

10. Notes on Common Agricultural Policy for Fresh Fruit and Vegetables

(生鮮野菜・果実に関するE C 共通農業政策)

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10.1 Fresh Fruit and Vegetables (生鮮野菜・果実)

(1) The Basic Regulation 1035/72

The gradual establishment of a fruit and vegetables market organization was provided for in Regulation No. 23 of 4 April 1962. This was replaced by Regulation (EEC) No 1035/72 on the common organization of the market in fruit and vegetables, which came into force on 1 June 1972 and was last amended by Regulation (EEC) No 1754/92.

The Regulation 1035/72 seeks to establish a common organization of the market with the standard of achieving a balance between supply and demand at prices which are fair to producers while encouraging specialization within the Community and taking account of trade with third countries. It applies to the products listed in table 8.1, which includes all the fruit and vegetables grown in the Community except for potatoes, peas and beans for fodder, wine grapes, olives and bananas for which separate arrangements operate. The member state (subject to subsequent endorsement by the Commission) must not be in breach of the Community's commitments under the GATT.

The regulation provide for the removal of barriers to intra-Community trade and the application of rules for fair competition; the adoption of common quality standards in internal and external trade; the application of the Common Customs Tariff (CCT) to trade with third countries together with the liberalization of imports arrangements and a reference price system for sensitive products; compensation for the withdrawal of produce; special aids in the citrus sector; and export subsidies.

(2) Marketing years/seasons

Marketing years are set for those products which are subject to reference prices or to withdrawal, but these are largely academic since they do not always coincide with basic and buying-in or reference price periods. These products and their marketing years are set out below.

| | |
|--------------|-------------------------|
| Aubergines | January 1 - December 31 |
| Tomatoes | January 1 - December 31 |
| Cucumbers | January 1 - December 31 |
| Cherries | April 1 - September 30 |
| Apricots | May 1 - August 31 |
| Peaches | May 1 - October 31 |
| Cauliflowers | May 1 - April 30 |
| Table grapes | May 1 - April 30 |
| Plums | June 1 - October 31 |
| Pears | June 1 - May 31 |
| Lemons | June 1 - May 31 |
| Apples | July 1 - June 30 |

| | |
|---------------------|--------------------------|
| Lettuce and endives | July 1 - June 30 |
| Oranges | October 1 - July 15 |
| Small citrus | October 1 - May 15 |
| Artichokes | October 1 - September 30 |
| Courgettes | January 1 - December 31 |
| Nectarines | May 1 - October 31 |

(3) Competence of Council and Commission

The Council is responsible for the basic regulations in the sector and for their amendment. In particular, it is responsible for determining which products are subject to quality standards, for fixing the annual basic and buying-in prices and for the arrangements for fixing the citrus market penetration premiums.

The Commission, acting with the advice of the Management Committee for Fresh Fruit and Vegetables, is responsible for the detailed rules implementing general decisions of the Council for the determination of marketing years, for the coverage and level of the reference prices the aids and minimum prices for oranges and lemons for processing; for the levels and coverage of the export subsidies, for the detailed quality standards and for the general management of the market for fresh fruit and vegetables.

(4) Common quality standards

Quality standards for fresh horticultural produce apply to a wide range of different fresh fruit and vegetables at all stages of distribution, from the grower's packhouse to the retail shop and to imports and exports, but excluding farmgate sales and produce destined for processing. The main objectives of the standards are to keep produce of an unsatisfactory quality off the market, to guide production to meet consumer requirements and to facilitate trade under fair conditions and thereby improve the profitability of production. The standards provide a degree of consumer protection for a sector where most products are highly perishable and serious defects can develop extremely rapidly. Moreover, they help build consumer and trade confidence in the quality of produce they buy.

The standards include criteria of quality, size, labeling, packaging and presentation and normally provide for three quality classes - Extra, Class I and Class 11. Each standard contains a list of minimum quality requirements appropriate to that product (refer to Annex: Quality Standards for Tomato and Peach). Produce must, however, be intact, sound and unaffected by deterioration, clean, practically free from pest damage and sufficiently developed. A Class 111 exists for certain products but only operates in exceptional circumstances, i.e. in order to meet demand in times of shortage within the Community. Member States are responsible for the enforcement of the standards. The commodities subject to these standards are listed on next page.

| Fruit | Vegetables | |
|----------------------|------------------|---------------|
| Apples | Artichokes | Garlic |
| Apricots | Asparagus | Leeks |
| Cherries | Aubergines | Lettuce |
| Kiwifruit | Beans | Onions |
| Lemons | Brussels sprouts | Peas |
| Mandarins | Cabbages | Spinach |
| Oranges | Carrots | Sweet Peppers |
| Peaches & Nectarines | Cauliflower | Tomatoes |
| Pears | Celery | |
| Plums | Chicory | |
| Strawberries | Courgettes | |
| Table grapes | Cucumbers | |

(5) Internal market support measures

a. Compensation for withdrawal

Market prices are supported by a system of compensation for withdrawal of produce from the market. The system is operated by the intervention agencies in member states through registered producer organizations and applies to all marketable qualities of the produce listed under paragraph (f. withdrawal prices) below. Because fruit and vegetables are highly perishable and storage for long periods is not economical, the price support system is not designed to achieve a guaranteed price over periods of excess and shortage as is the case with some other commodities subject to intervention. It seeks only to act as a safety net for producers at times of glut. The support prices are in the form of compensation for withdrawal and are derived from basic and buying-in prices by the application of coefficients which take account of the commercial characteristics of the produce. They are set at levels which are far below the levels normally obtaining in the market. This is in contrast with other sectors, in which support prices are designed to drive producers' prices up towards a target price set above the intervention price. Moreover, intervention applies at any time in the basic and buying-in periods and is not subject to specific Commission action as in other sectors.

b. Basic price

Basic prices were indicative prices which represented in a very broad way the price levels in the main areas of production in the Community. They were originally derived from the average of Community producer prices for defined products in a set period. They are now adjusted by the Council at the annual price fixing taking into account the need to support farmers' incomes, to stabilize market prices and to consider the interests of consumers. But consideration of the budgetary implications of price changes also plays an important part and there have been no increases now for several years.

c. **Buying-in price**

The 'buying-in prices' are also set by the Council within a prescribed percentage range of the basic prices as laid down in the basic regulation. For aubergines, cauliflowers and tomatoes the range is 30-45 %; for apples and pears 40-55 %; and for the remaining products it is 45-5 % .

f. **Withdrawal prices**

These are the amounts of compensation paid to producer organizations for eligible produce withdrawn from the market - i.e. the buying-in prices as modified by the coefficients plus 10% of the basic price. They apply during the relevant withdrawal seasons which are as follows:

| | |
|--------------|-----------------------|
| Apples | Aug. 1 - May 31 |
| Apricots | June 1 - July 31 |
| Aubergines | July 1 - Oct. 31 |
| Pears | July 1 - April 30 |
| Peaches | June 1 - Sept. 31 |
| Table grapes | Aug. 1 - Oct. 31 |
| Lemons | June 1 - May 31 |
| Tomatoes | June 11 - Nov. 30 |
| Oranges | Dec. 1 - May 31 |
| Mandarins | Nov. 16 - End of Feb. |
| Clementines | Dec. 1 - Feb. 15 |
| Satsumas | Oct. 16 - Jan. 15 |
| Cauliflowers | May 1 - April 30 |
| Nectarines | June 1 - Aug. 31 |

g. **Withdrawal of produce**

The withdrawal of produce is normally carried out through recognized producer organizations in accordance with the arrangements provided by the intervention agencies in member states. These agencies are responsible for the payment of compensation for withdrawals.

h. **Disposal of withdrawn produce**

There is provision for the disposal of withdrawn produce through approved outlets designed to avoid further disruption of the market. These outlets include free gifts to specified institutions and charities, animal feed and processing. Transport costs incurred in the disposal of produce through approved outlets for human consumption are reimbursed by the intervention agencies in member states at the standard rates laid down in Regulation 1365/82. In practice a large proportion of produce becomes unfit and is destroyed .

i. Preventative withdrawals

In addition to the normal withdrawal arrangements, provision is also made for the preventive withdrawal of apples and pears at the beginning of the marketing year. Detailed rules of operation are set out in Regulation 1596/79, as amended. Preventive withdrawal operates at the discretion of each member state and has applied so far only to limited varieties of apples. It encourages producer organizations to anticipate a situation of over-supply and to take action to avert a slump in prices by offering them a higher level of compensation for withdrawal than would otherwise be available in the early months of the season. The compensation is based on the average basic and buying-in prices for October, November and December. The arrangements for preventive withdrawal, which are triggered off by a prescribed crop forecast and market price situation, were originally introduced to apply only for the three seasons up to June 1982 but the trial period was extended until June 1987, and then subsequently until June 1990. It has now been made permanent .

j. State buying-in of certain products

Provision also exists for the buying-in by member states of summer pears, peaches, apricots, tomatoes and aubergines when, for Community-grown produce, prices as recorded on representative wholesale markets fall below prescribed levels. However, member states which have effective producers' organizations which cover the produce in question, or whose production of them is small may be exempted under Regulation 1852/85. The UK (amongst others) is regularly exempted in this way.

k. Limitation of season for withdrawals

Withdrawals may be carried out only in respect of produce which is marketed in the marketing year during which it was harvested.

l. Guarantee threshold

During 1987/88 the Council adopted a number of proposals from the Commission introducing a mechanism for reducing prices in the following year if the quantities withdrawn from the market exceeded certain maximum quantities or thresholds (stabilizers). The price reduction would be 1% for specified amounts over the threshold up to maximum of 20%. These amounts and the thresholds can be found in table 10.2. For apples however the overrun in the threshold is assessed on the basis of average withdrawals during the last three marketing years.

(6) Trade with third countries and Common Customs Tariff (CCT)

A system of 'ad valorem' Common Customs Tariffs applied to third country imports and the tariff may vary from country to country and on a seasonal basis. Special tariffs have been negotiated between the Community and the African, Caribbean and Pacific (ACP) countries which are members of the Lome Convention and with Cyprus, Israel, the Maghreb (Algeria, Morocco and Tunisia), the Mashraq (Egypt, Jordan, Lebanon and Syria), Poland, the Czech Republic, Slovakia, Romania, Bulgaria, the Republic of Bosnia - Herzegovina, Croatia and Slovenia, the territory of the former Yugoslavia and Republic of Macedonia, Malta and Turkey

Provision exists for introduction of import licenses through management committee procedure for all products within the regime as a form of market management.

A safeguard clause is provided to permit special measures to be operated if imports from third countries cause, or threaten to cause, a serious disturbance of the Community market. Any action taken in this connection by the Commission or by the member state (subject to subsequent endorsement by the Commission) must not be in breach of the Community's commitments under the GATT

(7) Reference price system 2118/74

The reference price system 2118/74 operates to protect Community producers during their main marketing period from low-priced imports from third countries. Its application is limited to certain sensitive products and its mechanisms are distinct from and additional to the CCT. The reference price system determines the minimum prices at which these products may enter the Community without facing additional levies. The minimum prices are equivalent to the reference prices plus the full rate of the CCT. Deliveries into any part of the Community at prices below those determined by the system are likely to result in the application of countervailing charges. The detailed rules of operation are set out in Regulation 2118/74.

Before the beginning of each marketing year the Commission, through the Management Committee, sets the reference prices for the seasons when Community marketing is greatest. The reference prices are derived from a comparison of the previous year's reference price and the arithmetic average of producer prices in the Community in the three previous seasons, account being taken of the trend in production costs. Under rules set by the Council, reference prices cannot be reduced. In practice they are not changed from one year to the next.

The products covered by the reference price system and the periods during which the reference prices usually apply are as follows.

| Fruit | Reference price period | |
|-----------------|------------------------|--------------|
| Fruit | | |
| Apples | July 1 - | June 30 |
| Apricots | June 1 - | July 31 |
| Table grapes | July 21 - | November 20 |
| Lemons | June 1 - | May 31 |
| Orange hybrids | November - | end February |
| Sweet oranges | December 1 - | May 31 |
| Peaches | June 11 - | September 30 |
| Pears | July 1 - | April 30 |
| Cherries | May 21 - | August 10 |
| Plums - group I | June 11 - | September 30 |
| - group II | August 1 - | September 30 |
| Clementines | December 1 - | ary |
| Vegetables | February 11 - | November 10 |
| Cucumbers | April 1 - | December 20 |
| Tomatoes | April 21 - | September 30 |
| Aubergines | April 1 - | October 31 |
| Endives | November 15 - | March 31 |
| Cabbage lettuce | November 1 - | May 31 |
| Artichokes | November 1 - | June 30 |

(8) Entry prices

During the periods for which reference prices are set, member states report daily to the Commission the importer wholesaler prices and quantities on the main markets; in the Community of third country imports of the relevant products. These prices are converted to 'entry prices' for each third country by deducting custom duty at the full rate of the CCT and any countervailing charge in operation. A conversion factor is used to allow for price variations for the different classes and qualities - for example, to take account of the non-availability of class 1 produce and the need to align the prices of indoor and out(door tomatoes and in the case of tomatoes and cucumbers to allow for production costs.

(9) Countervailing charges

If the entry price for at least 30% of imports from a given third country is 0.6 ECU/100 kg or more below the level of the reference price for a qualifying period, the Commission imposes a levy on subsequent imports of that product. The charge is equal to the difference between the reference price and the average of the last two entry prices. The countervailing charge is applicable throughout the Community to imports from the third country concerned. It is removed when the entry price is in line with or exceeds the reference price for two successive days or when no prices have been recorded on the Community markets for six successive days for the product from the

country concerned. In practice third country suppliers therefore gain no advantage from trying to supply the Community at low prices. In consequence, they tend to respect the reference price system or withhold supplies to avoid paying countervailing charges.

(10) Export refunds 2518/69

Detailed rules for setting - export refunds are set out in Regulation 2518/69 as amended. The amount of the refunds is based where possible on a comparison of prices in the Community and in third country export markets. It applies to fruit of a quality of at least Class 1I for which there are opportunities for exporting economically significant quantities and to certain nuts. Refunds may vary seasonally and in relation to destination. Conditions of eligibility for refunds are made public by the intervention agencies which are also responsible for payment.

(11) Producer organizations

The regime attaches much importance to the development of producer organizations to increase the efficiency of the fresh fruit and vegetables sector - especially as regards marketing. Financial encouragement is given to their development. Certain functions and privileges attach to these organizations including the presentation of produce for withdrawal. Growers wishing to withdraw produce with payment of compensation from Community funds must therefore join a recognized producer's organization.

Producers organizations must be officially recognized by the national and Community authorities as complying with the following requirements. They should:-

- promote the concentration of supply and the regularisation of prices at the producer stage.
- make suitable technical means available to members for presenting and marketing products;
- market virtually the whole of its members production;
- adopt and apply rules to improve the quality and control the volume of supply,
- gather information on supplies.

10.2 Processed Fruit and Vegetables (野菜・果実の加工)

(1) Basic regulation

The processed fruit and vegetables regime has been developing since original outline scheme (set out in Regulation 865/68) eliminated national measures, and imports from third countries were brought under control in 1975 (Regulations 1927/75 to 1931/75). The basic regime was consolidated into Council Regulation 516/77. As a consequence of the accession of Greece in 1981 the regime was amended and,

following a major review by the Commission, significant changes were agreed in 1984 (main amending Regulation, 988/84). The regulations were consolidated again in 1986 following the accession of Spain and Portugal. The current Regulation 426/86, as amended, applies to all member states and took effect from March 1, 1986. The Commission's proposals for reform are awaited. The products covered by the regime are set out in table 10.3.

