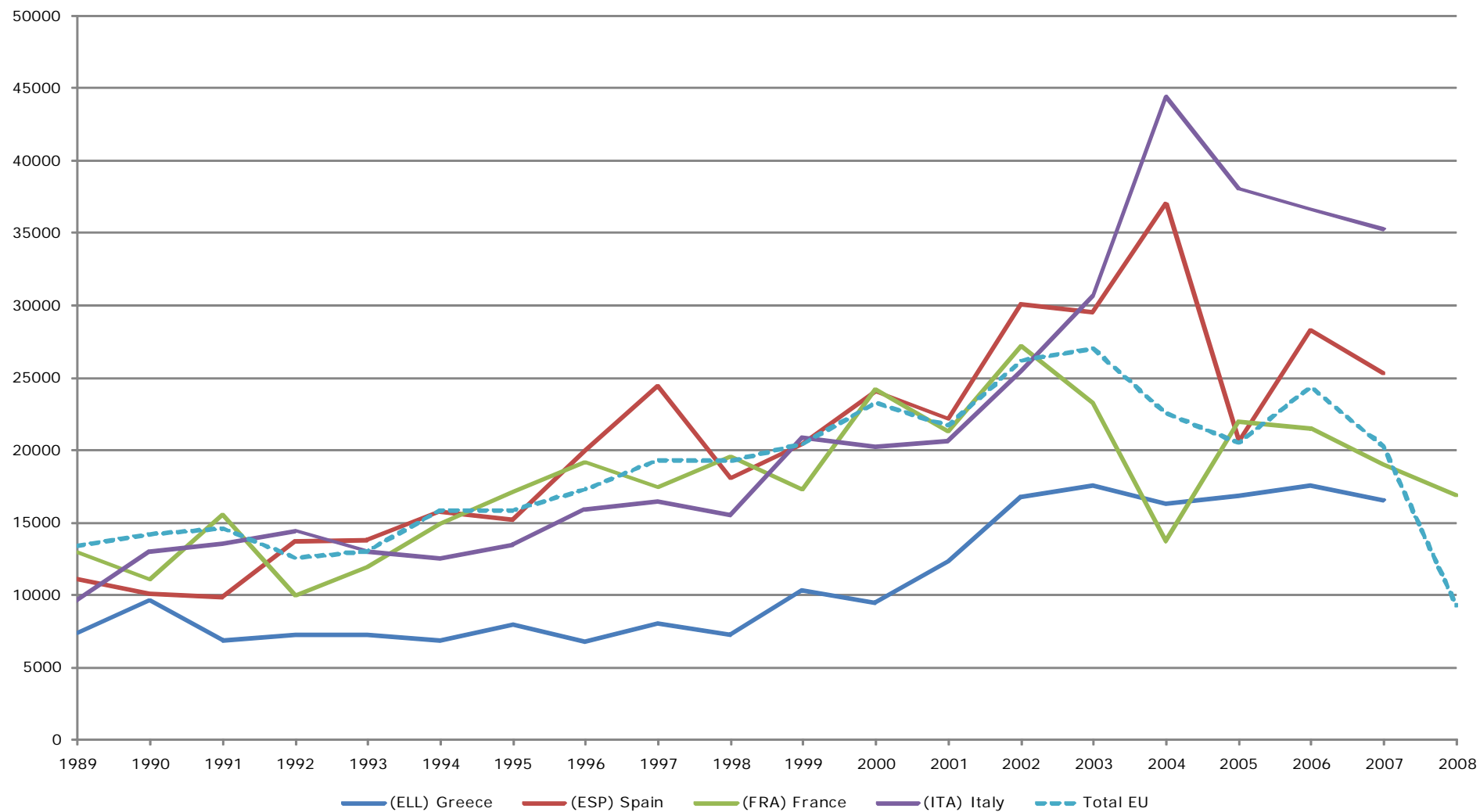
Source: Eurostat

Table A1.24 - Harmonized indices of consumer prices (HICP) (2005=100) - Fruit - Annual average index, 1996-2010

GEO/TIME	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
European Union (27 countries)	75.75	80.38	83.63	84.15	84.13	90.99	95.23	99.13	99.60	100.00	101.33	105.03
European Union (15 countries)	81.14	82.02	85.03	85.06	85.16	91.84	96.30	100.18	100.31	100.00	101.04	:
Belgium	77.62	83.23	85.20	82.67	83.07	89.75	95.78	100.41	100.08	100.00	101.25	103.72
Bulgaria	:	66.99	78.14	79.74	83.85	90.01	93.66	87.20	90.84	100.00	108.70	119.73
Czech Republic	:	:	:	:	84.30	95.30	92.50	93.60	96.30	100.00	93.80	100.80
Denmark	89.90	94.50	95.30	95.00	93.20	100.00	102.60	103.60	101.70	100.00	105.70	107.70
Germany (including former GDR from 1991)	90.80	92.10	94.80	91.70	91.60	99.20	99.10	97.90	97.80	100.00	102.40	104.80
Estonia	92.08	87.38	85.31	84.13	83.85	88.11	92.91	91.94	98.62	100.00	110.73	120.52
Ireland	81.60	86.10	90.50	91.70	94.40	96.00	100.10	100.90	101.20	100.00	101.90	106.20
Greece	73.47	79.20	84.92	83.67	82.91	93.80	108.09	123.77	110.90	100.00	98.54	104.23
Spain	66.24	64.39	66.29	70.61	70.14	74.29	80.69	88.91	95.67	100.00	100.83	104.70
France	80.97	83.43	86.57	83.83	85.44	94.68	98.85	104.77	101.05	100.00	102.35	105.24
Italy	82.60	81.30	85.10	85.60	85.00	89.30	96.60	102.00	105.60	100.00	97.50	102.50
Cyprus	84.71	91.61	89.34	92.37	99.44	108.45	110.03	111.42	105.94	100.00	107.07	113.70
Latvia	68.19	58.39	56.42	60.43	60.11	68.37	71.03	83.45	90.62	100.00	113.48	136.57
Lithuania	119.21	107.31	99.37	94.87	83.67	87.73	87.75	86.75	92.85	100.00	114.25	126.89
Luxembourg	74.60	75.34	78.76	79.31	80.86	86.64	93.70	97.00	101.61	100.00	100.58	104.46
Hungary	:	:	:	:	:	83.09	95.12	89.12	94.22	100.00	109.76	125.72
Malta	90.15	90.36	89.40	86.28	84.28	91.31	92.68	91.92	97.33	100.00	103.73	109.32
Netherlands	82.25	86.13	88.26	89.48	91.60	100.77	108.23	107.94	103.32	100.00	101.83	104.04
Austria	68.46	73.49	82.18	80.42	92.96	99.84	102.75	105.04	103.78	100.00	100.22	104.66
Poland	53.00	74.70	78.90	88.20	87.50	89.40	86.40	93.30	95.30	100.00	102.30	110.30
Portugal	76.91	77.43	81.58	89.11	81.72	87.71	92.20	98.37	101.75	100.00	100.45	103.56
Romania	:	:	:	:	:	63.42	80.31	89.96	92.30	100.00	103.28	110.90
Slovenia	:	:	:	:	81.55	91.54	91.72	94.93	94.98	100.00	97.49	108.64
Slovakia	85.78	84.74	85.58	88.42	86.57	98.24	96.73	96.02	96.50	100.00	104.02	107.12
Finland	74.44	75.96	82.30	81.63	79.86	86.78	96.02	96.97	98.28	100.00	101.71	104.41
Sweden	82.59	83.09	84.93	86.25	84.52	92.74	97.30	95.66	97.90	100.00	104.88	108.12
United Kingdom	88.20	90.50	91.80	91.00	91.30	99.30	100.40	101.70	98.80	100.00	100.80	102.20

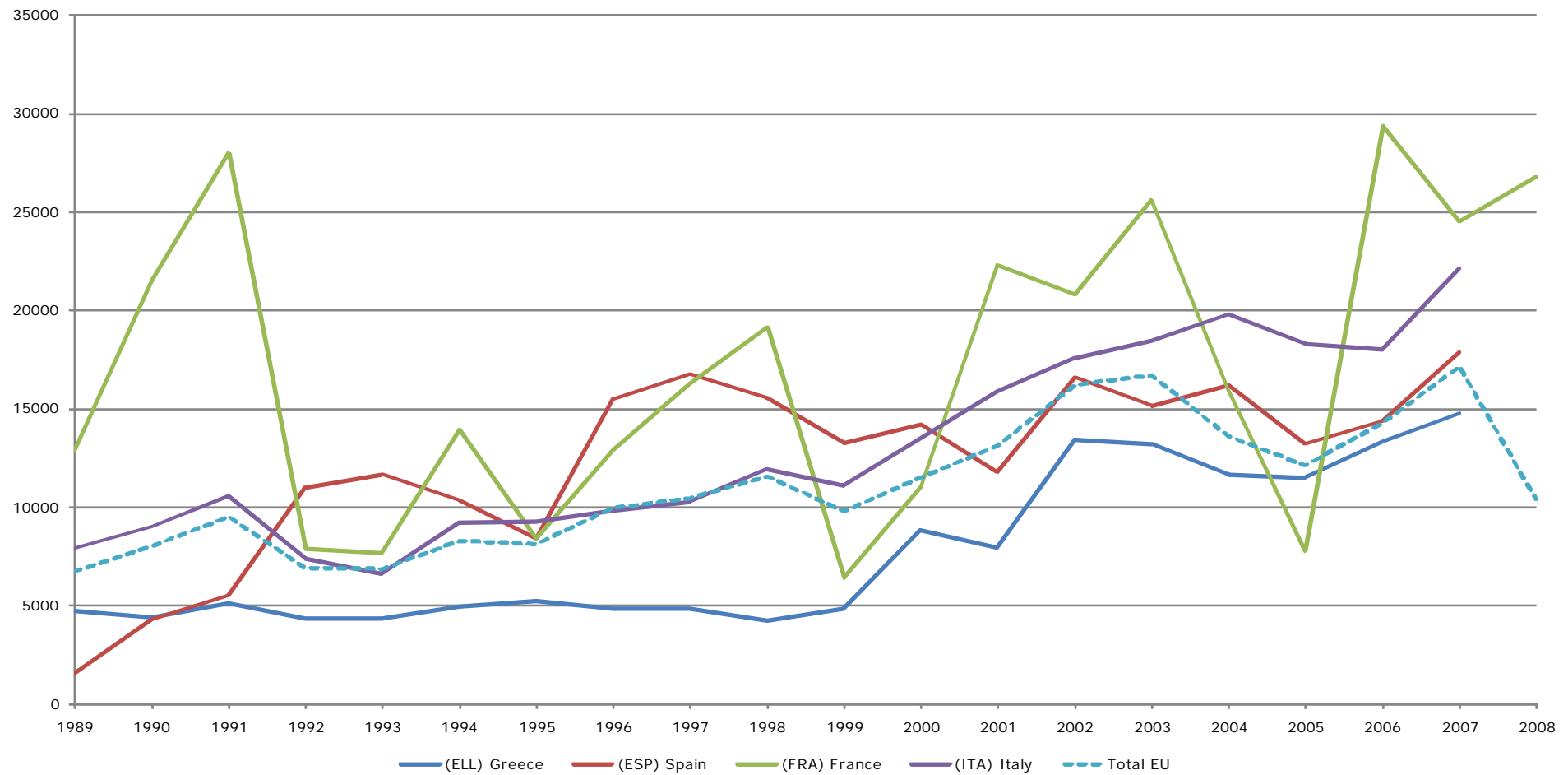
Source: Eurostat

Figure A1.12 - Farm Net Income / FWU - Specialist horticulture farms (EUR)