(2) Competence of Council and Commission

The Council is responsible for the principal regulations in the sector and for their amendment under Articles 42 and 43 of the Treaty. The basic regulation authorizes the Council to make certain specific provisions, to adopt general rules for the application of aspects of the regime, and to decide on the products covered by certain specific measures. The basic regulation provides for a management committee for the sector and the Commission, acting within that procedure, is responsible for enacting the detailed rules for the application of aspects of the regime including fixing the levels of prices etc. for aided produce. The Commission is also authorized to act on its own in certain circumstances, particularly to safeguard the market.

(3) Organization of the market

The state aid rules apply in the sector, and the regime is operated to take account of the agricultural and commercial objectives of the community as set out in Articles 39 and 110 of the Treaty. Producer prices of certain fruits and vegetables for processing are particularly important to specific regions and the regime supports the most important ones at a price higher than in third countries. A limited form of support buying applies to dried figs, sultanas and currants.

(4) Support for producers

The Community's processed products are made competitive not by a general system of import controls but by aids (which may be limited to avoid over-production) paid to processors to compensate for the high raw material cost. For the purpose of paying these aids marketing years are specified.

(5) International trade

However, controls are applied to some imports. Import licenses are required for sensitive products, and imports of preserved mushrooms in excess of specified quantities from particular sources are subject to an additional levy. Minimum import prices apply as part of the basic regime for dried grapes and have been applied on a temporary basis to other products. Frontier measures also apply to take account of the

sugar content of certain processed products. Export refunds may also be granted in specific circumstances.

(6) Processing aid

Production aid is paid to processors of a limited range of products who have paid producers specified minimum prices for raw material of suitable quality and have processed finished products meeting Community quality criteria. Limits are placed on the total aid paid by guarantee thresholds and other measures.

(7) Product coverage

The products eligible for production aid under the basic regulation include sultanas and currants (not raisins), dried figs, prunes, peaches, pears and tomato products. The list (in detail at table 10.3) may be amended by the Council. Canned pineapple receives aid under separate similar, but not identical, provisions (Council Regulation 525/77, as amended by Regulation 1699/85, and Commission Regulation 2077/85). Sultanas and currants will cease to qualify for production aid after the 1993/94 marketing year.

(8) Limitation of aid

The basic Regulation allows the Council to take measures where Community production potential is likely to cause a major imbalance on the market. In particular it may limit production aid to a specified quantity determined by average EC production and subject to adjustment. Guarantee thresholds were set for tomato products, peaches in syrup and William pears in syrup (Council Regulation 989/84). If a threshold is exceeded on average there is an automatic reduction in support the following year.

Aid for tomato products has been limited by production quotas since 1989/90 except for the 1992/93 marketing year. The quota system was introduced temporarily by Council Regulation 1203/90; lapsed in 1992/93 when guarantee threshold applied for the year (Council Regulation 1755/92); and was reinstated for an indefinite period in 1993/94 (Council Regulation 668/93). Individual quotas for each product have been allocated to producer member states.

(9) Minimum producer price

The price paid by processors to growers or groups has to be based on a contract, and the regime provides for special measures to ensure that the price is received by the grower. The minimum producer price which has to be paid by processors is calculated on the basis of the previous marketing year's price, the movement of basic prices in the fresh fruit and vegetable sector (resulting from the

annual price fixing) and the need to avoid distorting the normal markets for fresh produce.

(10) Quality requirements (raw materials and finished products)

To qualify for acceptance for processing at the minimum grower price, the raw material has to be of acceptable quality. Requirements are specified for sultanas, currants, dried figs and dried plums (Commission Regulations 2347/84, 1709/84 and 2022/85).

To qualify for production aid the finished product has to meet minimum quality requirements (Commission Regulations 1709/84 (dried figs and fig paste), 1289/85 (pears in syrup), 1290/85 (peaches in syrup), 2022/85 (prunes) and 1764/86 (tomato products)).

The Council is authorized to introduce common quality standards to apply to Community and imported produce for consumption in the EC or for exports to third countries. The products covered by this authorization are those listed in table 10.3 but the Council may also designate other products and introduce standards for them.

(11) Disposal of surplus produce

Under the existing arrangements sales from intervention are secured to maintain market stability and special measures may be taken to ensure this happens. Commission regulations provide for sales at fixed prices for normal consumption, distillation and use in the food industry, and by tender for fodder. Regulations authorizing sales at particular times are made under the Management Committee procedure.

(12) Minimum import price

The regime provides for a minimum import price (MIP) for all dried grapes (currants, sultanas and raisins) and certain processed sour cherry products. Where the MIP is not observed, a countervailing charge in addition to customs duty is imposed. The Council may amend the list of products subject to the MIP. General and detailed rules for the operation of the system are set out in Council Regulation 2089/85 and Commission Regulation 2237/85.

(13) Countervailing charge

The maximum countervailing charges are fixed from time to time under charge Management Committee procedure. They are based on the lowest prices of the main non-member supplier country. The countervailing charge is graduated according to the

amount the actual price at import is below the MIP. The charge is converted into national currencies by the agricultural conversion rate.

(14) Sugar levies

In addition to customs duty, an import levy is charged on the added sugars in processed products. There are two categories of product subject to this levy and the Council may amend the coverage of these. As part of the multi-lateral Trade Negotiations, certain canned fruits (listed in Annex II of the basic regulation) are considered as containing added sugar and are subject to a two per cent ad valorem levy at the time of customs entry.

For certain fruit, a levy based on the difference between the world and Community prices for white sugar is fixed by the Commission quarterly. The Council may make an adjustment if there are significant changes in the Community price for white sugar during a quarter. Rules for assessing the added sugar and the applicable levy are set out in the basic regulation.

(15) Regulation of the market

A system of import licenses helps the Commission monitor market developments in the Community. Products covered by import licenses are tomato concentrate and flakes, canned and peeled tomatoes, peaches in syrup, mushrooms (canned for immediate consumption and provisionally preserved in brine), canned pears and apricots, peas and beans in pod, frozen peas, dried prunes, dried apple, tomato juice, cherry juice, all forms of processed raspberries, frozen and provisionally preserved strawberries and cherries, dried grapes and preserved asparagus.

The Commission may introduce emergency safeguard measures if any particular market subject to the regime is disrupted or likely to be disrupted by third country imports. In the past such measures have included import bans, temporary MIPs with related countervailing charges, and import licenses. The Commission has used its safeguard powers to introduce a system of licensing for imports of orange juice (Regulation 3518/86 as amended by 210/88). The scope of the regulation was extended in Commission Regulation 314/93.

(16) Issue of certificates

Detailed rules for the Import certification system are set out in Regulation 743/87. Certificates are issued on application except for a few sensitive products when they are issued on the fifth working day after application and are valid for three months. The five-day working period is designed to allow the Commission time to consider

whether the Community market can absorb the level of imports which the applications represent, after which time the certificates are issued automatically unless the Commission has found it necessary to introduce emergency safeguard measures. Effectively this means suspending the issue of certificates until such time as the Community market is restored. Without an import certificate the goods covered by the system cannot be imported. However, once issued, the certificates confer a right to import which cannot be withdrawn. The import certificate obliges the holder to import the quantity of goods shown. The fulfillment of this obligation is guaranteed by the lodging of a security at the time of application and will be considered to have been fulfilled when transactions covering at least 95 % of the quantity have been completed.

Table 10.1 Products Covered by the Common Organization of the Market in Fresh Fruit and Vegetables

| CCT Heading No. | Description |
|----------------------------------|---|
| 070200 | Tomatoes, fresh or chilled |
| 0703 | Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled |
| 0704 | Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled |
| 0705 | Lettuce (<i>Lactuca Sativa</i>) and chicory (<i>Cichorium Spp.</i>), fresh or chilled |
| 0706 | Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots, fresh or chilled |
| 070700 | Cucumbers and gherkins, fresh or chilled |
| 0708 | Leguminous vegetables, shelled or unshelled, fresh or chilled |
| ex 0709 | Other vegetables, fresh or chilled excluding vegetables of subheadings 07096091, 07096095, 07096099, 07099031, 07099039, 07099060 |
| ex 0802 | Other nuts, fresh or dried, whether or not shelled or peeled, excluding azeca (or betel) and cola subheading 08029030 |
| ex 080300 | Plantain bananas |
| 08042010 | Figs, fresh |
| 08043000 | Pineapples |
| 08044000 | Avocados |
| 08045000 | Guavas, mangoes and mangosteens |
| 0805 | Citrus fruit, fresh or dried |
| 08061011 08061015 08061019 | Fresh table grapes |
| 0807 | Melons (including water melons) and pawpaws (papayas), fresh |
| 0808 | Apples, pears and quinces, fresh |
| 0809 | Apricots, cherries and peaches (including nectarines), plums and sloes, fresh |
| 0810 | Other fruit, fresh |
| 08135030 | Mixtures, exclusively of dried nuts of heading No's 0801, 0802 |
| 12121010 | Locust beans |

Table 10.2 Price Reduction Amounts and Thresholds

| Product | Threshold | | Tranche to trigger a 1% price reduction* |
|--------------|-----------------|--|--|
| Tomatoes | 390 000 | | 10 000 tonnes |
| Mandarins | 1987/88 | 65%) | 1% of 5 year average average withdrawal |
| | 1988/89 | 50%) of 5 year average production | |
| | 1989/90 | 35%) for the fresh market | |
| | 1990/91 | 20%) | |
| | 1991/92 onwards | 10%) | |
| Clementines | | 10%) of 5 year average production for the fresh market | 1% of 5 year average withdrawal |
| Satsumas | | 10%) of 5 year average production for the fresh market | 1% of 5 year average withdrawal |
| Nectarines | | 10%) of 5 year average production for the fresh market | 1% of 5 year average withdrawal |
| Oranges | 1988/89 | 15%) of 5 year average production | 1% of 5 year average withdrawal |
| Lemons | 1989/90 | 12.5%) for the fresh market | |
| | 1990/91 | 10%) | |
| Peaches | 1988/89 | 20%) of 5 year average production | 1% of 5 year average withdrawal |
| | 1989/90 | 15%) for the fresh market | |
| | 1990/91 | 10%) | |
| Apples | 1989/90 | 6%) 5 year | 1% of 5 year average withdrawal |
| | 1990/91 | 4%) average | |
| | 1991/92 | 3%) production | |
| Cauliflowers | | 3%) 5 year average production | 1% of 5 year average withdrawal |

Note: * to maximum of 20%

Table 10.3 Products Covered by the Common Organization of the Market in Processed Fruit and Vegetables

| HS Heading No. | Description |
|----------------|---|
| ex 0710 | Vegetables (whether or not cooked), preserved by freezing, excluding olives and peppers |
| ex 0711 | Vegetables provisionally preserved in brine, in sulphur, in sulphur water or in other preservative solutions but not specially prepared for immediate consumption excluding olives, peppers and sweetcorn |
| ex 0712 | Dried, dehydrated or evaporated vegetables, whole cut sliced |
| 804 2090 | Dried figs |
| 0806 | Dried grapes |
| 0811 | Fruits and nuts (whether or not cooked,), preserved by freezing, not containing added sugar |
| 0812 | Fruit provisionally preserved (for example by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions), but unsuitable in that state for immediate consumption |
| ex 0813 | Fruit, dried, other than that falling within headings 0801-0806 excluding dried nuts of headings 0801 and 0802 within subheading 0813.50-30 |
| 0814 | Peel of melons including watermelons and citrus fruit, fresh, frozen, dried or provisionally preserved in brine, in sulphur water or in other preservative solutions |
| 0904 2010 | Dried sweet peppers |
| ex 130220 | Pectic substances and pectinates |
| ex 2001 | Vegetables and fruit, prepared or preserved by vinegar or acetic acid, with or without sugar, whether or not containing salt, spices or mustard, other than olives, pepper's (other than of heading 2001 90-20) sweetcorn, yams, sweet potatoes, vine leaves, palm hearts |
| 2002 | Tomatoes prepared or preserved otherwise than by vinegar or acetic acid |
| 2003 | Mushrooms and truffle, prepared or preserved otherwise than by vinegar or acetic acid |
| ex 2004 | Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen, excluding olives and potatoes prepared or preserved in the flour, meal or flakes |
| ex 2005 | Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, froze, excluding olives, sweetcorn and peppers other than those of heading 2005 90-10 |
| 2006 | Fruit, nuts fruit-peel and parts of plants, preserved by sugar (drained, glacé or crystallised) |
| 2007 | Jams, fruit jellies, marmalades, fruit or nut puree and fruit pastes, being cooked preparations, whether or not containing added sugar |
| 2008 | Fruit otherwise prepared or preserved, whether or not containing added sugar or spirit |
| 2009 | Fruit juices (excluding grape juice and must) and vegetable juices, whether or not containing added sugar unfermented and not containing spirit |

Table 10.4 Processed Fruit and Vegetable Products Eligible for Production Aids

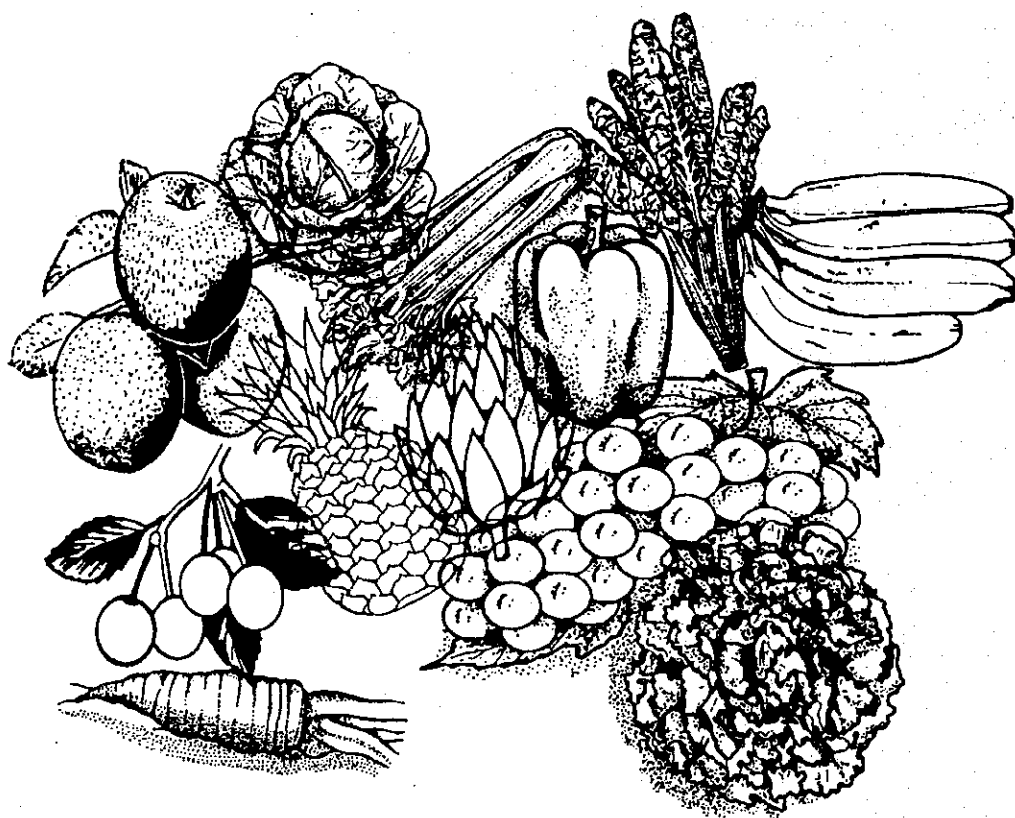
| HS Heading No. | Description |
|-----------------------------|--|
| ex 0710 8070 | Peeled tomatoes whether or not whole, frozen |
| ex 0712 9030 | Tomato flakes |
| 0804 20 90 | Dried figs |
| 0806 20 | * Sultanas and currants |
| ex 0813 20 | Prunes derived from dried "de Ente" plums |
| ex 2002 10 | Peeled and unpeeled tomatoes, whether or not whole |
| ex 2002 9010 | Tomato juice (including passata) |
| ex 2002 9030 | Tomato concentrate |
| ex 2002 9090 | |
| ex 2008 7061, 69, 71, 97 | Peaches in syrup and natural juice |
| ex 2008 4051, 71, 79 | William pears in syrup and natural juice |
| 2009 50 | Tomato juice |

** Not after 1993/94 marketing year*

10.3 Reprints from CAP WORKING NOTES 1994 (Fruit and Vegetables)
(共通農業政策(CAP) WORKING NOTES 1994)

EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR AGRICULTURE

CAP WORKING NOTES 1994



**FRUIT
and
VEGETABLES**

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I N T R O D U C T I O N

The information in this document is arranged in three parts:

- the "analysis" part describes the market situation and the mechanisms of the market organization in the product;
- the "statistics" part gives most of the tables appearing for the product in the annual report on agriculture in the Community;
- lastly, the "explanatory memorandum" of the Commission's annual agricultural price proposals provides an indispensable illustration of the Community policy.

* * *

DESCRIPTION OF THE MECHANISMS
OF THE COMMON ORGANIZATION OF THE MARKETS (*)

A. FRESH FRUIT AND VEGETABLES

The gradual establishment of a fruit and vegetables market organization was provided for in Regulation No 23 of 4 April 1962. This was replaced by Regulation (EEC) No 1035/72 on the common organization of the market in fruit and vegetables, which came into force on 1 June 1972 and was last amended by Regulation (EEC) No 1754/92.

There are a number of regulations introducing special measures:

- Regulation (EEC) No 2511/69 laying down, *inter alia*, special measures for improving the production and marketing of Community citrus fruits, as last amended by Regulation (EEC) No 1130/89;
- Regulation (EEC) No 2601/69 laying down special measures to encourage the processing of certain varieties of oranges, as last amended by Regulation (EEC) No 3848/89;
- Regulation (EEC) No 1035/77 laying down special measures to encourage the marketing of products processed from lemons, as last amended by Regulation (EEC) No 1199/90;
- Regulation (EEC) No 1198/90 establishing a Community register of citrus cultivation;
- Regulation (EEC) No 3438/92 laying down special rules for the transport of certain fresh fruit and vegetables originating in Greece;
- financial contributions to be proposed in connection with the restructuring of the French, Italian and Greek fruit and vegetable sectors, i.e. those most affected by the abolition of the transitional measures provided for in the Act of Accession of Spain and Portugal;
- Regulations (EEC) Nos 1196/90 and 1200/90 on the stabilization of the Community production of mandarins and apples;
- Regulations (EEC) Nos 1195/90 and 1201/90 on measures to increase the consumption and utilization of citrus fruit and apples;
- Regulation (EEC) No 789/89 instituting specific measures for nuts and locust beans.

(*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1994".

The market organization covers products falling within the following codes of the Combined Nomenclature:

- Vegetables: 0702 00 to 0708 and 0709, with the exception of codes 0709 60 91, 0709 60 95, 0709 60 99, 0709 90 31, 0709 90 39 and 0709 90 60;
- Fruit: 0802 (with the exception of code No 0802 90 30), 0804 20 10, 0805, 0806 10 11, 0806 10 15, 0806 10 19, 0807 to 0810 and ex 0813 50 30 (mixtures exclusively of nuts of codes 0801, 0802 and 1212 10 10);
- Locust beans: 1212 10 10.

Quality standards are fixed for a number of these products and normally comprise three classes: Extra, I and II.

The marketing year differs from product to product.

Expenditure on fresh fruit and vegetables was 1.9% of total EAGGF Guarantee spending in 1992.

1. ECONOMIC BACKGROUND(1)

Community production of fruit harvested for sale in 1991/92 was 28.2 million t, less (-8.4%) than in 1990/91. Production of vegetables, totalling 46.7 million t during 1991/92, was greater than in 1990/91 (+3.6%) and 8.7% above the average for 1987/89.

Internal consumption of fruit in 1990/91 came to 35.3 million t including 9.3 million t of citrus fruit. Consumption of vegetables was 43.0 million t. Nearly all internal consumption of fruit and vegetables (about 90%) is human consumption.

The self-sufficiency rate in vegetables was 104% in 1990/91, in non-citrus fruit 83% and in citrus fruit 71%.

Trade with countries outside the Community varies from product to product:

- imports in 1991: 3.8 million t of fruit (of which 1.6 million t of citrus fruit) and 0.9 million t of fresh vegetables,
- exports in 1991: 1.5 million t of fresh fruit (of which 0.8 million t of citrus fruit) and 0.6 million t of vegetables.

(1) Community production of bananas and the common organization of the market in bananas are not included here.

2. OPERATION OF THE MARKET(1)

2.1. Price arrangements

For each marketing year, the Council fixes two types of price for the products considered important in determining producers' incomes: peaches, pears, apples, table grapes, oranges, mandarins, lemons, cauliflowers, tomatoes, aubergines, apricots, clementines, satsumas and nectarines.

- (a) Basic price: This is fixed for each product, taking account of market prices over the three preceding years and the need to contribute to supporting producers' incomes. It is used to calculate buying-in prices.
- (b) Buying-in price: This price is set at between 30% and 65% of the basic price according to product.

There are two further types of price derived from the above 'institutional' prices:

- Withdrawal price
This is derived from the basic price and the buying-in price and is the price below which producer organizations do not offer their members' products for sale: the latter are paid compensation instead. The arrangement is currently confined to the above basic products, and the price guarantees to producers that part of the normal price they need to cover costs and labour. Withdrawal prices may not exceed the buying-in price for quality class II plus 10% of the basic price.
- Public buying-in price
Should a serious crisis occur on the market, intervention agencies may buy in surplus products at a price not exceeding the buying-in price, adjusted for quality class II, provided the products meet the standards set for this class, plus other adjustments where appropriate depending on the products being bought in.
- (c) Reference prices: The reference prices, set by the Commission, are minimum entry prices for a number of products exposed to competitive pressure from imports (cucumbers, tomatoes, aubergines, courgettes, cherries, apricots, peaches and nectarines, table grapes, lemons, plums, pears, apples, cabbage lettuces, endives, artichokes, mandarins and satsumas, clementines and blood oranges); reference prices are based on the

(1) Community production of bananas and the common organization of the market in bananas are not included here.

arithmetic mean of production prices in the Member States in the preceding three marketing years, taking account both of changes in production costs in the fruit and vegetables sector and of a sum representing the cost of transporting the products from the area of production to centres of consumption in the Community.

2.2. Specific market instruments

2.2.1. Import and export arrangements

In the case of imports, for each product concerned and for each place of origin, the entry price determined daily from the market prices recorded on representative markets in the Community is compared with the reference price. If the market price is below the reference price, a countervailing charge is payable.

To facilitate exports, export refunds generally designed to make up the difference between the internal price and the world market price may be granted.

2.2.2. Withdrawal operations

Where producer organizations have been unable to sell part of their production and have therefore paid compensation to producers, they receive financial compensation from the EAGGF. This compensation is equal to that paid to producers (which may not exceed withdrawal prices), minus net receipts obtained from the produce withdrawn from the market.

Financial compensation may also be paid in the case of public buying-in.

For tomatoes, mandarins, clementines, satsumas, oranges, lemons, peaches, nectarines, apples and cauliflowers there is a threshold for withdrawals. If the quantities withdrawn from the market in a single marketing year exceed the threshold, the buying-in price for the subsequent year is reduced progressively by 1%, up to a maximum reduction of 20%. Since 1990/91 the thresholds have been calculated for the Community.

2.3. Prices fixed

For the 1993/94 marketing year, the Commission has proposed the freezing of institutional prices.

2.4. Measures accompanying the price mechanisms

2.4.1. Establishment of a Community register of citrus cultivation

The establishment of the register was undertaken to improve production orientation and also to improve the Community arrangements for withdrawals and control measures. It was considered necessary to have access to data indicating citrus production potential in the Community.

2.4.2. Promotion measures

(a) Financial compensation for promotion of orange and mandarin sales

This takes the form of marketing premiums paid to sellers by each producing Member State (reimbursable by the EAGGF), with the aim of increasing sales in the Community by assisting marketing operations. These premiums have been degressive since 1990/91 onwards and cease in 1993/94.

(b) Financial compensation to support processing of citrus fruit

This scheme applies to oranges and lemons.

Premiums are paid to processors, thereby ensuring regular supplies of Community fruit to the Community processing industry, thus helping disposal of the fruit. Supply contracts between producers and processors are based on a minimum price fixed before the start of each marketing year.

For oranges, the minimum price is fixed at the level of the highest withdrawal price valid during the periods of substantial withdrawals. For lemons, the minimum price is also fixed on the basis of the withdrawal price, but in accordance with the system established by Regulation (EEC) No 1199/90 (OJ No L 119, 11.5.1990, p. 61).

The financial compensation cannot be greater than the difference between the minimum price and the prices charged for the raw material in non-Community producing countries.

These products are also subject to the stabilizers for fresh products. They are treated in the same way as production for consumption fresh for the purpose of fixing the intervention thresholds and as a quantity eligible for an intervention measure for the purposes of establishing whether the intervention thresholds have been exceeded.

- (c) Measures to increase consumption of apples and citrus fruit

The Community contributes from 50 to 60% towards the financing of schemes to promote consumption of fresh apples and citrus fruit harvested in the Community.

2.4.3. Measures to improve Community production

To adjust the supply of apples and mandarins to demand, growers qualified during the period 1990/91 to 1992/93 for a single orchard grubbing premium.

This premium was financed by the EAGGF Guarantee Section.

3. COMMON ORGANIZATION OF THE MARKET IN BANANAS

This organization is governed by Council Regulation (EEC) No 404/93 of 13 February 1993.

The common organization applies to Combined Nomenclature code ex 0803, excluding plantains, fresh or dried, and to products processed from bananas falling within various CN codes.

Quality standards are laid down for bananas intended to be supplied fresh to the consumer. Standards may also be laid down for processed products.

The marketing year runs from 1 January to 31 December.

3.1. Aid scheme

- (a) The Member States grant aids to recognized producers' organizations to encourage their establishment and assist their administrative operation. These aids are part-financed by the EAGGF Guidance Section.
- (b) The competent authorities of the Member States may draw up operational programmes under the Community support frameworks to achieve the objectives of improving quality and competitiveness. These programmes are part-financed by the EAGGF Guidance Section.
- (c) Compensation for any loss of income is granted to Community producers who are, in general, members of a recognized producers' organization.

The maximum quantity of Community bananas marketed for which compensation may be granted is fixed at 854 000 tonnes (net weight), broken down by producer region.

The compensatory aid is calculated on the basis of the difference between the 'flat-rate reference income' and the 'average production income'. Supplementary aid and advances may be paid in certain circumstances.

This aid is fixed by the Commission in accordance with the management committee procedure, before 1 March of each year for the previous year, and is chargeable in its entirety to the EAGGF Guarantee Section.

- (d) A single premium of ECU 1 000 per hectare, which may be adjusted, chargeable to the EAGGF Guarantee Section, is granted to Community producers who cease to grow bananas.
- (e) The Commission has proposed the introduction of a diversification and development programme for certain banana-producing countries in Latin America (COM (92) 496 final of 25 November 1992), which will be financed by a new budget heading under financial and technical aid and economic cooperation with developing countries in Latin America and Asia.

3.2. Import and export arrangements

Imports from the ACP States, amounting to 857 700 tonnes (net weight), considered as being traditional, are subject to zero customs duty and shared between the ACP States.

A tariff quota of 2 million tonnes (net weight) is opened each year for imports of bananas from third countries and non-traditional ACP imports.

Under this tariff quota imports of bananas from third countries are subject to a levy of ECU 100 a tonne, while imports of non-traditional ACP bananas are subject to zero duty.

When Community demand as determined on the basis of the forecast supply balance increases, the volume of the quota is increased accordingly before 30 November prior to the relevant marketing year.

Outside the quota:

- imports of non-traditional ACP bananas are subject to a duty of ECU 750/tonne;
- imports of bananas from third countries are subject to a levy of ECU 850/tonne.

On the basis of separate calculations for each of the categories of operators, each operator obtains import licenses on the basis of the average quantities of bananas that he has sold in the three most recent years for which figures are available.

B. PROCESSED FRUIT AND VEGETABLES

The processed fruit and vegetables market organization began operation in 1968. It is governed by Regulation (EEC) No 426/86, as last amended by Regulation (EEC) No 1569/92.

Regulation (EEC) No 525/77 introduced a system of production aid for tinned pineapple, and Regulation (EEC) No 1991/92 introduced special measures for raspberries intended for processing.

The common organization covers the following products: frozen, dehydrated and preserved, dried or leguminous vegetables; frozen, dried and preserved fruit, fruit paste, fruit juices and others.

The production of processed citrus fruit and bananas, on the other hand, is covered by the organization of the market in fresh fruit and vegetables.

Expenditure on products processed from fruit and vegetables came to 2% of total EAGGF Guarantee spending in 1992.

1. ECONOMIC BACKGROUND

Production of processed fruit and vegetables eligible for production aid increased slightly (0.5%) between 1990 and 1991.

The external trade balance for all processed fruit and vegetables showed the following trends:

- imports rose from 2.7 million t in 1990 to 3.1 million t in 1991,
- exports remained stable about 1.2 million t in both 1989 and 1990.

2. OPERATION OF THE MARKET

2.1. Specific market instruments

2.1.1. External trade arrangements

To facilitate exports, export refunds making up the difference between the Community price and the world market price may be granted.

A minimum price at the frontier has been introduced for certain processed products, including certain products processed from cherries and dried grapes. A similar measure is introduced in specific cases for certain soft fruit intended for processing originating in certain East European countries.

2.1.2. Aid for processed fruit and vegetables

The Council introduced this scheme in 1978 as part of a general policy for the Mediterranean areas. The aid scheme was necessary because of the difference between prices of Community products and those of imported products; the aim is to ensure adequate incomes for producers of fresh fruit and vegetables by means of a minimum price which the processor must undertake to pay to producers to qualify for the aid.

The Commission fixes minimum prices each year under the management committee procedure. Prices are fixed by product before the start of the marketing year, taking account of the minimum price of the previous marketing year and the movement in the basic prices for fresh products, as well as the need to ensure normal sales of fresh products to the various end-users.

The scheme covers tomato products, peaches and pears in syrup and/or natural fruit juice, prunes and (since the accession of Greece) dried figs and dried grapes.

The Commission decided as part of the 1990/91 prices package to fix the processing aid for all products except dried grapes in such a way as to offset the difference between the cost of the raw material used in the Community and that of the raw material from the main competing non-Community countries. (This system has already been implemented for pears and peaches in syrup and/or natural fruit juice.) For dried grapes the aid is fixed each year by the Commission in such a way as to compensate for the difference between the level of Community prices (having regard to the minimum price payable to the producer) and that of products of non-Community countries or, where imports do not attain a representative volume, that of a price determined on the basis of intra-Community trade and Community market prospects. The aid is granted in respect of the net finished product and is calculated on the basis of the raw material used.

In the case of dried grapes the production aid scheme is gradually - over the marketing years 1990/91 to 1993/94 - being replaced by cultivation aid fixed per hectare of specialized area harvested.

During the transitional period, the cultivation aid is being introduced progressively to offset the decrease in production aid resulting from the progressive reduction in the minimum price.

(From 1990/91 to 1993/94, this price is being cut by ECU 19,941/100 kg per marketing year. It will no longer be fixed from 1994/95, and the production aid will no longer apply from that marketing year.)

2.1.3. Stabilisation mechanisms

(a) *System limiting the grant of aid to certain quantities fixed in advance: it is used today for processed tomatoes*

- Processed tomatoes: this system was established by Council Regulation No 1320/85.

Council Regulation (EEC) No 668/93 restricts the grant of production aid for all the processing establishments in each Member State, starting in the 1993/94 marketing year, to a quantity of products processed from tomatoes, for the Twelve, corresponding to a volume of fresh tomatoes of 6 596 787 t.