Source: FADN

Figure A1.13 - Farm Net Income / FWU - Specialist orchards/ fruits farms (EUR)



Source: FADN

Table A1.25 - Production of Citrus fruit by products (thousand tons), 2000-2009

Member States	item	2000	2001	2002	2003	2004	2005	2006	2007
Italy	Oranges	1,876	1,724	1,724	1,734	2,105	2,261	2,346	2,197
	Tangerines, mandarins, clem	593	593	548	497	611	617	690	592
	Lemons and limes	613	547	486	520	583	603	573	556
	Citrus fruit, nes	16	26	26	24	29	29	37	15
	Grapefruit (inc. pomelos)	4	5	4	7	7	7	8	7
<i>Total Italy</i>		<i>3,103</i>	<i>2,895</i>	<i>2,789</i>	<i>2,781</i>	<i>3,336</i>	<i>3,518</i>	<i>3,654</i>	<i>3,368</i>
Spain	Oranges	2,616	2,898	2,963	3,052	2,767	2,376	3,397	2,740
	Tangerines, mandarins, clem	1,802	1,758	2,068	2,060	2,460	1,957	2,508	1,987
	Lemons and limes	915	1,024	934	1,130	810	945	877	507
	Citrus fruit, nes	11	9	18	11	10	13	21	13
	Grapefruit (inc. pomelos)	23	26	31	25	30	33	42	41
<i>Total Spain</i>		<i>5,367</i>	<i>5,717</i>	<i>6,014</i>	<i>6,278</i>	<i>6,077</i>	<i>5,324</i>	<i>6,846</i>	<i>5,288</i>
Greece	Oranges	946	1,112	1,193	952	698	936	899	816
	Tangerines, mandarins, clem	119	130	130	105	91	127	109	119
	Lemons and limes	110	179	166	144	68	84	88	86
	Citrus fruit, nes	3	3	3	3	2	1	1	1
	Grapefruit (inc. pomelos)	7	8	8	7	7	6	7	7
<i>Total Greece</i>		<i>1,185</i>	<i>1,433</i>	<i>1,500</i>	<i>1,211</i>	<i>866</i>	<i>1,154</i>	<i>1,104</i>	<i>1,029</i>
European Union	Oranges	5,738	5,995	6,205	6,059	5,869	5,843	6,925	5,998
	Tangerines, mandarins, clem	2,614	2,585	2,869	2,776	3,288	2,820	3,434	2,811
	Lemons and limes	1,672	1,786	1,621	1,827	1,497	1,665	1,568	1,176
	Citrus fruit, nes	32	40	49	39	43	45	60	31
	Grapefruit (inc. pomelos)	71	73	79	77	86	84	94	87
<i>Total European Union</i>		<i>10,127</i>	<i>10,479</i>	<i>10,822</i>	<i>10,778</i>	<i>10,783</i>	<i>10,457</i>	<i>12,082</i>	<i>10,103</i>
World	Oranges	63,812	60,117	62,004	59,608	64,833	62,927	65,540	65,295
	Tangerines, mandarins, clem	18,303	20,824	21,358	22,035	23,417	23,750	25,894	27,804
	Lemons and limes	11,209	11,980	12,057	12,362	12,073	12,118	13,165	13,058
	Citrus fruit, nes	6,559	6,808	6,739	6,799	7,015	7,082	7,133	7,440
	Grapefruit (inc. pomelos)	5,404	5,160	4,907	4,814	4,983	4,045	4,361	4,614
<i>Total World</i>		<i>105,288</i>	<i>104,889</i>	<i>107,064</i>	<i>105,617</i>	<i>112,320</i>	<i>109,923</i>	<i>116,092</i>	<i>118,211</i>

Source: Eurostat

Table A1.26 - Production of Peaches and Nectarines by EU Member States (thousand tons), 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	10	8	7	7	9	8	9	8	8	9
Bulgaria	42	13	10	17	22	15	22	19	15	17
Cyprus	4	3	4	4	4	4	4	4	4	5
Czech Republic	11	5	9	9	8	5	4	3	4	0
France	481	458	455	347	397	403	395	365	301	310
Germany	1	1	1	0	1	1	1	1	1	1
Greece	950	943	687	228	876	864	768	816	734	734
Hungary	64	57	22	32	83	48	68	41	48	61
Italy	1,655	1,679	1,587	1,176	1,710	1,693	1,665	1,630	1,589	1,638
Malta	1	0	1	1	1	1	2	1	1	1
Poland	2	4	3	12	14	10	6	4	12	13
Portugal	64	27	60	57	52	52	50	53	50	54
Romania	18	17	13	18	20	30	17	17	16	17
Slovakia	5	2	3	4	5	4	3	1	3	0
Slovenia	12	5	11	6	14	13	11	9	7	10
Spain	1,130	1,082	1,276	1,271	988	1,261	1,246	1,221	1,299	1,226
European Union	4,449	4,305	4,147	3,189	4,204	4,412	4,269	4,193	4,092	4,100
World	13,355	14,021	14,811	14,836	16,707	17,691	18,009	17,813	18,429	18,579

Source: FAOSTAT

Table A1.27 - Share (%) of production of Peaches and Nectarines by EU Member States, 2000-2009

Member States	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Bulgaria	0.9	0.3	0.2	0.5	0.5	0.3	0.5	0.4	0.4	0.4
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Czech Republic	0.3	0.1	0.2	0.3	0.2	0.1	0.1	0.1	0.1	0.0
France	10.8	10.6	11.0	10.9	9.4	9.1	9.2	8.7	7.4	7.6
Germany	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Greece	21.4	21.9	16.6	7.1	20.8	19.6	18.0	19.5	17.9	17.9
Hungary	1.4	1.3	0.5	1.0	2.0	1.1	1.6	1.0	1.2	1.5
Italy	37.2	39.0	38.3	36.9	40.7	38.4	39.0	38.9	38.8	40.0
Malta	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Poland	0.0	0.1	0.1	0.4	0.3	0.2	0.1	0.1	0.3	0.3
Portugal	1.4	0.6	1.4	1.8	1.2	1.2	1.2	1.3	1.2	1.3
Romania	0.4	0.4	0.3	0.6	0.5	0.7	0.4	0.4	0.4	0.4
Slovakia	0.1	0.0	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.0
Slovenia	0.3	0.1	0.3	0.2	0.3	0.3	0.3	0.2	0.2	0.2
Spain	25.4	25.1	30.8	39.8	23.5	28.6	29.2	29.1	31.7	29.9
European Union	100	100	100	100	100	100	100	100	100	100
<i>European Union/World</i>	33.3	30.7	28.0	21.5	25.2	24.9	23.7	23.5	22.2	22.1

Source: FAOSTAT

Table A1.28 - Trade of Peaches and Nectarines intra-EU and extra-EU (thousand tons), 2000-2009

	PARTNER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EXPORT	EXTRA-EU	105	118	112	72	117	151	164	194	196	208
	INTRA-EU	844	828	907	789	789	950	979	941	964	999
<i>EXPORT Total</i>	<i>EU-27</i>	<i>950</i>	<i>946</i>	<i>1,020</i>	<i>861</i>	<i>906</i>	<i>1,101</i>	<i>1,143</i>	<i>1,135</i>	<i>1,160</i>	<i>1,206</i>
IMPORT	EXTRA-EU	16	24	21	31	32	41	40	42	43	36
	INTRA-EU	833	872	888	776	810	971	985	958	989	968
<i>IMPORT Total</i>	<i>EU-27</i>	<i>849</i>	<i>896</i>	<i>909</i>	<i>807</i>	<i>842</i>	<i>1,012</i>	<i>1,025</i>	<i>1,000</i>	<i>1,031</i>	<i>1,004</i>

Source: Eurostat

Table A1.29 – Share (%) of Peaches and Nectarines trade intra-EU and extra-EU 2000-2009

	PARTNER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EXPORT	EXTRA-EU	11	12	11	8	13	14	14	17	17	17
	INTRA-EU	89	88	89	92	87	86	86	83	83	83
<i>EXPORT Total</i>	<i>EU-27</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>
IMPORT	EXTRA-EU	2	3	2	4	4	4	4	4	4	4
	INTRA-EU	98	97	98	96	96	96	96	96	96	96
<i>IMPORT Total</i>	<i>EU-27</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: Eurostat

Table A1.30 - EU imports of table Grapes, intra-EU and extra-EU (thousand tons), 2000-2009

	PARTNER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EXPORT	INTRA-EU	939	1,029	787	881	840	994	898	866	1,037	884
	EXTRA-EU	88	115	87	94	93	113	124	129	147	117
<i>EXPORT Totale</i>	<i>EU-27</i>	<i>1,027</i>	<i>1,144</i>	<i>874</i>	<i>975</i>	<i>933</i>	<i>1,107</i>	<i>1,022</i>	<i>994</i>	<i>1,184</i>	<i>1,001</i>
IMPORT	INTRA-EU	900	897	765	879	882	993	932	955	1,100	983
	EXTRA-EU	348	346	395	426	474	555	605	612	649	616
<i>IMPORT Totale</i>	<i>EU-27</i>	<i>1,249</i>	<i>1,243</i>	<i>1,159</i>	<i>1,305</i>	<i>1,356</i>	<i>1,548</i>	<i>1,537</i>	<i>1,566</i>	<i>1,749</i>	<i>1,600</i>

Source: Eurostat

Table A1.31 - EU imports of table Grapes by leading importing Countries (thousand tons), 2000-2009

REPORTER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
NETHERLANDS	170	147	150	192	195	270	295	342	389	382
GERMANY (incl DD from 1991)	378	363	310	363	356	393	352	323	367	321
UNITED KINGDOM	151	154	185	193	216	242	270	248	268	242
FRANCE	149	148	123	144	141	146	130	141	155	135
POLAND	81	93	69	71	69	74	74	90	114	85
BELGIUM (and LUXBG -> 1998)	91	95	93	92	89	88	86	77	59	71
AUSTRIA	54	55	48	45	61	62	54	47	50	49
CZECH REPUBLIC (CS->1992)	26	30	30	34	41	45	45	42	51	46
SPAIN	17	28	23	25	25	33	28	33	41	43
PORTUGAL	24	23	28	27	26	27	28	29	30	31

Source: Eurostat

Table A1.32 - EU imports of table Grapes from leading suppliers (thousand tons), 2000-2009

PARTNER	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
CHILE	87	80	86	111	120	154	178	172	208	190
SOUTH AFRICA (incl. NA ->1989)	130	142	168	158	173	172	189	181	183	181
EGYPT	4	5	9	10	17	24	31	38	40	49
BRAZIL	8	15	22	33	22	41	43	59	55	39
INDIA	9	6	11	15	11	22	30	28	41	37
TURKEY	51	45	37	35	52	52	44	37	36	30
ARGENTINA	22	20	25	26	33	37	37	43	29	28
PERU	1	2	2	4	3	4	7	7	11	16
NAMIBIA	2	2	5	6	6	13	15	12	17	16
MOROCCO	1	1	2	5	8	8	11	9	10	11

Source: Eurostat

Table A1.33 – Consumption of Citrus fruit in Italy (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
Oranges	659,516	613,056	626,452	627,002	624,909	608,931
Clementine	310,741	278,233	300,821	328,796	331,397	323,710
Lemons	253,445	247,050	242,133	249,797	290,152	289,441
Mandarins	115,417	90,694	83,866	83,637	89,790	97,723
Grapefruit	42,239	56,670	51,396	56,654	30,697	27,394