This volume is divided up as follows:

- 4 317 339 t for the manufacture of tomato concentrates;
- 1 543 228 t for the manufacture of whole peeled tomatoes;
- 736 220 t for the manufacture of other processed tomato products.

This volume of fresh tomatoes is divided between the Member States and allocated by the Member States to processing undertakings on the basis of the quantities produced by each of them during the three marketing years preceding that for which the aid is fixed.

(b) *Guarantee threshold system, overrun of which leads to a reduction in production aid during the current marketing year*

- Processed tomatoes: this system was established back in 1984/85 by Regulation (EEC) No 989/84 but was suspended by the application of the 'quota' system; it was not applied until 1992/93 and became obsolete from 1993/94.

(c) *Guarantee threshold system, overrun of which leads to a reduction in production aid during the following marketing year*

- Peaches in syrup: Regulation (EEC) No 2245/88 fixed the guarantee threshold for the Community of Eleven at 502 000 t: from 1989/90 this quantity also covers peaches in natural fruit juice and from 1990/91 onwards the threshold is 582 000 t for the Twelve (Regulation (EEC) No 1205/90).
- Williams pears in syrup: since the introduction of a production aid, aid has been limited to a fixed quantity. This quantity, changed into a guarantee threshold for Williams and Rocha pears in syrup and/or natural fruit juice by the Council as part of the 1989/90 prices decisions, is currently 102 805 t.
- Dried grapes:
 - (a) the guarantee thresholds for dried grapes in the Community of Twelve are as follows: currants: 68 000 t, sultanas: 93 000 t, and moscatel: 4 000 t.
 - (b) as regards aid per hectare, the reduction applies if the areas under dried grapes exceed the maximum guaranteed area set at 53 000 ha.

2.2. Prices fixed

The change in minimum prices and aids for 1993/94 will be decided by the Commission for each product before the beginning of the relevant marketing year under the management committee procedure.

2.3. Production aid for tinned pineapple

This is designed to help the industry to maintain competitive prices in relation to prices charged by the main non-Community producing countries, while ensuring adequate returns for producers of fresh pineapple; production aid is granted to processors who undertake to pay producers at least the minimum price fixed each year.

2.4. Special measures for raspberries for processing

This scheme was established by Council Regulation (EEC) No 1991/92 and includes the following aids:

- the EAGGF Guarantee Section contributes 50% towards the financing of flat-rate aids granted by the Member States to recognized producers' organizations which have submitted programmes for improving the competitiveness of the raspberry industry;
- approved programmes qualify for a Community aid of 40% of the amount of the expenditure incurred.

Trend of appropriations (*)

(ECU)

| Article | Heading | Appropriations 1994 | Appropriations 1993 |
|--|---|------------------------|------------------------|
| B1-150 | FRESH FRUIT AND VEGETABLES | | |
| B1-1500 | Export refunds | 104 000 000 | 104 000 000 |
| B1-1501 | Compensation for withdrawals and buying in and for free distribution operations | 390 000 000 | 520 000 000 |
| B1-1502 | Compensation to promote Community citrus fruits | 4 000 000 | 9 000 000 |
| B1-1503 | Compensation to encourage processing of citrus fruits | 173 000 000 | 202 000 000 |
| B1-1504 | Citrus register | 6 000 000 | 2 000 000 |
| B1-1505 | Improvement of production | p.m. | 18 000 000 |
| B1-1506 | Promotion measures | 22 000 000 | 22 000 000 |
| B1-1507 | Nuts | 79 000 000 | 117 000 000 |
| B1-1508 | Bananas | 185 000 000 | 94 000 000 |
| B1-1509 | Other intervention | 49 000 000 | 16 000 000 |
| Total of article B1-150 (fresh fruit and vegetables) | | 1 012 000 000 | 1 104 000 000 |
| B1-151 | PROCESSED FRUIT AND VEGETABLES | | |
| B1-1510 | Export refunds | 23 000 000 | 24 000 000 |
| B1-1511 | Production aid for processed tomato products | 422 000 000 | 355 000 000 |
| B1-1512 | Production aid for fruit-based products | 118 000 000 | 125 000 000 |
| B1-1513 | Production aid and intervention for processed dried grape products | 135 000 000 | 111 000 000 |
| B1-1514 | Production aid for tinned pineapple | 10 000 000 | 10 000 000 |
| B1-1516 | Production aid for processed raspberries | 2 000 000 | 1 000 000 |
| B1-1519 | Other intervention | p.m. | p.m. |
| Total of article B1-151 (processed fruit and vegetables) | | 710 000 000 | 626 000 000 |
| TOTAL OF CHAPTER B1-15 (Fruit & vegetables) | | 1 722 000 000 | 1 730 000 000 |

(*) Extracted from "Final adoption of the general budget for the European Union for the financial year 1994" - OJ L 34, 7.2.1994.

Fresh fruit and vegetables

There may not be a world market, in the exact sense of the term, in fruit and vegetables, but there is nevertheless a large volume of international trade in citrus fruit, apples and pears. In all three cases it is the Community market that exercises the strongest influence on trade, above all trade in citrus fruit. In 1992/93 world production of citrus fruit totalled 70 million tonnes, a 5 % increase on 1991/92. The proportion of fruit processed rose from about 32 % around 1975 to 36 % in 1989/90, particularly in the case of citrus fruit, the production of concentrated orange juice being the fastest growing form of processing.

The data available on Community production of fresh fruit and vegetables in the 1992/93 marketing years do not provide an adequate basis for a full assessment. The most striking factor was an unprecedented level of apple production (10.58 million tonnes). The biological phenomenon of biennial bearing was partly responsible for the 365 % increase in German production, but the Benelux countries and France also saw very substantial increases in production in 1992 (194 and 82 % respectively). Withdrawals from the market by producer groups in 1992 totalled 1.69 million tonnes (16 % of production). As a result, the institutional

(*) Extract from "The agricultural situation in the Community. 1993 report."

prices of apples were reduced by 5 % in 1993 after the intervention threshold was exceeded. The indications are that the 1993 apple harvest will be smaller, but still above average. However, production is changing to adapt to market requirements: new varieties of apples are being introduced to meet changing consumer demand.

In the citrus fruit sector, almost 6 million tonnes of oranges were produced in the 1992/93 marketing year, representing an increase of 17 % on 1991/92 production. Production of clementines in Italy and Spain rose by 21 and 22 % respectively, but fell in France. In Greece production remained stable. Spain, which at present supplies nearly all the satsumas produced in the Community, saw a slight fall (5 %) in the production of this fruit. Satsuma withdrawals remain at a very low level, less than 1 % of production. Production of lemons fell by 51 % in Greece but increased by 24 % in Spain.

In the important nuts sector, walnut production increased by 46 % in France, but production remained stable in Italy. Hazelnut production fell by 24 % in Italy, which is the biggest producer, and increased by almost 50 % in Spain.

Community pear production exceeded the initial estimates and reached 3.2 million tonnes. Only in the United Kingdom did production fall (by 32 %), while in Italy, Spain and Germany harvests exceeded 1992 levels by 61, 55 and 238 % respectively. Pear withdrawals totalled 236 100 tonnes, or 8 % of production. It appears that the 1993 harvest will also be above average.

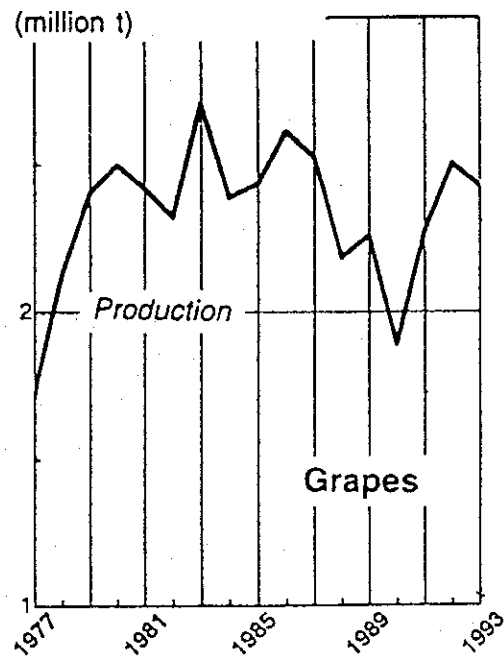
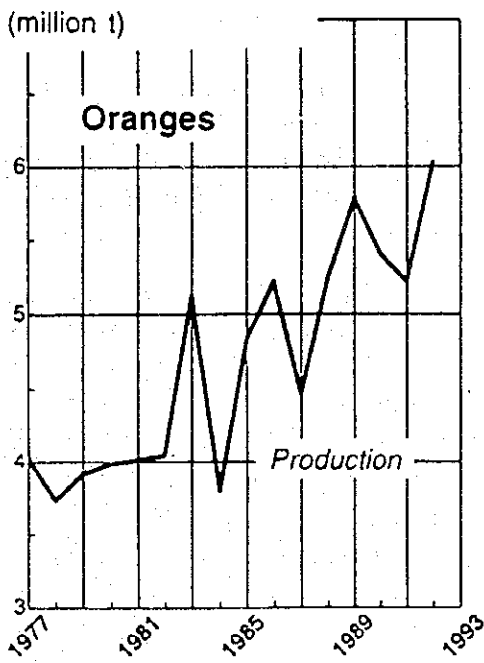
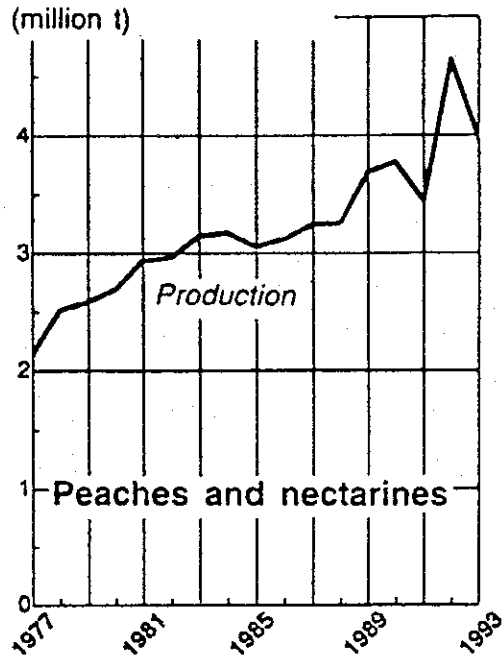
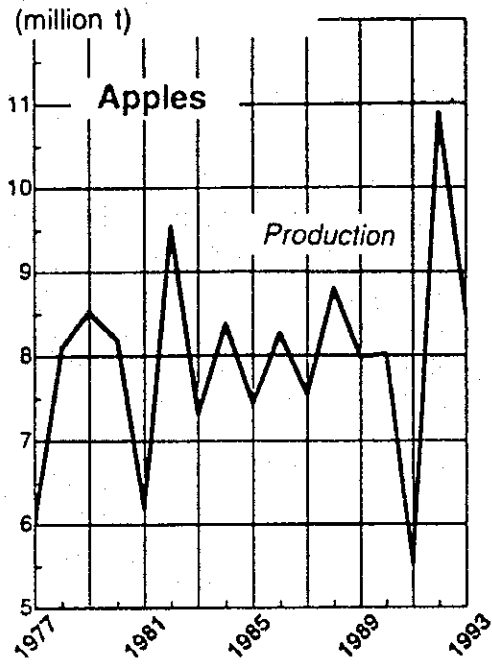
Production of peaches and nectarines did not increase as sharply as in the case of pomaceous fruit, but it has been rising over the last few years (with the exception of 1991), and in 1992 almost 3.6 million tonnes of peaches and 1.1 million tonnes of nectarines were produced. In all 877 400 tonnes of peaches (24 % of production) and 348 400 tonnes of nectarines (32 % of production) were withdrawn from the market.

Production levels for fresh vegetables in 1992/93 were similar to those of the preceding few years, increasing in the northern Member States (Germany, the Netherlands and the United Kingdom) and falling in Italy. Cauliflower production continued to rise in Italy, Belgium and the United Kingdom, but showed signs of stabilizing elsewhere (Germany and the Netherlands). Withdrawals totalled 122 500 tonnes and represented about 5 % of production. Tomato production fell in some Member States, but the quantities of fresh tomatoes supplied to the market did not change significantly.

Internal trade in fruit and vegetables, which had been expanding at an annual rate of 5 to 6 % over the previous few years, continued to do so in 1992, with the exception of apples, for which the volume of trade fell by 6 to 7 % against 1991.

On the level of external trade, imports were generally stable in 1992, but there was a fairly substantial increase in exports, mainly accounted for by oranges. However, the balance of trade in fresh fruit remained negative, with 1992 imports at 110 % of 1985 imports.

Fruit



Vegetable exports, which are far lower than fruit exports, are increasing gradually but steadily, with the exception of cucumbers. Tomato imports increased slightly.

Market management

The Council has kept all basic prices and purchase prices for fresh fruit and vegetables at their previous levels for the 1993/94 marketing year. However, the rules governing the stabilizer scheme led to a fall in these prices for cauliflowers (- 5 %), peaches (- 16 %), nectarines (- 20 %), lemons (- 2 %), apples (- 5 %) and oranges (- 15 %). These reductions were in addition to those caused by the currency realignments in September 1992, November 1992, January 1993 and May 1993. The prices in force in the Community of Ten were applied in Spain from 1 January 1993 and in Portugal from 1 April 1993.

The Council extended the aid scheme for processing oranges to small citrus fruit (mandarins, satsumas and clementines).

Processed fruit and vegetables

Only certain products in this sector are covered by a Community support scheme.

Although a large volume of prunes is produced in the Community, prices rose sharply in the 1992/93 marketing year. Imports, mainly from the USA, remain more or less equivalent to Community production, although they fell by 6 % in 1992. Exports rose sharply but are still at a relatively low level (2 700 tonnes). The firmness of the market made it possible to increase minimum prices by 2.5 % and reduce production aid by 2.73 %.

Production of peaches in syrup has risen sharply over the last two marketing years and reached 697 000 tonnes in 1992/93, which represents a 14.5 % increase on the 1991/92 level. Prices remained stable but trade within the Community fell by 7.5 %. Exports, on the other hand, increased substantially, by 51 %, but external trade prices were low, especially for exports to the USA. Import prices rose (+ 13 % against 1991 prices), in particular for products originating in South Africa, which is the Community's principal supplier (+ 16 % from 1991 to 1992). With regard to market management, the minimum price for peaches for processing for 1993/94 has followed the development of withdrawal prices for fresh peaches, which fell by 10 % because the intervention threshold was exceeded. It was decided to lower the minimum price by 13 % for peaches for processing.

The big pear harvest in 1992 did not greatly influence the market for pears in syrup. But production aid was reduced after the intervention threshold was exceeded and minimum prices remained unchanged since prices within the Community and for exports were fairly stable.

The Commission modified the minimum import price system for soft fruits adopted in the context of the Association Agreements with Hungary, Poland (the biggest exporter) and the former Czechoslovakia.

Processing aid for pineapples was increased by 6.1% following the establishment of processing facilities in Martinique. But the minimum price remained unchanged. An effort is being made to orient Community production towards higher quality products to distinguish them from products from the Far East, with which the Community is in direct competition.

Within the Community, trade in dried figs stabilized at 4 718 tonnes and production at 14 500 tonnes in 1992/93. Of the three Community producers, Greece produced 7 000 tonnes, Spain 5 500 tonnes and Portugal 2 000 tonnes. Community exports increased in 1992 for the second consecutive year (+ 26%), as did unit values (+ 26%). Import prices rose by only 5%. Imports come almost exclusively from Turkey. For 1993/94 the minimum price has been kept at the 1992/93 level, but production aid has been reduced by 29%.