Source: Cso processing on GFK data

Table A1.34 – Purchases of Oranges in Italy (tons), 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Hypermarkets	48,849	52,401	43,686	51,276	56,508	60,460	61,283	59,389	68,862	66,342
Supermarkets	154,580	146,626	153,273	153,273	158,589	141,774	166,228	194,148	188,488	188,861
Discount stores	22,273	20,219	18,928	27,251	29,406	29,908	32,820	37,704	37,070	39,172
Superettes	23,378	21,378	20,011	19,561	13,896	13,008	18,377	15,195	17,532	16,808
Costers	316,741	314,247	288,244	271,690	253,051	224,393	203,905	186,506	178,050	162,407
Traditional retailers	13,024	13,867	14,553	14,604	8,016	4,660	9,578	14,534	15,399	12,596
Specialist retailers	134,142	124,833	131,982	122,419	123,616	127,973	126,887	113,914	114,462	119,267
Other	10,901	16,966	19,537	24,907	16,443	10,906	7,374	5,618	5,048	3,477
<i>Total</i>	<i>723,888</i>	<i>710,530</i>	<i>690,212</i>	<i>684,978</i>	<i>659,516</i>	<i>613,056</i>	<i>626,452</i>	<i>627,002</i>	<i>624,909</i>	<i>608,931</i>

Source: Cso processing on GFK data

Table A1.35 – Purchases of Clementines in Italy (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
SUPERMARKETS	59,909	57,686	75,364	82,260	84,493	90,668
TRADITIONAL SHOPS	3,493	2,648	4,793	6,111	5,054	6,304
COSTERS	78,342	79,966	72,273	67,757	62,141	57,028
OTHER SHOPS	7,106	7,974	7,770	8,245	8,767	8,822
DISCOUNT STORES	8,866	11,633	11,985	14,847	15,295	14,528
HYPERMARKETS	20,267	23,169	23,016	27,368	27,808	32,667
TRADITIONAL RETAILERS	46,955	44,132	47,149	46,594	48,723	50,921
<i>Total</i>	<i>224,938</i>	<i>227,208</i>	<i>242,350</i>	<i>253,182</i>	<i>252,281</i>	<i>260,938</i>

Source: Cso processing on GfK data

Table A1.36 – Purchases of Lemons in Italy (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
SUPERMARKETS	60,433	59,823	65,559	69,125	69,913	72,636
TRADITIONAL SHOPS	3,103	2,655	2,794	3,528	4,190	4,787
COSTERS	50,216	47,927	61,255	48,031	38,656	35,241
OTHER SHOPS	12,160	10,382	7,791	7,319	7,333	7,641
DISCOUNT STORES	14,831	11,299	13,201	13,396	13,974	16,362
HYPERMARKETS	25,998	24,584	17,772	23,435	24,454	23,834
TRADITIONAL RETAILERS	34,243	35,745	31,627	31,300	28,085	26,264
<i>Total</i>	<i>200,984</i>	<i>192,415</i>	<i>199,999</i>	<i>196,134</i>	<i>186,605</i>	<i>186,765</i>

Source: Cso processing on GfK data

Table A1.37 – Purchases of Mandarins in Italy (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
SUPERMARKETS	19,119	12,348	16,091	14,676	13,683	13,438
TRADITIONAL SHOPS	1,370	1,191	862	1,528	1,808	1,248
COSTERS	39,021	30,423	30,633	24,560	21,962	31,306
OTHER SHOPS	5,630	3,572	2,338	2,407	1,813	2,381
DISCOUNT STORES	988	977	1,261	1,865	2,329	2,372
HYPERMARKETS	2,244	2,920	4,138	6,914	8,358	6,184
TRADITIONAL RETAILERS	20,901	19,945	15,085	18,544	17,569	16,326
<i>Total</i>	<i>89,273</i>	<i>71,376</i>	<i>70,408</i>	<i>70,494</i>	<i>67,522</i>	<i>73,255</i>

Source: Cso processing on GFK data

Table A1.38 – Purchases of Grapefruit in Italy (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
SUPERMARKETS	15,932	16,802	17,243	16,689	11,626	10,021
TRADITIONAL SHOPS	215	197	140	613	248	141
COSTERS	3,365	2,755	3,805	5,280	2,724	1,810
OTHER SHOPS	876	781	683	1,226	1,318	1,160
DISCOUNT STORES	584	821	2,362	1,649	941	856
HYPERMARKETS	4,038	5,174	3,283	5,507	3,100	3,379
TRADITIONAL RETAILERS	2,712	3,067	2,983	2,634	2,014	1,822
<i>Total</i>	<i>27,722</i>	<i>29,597</i>	<i>30,500</i>	<i>33,598</i>	<i>21,972</i>	<i>19,190</i>

Source: Cso processing on GFK data

Table A1.39 – Purchases of Peaches in Italy (tons), 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Costers	134,986	121,541	126,260	111,801	107,541	92,762	88,140	83,454	75,569	82,091
Hypermarkets	13,611	17,004	16,752	14,774	19,273	21,166	22,647	21,714	25,588	23,886
Supermarkets	53,593	50,714	54,531	46,669	44,209	51,191	57,791	67,070	70,352	73,215
Discount Stores	8,943	7,040	7,990	6,559	9,072	10,035	12,218	10,773	14,419	14,422
Superettes	6,772	9,255	5,932	6,137	8,333	4,676	5,563	5,304	5,084	5,544
Traditional retailers	7,367	6,807	6,584	5,311	4,622	3,366	4,768	5,408	6,547	5,191
Specialist retailers	49,445	60,545	53,485	57,000	55,490	54,900	54,127	52,652	57,326	51,679
Other	12,710	4,303	7,264	6,310	5,387	1,987	1,312	1,567	1,784	2,040
<i>Total</i>	<i>287,427</i>	<i>277,209</i>	<i>278,798</i>	<i>254,561</i>	<i>253,927</i>	<i>240,082</i>	<i>246,566</i>	<i>247,944</i>	<i>256,669</i>	<i>258,068</i>

Source: Cso processing on GFK data

Table A1.40 – Purchases of Nectarines in Italy (tons), 2004-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Costers	29,970	26,666	32,030	31,617	30,659	27,497	26,068	25,601	23,618	25,522
Hypermarkets	7,756	9,535	7,725	10,124	9,630	10,822	14,174	12,104	16,477	16,910
Supermarkets	24,064	26,338	28,312	30,518	26,904	30,667	36,203	38,346	41,898	41,889
Discount Stores	2,691	4,721	4,077	6,350	7,801	6,613	7,011	7,473	8,193	8,678
Superettes	2,044	3,150	2,428	2,025	3,095	2,509	2,811	1,827	2,429	2,521
Traditional retailers	3,516	3,515	6,215	1,731	1,721	1,333	1,120	1,597	1,963	1,826
Specialist retailers	16,394	15,160	10,428	12,881	20,379	19,502	18,091	16,694	13,937	11,830
Other	3,602	3,056	2,130	1,148	846	2,364	386	524	829	811
<i>Total</i>	<i>90,225</i>	<i>92,146</i>	<i>93,354</i>	<i>96,394</i>	<i>101,035</i>	<i>101,307</i>	<i>105,864</i>	<i>104,167</i>	<i>109,344</i>	<i>109,987</i>

Source: Cso processing on GFK data

Table A1.41 – Purchases of table Grapes in Italy (tons), 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Costers	95,761	91,174	82,042	73,737	54,209	53,373	48,895	45,675	42,077	36,858
Hypermarkets	17,574	17,360	18,854	14,196	14,086	19,211	20,919	19,207	22,393	23,245
Supermarkets	51,599	53,744	53,375	53,733	48,422	51,487	57,947	65,445	59,155	64,255
Discount Stores	4,526	11,804	7,239	11,633	8,856	6,472	7,954	8,962	10,589	9,830
Superettes	7,492	6,945	6,305	5,222	3,638	2,780	4,931	4,657	3,948	3,244
Traditional retailers	7,253	8,556	7,642	4,095	2,234	2,629	3,242	3,375	4,469	4,578
Specialist retailers	40,787	50,263	41,977	36,043	37,062	31,882	28,916	32,273	32,215	30,491
Other	7,803	7,630	8,486	4,967	4,303	2,971	1,752	1,317	2,491	756
<i>Total</i>	<i>232,795</i>	<i>247,476</i>	<i>225,920</i>	<i>203,626</i>	<i>172,810</i>	<i>170,804</i>	<i>174,556</i>	<i>180,911</i>	<i>177,337</i>	<i>173,257</i>

Source: Cso processing on GFK data

Table A1.42 – Purchases of table Grapes in Italy (thousand euros), 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Costers	116,283	116,203	113,307	104,397	83,674	71,828	75,280	73,850	77,714	66,790
Hypermarkets	27,469	27,766	34,198	24,918	22,968	29,893	36,336	34,778	45,877	46,755
Supermarkets	83,650	91,189	100,465	98,481	84,280	85,265	106,703	121,776	129,462	132,631
Discount Stores	6,667	22,682	11,309	18,086	12,755	9,956	12,744	14,833	19,791	17,198
Superettes	12,058	11,598	11,976	9,095	6,025	4,460	9,218	9,026	8,480	6,602
Traditional retailers	11,788	13,551	17,437	8,224	4,180	4,789	6,425	6,773	11,231	9,987
Specialist retailers	57,921	72,519	65,006	61,151	60,886	49,119	49,131	55,262	62,406	58,153
Other	6,348	7,837	8,989	5,877	5,189	4,273	2,974	2,499	6,372	1,624
<i>Total</i>	<i>322,184</i>	<i>363,345</i>	<i>362,687</i>	<i>330,229</i>	<i>279,957</i>	<i>259,583</i>	<i>298,811</i>	<i>318,797</i>	<i>361,333</i>	<i>339,740</i>

Source: Cso processing on GFK data

Table A1.43 – Consumption of Fruit in France (tons), 2003-2009

	2003	2004	2005	2006	2007	2008	2009
Peaches and Nectarines	165,688	168,941	171,056	187,018	175,031	186,048	182,414
Table Grapes	114,229	107,560	106,979	98,168	105,761	111,085	98,373
Lemons	51,149	51,783	47,294	44,814	41,890	39,494	46,225
Mandarins and clementines	203,733	197,308	227,999	224,353	240,935	207,864	210,465
Oranges	295,156	320,247	261,033	263,318	295,498	287,957	279,246
Grapefruit	90,225	91,089	79,647	77,625	91,295	94,571	91,310
Other citrus fruit	5,458	4,614	3,694	3,545	3,464	3,762	3,978

Source: KANTAR Worldpanel

Table A1.44 – Consumer price index, Fruit - France (EUR/KG), 2003-2009

	2003	2004	2005	2006	2007	2008	2009
Peaches and Nectarines	2.76	2.21	2.00	2.22	2.13	2.40	2.06
Table Grapes	2.22	2.11	2.17	2.27	2.35	2.35	2.26
Lemons	2.04	1.99	2.23	2.07	2.32	3.40	2.48
Mandarins and clementines	1.84	1.78	1.68	1.67	1.70	1.82	1.87
Oranges	1.32	1.35	1.35	1.38	1.35	1.45	1.29
Grapefruit	1.60	1.44	1.60	1.67	1.60	1.59	1.49
Other citrus fruit	3.05	2.97	3.58	3.34	3.37	3.92	3.66

Source: KANTAR Worldpanel

Table A1.45 – Purchases of Citrus fruit in Spain (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
Specialist retailers	387,830	372,488	413,733	440,338	421,875	447,064
Costers	252,166	253,882	247,908	270,335	250,414	228,417
Discount Stores	60,394	55,199	58,932	59,895	57,131	66,741
Hypermarkets	104,742	96,902	107,008	109,879	106,295	101,095
Supermarkets	263,107	261,382	276,193	294,055	264,945	293,411
Other	112,488	105,759	107,339	139,311	145,623	164,976
<i>Total</i>	<i>1,180,727</i>	<i>1,145,613</i>	<i>1,211,113</i>	<i>1,313,814</i>	<i>1,246,284</i>	<i>1,301,704</i>

Source: Cso processing on MAPA data

Table A1.46 – Consumer price index, Citrus fruit - Spain (EUR/KG), 2004-2009

	2004	2005	2006	2007	2008	2009
Specialist retailers	0.94	0.99	0.97	0.99	1.08	1.00
Costers	0.91	0.92	0.93	0.94	1.03	0.94
Discount Stores	0.93	0.95	0.97	1.01	1.18	1.00
Hypermarkets	1.04	1.08	1.06	1.08	1.24	1.07
Supermarkets	1.02	1.07	1.06	1.09	1.22	1.07
Other	0.85	0.89	0.92	0.94	1.04	0.96
<i>Total</i>	<i>0.95</i>	<i>0.99</i>	<i>0.98</i>	<i>1.01</i>	<i>1.11</i>	<i>1.00</i>

Source: Cso processing on MAPA data

Table A1.47 – Purchases of table Grapes in Spain (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
Specialist retailers	28,686	27,789	29,227	27,666	27,699	31,193
Costers	18,071	16,181	16,905	14,284	15,407	15,611
Discount Stores	4,564	4,392	4,617	4,636	4,336	4,748
Hypermarkets	8,084	8,631	8,118	7,497	6,773	6,637
Supermarkets	22,187	20,192	19,617	16,340	16,762	19,404
Other	14,456	25,233	23,341	16,747	14,960	19,176
<i>Total</i>	<i>96,048</i>	<i>102,417</i>	<i>101,825</i>	<i>87,169</i>	<i>85,938</i>	<i>96,769</i>

Source: Cso processing on MAPA data

Table A1.48 – Purchases of Peaches in Spain (tons), 2004-2009

	2004	2005	2006	2007	2008	2009
Specialist retailers	72,214	76,241	79,333	80,628	82,536	78,993
Costers	49,702	52,322	49,212	45,787	43,673	37,631
Discount Stores	6,185	6,969	8,841	9,765	9,648	10,961
Hypermarkets	19,973	18,592	19,102	16,373	16,581	16,289
Supermarkets	46,739	53,099	49,941	44,937	42,510	44,121
Other	12,749	19,461	18,755	19,734	15,924	22,696
<i>Total</i>	<i>207,562</i>	<i>226,684</i>	<i>225,185</i>	<i>217,224</i>	<i>210,872</i>	<i>210,691</i>

Source: Cso processing on MAPA data

ANNEX 2 - IMPORT REGIME¹

1. The evolution of the EU import regime for fresh fruit and vegetables

Council Regulation 1035/72 of 18 May 1972 on the common organization of the fruit and vegetables (F&V) market codified for the first time basic provisions on the organization of the F&V market and contained a number of separate regulations, drawn up at different times and amended several times since their adoption.

The Regulation defined the production of F&V as a substantial factor in agricultural income and stated that an essential objective must be the achievement of a balance between supply and demand at fair prices to the producer, account being taken of trade with non-EU countries.

The establishment of a single Community F&V market required the introduction of a single trading system at the external frontiers of the Community. The application of Common Customs Tariff duties should suffice, as a rule, to stabilize the Community market by preventing the price level in non-EU countries and relative fluctuations from having repercussions on prices within the Community.

Furthermore, Council Regulation No 1035/72 stated that disturbances in the Community market arising from supplies at abnormal prices from non-EU countries must be avoided. To this end, provisions should be made for the fixing of reference prices and the levying of a countervailing charge in addition to customs duty for F&V when the entry price of imported products is below the reference price.

After the 1994 GATT Uruguay round of multilateral trade negotiations (URAA) the import regime for F&V was modified (Uruguay Round of Multilateral Trade Negotiations (1986-1994) OJ L 336, 1994). The Agreement required the abolition of non-tariff barriers (Ntb) such as variable import levies and other measures and import charges provided for at the time under the market organization. This meant the conversion of all measures restricting imports of agricultural products into customs duties ("tariffication") and the prohibition of such measures in the future. However, for certain product groups such as cereals, rice, wine and F&V, the introduction of supplementary or other trade mechanisms (such as the entry price system for F&V) not involving the collection of fixed customs duties required the adoption of rules providing for derogations to basic regulations (as stated in Council Regulation No 3290/1994, art. 23).

The reasons for the partial exception to "tariffication" for F&V trade are linked to technical problems of monitoring cif prices of imports and to the economic impacts of using proxies such as wholesale domestic prices or cif prices from non EU markets to calculate the price gap between internal EU prices and external reference prices (Swinbank-Ritson (1995); Grethe-Tangermann (1998)). Therefore, while the countervailing charges were somehow "tariffied" and bound in the WTO schedule, the EU had to keep some import price threshold in place.

As a result, the specific objective of "stabilizing the Community market by preventing the price level in non-EU countries and fluctuations thereof from having repercussions on prices within the Community", as defined by Council Regulation No 1035/72, has not changed after the URAA in 1994, as well as some fundamental characteristics of non-tariff protection in F&V trade.

¹ Information in this Annex is mainly derived from AgroSynergie (2008).

2. Import measures

Within the current framework of the F&V Common Market Organization (CMO), EU import measures include:

- a) tariffs
- b) entry price system;
- c) import licences system;
- d) special agricultural safeguard clause;
- e) tariff rate quotas;
- f) sanitary and phytosanitary measures.

a) Tariffs

All products covered by the F&V CMO (as listed in Article 1(2) of Council Regulation No 2200/96) are subjected to the common customs tariff (CCT). All customs duty rates and Community rules applicable to the Community's external trade are comprised within the TARIC (Integrated Tariff of the European Communities)².

b) Entry price system (EPS)

Within the CCT, for a certain group of products, in certain periods (listed in the Annex of **Commission Regulation No 3223/94**) a specific scheme (EPS) is applied. Technicalities on EPS are reported below (see par. 3), while the products/periods concerned are reported in the following Table A2.1

c) Import licences

Imports of any of the products listed in Article 1 (2) of **Council Regulation (EEC) No 1035/72** and in the same Article of the **Council Regulation 2200/96** can be subject to the presentation of an import or export licence (AGRIM/AGREX). See also Art. 22 of **Council Regulation (EEC) No 3290/1994**.

According to **Commission Regulation No 1556/96**, licences are issued by Member States to any applicant, irrespective of its place of establishment within the Community. Such a Regulation introduced a system of import licences for certain F&V products imported from non-EU countries and set the list of products covered in the F&V sector. An import licence system was introduced to gain a better knowledge of trade flows from non-EU countries for certain sensitive products.

² See Council Regulation (EEC) No 2658/87 of 23 July 1987 on the tariff and statistical nomenclature and on the Common Customs Tariff. Member States develop their automated goods clearance system on the basis of TARIC. Every year the Commission adopts a Regulation reproducing a complete version of the Combined Nomenclature (CN) and Common Customs Tariff duty rates, taking Council and Commission amendments into account. The Regulation is published in the Official Journal by no later than 31 October, and applies as from 1 January of the following year. See http://ec.europa.eu/taxation_customs/dds2/taric

Table A2.1 - List of products under the EP scheme**PART A**

(as established by the Annex to the consolidated version of Commission Regulation (EC) n.3223/1994)

N.	CN codes	Description	Period of application
1	ex 0702 00 00	Tomatoes	From 1 January to 31 December
2	ex 0707 00 05	Cucumbers ⁽¹⁾	From 1 January to 31 December
3	ex 0709 10 00	Artichokes	From 1 November to 30 June
4	0709 90 70	Courgettes	From 1 January to 31 December
5	ex 0805 10 20	Sweet oranges, fresh	From 1 December to 31 May
6	ex 0805 20 10	Clementines	From 1 November to end of February
7	ex 0805 20 30 ex 0805 20 50 ex 0805 20 70 ex 0805 20 90	Mandarins (including tangerines and satsumas); wilking and similar citrus hybrids	From 1 November to end of February
8	ex 0805 50 10	Lemons (<i>Citrus limon</i> , <i>Citrus limonum</i>)	From 1 June to 31 May
9	ex 0806 10 10	Table grapes	From 21 July to 20 November
10	ex 0808 10 80	Apples	From 1 July to 30 June
11	ex 0808 20 50	Pears	From 1 July to 30 April
12	ex 0809 10 00	Apricots	From 1 June to 31 July
13	ex 0809 20 95	Cherries, other than sour cherries	From 21 May to 10 August
14	ex 0809 30 10 ex 0809 30 90	Peaches, including nectarines	From 11 June to 30 September
15	ex 0809 40 05	Plums	From 11 June to 30 September

⁽¹⁾ Other than cucumbers referred to in Part B of this Annex

PART B

N.	CN codes	Description	Period of application
16	ex 0707 00 05	Cucumbers intended for processing	From 1 May to 31 October
17	ex 0809 20 05	Sour cherries (<i>Prunus cerasus</i>)	From 21 May to 10 August

In 1997 and 1998 Commission Regulation No 1556/96 was amended by gradually abolishing the licence requirement for products covered by the import licences system (over time the annex listing the products covered was replaced eight times). Finally the Regulation was repealed with Commission Regulation (EC) No 2623/98 and replaced by a direct system of surveillance managed by DG TAXUD. At present, within the fresh F&V sector licences are required only for garlic – NC 07032000 and "other (i.e. excluding onions, shallots and leeks) alliaceous vegetables – CN ex 0703 90 00". For apples – NC 08081080 according to Reg. EC 179/2006 licences are required only for statistical surveys.

Commission Regulation No 341/2007 opened and provided for the administration of tariff quotas (see following point e) and introduced a system of import licences and certificates of origin for garlic imported from non-EU countries. The Regulation laid down rules for issuing licences, for categories of importers (traditional and new) and licences (A and B), amount of securities, etc.

d) Special Agricultural Safeguard Clause (SSG)

According to the Special Agricultural Safeguard (SSG), a provision of the URAA, an *additional* customs duty can be imposed on agricultural products if their import volume exceeds defined trigger levels or if prices fall below specified trigger levels³. This is designed to prevent

³ The special agricultural safeguard clause is an alternative to the general safeguard provisions in the General Agreement on Tariffs and Trade (GATT), and is much easier to invoke because it does not require a test of injury.

disruption on domestic markets due to import surges or abnormally low import prices, and can apply only to imports that exceed tariff-quota volumes (see following point e). No additional duty may be imposed on products which enjoy preferences in respect of the entry price, insofar as their tariff classification does not entail application of the highest specific duty (MTE) (see following Par. 3 and Annex 3-trade preferences).

The trigger periods and trigger level (tons) are fixed several times during each year with updates of Commission Regulation No 1555/96.