Production of dried grapes in 1992/93 remained at practically the same level as in the two preceding years (82 000), but far below pre-1990 production (135 000 tonnes). There were no problems regarding production, particularly in the case of sultanas. However, there was a fall in demand for currants resulting from changing patterns of use. Trade in dried grapes within the Community rose by 16% against 1991, and prices were stable. Greek consignments increased by 10%, but prices fell by 5% and there was an increase in consignments of small packs, although levels remained low compared with imports. Exports totalled 9 594 tonnes, an increase on 1991 but still lower than 1990 levels (14 686 tonnes). Imports fell (211 170 tonnes). Since 1993/94 is the last year of the transitional period for replacing the minimum price scheme and aid to producers with the system of aid per hectare, the provisions of the Community scheme were therefore left unchanged.

Common organization of the market in bananas

The common organization of the market in bananas came into force on 1 July 1993,¹ completing the single market in the sector. It distinguishes between bananas produced in the Community and bananas originating in third countries, and within the latter category, it distinguishes between traditional imports from ACP States and imports from other countries (so-called 'dollar' bananas coming principally from Latin American countries).

The COM rules regarding trade with third countries provide for the opening of an annual tariff quota of 2 million tonnes for bananas from third countries other than traditional ACP bananas, for which quantities are laid down in Regulation (EEC) No 404/93. The customs duty is ECU 100 per tonne, except for ACP bananas, which are exempt from duties. The

¹ Regulation (EEC) No 404/93, 13.2.1993, OJ L 47, 25.2.1993, p. 1.

quota may be revised by a Commission decision in response to changes in consumption patterns evaluated on the basis of a forecast supply balance. For imports in excess of this tariff quota, the tariff is ECU 850 per tonne for imports from non-ACP third countries and ECU 750 per tonne for non-traditional imports from ACP States.

Banana imports from third countries are subject to import licence arrangements. Provision is also made for the application of a safeguard clause to all banana imports.

The COM also includes provisions concerning the production and marketing of bananas within the Community. This involves, in particular, compensation for loss of income by Community producers; a premium for ceasing to produce bananas; measures to promote the formation of producer groups and structural measures, to be financed under Community support framework arrangements, to improve the banana sector as a whole. The internal arrangements also cover the introduction of quality and marketing standards so that bananas from a variety of origins can be distributed satisfactorily on the Community market.

Finally, the Regulation provides that the Commission must submit to the European Parliament and the Council a first report on the operation of the COM Regulation after it has been in force for three years, with proposals if necessary, and a second report on 31 December 2001.

COMMISSION PRICE PROPOSALS (*)

In accordance with Article 16 of Council Regulation (EEC) No 1035/72 on the common organization of the market in fruit and vegetables the Commission proposes each year a basic and a buying-in price for each of the products listed in Annex II to the Regulation, i.e. cauliflowers, apricots, nectarines, peaches, lemons, tomatoes, aubergines, pears, table grapes, apples, satsumas, mandarins, clementines and oranges.

Pending its proposals on a reform of the common market organizations for fresh and processed fruit and vegetables, the Commission proposes that the basic and buying-in prices be kept at their present level. The Commission will take appropriate action if it emerges that intervention thresholds have been exceeded when the final withdrawal figures for the 1993/94 marketing year are known.

(*) Extracted from "Commission proposals on the prices for agricultural products and on related measures 1994/95 - Explanatory memoranda"
[COM (94) 10 final - Vol. 1]

Fruit and vegetables

Basic price

(ECU/100 kg net)

| | 1 9 9 4 | | | | | | | | | | | | 1 9 9 5 | | | | |
|---------------|--------------------------------|-------|--------|-------|---------------|---------------|-------|--------------|--------------|-------|-------|-------|---------|--|--|--|--|
| | June | July | August | Sept. | October | November | Dec. | January | February | March | April | May | | | | | |
| Cauliflowers | 24,92 | 22,13 | 22,13 | 23,90 | 24,79 | 29,82 | 29,82 | 29,82 | 27,82 | 29,26 | 29,62 | - | | | | | |
| Tomatoes | (11-20) 28,41 (21-30) 25,87 | 23,34 | 20,93 | 22,20 | 23,53 | 28,28 | - | - | - | - | - | - | | | | | |
| Aubergines | - | 17,74 | 17,74 | 17,74 | 17,74 | - | - | - | - | - | - | - | | | | | |
| Peaches | 45,31 | 42,92 | 42,92 | 42,92 | - | - | - | - | - | - | - | - | | | | | |
| Nectarines | 59,07 | 54,69 | 54,69 | - | - | - | - | - | - | - | - | - | | | | | |
| Apricots | 41,68 | 41,68 | - | - | - | - | - | - | - | - | - | - | | | | | |
| Lemons | 42,47 | 43,48 | 43,05 | 38,67 | 36,50 | 35,49 | 34,86 | 35,87 | 34,61 | 36,00 | 37,65 | 38,53 | | | | | |
| Pears | - | 28,62 | 26,72 | 25,57 | 26,59 | 26,98 | 27,35 | 27,60 | 27,60 | 27,60 | 27,60 | - | | | | | |
| Table grapes | - | - | 36,25 | 32,45 | 32,45 | (1-20) 32,45 | - | 27,60 | - | - | - | - | | | | | |
| Apples | - | - | 26,46 | 26,46 | 26,46 | 27,17 | 29,56 | 31,96 | 31,96 | 31,96 | 31,96 | 31,96 | | | | | |
| Mandarins | - | - | - | - | - | (16-30) 36,85 | 36,47 | 35,97 | 34,31 | - | - | - | | | | | |
| Satsumas | - | - | - | - | (16-31) 28,65 | 25,41 | 27,57 | (1-15) 26,49 | - | - | - | - | | | | | |
| Clementines | - | - | - | - | - | - | 33,76 | 31,57 | (1-15) 36,33 | - | - | - | | | | | |
| Sweet oranges | - | - | - | - | - | - | 34,36 | 30,81 | 31,43 | 33,34 | 33,97 | 33,97 | | | | | |

STATISTICAL TABLES (*)

Supply balance — fresh fruit (1)
Market balance — fresh apples

EUR 12

| | 1 000 t | | | % TAV | |
|---------------------------------------|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1989/90 | 1990/91 | $\frac{1989/90}{1985/86}$ | $\frac{1990/91}{1989/90}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Fresh fruit (excl. citrus) (1)</i> | | | | | |
| Usable production | 21195 | 20564 | 21201 | -0,8 | 3,1 |
| Imports | 4818 | 5614 | 5833 | 3,9 | 3,9 |
| Exports | 1643 | 1288 | 1416 | -5,9 | 9,9 |
| Intra-EC trade | 4407 | 5204 | 5247 | 4,2 | 0,8 |
| Change in stocks | 6 | 17 | 12 | 29,7 | -29,4 |
| Internal use of which: | 24616 | 24873 | 25606 | 0,3 | 2,9 |
| — animal feed | 294 | 252 | 265 | -3,8 | 5,2 |
| — losses (market) | 2369 | 2339 | 2285 | -0,3 | -2,3 |
| — industrial uses | 756 | 506 | 456 | -9,6 | -9,9 |
| — human consumption (gross) | 20020 | 20388 | 20657 | 0,5 | 1,3 |
| Human consumption (kg/head) | 62 | 63 | 64 | 0,4 | 1,6 |
| Self-sufficiency (%) | 86 | 83 | 83 | -0,9 | 0,0 |
| <i>Fresh apples</i> | | | | | |
| Sales by commercial producers | 7105 | 7176 | 7258 | 0,2 | -0,3 |
| Imports | 600 | 744 | 699 | 5,5 | -6,0 |
| Exports | 200 | 268 | 257 | 7,6 | -4,1 |
| Intra-EC trade | 1334 | 1451 | 1604 | 2,1 | 10,5 |
| Change in stocks | -35 | -78 | -40 | x | x |
| Internal use of which: | 7539 | 7730 | 7640 | 0,6 | -1,2 |
| — animal feed | 114 | 123 | 78 | 1,9 | -36,6 |
| — losses (market) | 734 | 878 | 767 | 4,6 | -12,6 |
| — industrial uses | 613 | 270 | 120 | -18,5 | -55,6 |
| — human consumption (2) | 6035 | 6459 | 6675 | 1,7 | 3,3 |

Source: Eurostat.

(1) Including fruit preserves and juices.

(2) According to the market balance.

(*) Extract from "The agricultural situation in the Community. 1993 report".

Market balance — fresh pears
— fresh peaches

EUR 12

| | 1 000 t | | | % TAV | |
|------------------------------------|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1989/90 | 1990/91 | $\frac{1989/90}{1985/86}$ | $\frac{1990/91}{1989/90}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Fresh pears</i> | | | | | |
| Sales by commercial producers | 2467 | 2285 | 2337 | -1,9 | 2,3 |
| Imports | 89 | 224 | 227 | 26,0 | 1,3 |
| Exports | 134 | 184 | 166 | 8,3 | -9,8 |
| Intra-EC trade | 287 | 345 | 377 | 4,7 | 9,3 |
| Change in stocks | 7 | -22 | -32 | x | x |
| Internal use | 2414 | 2347 | 2430 | -0,7 | 3,5 |
| of which: | | | | | |
| — animal feed | 35 | 25 | 25 | -8,1 | 0,0 |
| — losses (market) | 147 | 124 | 122 | -4,2 | -1,6 |
| — industrial uses | 44 | 55 | 20 | 5,7 | -63,6 |
| — human consumption ⁽¹⁾ | 2175 | 2143 | 2263 | -0,4 | 5,6 |
| <i>Fresh peaches</i> | | | | | |
| Sales by commercial producers | 2944 | 2998 | 3178 | 0,5 | 6,0 |
| Imports | 8 | 10 | 8 | 5,7 | -20,0 |
| Exports | 94 | 79 | 94 | -4,3 | 19,0 |
| Intra-EC trade | 410 | 458 | 479 | 2,8 | 4,6 |
| Change in stocks | 0 | 0 | 0 | x | x |
| Internal use | 2853 | 2929 | 3092 | 0,7 | 5,6 |
| of which: | | | | | |
| — animal feed | 24 | 32 | 32 | 7,5 | 0,0 |
| — losses (market) | : | : | : | x | x |
| — industrial uses | 93 | 70 | 87 | -6,9 | 24,3 |
| — processing | 602 | 709 | 691 | 4,2 | -2,5 |
| — human consumption ⁽¹⁾ | 1781 | 2118 | 2282 | 4,4 | 7,7 |

Source: Eurostat.

⁽¹⁾ According to the market balance.

Market balance — table grapes
Supply balance — fresh vegetables ⁽¹⁾

EUR 12

| | 1 000 t | | | % TAV | |
|--|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1989/90 | 1990/91 | $\frac{1989/90}{1985/86}$ | $\frac{1990/91}{1989/90}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Table grapes</i> | | | | | |
| Sales by commercial producers | 2575 | 2337 | 2410 | -2,4 | 3,1 |
| Imports | 354 | 587 | 565 | 13,5 | -3,7 |
| Exports | 637 | 208 | 211 | -24,4 | 1,4 |
| Intra-EC trade | 918 | 1032 | 1134 | 3,0 | 9,9 |
| Change in stocks | -150 | 27 | 0 | x | x |
| Internal use | 2447 | 2897 | 2975 | 4,3 | 2,7 |
| of which: | | | | | |
| — animal feed | : | : | : | x | x |
| — losses (market) | 111 | 111 | 121 | 0,0 | 9,0 |
| — industrial uses | 0 | 0 | 0 | x | x |
| — human consumption | 2248 | 2786 | 2854 | 5,5 | 2,4 |
| <i>Fresh vegetables ⁽¹⁾</i> | | | | | |
| Usable production | 45703 | 45962 | 47101 | 0,1 | 2,5 |
| Imports | 2001 | 2780 | 2802 | 8,6 | 0,8 |
| Exports | 5165 | 4868 | 4663 | -1,5 | -4,2 |
| Intra-EC trade | 6690 | 8499 | 8331 | 6,2 | -2,0 |
| Change in stocks | 50 | -150 | 104 | x | x |
| Internal use | 42490 | 44024 | 45136 | 0,9 | 2,5 |
| of which: | | | | | |
| — animal feed | 745 | 424 | 518 | -13,1 | 22,2 |
| — losses (market) | 4672 | 4340 | 4831 | -1,8 | 11,3 |
| — seed | 15 | 11 | 12 | -7,5 | 9,1 |
| — human consumption ⁽¹⁾ | 37058 | 38049 | 38552 | 0,7 | 1,3 |
| Human consumption (kg/head) | 115 | 118 | 119 | 0,6 | 0,8 |
| Self-sufficiency (%) | 108 | 104 | 104 | -0,9 | 0,0 |

Source: Eurostat.

⁽¹⁾ Including vegetable preserves and juices.

Market balance — cauliflowers
— fresh tomatoes

EUR 12

| | 1000 t | | | % TAV | |
|------------------------------------|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1989/90 | 1990/91 | $\frac{1989/90}{1985/86}$ | $\frac{1990/91}{1989/90}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Cauliflowers</i> | | | | | |
| Sales by commercial producers | 1541 | 1785 | 1770 | 3,7 | -0,8 |
| Imports | 5 | 7 | 8 | 8,8 | 14,3 |
| Exports | 23 | 43 | 38 | 16,9 | -11,6 |
| Intra-EC trade | 220 | 356 | 333 | 12,8 | -6,5 |
| Change in stocks | 0 | 0 | 0 | x | x |
| Internal use | 1517 | 1749 | 1740 | 3,6 | -0,5 |
| of which: | | | | | |
| — animal feed | 32 | 23 | 25 | -7,9 | 8,7 |
| — losses (market) | 80 | 196 | 164 | 25,1 | -16,3 |
| — industrial uses | : | : | : | x | x |
| — human consumption ⁽¹⁾ | 1413 | 1530 | 1531 | 2,0 | 0,1 |
| <i>Fresh tomatoes</i> | | | | | |
| Sales by commercial producers | 13393 | 11698 | 12102 | -3,3 | 3,5 |
| Imports | 283 | 315 | 330 | 2,7 | 4,8 |
| Exports | 253 | 86 | 98 | -23,6 | 14,0 |
| Intra-EC trade | 678 | 850 | 876 | 5,8 | 3,1 |
| Internal use | 13423 | 11927 | 12334 | -2,9 | 3,4 |
| of which: | | | | | |
| — animal feed | 88 | 89 | 98 | 0,3 | 10,1 |
| — losses (market) | 503 | 600 | 522 | 4,5 | -13,0 |
| — processing | 9122 | 7495 | 8285 | -4,8 | 10,5 |
| — human consumption ⁽¹⁾ | 3710 | 3743 | 3429 | 0,2 | -8,4 |

Source: Eurostat.

⁽¹⁾ According to the market balance.

Supply balance — citrus fruit ⁽¹⁾
 Market balance — oranges ⁽¹⁾

EUR 12

| | 1 000 t | | | % TAV | |
|------------------------------------|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1989/90 | 1990/91 | $\frac{1989/90}{1985/86}$ | $\frac{1990/91}{1989/90}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Citrus fruit ⁽¹⁾</i> | | | | | |
| Usable production | 6401 | 8478 | 9222 | 7,3 | 8,8 |
| Imports | 2542 | 4520 | 4626 | 15,5 | 2,3 |
| Exports | 305 | 993 | 907 | 34,3 | -8,7 |
| Intra-EC trade | 4128 | 3263 | 3434 | -5,7 | 5,2 |
| Change in stocks | 0 | 0 | 0 | x | x |
| Internal use | 8595 | 12005 | 12941 | 8,7 | 7,8 |
| of which: | | | | | |
| — animal feed | 25 | 50 | 20 | 18,9 | -60,0 |
| — losses (market) | 630 | 965 | 1413 | 11,2 | 46,4 |
| — industrial uses | 88 | 53 | 103 | -11,9 | 94,3 |
| — human consumption | 7895 | 10937 | 11405 | 8,5 | 4,3 |
| Human consumption (kg/head) | 24,6 | 34 | 35 | 8,4 | 2,9 |
| Self-sufficiency (%) | 75 | 71 | 71 | -1,4 | 0,0 |
| <i>Oranges ⁽¹⁾</i> | | | | | |
| Sales by commercial producers | 3698 | 5058 | 5184 | 8,1 | 2,5 |
| Imports | 1382 | 2211 | 2348 | 12,5 | 6,2 |
| Exports | 286 | 547 | 613 | 17,6 | 12,1 |
| Intra-EC trade | 2095 | 2472 | 2611 | 4,2 | 5,6 |
| Change in stocks | 0 | 493 | 593 | x | 20,3 |
| Internal use | 4795 | 6229 | 6326 | 6,8 | 1,5 |
| of which: | | | | | |
| — animal feed | 10 | 10 | 10 | 0,0 | 0,0 |
| — losses (market) | 215 | 508 | 604 | 24,0 | 18,9 |
| — industrial uses | : | : | : | x | x |
| — human consumption | 4549 | 5711 | 5712 | 5,9 | 0,0 |

Source: Eurostat.

⁽¹⁾ Including fruit preserves and juices.

Market balance — processed tomatoes
— processed peaches

EUR 12

| | 1 000 t | | | % TAV | |
|------------------------------------|---------|---------|---------|---------------------------|---------------------------|
| | 1985/86 | 1990/91 | 1991/92 | $\frac{1990/91}{1985/86}$ | $\frac{1991/92}{1990/91}$ |
| 1 | 2 | 3 | 4 | 5 | 6 |
| <i>Processed tomatoes</i> | | | | | |
| Usable production | 7155 | 6790 | 6427 | -1,0 | -5,3 |
| Imports | 94 | 597 | 602 | 44,7 | 0,8 |
| Exports | 3065 | 1674 | 1543 | -11,4 | -7,8 |
| Intra-EC trade | 1441 | 2578 | 2996 | 12,3 | 16,2 |
| Change in stocks | 100 | : | : | x | x |
| Internal use | 4083 | 5713 | 5486 | 7,0 | -4,0 |
| of which: | | | | | |
| — losses (market) | 0 | 0 | 0 | x | x |
| — human consumption ⁽¹⁾ | 4083 | 5713 | 5486 | 7,0 | -4,0 |
| Human consumption (kg/head) | 13 | - | - | x | x |
| Self-sufficiency (%) | 175 | 119 | 117 | -7,4 | -1,7 |
| <i>Processed peaches</i> | | | | | |
| Usable production | 602 | 460 | 566 | -5,2 | 23,0 |
| Imports | 27 | 156 | 145 | 42,1 | -7,1 |
| Exports | 103 | 213 | 252 | 15,6 | 18,3 |
| Intra-EC trade | 134 | 735 | 746 | 40,6 | 1,5 |
| Change in stocks | 0 | 0 | 30 | x | x |
| Internal use | 526 | 403 | 429 | -5,2 | 6,5 |
| of which: | | | | | |
| — losses (market) | 0 | 0 | 0 | | x |
| — human consumption ⁽¹⁾ | 526 | 403 | 429 | -5,2 | 6,5 |
| Human consumption (kg/head) | 2 | 1,2 | 1,3 | -9,7 | 8,3 |
| Self-sufficiency (%) | 114 | 114 | 132 | 0,0 | 15,8 |

Source: Eurostat.
(1) According to the market balance.

Area, yield and harvested production of (a) fruit, (b) citrus fruit and (c) vegetables

| | Area | | | | | | Yield | | | | | | Harvested production | | | | | |
|--|----------|--------|--------|-------|------|------|-----------|------|------|-------|-------|-------|----------------------|---------|-------|-------|------|------|
| | 1 000 ha | | | % TAV | | | 100 kg/ha | | | % TAV | | | 1 000 t | | | % TAV | | |
| | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 |
| 1 | 2 | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | | |
| EUR 12 | 3015 | 3107** | 3110** | 0.5 | 0.1 | | 72 | 61 | 75 | -2.8 | 22.9 | 21689 | 18943** | 23183** | -2.3 | 23.0 | | |
| A. Fruit (excl. citrus) A.1 All fruit | | | | | | | | | | | | | | | | | | |
| Belgique/België | 11 | 14 | 14** | 4.1 | 0.0 | | 315 | 175 | 465 | -9.3 | 165.7 | 346 | 245 | 651 | -5.6 | 165.7 | | |
| Denmark | 9 | 8 | 8** | -1.9 | 0.0 | | 81 | 60 | 65 | -4.9 | 4.2 | 73 | 48** | 50** | -6.7 | 4.2 | | |
| FR Deutschland | 54 | 53 | 53** | -0.3 | 0.0 | | 499 | 279 | 394 | -8.2 | 41.4 | 2694 | 1478 | 2090** | -9.5 | 41.4 | | |
| Elhida | 288 | 284** | 284** | -0.2 | 0.0 | | 37 | 37 | 88 | 0.1 | 1.2 | 2500 | 2480** | 2510** | -0.1 | 1.2 | | |
| España | 1119 | 1202 | 1205** | 1.2 | 0.2 | | 39 | 52 | 28 | -3.9 | 61.8 | 4349 | 3821 | 3427** | -2.1 | 61.8 | | |
| France | 250 | 233 | 233** | -1.2 | 0.0 | | 137 | 106 | 172 | -4.2 | 61.8 | 3434 | 2471 | 3998 | -5.3 | 61.8 | | |
| Ireland | 2 | 2 | 2** | 0.0 | 0.0 | | 75 | 85 | 85 | 2.1 | 0.0 | 15 | 17 | 17** | 0.0 | 0.0 | | |
| Italia | 952 | 961** | 961** | 0.2 | -0.1 | | 72 | 71 | 89 | -0.3 | 25.5 | 6898 | 6839 | 8574 | -0.1 | 25.5 | | |
| Luxembourg | 0 | 0 | 0 | x | x | | x | x | x | x | x | 7 | 2 | 15 | -18.8 | 650.0 | | |
| Nederland | 25 | 26 | 26 | 1.6 | 0.0 | | 176 | 135 | 272 | -4.3 | 101.1 | 439 | 351 | 706 | -3.7 | 101.1 | | |
| Portugal | 255 | 280 | 281** | 3.6 | 0.4 | | 17 | 21 | 21 | 3.4 | 0.8 | 443 | 593** | 600** | 5.0 | 0.8 | | |
| United Kingdom | 50 | 44 | 44 | -2.1 | 0.0 | | 98 | 113 | 124 | 2.4 | 9.4 | 491 | 498 | 545 | 0.2 | 9.4 | | |
| A.2 Apples | 323 | 315** | 323** | -0.4 | 2.5 | | 230 | 176 | 337 | -4.4 | 91.8 | 7433 | 5534 | 10881 | -4.8 | 96.6 | | |
| Belgique/België | 6 | 8 | 8** | 4.9 | 0.0 | | 360 | 171 | 603 | -11.6 | 251.8 | 216 | 137 | 482 | -7.3 | 251.8 | | |
| Denmark | 4 | 2 | 2** | -10.9 | 0.0 | | 113 | 160 | 200 | 6.0 | 25.0 | 45 | 32 | 40 | -5.5 | 25.0 | | |
| FR Deutschland | 24 | 24 | 25** | 0.0 | 4.2 | | 576 | 325 | 1173 | -9.1 | 260.4 | 1383 | 781 | 2932 | -9.1 | 275.4 | | |
| Elhida | 18 | 18** | 18** | 0.0 | 0.0 | | 148 | 103 | 214 | -5.8 | 107.0 | 267 | 186 | 385 | -5.8 | 107.0 | | |
| España | 57 | 47 | 48** | -3.2 | 2.1 | | 176 | 98 | 209 | -9.4 | 114.4 | 1004 | 459 | 1005 | -12.2 | 119.0 | | |
| France | 66 | 69 | 77 | 0.7 | 11.6 | | 272 | 187 | 311 | -6.0 | 66.6 | 1793 | 1290 | 2398 | -5.3 | 85.9 | | |
| Ireland | 1 | 1 | 1** | 0.0 | 0.0 | | 90 | 90 | 100 | 0.0 | 11.1 | 9 | 9 | 10 | 0.0 | 11.1 | | |
| Italia | 85 | 83 | 82 | -0.4 | -1.2 | | 237 | 220 | 292 | -1.2 | 32.5 | 2014 | 1830 | 2395 | -1.6 | 30.9 | | |
| Luxembourg | 0 | 0 | 0 | x | x | | x | x | x | x | x | 6 | 2 | 10 | -16.7 | 400.0 | | |
| Nederland | 16 | 17 | 17 | 1.0 | 0.0 | | 188 | 131 | 335 | -5.8 | 155.6 | 300 | 223 | 570 | -4.8 | 155.6 | | |
| Portugal | 22 | 24 | 25 | 1.5 | 4.2 | | 43 | 108 | 111 | 16.6 | 2.3 | 95 | 260 | 77 | 18.3 | 16.5 | | |
| United Kingdom | 24 | 22 | 20 | -1.4 | -9.1 | | 125 | 148 | 189 | 2.8 | 27.6 | 301 | 325 | 377 | 1.3 | 16.0 | | |
| A.3 Pears | 137 | 138** | 139** | 0.1 | 0.7 | | 188 | 135 | 223 | -5.3 | 64.9 | 2579 | 1868 | 3102 | -5.2 | 66.1 | | |
| Belgique/België | 3 | 3 | 3** | 0.0 | 0.0 | | 260 | 227 | 370 | -2.3 | 63.2 | 78 | 68 | 111 | -2.3 | 63.2 | | |
| Denmark | 0 | 0 | 0** | x | x | | x | x | x | x | x | 4 | 3 | 4 | -4.7 | 33.3 | | |
| FR Deutschland | 2 | 2 | 2 | 0.0 | 0.0 | | 1620 | 875 | 2670 | -9.8 | 205.1 | 324 | 175 | 534 | -9.8 | 205.1 | | |
| Elhida | 7 | 7** | 7** | 0.0 | 0.0 | | 200 | 106 | 130 | -10.3 | 23.0 | 140 | 74 | 91 | -10.1 | 23.0 | | |
| España | 36 | 36 | 36** | 0.0 | 0.0 | | 165 | 108 | 167 | -6.9 | 52.6 | 595 | 387 | 602 | -6.9 | 55.6 | | |
| France | 20 | 16 | 16 | -3.7 | 2.0 | | 209 | 141 | 246 | -5.3 | 71.3 | 417 | 226 | 394 | -9.7 | 74.3 | | |
| Italia | 49 | 51 | 52 | -0.7 | 2.0 | | 164 | 138 | 219 | -2.8 | 38.1 | 806 | 766 | 1138 | -2.2 | 61.2 | | |
| Nederland | 6 | 5 | 5 | -3.0 | 0.0 | | 178 | 192 | 202 | 1.2 | 5.2 | 107 | 96 | 101 | -1.8 | 5.2 | | |
| Portugal | 10 | 14 | 14** | 5.8 | 0.0 | | 57 | 67 | 71 | 2.8 | 6.4 | 57 | 94 | 100 | 8.7 | 6.4 | | |
| United Kingdom | 4 | 4 | 4 | 0.0 | 0.0 | | 128 | 98 | 65 | -4.4 | -33.3 | 51 | 39 | 26 | -4.4 | -33.3 | | |

| | EUR 12 | 210 | 222** | 226** | 0.9 | 1.8 | 128 | 126 | 158 | -0.2 | 25.6 | 2682 | 2794 | 3573** | 0.7 | 27.9 |
|----------------------|--------|------|-------|-------|-------|------|-----|-----|-----|-------|-------|------|--------|--------|-------|-------|
| A.4 Peaches | EUR 12 | 0 | 0 | 0** | x | x | x | x | x | x | x | 18 | 10 | 10** | -9.3 | 0.0 |
| BR Deutschland | | 32 | 33** | 34** | 0.5 | 3.0 | 164 | 225 | 300 | 5.4 | 33.6 | 524 | 741 | 1020 | 5.9 | 37.7 |
| Elkida | | 58 | 68 | 70** | 2.7 | 2.9 | 92 | 99 | 115 | 1.3 | 16.5 | 532 | 673 | 807 | 4.0 | 19.9 |
| Espana | | 29 | 26** | 26** | -1.8 | 0.0 | 135 | 108 | 133 | -3.6 | 22.7 | 391 | 282 | 346 | -5.3 | 22.7 |
| France | | 83 | 78 | 79 | -1.0 | 1.3 | 143 | 128 | 162 | -1.8 | 26.3 | 1191 | 1002 | 1282 | -2.8 | 27.9 |
| Italia | | 8 | 17 | 17** | 13.4 | 0.0 | 33 | 51 | 64 | 7.7 | 25.6 | 26 | 86 | 108 | 22.1 | 25.6 |
| Portugal | | | | | | | | | | | | | | | | |
| A.5 Nectarines | EUR 12 | 35** | 63** | 67** | 10.3 | 6.3 | 107 | 108 | 165 | 0.2 | 52.0 | 375 | 683 | 1104 | 10.5 | 61.6 |
| Elkida | | 2 | 4** | 5** | 12.2 | 25.0 | 120 | 200 | 296 | 8.9 | 48.0 | 24 | 80 | 148 | 22.2 | 85.0 |
| Espana | | 3 | 11 | 14** | 24.2 | 27.3 | 55 | 50 | 112 | -1.1 | 124.3 | 16 | 55 | 157 | 22.8 | 185.5 |
| France | | 8 | 11** | 11** | 5.5 | 0.0 | 123 | 114 | 158 | -1.2 | 39.2 | 98 | 125 | 174 | 4.1 | 39.2 |
| Italia | | 22 | 35 | 35 | 8.0 | 0.0 | 106 | 115 | 172 | 1.3 | 49.6 | 234 | 403 | 603 | 9.5 | 49.6 |
| Portugal | | 0** | 2** | 2** | x | 0.0 | x | 100 | 110 | x | 10.0 | 3 | 20 | 22 | 37.2 | 10.0 |
| A.6 Table grapes | EUR 12 | 207 | 183** | 192** | -2.0 | 4.9 | 118 | 123 | 130 | 0.8 | 5.9 | 2433 | 2233 | 2504 | -1.3 | 11.1 |
| Belgique/België | | 0 | 0 | 0** | x | x | x | x | x | x | x | 3 | 1 | 1 | -16.7 | 0.0 |
| Elkida | | 19 | 19** | 19** | 0.0 | 0.0 | 131 | 153 | 168 | 2.6 | 10.3 | 249 | 290 | 320 | 2.6 | 10.3 |
| Espana | | 76 | 58 | 59** | -4.4 | 1.7 | 73 | 73 | 73 | 0.0 | -1.0 | 558 | 426 | 429 | -4.4 | 0.7 |
| France | | 26 | 17 | 17 | -6.8 | 0.0 | 60 | 41 | 52 | -6.1 | 27.1 | 156 | 70 | 89 | -12.5 | 27.1 |
| Italia | | 80 | 80 | 88 | 0.0 | 10.0 | 175 | 176 | 183 | 0.1 | 3.7 | 1402 | 1411 | 1610 | 0.1 | 14.1 |
| Nederland | | 0 | 0 | 0 | x | x | x | x | x | x | x | 1 | 0 | 0 | x | x |
| Portugal | | 6 | 9 | 9** | 7.0 | 0.0 | 107 | 61 | 61 | -8.9 | 0.0 | 64 | 55 | 55** | -2.5 | 0.0 |
| A.7 Apricots | EUR 12 | 60 | 66** | 66** | 1.6 | 0.0 | 98 | 83 | 95 | -2.7 | 14.6 | 587 | 548 | 628** | -1.1 | 14.6 |
| BR Deutschland | | 0 | 0 | 0** | x | x | x | x | x | x | x | 2 | 1 | 1** | -10.9 | 0.0 |
| Elkida | | 7 | 7** | 7** | 0.0 | 0.0 | 187 | 93 | 129 | -11.0 | 38.5 | 131 | 65 | 90 | -11.1 | 38.5 |
| Espana | | 21 | 26 | 26** | 3.6 | 0.0 | 72 | 81 | 74 | 2.0 | -8.5 | 151 | 211 | 193 | 5.7 | -8.5 |
| France | | 14 | 16** | 16** | 2.3 | 0.0 | 73 | 67 | 99 | -1.4 | 48.6 | 102 | 107 | 159 | 0.8 | 48.6 |
| Italia | | 16 | 16 | 16 | 0.0 | 0.0 | 123 | 98 | 109 | -3.7 | 12.2 | 196 | 156 | 175 | -3.7 | 12.2 |
| Portugal | | 2 | 1 | 1** | -10.9 | 0.0 | 25 | 80 | 100 | 21.4 | 25.0 | 5 | 8 | 10 | 8.1 | 25.0 |
| B. Citrus fruit | EUR 12 | 520 | 540** | 537** | 0.6 | -0.6 | 155 | 159 | 181 | 0.4 | 13.6 | 8082 | 8600** | 9714** | 1.0 | 13.0 |
| B.1 All citrus fruit | | | | | | | | | | | | | | | | |
| Elkida | | 52 | 57** | 58** | 1.5 | 1.8 | 175 | 178 | 184 | 0.3 | 3.3 | 911 | 1014 | 1066 | 1.8 | 5.1 |
| Espana | | 252 | 265 | 265** | 0.8 | 0.0 | 139 | 173 | 191 | 3.7 | 10.6 | 3514 | 4583 | 5073 | 4.5 | 10.6 |
| France | | 2 | 3** | 3** | 7.0 | 0.0 | 185 | 107 | 77 | -8.8 | -28.1 | 37 | 32 | 23 | -2.4 | -28.1 |
| Italia | | 184 | 184 | 180 | 0.0 | -2.2 | 189 | 153 | 189 | -3.4 | 23.3 | 3484 | 2824 | 3406 | -3.4 | 20.6 |
| Portugal | | 30 | 31 | 31** | 0.5 | 0.0 | 45 | 47 | 47 | 0.5 | 0.7 | 136 | 143** | 146** | 1.1 | 0.7 |
| B.2 Oranges | EUR 12 | 295 | 305** | 305** | 0.6 | 0.0 | 164 | 167 | 195 | 0.3 | 17.1 | 4836 | 5092 | 5962 | 0.9 | 17.1 |
| Elkida | | 34 | 36** | 37** | 1.0 | 2.8 | 185 | 195 | 226 | 0.9 | 20.9 | 630 | 702 | 872 | 1.8 | 24.2 |
| Espana | | 132 | 141 | 140** | 1.1 | 0.7 | 147 | 188 | 202 | 4.1 | 7.6 | 1945 | 2631 | 2875 | 5.3 | 8.4 |
| France | | 0 | 0** | 0** | x | x | x | x | x | x | x | 3 | 2 | 2 | -6.3 | 0.0 |
| Italia | | 109 | 110 | 108** | 0.2 | -1.8 | 198 | 149 | 195 | -4.6 | 30.9 | 2162 | 1642 | 2111 | -4.5 | 28.6 |
| Portugal | | 20 | 18 | 18** | -1.7 | 0.0 | 48 | 53 | 58 | 1.6 | 9.5 | 96 | 95 | 104 | -0.2 | 9.5 |