Commission Regulation No 1242/2006 of 17 August 2006 (amending Reg. No 1555/96 on rules of application for additional import duties on F&V) introduced some changes, which appear to provide greater flexibility in the triggering mechanism of the safeguard. Specifically, in Article 3.1, the trigger condition has been modified. Under Commission Reg. No 1555/96, "If it is found that the quantity imported (...) exceeded (...) the trigger level (...), the Commission shall impose an additional duty." Under the new provisions of Commission Regulation No 1242/2006, "If it is found that, for one of the products (...) the quantity put into free circulation exceeds the corresponding triggering volume the Commission shall levy an additional duty unless the imports are unlikely to disturb the Community market, or the effects would be disproportionate to the intended objective." This amendment allows for the possibility of not implementing the safeguard measures even though a trigger volume has been exceeded.

e) Tariff rate quotas (TRQs)

Within TRQs, a predetermined volume of goods originating in a specified country can benefit from imports into the EU having a more favorable rate of duty than the MFN duty mentioned in the combined nomenclature. In the case of F&V, tariffs as well as trigger entry prices (see TEP in the following Par. 3) are modified within the framework of several agreements that the EU entered into with third countries or within the framework of autonomous preferential concessions. For some beneficiary countries, such preferences are limited to a predetermined quantity. This kind of preferences are called 'preferential tariff quotas' (see Commission Regulation (EC) No 3223/94 and subsequent amendments; see also Annex 3-trade preferences).

Entitlement to benefit from preferential tariff quotas is of course subject to presentation of the necessary evidence of origin. Commission Regulation No 1831/96 of 23 September 1996, opened and provided for the administration of Community tariff quotas bound under GATT for certain fresh and processed F&V products from 1996. In particular, the Regulation includes the following fresh products of F&V CMO: CN 07061000, ex 07096010, ex 0802 1190, 08021290, 0805 10 20, 0805 20 90, 08055010, 0809 1000.

Importers wishing to benefit from tariff quotas must make a claim in accordance with Community and national requirements.

In accordance with Community provisions, the customs services register the date when they accept each customs declaration. Management of tariff quotas is on a first-come first-served basis. This means that, when more than one claim for the same tariff quota is being considered, priority is given to the claim which results from the customs declaration(s) accepted first. Claims which have the same priority are given equal treatment. This is *usually* done at the time of import when the Tariff Quota number is declared on the import declaration. Notification about the success of the claim is not immediately available because all the requests received throughout the EC are processed (collated and apportioned) by the European Commission and allocated two working days after receipt. According to art. 34 of Council Regulation No 2200/1996, TRQs may be administered by applying one of the following methods or a combination thereof:

- (a) a method based on the chronological order in which applications are lodged ('first come, first served' basis);
- (b) a method of allocating quotas in proportion to quantities requested when applications are lodged (using the 'simultaneous examination' method);
- (c) a method based on taking traditional trade flows into account (using the 'traditional importers/new arrivals' method).

Recently, in order to simplify and improve the effectiveness and usefulness of the administration and control mechanisms, the Commission Regulation No 1301/2006 introduced common conditions for the administration of import tariff quotas subject to an import licensing system. According to this Regulation two methods are foreseen: the 'simultaneous examination method' according to which licences are allocated in proportion to the overall quantities requested, or a method of import based on documents "to be issued by third countries". Where an import tariff quota is administered using a method based on a document issued by a third country, such document shall be presented to the competent issuing body of the Member State, together with the application for the import licence to which that document relates.

In many instances, instead of TRQs, *reference quantities (RQs)*, or the right to impose RQs, are defined, so that the Commission has the option to submit a product to TRQ. RQs are imposed on many fresh F&V, some dried or processed ones, nuts, and fresh and preserved tropical fruit. It implies that 100% exemption with no quotas can be agreed with a preferential agreement, but the imported quantities have to be checked periodically by the EC to make sure they do not affect local products in EU. In this case the EU sets out reference quantities for products, and if quantities rise above them, full or reduced duties payment for certain periods can be levied.

In the system of import licences RQs can also be fixed as the maximum quantities of a certain product imported per calendar year by a traditional importer during one of the last three calendar years.

f) Sanitary and phytosanitary measures (SPS)

SPS are designed to protect human, animal or plant life or health. Measures which fall into this category include, among others, standards on additives, disease-causing organisms and residues of pesticides in food and feedstuffs. SPS are deepened in Sec. 2.3 and 5.2.

3. Functioning mechanism for the entry price system

With the purpose of understanding the mechanism of the EPS and differences compared with the situation before its implementation, it is helpful to briefly describe the "reference price system" which was applied until June 30th, 1995 according to Council Regulation No 1035/72.

In the previous scheme the EC fixed reference prices for the products concerned each year. Representative wholesale prices of imported produce in the EU were monitored by origin of the import concerned at the level of individual EU Member States and reported to the Commission.

The scheme based on the "reference price" worked in such a way that when the wholesale price of a product from any third country, less a marketing margin and the MFN tariff of the EU, fell significantly below the reference price for a period of two successive days or for two

days out of five, a so-called countervailing charge was applied on all subsequent supplies of this product from the country concerned.

The countervailing charge was equal to the difference between the reference price and the arithmetic mean of the last two entry prices available for that exporting country (average entry price) minus all import charges and margins. It was removed only when the reference price had been respected for two market days.

Therefore the reference price system is administered on country-by-country level. This means that all shipments originating from the same country were subject to the countervailing charge, regardless of the price at which a given shipment was landed in the EU, once a certain quantity from that country had entered the EU market at a price which was too low if compared to the reference price.

When it came to the implementation of the results of the URAA, EU has converted the countervailing charges into tariffs by calculating, for each fruit and vegetable concerned, a price gap between the highest reference price (among the seasonally variable reference prices) and an EU internal price (to substitute for the missing c.i.f. unit value). This price gap has been bound as a specific tariff which is also called "maximum tariff equivalent" (MTE). At the same time the EU has established, by adding footnotes for the products concerned to its GATT schedule, two tariff lines for each product where entry prices are applied.

One applies to imports at or above a trigger entry price (TEP) level and the second to imports below this TEP. Only the "normal" *ad valorem* tariff (i.e. the tariff which already existed under the reference price regime) is charged on imports whose entry price (EP) is at or above TEP. The *ad valorem* customs duty is fixed as a variable percentage of the value of the goods. The percentage can vary for periods during the year, but it remains fixed, with some exceptions, regardless of the value of import goods.

If the EP is 8% lower than the TEP, in addition to the *ad valorem* duty, a *specific* duty is levied (Euro/100 kg) and its amount is substantially the difference between the TEP and the EP. The system works for intermediary EP values in terms that if the EP of a specific consignment is 2, 4, 6, 8% the specific duty shall be 2, 4, 6, 8% of TEP.

If the EP is less than 92% of TEP the MTE duty plus the *ad valorem* tariff will be charged.

The EPS differs in some important aspects from its predecessor: first of all it is administered on a shipment-by-shipment level instead of a country-by-country level. Under the new system the additional specific tariff is charged per individual shipment. If the c.i.f. price of one shipment undercuts the entry price, this does not affect subsequent shipments from the same country. This aspect clearly reduces the protective effect of the new system.

The implementation of the new system has also involved important changes in procedures (Commission Regulation No 3223/94). Most F&V trade is on a consignment basis, and no agreed c.i.f. price exists at the time of importation. Consequently compliance with entry prices cannot really be monitored on the basis of c.i.f. prices. Therefore price formation is monitored on the domestic EU market, where wholesale prices are still monitored by origin. Based on these prices, the Commission calculates "standard import values" (SIVs) on a daily basis for each country that actually exports to the EU⁴.

⁴ Each working day the EC fixes a SIV for each product under the entry price scheme and for the periods set out in the Annex of the same regulation and for each origin. SIVs are equal to the weighted average of representative prices less a standard amount of ECU 5/100 kg and *ad valorem* customs duties. SIVs are published daily in the Official Journal. MSs communicate (only for fresh F&V listed in part A of the Annex to Commission Regulation No 3223/1994): a) the average representative prices of products in "representative markets" (as listed in Art. 3 of

As established by Commission Regulation No 3223/94, importers can choose from three methods to declare the EP: invoice, deductive, entry price-standard import value (SIV) comparison.

With the *invoice method* (Art. 5 paragraph 1.a) importers choose the EP equal to the fob price plus the costs of insurance and freight up to the borders of the Community at the time the declaration of release of products for free circulation is made. The importer must lodge the security where the aforementioned prices are more than 8% greater than the SIV applicable to the product in question at the time the declaration of release for free circulation is made.

With the *deductive method* (Art. 5 paragraph 1.b) the customs value is calculated in accordance with art. 30 paragraph 2 (c) of Council Regulation No 2913/92. In that case the customs value is "the value based on the unit price at which the imported goods for identical or similar imported goods are sold within the Community in the greatest aggregate quantity to persons not related to the sellers". According to art. 29 to 31 of Council Regulation No 2913/92, the deductive method should be used only in the absence of sale.

The *entry price-SIV comparison method* (Art. 5 paragraph 1.c) is simply based on the Entry price-SIV comparison for all imports coming from a given country, with no investigation of the single consignment's price, as in the old "reference price" system. The third system is not applicable for F&V listed in part B of the Annex of implementing Commission Regulation No 3223/1994.

Another important difference compared with the former system is that imports from countries that enjoy a tariff preference can now sell at lower prices on the EU market than those from MFN suppliers⁵.

With regard to the security, importers must lodge one corresponding to the amount of the duty they would have paid if the classification of products had been made on the basis of SIV applicable to the lot. Importers can ask for a partial or total rebate of the sum by proving, through invoices or other customs documentation, that the actual sale price of their consignment was such that a lower duty was to be paid. The security lodged is released to the extent that proof of the conditions of disposal is provided to the satisfaction of the customs authorities. Otherwise the security is forfeited by way of payment of the import duties.

The European Commission explanatory note concerning Commission Regulation No 3223/94 [D(99) 01/10/1999] gives a technical definition for each case and combination when the *ad valorem* tariff, the specific tariff and the security have to be calculated.

Commission Regulation No 3223/1994) imported from non-EU countries and sold in the representative import markets, and b) total quantities relating to the prices referred. Representative prices are recorded for each product listed, for all available varieties and sizes, at the importer-wholesaler or wholesaler-retailer (if the former is not available) stage. In the latter case they are reduced by 9% to take account of the wholesaler's trade margin and by € 0.7245 per 100 kg to take account of the costs of handling and market taxes and charges. These prices are reduced by the marketing margin of 15% for the marketing centres of London, Milan and Rungis and 8% for other marketing centres, and the costs of transport and insurance within the customs territory.

⁵ Under the old system wholesale prices minus the full MFN tariffs and a marketing margin were compared to the reference prices. As a result imports from all countries had to accept the same minimum wholesale prices, regardless of tariffs applied to the individual country. Trade preferences are dealt with in Sec 2.2 and Sec. 5.

ANNEX 3 - TRADE PREFERENCES SYSTEM

1. Overview

Trade preferences are granted by the EU to many non-EU countries under various agreements. The comprehensive system of EU trade concessions is the result of the Common Commercial Policy and the Development Policy on behalf of the External Relations common framework⁶. These Community policies are also to be considered within the global framework of World Trade Organizations (WTO) commitments.

Preferential origin confers certain benefits on goods traded between particular countries, namely entry at a reduced or zero rate of duty. In order to have preferential origin goods must meet the relevant conditions laid down in the origin protocol to the agreement of whichever country is concerned or in the origin rules of the autonomous concessions.