| | Area | | | | | | Yields | | | | | | Harvested production | | | | | |
|------------------------|----------|-------|-------|-------|------|------|-----------|------|------|-------|-------|------|----------------------|--------|------|-------|------|------|
| | 1 000 ha | | | % TAV | | | 100 kg/ha | | | % TAV | | | 1 000 t | | | % TAV | | |
| | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 | 1985 | 1991 | 1992 |
| 1 | 2 | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | | |
| B.3 Lemons | 112 | 103** | 102** | -1,4 | -1,0 | | 129 | 147 | 154 | 2,2 | 5,0 | 1442 | 1519** | 1573** | 0,8 | 4,0 | | |
| Elida | 13 | 13** | 13** | 0,0 | 0,0 | | 158 | 172 | 84 | 1,5 | -51,3 | 205 | 224 | 109 | 1,5 | -51,3 | | |
| España | 55 | 46 | 46** | -2,9 | 0,0 | | 88 | 121 | 150 | 5,5 | 24,5 | 482 | 555 | 691 | 2,4 | 24,5 | | |
| Francia | 0 | 0** | 0** | x | x | | x | x | x | x | x | 0 | 0 | 1** | x | 0,0 | | |
| Italia | 40 | 39 | 38 | -0,4 | -2,6 | | 185 | 183 | 198 | -0,2 | 8,2 | 738 | 713 | 732 | -0,6 | 5,5 | | |
| Portugal | 4 | 5 | 5** | 3,8 | 0,0 | | 43 | 40 | 40 | -1,0 | 0,0 | 17 | 20** | 20** | 2,7 | 0,0 | | |
| B.4 Mandarins | 29 | 32** | 31** | 1,7 | -3,1 | | 142 | 100 | 105 | -5,7 | 5,2 | 411 | 319** | 325** | -4,1 | 1,9 | | |
| Elida | 4 | 5** | 5** | 3,8 | 0,0 | | 125 | 88 | 88 | -5,7 | 0,0 | 50 | 44 | 44 | -2,1 | 0,0 | | |
| España | 3 | 6 | 6** | 12,2 | 0,0 | | 160 | 112 | 92 | -5,8 | -17,9 | 48 | 67 | 55 | -5,7 | -17,9 | | |
| Italia | 16 | 14 | 13 | -2,2 | -7,1 | | 182 | 131 | 155 | -5,4 | 18,3 | 291 | 183 | 201 | -7,4 | 9,8 | | |
| Portugal | 6 | 7 | 7** | 2,6 | 0,0 | | 37 | 36 | 36 | -0,4 | 0,0 | 22 | 25** | 25** | 2,2 | 0,0 | | |
| B.5 Clementines | 58 | 75** | 76** | 4,4 | 1,3 | | 150 | 156 | 184 | 0,6 | 18,1 | 872 | 1169 | 1399 | 5,0 | 19,7 | | |
| Elida | 0 | 2** | 2** | x | 0,0 | | x | 145 | 145 | x | 0,0 | 14 | 29 | 29 | 12,9 | 0,0 | | |
| España | 40 | 52 | 53** | 4,5 | 1,9 | | 145 | 157 | 198 | 2,4 | 19,2 | 579 | 866 | 1032 | 6,9 | 21,5 | | |
| Francia | 2 | 2** | 2** | 0,0 | 0,0 | | 165 | 145 | 95 | -2,1 | -34,5 | 53 | 29 | 19 | -2,1 | -34,5 | | |
| Italia | 16 | 19 | 19 | 2,9 | 0,0 | | 154 | 129 | 157 | -2,9 | 22,0 | 246 | 245 | 299 | -0,1 | 22,0 | | |
| B.6 Satsumas | 18 | 17** | 17** | -0,9 | 0,0 | | 237 | 242 | 230 | 0,3 | -4,9 | 427 | 411 | 391 | -0,6 | -4,9 | | |
| Elida | 0 | 1** | 1** | x | 0,0 | | x | 40 | 40 | x | 0,0 | 3 | 4 | 4 | 4,9 | 0,0 | | |
| España | 18 | 16 | 16** | -1,9 | 0,0 | | 236 | 234 | 242 | 1,3 | -4,9 | 424 | 407 | 387 | -0,7 | -4,9 | | |
| B.7 Other citrus fruit | 7 | 4** | 4** | -8,9 | 0,0 | | 99 | 133 | 135 | 5,1 | 1,9 | 69 | 53 | 54** | -4,3 | 1,9 | | |
| Elida | 0 | 0** | 0** | x | x | | x | x | x | x | x | 5 | 4 | 3 | -3,7 | -25,0 | | |
| España | 4 | 2 | 2** | -10,9 | 0,0 | | 60 | 75 | 70 | 3,8 | -6,7 | 24 | 15 | 14** | -7,5 | -6,7 | | |
| Italia | 3 | 2 | 2 | -6,5 | 0,0 | | 133 | 170 | 185 | 4,1 | 8,8 | 40 | 34 | 37** | -2,7 | 8,8 | | |