While the provisions of individual concessions may vary in certain details, most preferential origin arrangements have a number of common provisions, related not only to trade concessions, but also to other institutional, political and economic dimensions of the deal.

EU preferential treatments can be grouped in two clusters (some countries may benefit from more than one arrangement). The main ones are⁷:

Preferential Agreements

EFTA/EEA countries;

Western Balkan countries;

Mediterranean Countries;

Other countries and territories: ACP (Africa, the Caribbean and the Pacific) countries, South Africa, Mexico, Chile.

Autonomous preferential concessions

Overseas Countries and Territories (OCT);

Generalised System of Preferences (GSP).

2. Agreements with Mediterranean Countries

With Mediterranean Partner Countries (MPCs) the agreements may be dated back to the 1970s EU "global Mediterranean policy". Revised in the late 1980s after the enlargement of the EU to include Greece, Spain and Portugal, the current Euro-Med Association Agreements (EMAA) are being re-launched within the framework of the Union for the Mediterranean (2008) and the wider European Neighbourhood Policy⁸: reciprocal trade liberalisation, as well

⁶ This Annex partially derives from AgroSynergie (2008).

⁷ See http://trade.ec.europa.eu/doclib/docs/2006/december/tradoc_111588.pdf for a list of agreements in force, and http://ec.europa.eu/taxation_customs/customs/customs_duties/rules_origin/introduction/article_403_en.htm for a list of applicable arrangements for each non-EU countries.

⁸ See http://eeas.europa.eu/euromed/index_en.htm.

as EU technical co-operation and financial support, are seen as major threads driving development and integration in the whole area (INEA, 2002; De Wulf-Maliszewska, 2009).

Table A3.1 – EuroMed Agreements. Products to which a reduced entry price applies.

Product	Preference receiver country / in force since	MFN entry price (€/100kg)	Preferential entry price (€/100kg)	Period of the preference	Entry price quota (tonnes)
Fresh or chilled tomatoes CN 0702 00 00	Morocco Marketing year 2003/2004	Ranges from 62,6 to 112,6	46,1	01.10 to 31.05	Monthly (or shorter periods) quotas
Cucumbers CN 0707 00 05	Morocco Marketing year 2003/2004	Ranges from 48,1 to 110,5	44,9	01.11 to 31.05	5.600
Globe artichokes CN 0709 10 00	Morocco Marketing year 2003/2004	94,3	57,1	01.11 to 31.12	500
Courgettes CN 0709 90 70	Morocco Marketing year 2003/2004	Ranges from 69,2 to 48,8	42,4	01.10 to 31.01 and 01.04 to 20.04	20.000
Fresh oranges CN ex 0805 10	Morocco Marketing year 2003/2004	35,4	26,4	01.12 to 31.05	300.000
Fresh clementines CN ex 0805 20 10	Morocco Marketing year 2003/2004	64,9	48,4	01.11 to end February	130.000
Fresh or chilled tomatoes CN 0702 00 00	Jordan Since January 2006	Ranges from 62,6 to 112,6	46,1	01.10 to 31.05	No quantity constraint
Cucumbers CN 0707 00 05	Jordan Since January 2006	Ranges from 48,1 to 110,5	44,9	01.11 to 31.05	No quantity constraint for reduced EP. Overall quota for CN 070700 with 2000 tonnes in 2006
Globe artichokes CN 0709 10 00	Jordan Since January 2006	94,3	57,1	01.11 to 31.12	No quantity constraint
Courgettes CN 0709 90 70	Jordan Since January 2006	Ranges from 69,2 to 48,8	42,4	01.10 to 31.01 and 01.04 to 20.04	No quantity constraint
Sweet oranges, fresh 0805 10 20	Jordan Since January 2006	35,4	26,4	01.12 to 31.05	No quantity constraint for reduced EP. Overall quota for citrus fruits CN 0805 with 1000 tonnes in 2006
Fresh clementines CN ex 0805 20 10	Jordan Since January 2006	64,9	48,4	01.11 to end February	
Fresh oranges CN ex 0805 10	Israel Since January 2004	35,4	26,4	01.12 to 31.05	200.000
Sweet oranges, fresh CN ex 0805 10 10, ex 0805 10 30, ex 0805 10 50	Egypt Since June 2004	35,4	26,4	01.12 to 31.05	34.000

Source: Agrosynergie (2008)

The EuroMed Partnership includes, besides EU members, nine countries (Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Palestinian Authority, Syria and Tunisia). With these MPCs the grid of EMAAs has been completed. Association Agreements are in force between the EU

and Tunisia (since 1998), Israel (2000), Morocco (2000), Jordan (2002), Egypt (2004), Algeria (2005), Lebanon (2006), and on an interim basis with the Palestinian Authority (1997). The EMAA with Syria has been initialed in 2008 and the EU formally agreed to proceed with signature on 27 October 2009. Syria's agreement to sign is pending. The other MPC, Turkey, is a candidate country for EU membership, engaged in accession negotiations since 2005. With Turkey the EU signed first generation association agreements in the 1960s. As a result of this a customs union with the EU came into force on 1 January 1996 enabling goods which are in free circulation in the EU to be regarded as being in free circulation in Turkey, and vice versa.

EMAA establish relevant preferential trade concessions for fresh F&V. The provisions governing bilateral relations vary from one MPC to another. Agreements normally regard tariff concessions (zero tariff import quotas and TRQs) and non-tariff concessions (preferential TEPs - and entry prices quotas – EPQs) for products defined for each country. Table A3.1 summarizes the concessions on entry prices.

As far as Turkey is concerned, agricultural products enter the customs union with limitations. For agricultural products the EC-Turkey trade agreement results from Decision No 1/98 of the Association Council entered into force on 25.02.1998⁹. The preferential regime envisages widespread extensions of *ad valorem* duties and preferential measures on specific duties for certain products, which roughly cover 93% of traditional exports to the EU. For many fresh and processed fruit and vegetables tariff exemptions or reductions are to be bound by TRQs and import calendars. The EU enjoys preferential treatment on 33% of its exports to Turkey, with lower to zero TRQs for several products.

3. Other agreements

Preferential Agreements: ACP «Cotonou» Agreement

The «Cotonou» Agreement is a preferential trade agreement between the EU and 71 African, Caribbean and Pacific (ACP) States. Preferential trade provisions are reciprocal and based on the principle of free access to the EU market for products originating in ACP States, with special provisions for agricultural products. Under the ACP Agreement, certain products may be admitted into the EU at preferential (either reduced or zero) duty rates. For particular goods, preferential rates are granted only within the limits of tariff quotas or ceilings.

Autonomous preferential concessions: Generalized System of Preferences

The EU's common commercial policy is to be consistent with and consolidate the objectives of development policy, in particular the eradication of poverty and the promotion of sustainable development and good governance in developing countries. Many countries have in place systems of generalized preferences towards developing countries, consistently with WTO requirements and in particular with the GATT Enabling clause of 1979.

Since 1971, the Community has granted trade preferences to developing countries, within the framework of its GSP (Generalised System of Preferences) scheme. The EU's GSP grants products imported from GSP beneficiary countries either duty-free access or a tariff reduction, depending on which of the GSP arrangements a country enjoys. The EU's GSP is implemented following cycles of ten years, for which general guidelines are drawn up. The main features of the early schemes were quotas and ceilings for individual countries and products. Since 1995,

⁹ Decision No 1/98 has been amended by Decision No 3/2006 of the EC-Turkey Association Council of 19.12.2006.

the EU's GSP has done away with any quantitative limitations. Instead, it provides for tariff preferences which vary according to the sensitivity of products on the EU market.

Guidelines for the period 2006-2015 were adopted in 2004. Based on the guidelines of 2004, new GSP schemes have been adopted through Council regulations, the last of which applies from 1 January 2009 to 31 December 2011 (EC Reg. No 732/2008 of 22 July 2008). Beneficiaries are 176 developing countries listed in Annex 1 to the Reg. 732/2008.

Products are divided into two categories: sensitive products and non-sensitive products. Sensitivity is determined in relation to the effect that imports into the EU could have on EU products. Product listed as "non-sensitive" are duty-free (about 3200 tariff lines). Sensitive products enjoy tariff reductions by specified amounts below normal MFN tariff rates (in case of ad valorem duties: by 3.5% points or 20% for Section XI; in case of specific duties: by 30%). Agricultural products are listed as "sensitive". For the period 01.01.2009 to 31.12.2011, there are three types of arrangements in place for beneficiary countries:

- all beneficiary countries enjoy the benefit of the general arrangement;
- the special incentive concession for sustainable development and good governance (the "GSP+") provides additional benefits for countries implementing certain international standards in human and labour rights, environmental protection, the fight against drugs and good governance. From 01.01.2009 to 31.12.2011 16 beneficiary countries have qualified to receive the additional preferences (see Commission Decision of 9 December 2008);
- "EBA Regulation" (Council Regulation No 416/2001), granting duty-free access to imports of all products from LDCs without any quantitative restrictions, except for arms and munitions. At present, 49 developing countries belong to the category of LDCs. The provisions of the EBA Regulation have been incorporated into the GSP Regulation. Only imports of fresh bananas, rice and sugar were not fully liberalized immediately. Duties on those products have been gradually reduced until duty free access has been granted for bananas (2006) and sugar and rice (2009). Only for sugar, for the period from 1 October 2009 to 30 September 2012, the importer of sugar shall undertake to purchase such products at a minimum price not lower than 90 % of the reference price.

Under certain circumstances various beneficiary countries have been grouped together for the purposes of cumulation of origin under GSP. Cumulation is a term used to indicate the basis upon which a product may enjoy originating status, even though the normal origin rules would not confer origin on the basis of work performed in the country of last processing. Regional cumulation applies to three separate groups of beneficiary countries that benefit from GSP:

- the Association of South-East Asian Nations (ASEAN) consisting of Brunei-Darussalam, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, Vietnam and Cambodia.
- the Andean Community – Central American Common Market and Panama Permanent Joint Committee on Origin, consisting of Bolivia, Columbia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Venezuela.
- the South Asian Association for Regional Co-operation (SAARC) consisting of Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan and Sri Lanka.

ANNEX 4 – EU–MOROCCO AGRICULTURAL PROTOCOL¹⁰

The Council of EU Agriculture Ministers and Morocco agreed on December 13, 2010 on the new protocol regulating their reciprocal liberalisation measures on agricultural products. The agreement took the form of an exchange of letters of intent. It would however not take effect before the 2011 season at least, provided that the European Parliaments votes the ratification. The agreement opens the way to larger Moroccan F&V exports to the EU. The EU Commissioner for Agriculture Dacian Ciolos stated during a press conference that the agreement "protects" EU producers as there are measures to "avoid negative consequences". Ciolos also called on the responsibility of Member States responsible for border controls. On the other hand, the Moroccan minister of Agriculture, Aziz Ajenouch, revealed he still considered "too high" the custom tariff for Moroccan fruits and vegetables exported into the EU and manifested his concern that "these protective measures for the European market are too strict".

On the date of entry into force of the Protocol, customs duties applicable on imports into the European Union of agricultural products, processed agricultural products, fish and fishery products originating in Morocco shall be eliminated, except for a number of exceptions.

Tomato keeps being the most controversial product because its sensitive character in EU markets. For fresh or chilled tomatoes the preferential treatment will keep restricted by tariff quota, increasing them in five years from 233,000 to 285,000 tons.

For certain products originating in Morocco listed in the Annex to the Protocol, duty elimination is restricted by tariff quotas. For the products to which an entry price applies, the elimination applies only to the ad valorem part of the duty. For certain products, the agreed entry price level from which specific duties will be reduced to zero during the periods indicated are set at a reduced level.

The situation for the products highlighted in the present study is the following:

	Agreed entry price below the MFN entry price (€/t)	Period for agreed reduced entry price	TRQ (t)
Sweet oranges	264	01.12 – 31.05	Unlimited
Clementine	484	01.11 – 28.02	175,000
Mandarins	No reduction		Unlimited
Lemons	No reduction		Unlimited
Table grapes	358	21.07 – 20.11	Unlimited
Peaches and nectarines	491	11.06 – 30.09	Unlimited

If, given the particular sensitivity of the agricultural markets, there are such increased quantities of imports of products from Morocco, which are the subject of concessions granted under this Protocol that they cause serious disturbance to Community markets and/or serious disturbance to the production sector, both Parties shall hold consultations immediately to find an appropriate solution. Pending such solution, the importing Party is authorised to take the measures it deems necessary. The safeguard measures, taken pursuant to the previous

¹⁰ Source: European Commission (2009), *Proposal for a COUNCIL DECISION on the conclusion of an Agreement in the form of an Exchange of Letters between the European Union and the Kingdom of Morocco concerning reciprocal liberalisation measures on agricultural products, processed agricultural products, fish and fishery products, the replacement of Protocols 1, 2 and 3 and their Annexes and amendments to the Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Kingdom of Morocco, of the other part*. Brussels, 16.9.2010 COM(2010) 485 final 2010/0248 (NLE).

paragraph, may only be applied for a maximum duration of one year, which may be renewed just once on the decision of the Association Committee.

ANNEX 5 – INEA SURVEY

QUESTIONNAIRE

Section 1 – Principal information on Producer organisation

Name of the PO

Identification number

Contact person

Phone number

E-mail address

Date of recognition of the PO.....

The PO belongs to an association of producer organizations (APOs)? ☐ YES ☐ NO

If the answer is “YES”, specify the name of the APO
.....

Basis on which the organisation was formed?

☐ New constitution

☐ Recognition of a single existing organisation (association, cooperative,)

☐ Recognition of a several existing organisations (associations, cooperatives,)

☐ Merger of several POs

Number of members of the PO

a) Natural persons

b) Legal persons

Main products and marketing channels

Products	Average quantity (2008-2009-2010) (t)	% on total	Processing (%)	Large-scale retail (%)	Wholesale market (%)
1.					
2.					
3.					
4.					
5.					

Main products and market destination

Products	% domestic market	Main foreign markets
1.		
2.		
3.		
4.		
5.		

Value of marketed production, amount and share of EU support in total VMP

	VMP (mio €)	EU aid (mio €)	EU aid/VMP
2006			
2007			
2008			
2009			
2010			

Section 2 – Impact of the fruit and vegetable CMO measures and trade agreement policyTheme 1: Implementation of the F&V CMO in the EU

The reformed CMO for fruit and vegetables, that is in place as from 1 January 2008, has introduced some elements, aimed at:

- improving the competitiveness and market orientation of the EU fruit and vegetable sector;
- reducing producers' income fluctuations resulting from crises;
- promoting F&V consumption, thus contributing to improve public health;
- enhancing environmental safeguards.

In order to further improve the attractiveness of producer organisations (POs), the reformed CMO has provided to make them more flexible in their operation through the following elements: product range of a producer organisation; the extent of direct sales permitted and the extension of rules to non-members; permitting associations of producer organisations to carry out any of the activities of their members and permitting the outsourcing of activities. As well more incentives to mergers of POs, associations of producer organisations (APOs), to those regions where the level of concentration of the supply through POs is particularly low, etc.

1. In which measure the pursuit of the following objectives (a., b., c., d., e.) of the CMO has been positively affected by such provisions?¹¹:

a. improve the **attractiveness** of POs.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

b. increase and/or **stabilize** producers' income.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

c. increase the **concentration** of the fruit and vegetable supply on the EU market or contribute more effectively than the previous CMO.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

d. improve the **competitiveness** in the fruit and vegetable sector.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

e. strengthen **producers' negotiating ability** on the EU market.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....

¹¹ 1) no, they haven't, 2) weakly, 3) significantly, 4) very strongly.

f. which **provisions** among the following ones have been more effective in contributing to achieve the strategic objectives of the reformed CMO, according to your experience?

- product range of a producer organisation.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- the extent of direct sales permitted.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- the extension of rules to non-members.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- permitting associations of producer organisations to carry out any of the activities of their members.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- permitting the outsourcing of activities.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- more incentives to mergers of POs, associations of producer organisations (APOs), etc.

1 ☐ 2 ☐ 3 ☐ 4 ☐

- more incentives to those regions where the level of concentration of the supply through POs is particularly low.

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

2. In which measure in the POs' **operational programmes**, according to you, the actions have been more effective in contributing to achieve the above mentioned strategic objectives of the reformed CMO?

- actions aimed at planning of production (3.2.1)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- actions aimed at improving or maintaining product quality (3.2.2)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- actions aimed at improving marketing (3.2.3)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- research and experimental production (3.2.4)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- training types of actions (other than in relation to crisis prevention and management) and actions aimed at promoting access to advisory services (3.2.5)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- crisis prevention and management measures (3.2.6)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- environmental types of actions (3.2.7)

1 ☐ 2 ☐ 3 ☐ 4 ☐

- other types of actions (3.2.8)

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments.....
.....

3. In particular, in relation to **crisis prevention and management measures** provided by the F&V CMO (market withdrawal, green harvesting or non harvesting of F&V, promotion and communication, training measures, harvest insurance, support for the administrative costs of setting up mutual funds):

- a. have you been utilizing the additional EU support (0.5%) to operational programmes?

☐

YES

☐

NO

how, in which measure?.....
.....

- b. which kind of measures, among those considered, have you implemented? And which has been the percentage of their utilization in each year (2008, 2009 and 2010)?

Measures	% of utilization 2008	% of utilization 2009	% of utilization 2010
Market withdrawal			
Green harvesting / non harvesting			
Promotion and communication			
Training measures			
Harvest insurance			
Support for setting up mutual funds			
Total	100.00	100.00	100.00

- c. which is your opinion about the effectiveness and the adequacy of the current measures to cope with the increased risks of price volatility and the effects of climate change?

.....
.....

- d. what has been their impact on the producers' income in terms of stabilization as well as coping with market crisis?

.....
.....

4. In these last years the **fruit and vegetable consumption** in EU-27 is decreasing or, at best, stagnating. However it remains below WHO recommendation in half of the EU Member States.

- a. do you retain that the recent institutional promotion measures (School Fruit Scheme, etc.) are effective and adequate to stimulate F&V consumption?

1 ☐2 ☐3 ☐4 ☐

Comments.....
.....

5. As regards the **single payment scheme**,

- a. on the basis of your experience, which kind of impact has this scheme had on farmers' behaviour (production choices) and then on concerned supply chain?
.....
.....
.....
- b. which kind of impact has the introduction of simple payment scheme had on the farmers' economic results?
.....
.....
.....
- c. in your opinion, how the simple payment scheme affects the supply of the processing industry?
.....
.....
.....

Theme 2: Trading arrangements and preferential agreements regarding the F&V sector

The core of external protection to EU producers of all F&V products is made of tariffs and, for the main products, by policy devices meant to operate as minimum import prices (entry prices). The EU has traditionally managed such a system looking at protection and stabilisation of revenues of EU producer of F&V, but also at availability of large and differentiated supply of F&V products to EU consumers at reasonable price, and also at integration in the import regime of the supply of developing and neighbouring countries.

1. Do you consider current trade policy measures effective in keeping imports in line with the need of having stable domestic prices and producers income?

☐

YES

☐

NO

why?

In a scenario of further trade liberalization:

2. Do you consider your PO able to gain from liberalization in F&V trade?

☐

YES

☐

NO

why?

3. Could list the conditions for POs to gain from trade liberalization (transnational structure of PO, supply consolidation, involvement in cross-country investments, etc.)?

.....
.....

4. Do you feel that the phasing out of quotas and entry prices could imply a surge of imports or domestic price instability?

☐

YES

☐

NO

why?

5. Could you list the F&V products that, in your opinion, should be kept apart from the liberalization process?

.....

6. Why should they be treated as exception in the WTO context?

.....

Theme 3: The issues relating to product and process standards

1. Have you developed a strategy aimed at improving the quality of the F&V products?

☐ YES ☐ NO

If the answer is “YES”, specify which kind of strategy:

☐ Certifications and public standards of quality:

☐ Private standards of quality:

☐ Environmentally friendly standards:

☐ Organic:

☐ Others (specify):

2. Which opportunities have you derived from the adaptation of your products to the public standards?

.....

3. Which difficulties?

.....
 ...

4. Which opportunities have you derived from the adaptation of your products to the private standards?

.....

5. Which difficulties?

.....
 ...

Section 3 – New aid scheme for the fruit and vegetable sector

1. How to improve the use of existing tools and measures in order to make the fruit and vegetable supply chain functioning better?
.....
.....
....

2. Which is your opinion about carrying on with the following instruments of EU support in the Post 2013 CMO for fruit and vegetables? :

a. Single payment scheme

☐ carrying on ☐ reduction ☐ removal

why.....
...

b. Operational funds and programmes

☐ carrying on ☐ reduction ☐ removal

why.....

c. Crisis prevention and management scheme

☐ carrying on ☐ reduction ☐ removal

why

3. Do you deem that the operational programme is an adequate instrument to pursue F&V CMO's objectives?

1 ☐ 2 ☐ 3 ☐ 4 ☐

Comments

.....
.....
....

4. In order to improve the concentration of the F&V supply, do you deem necessary to maintain or increase the current additional support (Community co-financing) to mergers of POs, associations of producer organisations (APOs), to those regions where the level of concentration of the supply through POs is particularly low, etc.?

specify.....
.

5. In relation to **crisis prevention and management scheme**, do you deem necessary a review of the current tools?

☐ YES ☐ NO

- a. If yes, why?
- b. which kind of changes would you propose?
.....
.....
...
- c. in order to address more severe market crises, do you deem necessary to create an additional and complementary tool outside POs' operational programme, aimed at guaranteeing a safety net for all F&V producers?

☐ YES ☐ NO

- d. on the basis of your experience which could be your proposal on this matter?
.....
.....
...
- e. do you deem necessary to increase Community financial endowment?

☐ YES ☐ NO

If yes, in which
measure?.....

If yes, could you suggest measures or area of CAP agricultural budget that should
be reduced in order to make room for an increased crisis management scheme?

.....
.....

ANNEX 6 - COMPETITION AND REGULATION IN AGRICULTURE¹²

Main aspects of general EU competition rules applicable to the agricultural sector

EU anti-trust competition law, in Articles 101-106 of Treaty on the Functioning of the European Union (TFEU), is a fundamental aspect of the functioning of the internal market. The agricultural chapter of the TFEU in Article 40(1) underlines that common rules on competition are the basis for a common market organisation.

EU anti-trust competition law in Article 101(1) TFEU prohibits certain anti-competitive practices, such as direct or indirect price fixing, market partitioning and production controls. It only applies, however, to practices which may affect trade between Member States, so that minor issues fall only under national competition law, which varies between Member States. The application of Article 101(1) TFEU to any cooperation agreements between farmers requires therefore as a pre-condition that such agreements are capable of appreciably affecting trade between Member States. A case-by-case analysis is necessary in order to determine if this condition is fulfilled, taking account of the particular characteristics of the agreements and markets at issue.

Article 101(3) TFEU provides for a waiver making some practices acceptable if they contribute to improving the production or distribution of goods, or to promoting technical or economic progress, whilst allowing consumers a fair share of the resulting benefits and do not eliminate competition in respect of a substantial part of the products concerned.

With respect to those agreements between farmers capable of appreciably affecting trade between Member States and therefore subject to EU competition law, the analysis under Article 101(1) and (3) should be made under the general competition rules applicable to horizontal agreements between competitors.

As far as the assessment of cooperation agreements between farmers in the framework of producer organisations or other forms of farmers' associations is concerned, two main categories of agreements could be distinguished depending on the aims pursued and the level of integration of activities between farmers: joint production agreements and commercialisation agreements.

As regards **joint production agreements**, EU competition rules recognise the substantial economic benefits stemming from this type of agreements and provide for a flexible approach when assessing such forms of cooperation between competitors. Joint production, whatever its scope and form, always involves an integration of economic activities, capacities or assets between participating companies.

European Courts have expressly recognised cooperative organisations¹³ as pro-competitive structures which contribute to the modernization and rationalization of the agricultural sector

¹² Information in this Annex is mainly derived from European Commission (2010a) and High Level Group on Milk (2010).

¹³ The DG Competition of European Commission (2010a) asserted, in its Working Paper *The interface between EU competition policy and the Common Agriculture Policy (CAP): Competition rules applicable to cooperation agreements between farmers in the dairy sector*, that the same type of favourable treatment may be extended to POs or other farmers' associations, as entities which may entail a certain level of integration of activities and contribute to modernize and rationalize the supply chain. More specifically, "this would be the case for instance

by enabling a large number of small producers to participate in the economic process on a wider geographical basis. However, EU competition rules view such agreements favourably if the farmers involved in these forms of cooperation do not collectively hold a level of market power such as to restrict competition in the market to the detriment of consumers.

Market share thresholds should be taken into account when assessing the market power of a cooperative: EU competition rules would very likely allow farmers to jointly decide on sales targets and product prices, if market shares are not exceeding 20% in the relevant market. Above that limit a case by case analysis is necessary.

EU competition rules recognise the efficiency gains stemming from the integration of product collecting activities, which may imply an overall favourable assessment. However, previously mentioned limitations based on market power of the agreements apply.

As regards **joint commercialisation agreements**, that is cooperation agreements between competitors in the selling, distribution or promotion of their products, a distinction must be made based on price fixing. Whether commercialisation agreements do not involve any price fixing, they are only subject to Article 81(1) EC if the parties have a degree of market power above 15%. In this case the agreement is not presumed to be illegal, but a case-by-case assessment is necessary. Joint commercialisation agreements are instead accepted if it does not exceed such a market share threshold. Whether commercialisation agreements involve price fixing, they fall under Article 81(1) EC irrespective of the market power of the parties. This would normally be considered as a form of cartel prohibited by EU competition rules.

Nevertheless, price fixing may be exempted under Article 81(3) if the cooperation involves a certain level of integration of marketing functions which generate substantial efficiencies and for which price fixing is indispensable. Such exceptions arise in two cases: (1) when large buyers reluctant to deal with a multitude of prices request a single supply price; (2) when creation of a common brand requires that all aspects of marketing, including price, are standardized. In any case, such exceptions apply only if the collective entity does not have a significant market power (market share below 15%).

Specific EU competition rules applicable to the agricultural sector

The agricultural sector is subject to the EU's competition rules with a specific regime applicable to such products. Article 42(1) TFEU provides that EU rules on competition shall apply to production and trade in agricultural products only to the extent determined by the European Parliament and the Council within the framework of Article 43(2) TFEU, which itself provides for the adoption of a common market organisation for agricultural products, and taking into account the objectives of the CAP set out in Article 39 TFEU.

In light of this provision, two Regulations adopted by the Council and governing the application of competition rules to the agriculture sector are currently in force:

1. Council Regulation (EC) No. 1234/2007 (Single CMO Regulation), which establishes a common organisation of the markets for certain sectors included in Annex I to the TFEU;

for joint [product] collection, which may involve efficiency enhancing effects to the extent that it allows small farmers to group together their individual [product] outputs in larger quantities, thereby meeting the needs of large buyers who may not want to deal with a wide number of suppliers." (ibidem, p. 16).

2. Council Regulation (EC) No. 1184/2006, which applies certain rules of competition to the production of, and trade in, agricultural products, listed in Annex I to the TFEU with the exception of the products covered by the Single CMO Regulation.

Both the Single CMO Regulation and Regulation (EC) No. 1184/2006 provide for the same substantive competition rules applicable to the agricultural sector.

Article 175 of the Single CMO Regulation provides for the general application of anti-trust competition rules to the agricultural sector subject to three exceptions in Article 176(1). These three exceptions only concern Article 101 of the TFEU. Article 102 of the TFEU (abuse of a dominant position) therefore remains fully applicable to the agricultural sector. In accordance with Article 176(2) of the Single CMO Regulation the Commission has sole power to determine which agreements, decisions and practices fulfil the conditions required by the above exceptions. The Commission shall undertake such determination either on its own initiative or at the request of a competent authority of a Member State or of an interested undertaking or association of undertakings.

On this point the DG Competition of European Commission (2010a, p. 7) highlighted that *"from the outset their potential application to a PO or farmers' cooperation agreement only becomes relevant when the agreement at issue may fall under the scope of application of Article 101(1) (that is, when it may actually or potentially affect trade between Member States). If such is not the case (because, for instance, the PO or farmers' association has a limited geographical scope in the territory of a Member State), a derogation from Article 101(1) would not ultimately make sense since the agreement would not be capable in any event of triggering the potential application of this provision."*

As regards the first exception, this one concerns agreements which are an integral part of national market organisations. It has a very limited importance, since the majority of products (including fruit and vegetables) are now covered by a single CMO.

The second exception applies to agreements necessary for the attainment of the objectives of the CAP as set out by Article 39 of the TFEU¹⁴. Since it is not possible to achieve these objectives simultaneously, they *"can be met if there are sufficient efficiencies or productivity gains that are passed onto consumers in the form of reasonable prices, while entailing higher farming incomes."* (*ibidem*, p. 9).

The third exception requires three cumulative conditions:

- a) The agreements must be concluded between farmers, farmers' associations or associations of farmers' associations belonging to a single Member State.
- b) The agreements must concern the production or sale of agricultural products or the use of joint facilities for the storage, treatment or processing of agricultural products, and under which there is no obligation to charge identical prices.

¹⁴ These objectives are the following:

"(a) to increase agricultural productivity by promoting technical progress and by ensuring the rational development of agricultural production and the optimum utilisation of the factors of production, in particular labour;
(b) thus to ensure a fair standard of living for the agricultural community, in particular by increasing the individual earnings of persons engaged in agriculture;
(c) to stabilise markets;
(d) to assure the availability of supplies;
(e) to ensure that supplies reach consumers at reasonable prices."

- c) The agreements may not exclude competition or jeopardize the objectives of the CAP.

The requirement that there be no obligation to charge identical prices would appear to make this exception inapplicable to collective bargaining for an identical price.

Competition rules applicable to interbranch organisations (IPOs)

Currently in the CAP there is explicit provision in several sectors, including in particular F&V, for the recognition of IPOs under a EU statute. IPOs may be also recognised under national statutes in other sectors under Article 124 of the Single CMO Regulation.

The role of IPOs is set out in Article 123 of the single CMO. In this regard, it could be worth recalling the Annex 3 of the HLG 's Report (2010) on "current activities allowed for IPOs in the fruit and vegetable sector under Article 123 of the Single CMO Regulation":

Carrying out, in the case of the fruit and vegetable sector, two or more, of the following activities in one or more regions of the EU, taking into account the interests of consumers:

- *Improving knowledge and the transparency of production and the market;*
- *Helping to coordinate better the way the products of the fruit and vegetable sector are placed on the market, in particular by means of research and market studies;*
- *Drawing up standard forms of contract compatible with EU rules;*
- *Exploiting to a fuller extent the potential of the fruit and vegetables produced;*
- *Providing the information and carrying out the research necessary to adjust production towards products more suited to market requirements and consumer tastes and expectations, in particular with regard to product quality and protection of the environment;*
- *Seeking ways of restricting the use of plant-health products and other inputs and ensuring product quality and soil and water conservation;*
- *Developing methods and instruments for improving product quality at all stages of production and marketing;*
- *Exploiting the potential of organic farming and protecting and promoting such farming as well as designations of origin, quality labels and geographical indications;*
- *Promoting integrated production or other environmentally sound production methods;*

With regard to the fruit and vegetable sector, laying down rules, as regards the following production and marketing rules, which are stricter than EU or national rules:

Production rules

- *choice of seed to be used according to intended destination (fresh market/industrial processing);*
- *thinning in orchards.*

Marketing rules

- *specified dates for commencement of cropping, staggering of marketing;*
- *minimum quality and size requirements;*
- *preparation, presentation, packaging and marking at first marketing stage;*
- *indication of product origin.*

As regards competition rules applicable to IPOs, given the Article 176 of Single CMO Regulation relating to the exemptions, in absence of any specific derogation contained in other provisions of such a legal framework, Article 101 TFEU applies to IPOs. Consequently,

the agreements or concerted practices taken by an IPO would have to be analysed under Article 101(1) and any possible efficiency enhancing effects under 101(3).

In this respect it is interesting to recall the European Courts' conclusion, following the case law on the application of Article 81(3): *an agreement that would have a horizontal and vertical dimension bringing together operators at various steps of the supply chain, having an effect on inter-State trade, and leading to a price fixing agreement deprived of any efficiencies would be prohibited. Such an agreement would be regarded as a hardcore restriction of competition and would not likely benefit from an exception under Article 101(3)* (European Commission, 2010a). Furthermore, the European Courts ruled that *ensuring a fair standard of living for the agricultural community is not sufficient to justify a price fixing agreement and that fixing minimum prices cannot be regarded as neutral in relation to the objective of Article 39 that supplies reach consumers at reasonable prices*.

For the F&V sector there is an explicit provision in Article 176a of the single CMO exempting agreements and practices of IPOs carrying out these activities from Article 101(1) TFEU provided that: they are notified to the Commission, and that the Commission does not find them incompatible with Community rules. Certain anti-competitive agreements and practices are explicitly declared incompatible, namely those which may lead to the partitioning of markets, affect the sound operation of the market organisation, create distortions of competition, entail the fixing of prices or create discrimination or eliminate competition in respect of a substantial proportion of the products in question.

Relating to the IPOs an important focus of attention regards the so-called *extension of rules*. The rules for which extension to other operators may be requested shall have one of the following aims:

- a) production and market reporting;
- b) stricter production rules than those laid down in Community or national rules;
- c) drawing up of standard contracts which are compatible with Community rules;
- d) rules on marketing;
- e) rules on protecting the environment;
- f) measures to promote and exploit the potential of products;
- g) measures to protect organic farming as well as designations of origin, quality labels and geographical indications.

Such rules shall have been in force for at least one marketing year, may be made binding for no more than three marketing years, and shall not cause any damage to other operators in the Member State concerned or the Community.

Furthermore, the Member State which has granted recognition to the IPO may decide that individuals or groups which are not members of the IPO but which benefit from those activities shall pay the organisation all or part of the financial contributions paid by its members to the extent that such contributions are intended to cover costs directly incurred as a result of pursuing the activities in question (the so-called *"financial contribution of non-members principle"*).

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