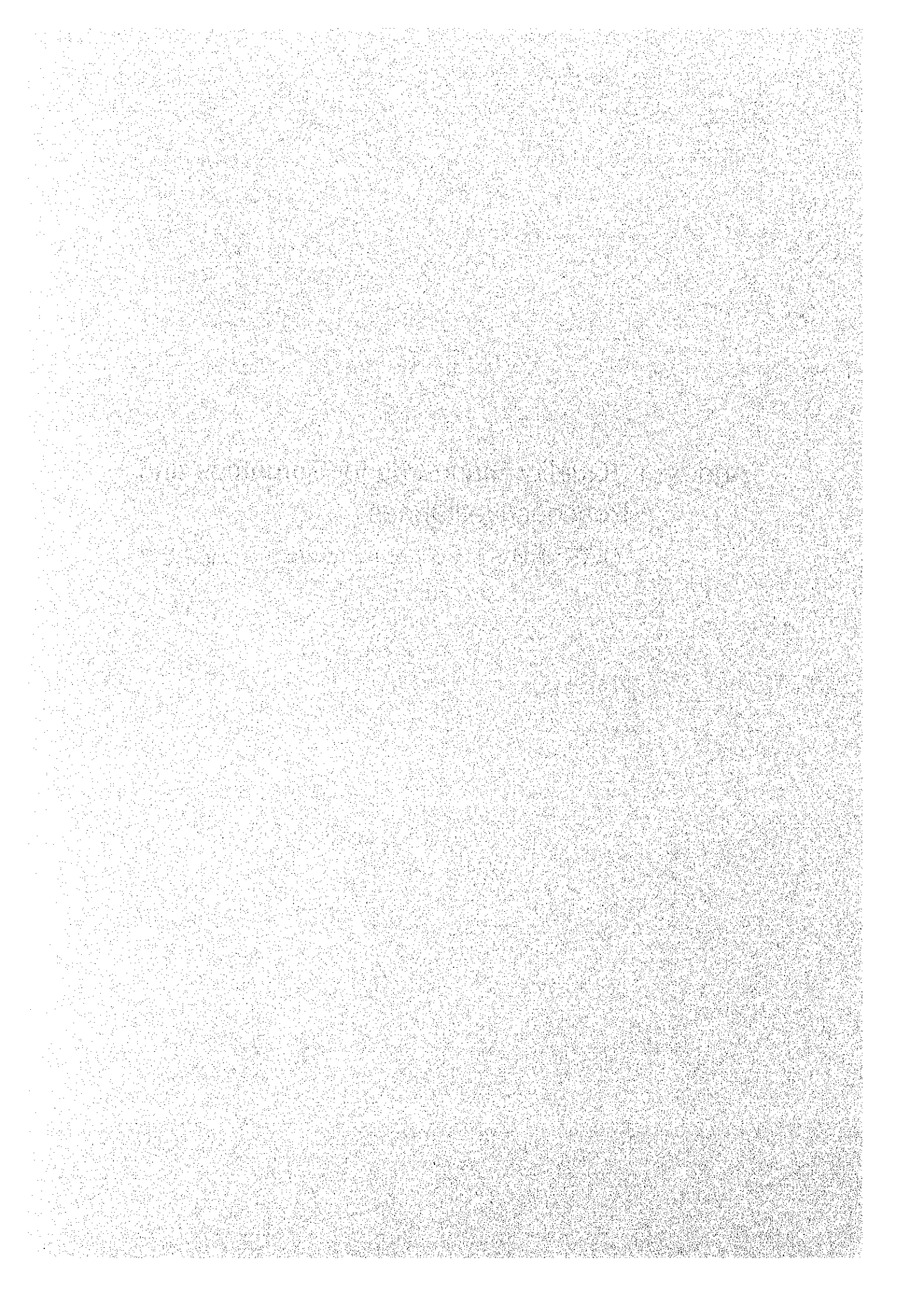
C. Vegetables
C.1 All vegetables

| | 1962 | 1752** | 1755** | -1.9 | 0.2 | 2.3 | 264 | 267 | 2.9 | 1.0 | 43712 | 46302** | 46850** | 1.0 | 1.2 |
|------------------|------|--------|--------|------|------|------|------|------|------|-------|-------|---------|---------|-------|-------|
| EUP 12 | | | | | | | | | | | | | | | |
| Belgique/België | 50 | 32 | 33** | -7.2 | 3.1 | 204 | 390 | 415 | 11.4 | 6.4 | 1021 | 1249 | 1371 | 3.4 | 9.8 |
| Danmark | 19 | 16 | 16** | -2.8 | 0.0 | 146 | 156 | 156 | 1.1 | -0.4 | 278 | 250** | 249** | -1.8 | -0.4 |
| BR Deutschland | 55 | 75 | 73 | -2.7 | 0.0 | 277 | 273 | 290 | -0.3 | 6.2 | 1526 | 2048 | 2116 | 5.0 | 3.3 |
| Elláda | 155 | 135** | 136** | -2.3 | 0.0 | 278 | 285 | 284 | 0.4 | -0.5 | 4305 | 3850** | 3860** | -1.8 | 0.3 |
| España | 472 | 498** | 499** | 0.9 | 0.2 | 201 | 213 | 214 | 0.9 | 0.7 | 9500 | 10700** | 10700** | 1.8 | 0.9 |
| France | 328 | 282 | 279** | -2.3 | -1.1 | 169 | 206 | 204 | 3.4 | -1.1 | 5338 | 5807 | 5684 | 0.8 | -2.1 |
| Irland | 7 | 4 | 5** | -8.9 | 25.0 | 314 | 600 | 472 | 11.4 | -21.3 | 220 | 240 | 236** | 1.5 | -1.7 |
| Italia | 533 | 411** | 410** | -4.2 | -0.2 | 245 | 315 | 311 | 4.2 | -1.1 | 13061 | 12928 | 12756 | -0.2 | -1.3 |
| Luxembourg | 0 | 0 | 0 | x | x | x | x | x | x | x | 3 | 1 | 2 | -16.7 | 100.0 |
| Nederhand | 77 | 65** | 65** | -2.8 | 0.0 | 356 | 556 | 597 | 7.7 | 7.4 | 2742 | 3612 | 3881 | 4.7 | 7.4 |
| Portugal | 94 | 84** | 84** | -1.9 | 0.0 | 211 | 235 | 235 | 1.8 | 4.0 | 1975 | 1976** | 1976** | -0.1 | 0.1 |
| United Kingdom | 172 | 150** | 155** | -2.3 | 3.3 | 205 | 249 | 259 | 3.3 | 0.0 | 3534 | 3741 | 4019 | -1.0 | 7.4 |
| C.2 Cauliflowers | | | | | | | | | | | | | | | |
| | 123 | 140** | 144** | 2.2 | 2.9 | 155 | 163 | 164 | 0.8 | 0.9 | 1903 | 2277** | 2362** | 3.0 | 3.7 |
| EUR 12 | | | | | | | | | | | | | | | |
| Belgique/België | 4 | 5 | 5 | 3.8 | 0.0 | 155 | 176 | 194 | 2.1 | 10.2 | 62 | 88 | 97 | 6.0 | 10.2 |
| Danmark | 1 | 1** | 1** | 0.0 | 0.0 | 110 | 70 | 70 | -7.3 | 0.0 | 11 | 7** | 7** | -7.3 | 0.0 |
| BR Deutschland | 3 | 7 | 7 | 15.2 | 0.0 | 263 | 237 | 227 | -1.7 | -4.2 | 79 | 166 | 159 | 13.2 | -4.2 |
| Elláda | 3 | 3 | 3** | 0.0 | 0.0 | 177 | 197 | 200 | 1.8 | 1.7 | 53 | 59 | 60** | 1.8 | 1.7 |
| España | 10 | 15 | 14 | 7.0 | -6.7 | 222 | 185 | 184 | -3.0 | -0.6 | 222 | 278 | 258 | 3.8 | -7.2 |
| France | 46 | 45 | 47 | -0.4 | 4.4 | 114 | 128 | 125 | 1.9 | -2.3 | 526 | 575 | 587 | 1.5 | 2.1 |
| Irland | 1 | 1 | 1** | 0.0 | 0.0 | 140 | 120 | 120 | -2.5 | 0.0 | 14 | 12 | 12 | -2.5 | 0.0 |
| Italia | 31 | 33 | 36 | 1.0 | 9.1 | 161 | 191 | 191 | 2.9 | -0.5 | 500 | 632 | 686 | 4.0 | 8.5 |
| Nederhand | 3 | 4 | 4 | 4.9 | 0.0 | 163 | 145 | 165 | -2.0 | 13.8 | 49 | 58 | 66 | 2.9 | 13.8 |
| Portugal | 1 | 1 | 1** | 0.0 | 0.0 | 180 | 200 | 200 | 1.8 | 0.0 | 18 | 20 | 20** | 1.8 | 0.0 |
| United Kingdom | 20 | 25 | 25 | 3.8 | 0.0 | 185 | 153 | 164 | -3.1 | 7.3 | 369 | 382 | 410 | 0.6 | 7.3 |
| C.3 Tomatoes | | | | | | | | | | | | | | | |
| | 300 | 272** | 235** | -1.6 | -6.3 | 466 | 486 | 491 | 0.7 | 1.2 | 13985 | 13210 | 12531** | -0.9 | -5.1 |
| EUR 12 | | | | | | | | | | | | | | | |
| Belgique/België | 1 | 1 | 1 | 0.0 | 0.0 | 1600 | 3140 | 3300 | 11.9 | 5.1 | 160 | 314 | 330 | 11.9 | 5.1 |
| Danmark | 0 | 0** | 0** | x | x | x | x | x | x | x | 17 | 18 | 20 | 1.0 | 11.1 |
| BR Deutschland | 0 | 0 | 0 | x | x | x | x | x | x | x | 23 | 32 | 31 | 5.7 | -3.1 |
| Elláda | 49 | 45 | 45** | -1.4 | 0.0 | 462 | 420 | 407 | -1.6 | -3.2 | 2264 | 1891 | 1830 | -3.0 | -3.2 |
| España | 61 | 60 | 56 | -0.3 | 6.0 | 398 | 444 | 467 | 1.8 | 5.2 | 2429 | 2665 | 2616 | 1.6 | -1.8 |
| France | 17 | 13 | 12 | -4.4 | -7.7 | 553 | 625 | 633 | 2.1 | 1.4 | 940 | 812 | 760 | -2.4 | -6.4 |
| Irland | 0 | 0 | 0** | x | x | x | x | x | x | x | 14 | 9 | 10** | -7.1 | 11.1 |
| Italia | 143 | 130 | 118 | -1.6 | -9.2 | 459 | 446 | 467 | -0.5 | 4.6 | 6563 | 5798 | 5506 | -2.0 | -5.0 |
| Nederhand | 2 | 2 | 2 | 0.0 | 0.0 | 2625 | 3180 | 3260 | 3.2 | 2.5 | 525 | 636 | 652 | 3.2 | 2.5 |
| Portugal | 26 | 20 | 20** | -4.3 | 0.0 | 357 | 447 | 320 | 3.8 | -28.4 | 928 | 894 | 640 | -0.6 | -28.4 |
| United Kingdom | 1 | 1 | 1 | 0.0 | 0.0 | 1220 | 1410 | 1360 | 2.4 | -3.5 | 122 | 141 | 136 | 2.4 | -3.5 |
| C.4 Aubergines | | | | | | | | | | | | | | | |
| | 20 | 19 | 18** | -0.9 | -5.3 | 267 | 291 | 312 | 1.4 | 7.3 | 534 | 552 | 561** | 0.6 | 1.6 |
| EUR 12 | | | | | | | | | | | | | | | |
| Elláda | 3 | 3 | 3** | 0.0 | 0.0 | 237 | 207 | 217 | -2.2 | 4.8 | 71 | 62 | 65** | -2.2 | 4.8 |
| España | 4 | 4 | 4** | 0.0 | 0.0 | 505 | 350 | 350 | 2.5 | 0.0 | 122 | 140 | 140** | 2.3 | 0.0 |
| France | 1 | 1 | 1 | 0.0 | 0.0 | 290 | 240 | 240 | -3.1 | 0.0 | 29 | 24 | 24 | -3.1 | 0.0 |
| Italia | 12 | 11 | 10 | -1.4 | -9.1 | 248 | 269 | 303 | 1.4 | 12.6 | 297 | 296 | 303 | -0.1 | 2.4 |
| Nederhand | 0 | 0 | 0 | x | x | x | x | x | x | x | 15 | 30 | 29 | 12.2 | -3.3 |

Source: Eurostat.

Annex- 1 Quality Standards for Tomatoes and Peaches/Nectarines

(E Cにおけるトマト、モモ/ネクタリンの品質基準)



Annex-1 Quality Standards for Tomatoes and Peaches & Nectarines
(ECにおけるトマト、モモ/ネクタリンの品質基準)

(1) Tomatoes

ANNEX

QUALITY STANDARD FOR TOMATOES

I. DEFINITION OF PRODUCE

This standard applies to tomatoes of the varieties (cultivars) grown from *Lycopersicon esculentum* Mill. to be supplied fresh to the consumer, tomatoes for industrial processing being excluded.

Tomatoes may be classified into three commercial types, according to shape:

- 'round' (i.e. of spherical type, including 'cherry' tomatoes),
- 'ribbed',
- 'oblong' (or 'elongated').

II. PROVISIONS CONCERNING QUALITY

The purpose of the standard is to define the quality requirements for tomatoes after preparation and packaging.

A. Minimum requirements

In all classes, subject to the special provisions for each class and the tolerances allowed, the tomatoes must be:

- intact,
- fresh-looking,
- sound, produce affected by rotting or deterioration such as to make it unfit for consumption is excluded,
- clean, practically free of any visible foreign matter,
- free of abnormal external moisture,
- free of any foreign smell and/or taste.

The development and condition of the tomatoes must be such as to enable them:

- to withstand transport and handling, and
- to arrive in satisfactory condition at the place of destination.

B. Classification

The tomatoes are classified into the four classes defined below:

(i) 'Extra' Class

Tomatoes in this class must be of superior quality. They must have firm flesh and have the characteristics typical of the variety as regards shape, appearance and development.

Their colouring, depending on their state of ripeness, must satisfy the requirements set out in the last subparagraph of paragraph A above.

The tomatoes must be free from 'green backs' and other defects, except for very slight superficial defects, provided this affects neither the quality nor the general appearance of the produce, nor the general presentation in the package.

(ii) Class I

Tomatoes in this class must be of good quality, reasonably firm and have the characteristics typical of the variety.

They must be free of unhealed cracks and visible 'green backs'.

The tomatoes may show the following slight defects provided they do not affect the general appearance, quality, conservation or presentation of the product:

- slight defect in shape and development,
- slight defect in colouring,
- slight skin defects,
- very slight bruises.

Furthermore 'ribbed' tomatoes may show :

- healed cracks not more than 1 cm long,
- no excessive deformations,
- small umbilicus, but no suberization,
- suberization of the stigma up to 1 cm²,
- fine blossom scar in elongated form (like a seam), but not longer than two-thirds of the greatest diameter of the fruit.

(iii) *Class II*

This class includes tomatoes which do not qualify for inclusion in the higher classes, but satisfy the minimum requirements specified above.

The tomatoes must be reasonably firm and must not show unhealed cracks.

The tomatoes may show the following slight defects provided they retain their basic characteristics as regards quality and presentation :

- defects in shape, development and colouring,
- skin defects or bruises, provided the fruit is not seriously affected,
- healed cracks not more than 3 cm in length.

Furthermore 'ribbed' tomatoes may show :

- more marked deformations than allowed under Class I, but without being misshapen,
- umbilicus,
- suberization of the stigma up to 2 cm²,
- fine blossom scar in elongated form (like a seam).

(iv) *Class III*⁽¹⁾

This class includes tomatoes which do not qualify for inclusion in the higher classes, but satisfy the requirements for Class II above. However, they may have healed cracks more than 3 cm in length.

III. PROVISIONS CONCERNING SIZING

Sizing is determined by the maximum diameter of the equatorial section. The following provisions shall not apply to 'cherry' tomatoes.

A. Minimum size

For tomatoes classified in the 'Extra' Class and Classes I and II, the minimum size is set at :

- for 'round' and 'ribbed' tomatoes : 35 mm,
- for 'oblong' tomatoes : 30 mm.

For tomatoes classified in Class III, the minimum size is set at :

- for 'oblong' tomatoes and tomatoes produced under protection (glass or plastic) regardless of commercial type : 20 mm,
- for other tomatoes : 35 mm.

B. Sizing scale

The following sizing scale has been adopted :

- 30 mm and over but under 35 mm⁽²⁾,
- 35 mm and over but under 40 mm,
- 40 mm and over but under 47 mm,
- 47 mm and over but under 57 mm,
- 57 mm and over but under 67 mm,
- 67 mm and over but under 82 mm,
- 82 mm and over but under 102 mm,
- 102 mm and over.

Observance of sizing scale is compulsory for 'Extra' Class and Class I tomatoes.

⁽¹⁾ Supplementary class within the meaning of Article 2 (1) of Regulation (EEC) No 1035/72. The application of this quality class or of certain of its specifications is subject to a decision to be taken under Article 4 (1) of that Regulation.

⁽²⁾ Only for 'oblong' tomatoes.

IV. PROVISIONS CONCERNING TOLERANCES

The following tolerances in respect of quality and size are allowed for produce not satisfying the requirements of the class indicated in each package.

A. Quality tolerances

(i) *'Extra' Class*

5 % by number or weight of tomatoes not satisfying the requirements for the class, but meeting those for Class I or, exceptionally, coming within the tolerances for that class.

(ii) *Class I*

10 % by number or weight of tomatoes not satisfying the requirements for the class, but meeting those for Class II or, exceptionally, coming within the tolerances for that class.

(iii) *Class II*

10 % by number or weight of tomatoes satisfying neither the requirements for the class nor the minimum requirements, with the exception of produce affected by rotting, pronounced bruising or any other deterioration rendering it unfit for consumption.

(iv) *Class III*

15 % by number or weight of tomatoes satisfying neither the requirements for the class nor the minimum requirements, with the exception of produce affected by rotting, pronounced bruising or any other deterioration rendering it unfit for consumption.

B. Size tolerances

For all classes, 10 % by number or weight of tomatoes conforming to the size immediately below and/or above that specified, with a minimum of 33 mm for 'round' and 'ribbed' tomatoes, and 28 mm for 'oblong' tomatoes in the 'Extra' Class and Classes I and II.

V. PROVISIONS CONCERNING PRESENTATION

A. Uniformity

The contents of each package must be uniform and contain only tomatoes of the same origin, variety or commercial type, quality and size (if the produce has to be sized).

The ripeness and colouring of tomatoes in the 'Extra' Class and Class I must be practically uniform. In addition, the length of 'oblong' tomatoes must be sufficiently uniform.

The visible part of the contents of each package must be representative of the entire contents.

B. Packaging

The tomatoes must be packed in such a way as to protect the produce properly.

The materials used inside the package must be new, clean and of a quality such as to avoid causing any external or internal damage to the produce.

The use of materials and particularly of paper or stamps bearing trade specifications is allowed provided that the printing or labelling has been done with a non-toxic ink or glue.

No stamp or label may be placed on the tomatoes themselves.

The packages must be free from all foreign matter.

VI. PROVISIONS CONCERNING MARKING

Each package must bear the following particulars in letters grouped on the same side, legibly and indelibly marked and visible from the outside:

A. Identification

Packer and/or dispatcher: name and address or officially issued or accepted code mark.

B. Nature of produce

- 'Tomatoes' and the commercial type, if the contents are not visible from the outside. These details must always be provided for 'cherry' tomatoes and for Class III tomatoes:
 - grown under protection (glass or plastic) and of a size between 20 and 35 mm,
 - 'oblong', and of a size between 20 and 30 mm.
- Name of variety (optional).

C. Origin of produce

Country of origin and, optionally, district where grown or national, regional or local place name.

D. Commercial specifications

- Class.
- When sized, size expressed as minimum and maximum diameters or, alternatively, the word 'unsized'.

E. Official control mark (optional)

ANNEX

QUALITY STANDARD FOR PEACHES AND NECTARINES

I. DEFINITION OF PRODUCE

This standard applies to peaches and nectarines (*) grown from varieties (cultivars) or *Prunus persica Sieb. and Zucc.*, to be supplied fresh to the consumer, peaches for industrial processing being excluded.

II. PROVISIONS CONCERNING QUALITY

The purpose of the standard is to define the quality requirements for peaches and nectarines after preparation and packaging.

A. Minimum requirements

In all classes, subject to the special provisions for each class and the tolerances allowed, the peaches and nectarines must be :

- intact,
- sound ; produce affected by rotting or deterioration such as to make it unfit for consumption is excluded,
- clean, practically free of any visible foreign matter,
- free of abnormal external moisture,
- free of any foreign smell and/or taste,
- practically free from pests,
- practically free from damage caused by pests.

The peaches and nectarines must have been carefully picked. The development and the state of ripeness of the peaches must be such as to enable them :

- to withstand transport and handling, and
- to arrive in satisfactory condition at the place of destination.

B. Classification

The peaches and the nectarines are classified into three classes defined below :

(i) 'Extra' class

The peaches and the nectarines in this class must be of a superior quality. In shape, development and colouring they must be typical of the variety allowing for the district in which they are grown. They must be free from defects with the exception of very slight superficial defects, provided that these do not affect the general appearance of the produce, the quality, the keeping quality and presentation in the package.

(ii) Class 1

The peaches and the nectarines in this class must be of good quality. They must have the characteristics typical of the variety, allowing for the district in which the fruit is grown. However, a slight defect in shape, development or colouring may be allowed.

The flesh must be perfectly sound.

Peaches split where the stem is joined to the fruit are excluded.

Slight skin defects however may be allowed provided that these do not affect the general appearance of the produce, the quality, the keeping quality and the presentation in the package and do not exceed :

- 1 cm in length for defects of elongated shape,
- 0,5 cm² of the total area for other defects.

(*) This text applies to all varieties grown from *Prunus persica Sieb. and Zucc.*, being peaches or nectarines or similar with attached or unattached stone and smooth or rough skin.

(iii) *Class II*

This class includes peaches and the nectarines which do not qualify for inclusion in the higher classes, but satisfy the minimum requirements specified above.

The flesh should not show any serious defects. Peaches split where the stem is jointed to the fruit are allowed only in connection with the quality tolerances.

Skin defects may be allowed provided that the fruit retain their essential characteristics as regards the quality, the keeping quality and presentation and do not exceed:

- 2 cm in length for defects of elongated shape, and
- 1,5 cm² in total area for all other defects.

III. PROVISIONS CONCERNING SIZING

Sizing is determined by:

- circumference, or
- maximum diameter of the equatorial section.

The peaches and the nectarines must be graded according to the following scale:

| Diameter | Size (code) | Circumference |
|--------------------------------|-------------|----------------------------------|
| 90 mm and over | AAAA | 28 cm and over |
| 80 mm and over but under 90 mm | AAA | 25 cm and over but under 28 cm |
| 73 mm and over but under 80 mm | AA | 23 cm and over but under 25 cm |
| 67 mm and over but under 73 mm | A | 21 cm and over but under 23 cm |
| 61 mm and over but under 67 mm | B | 19 cm and over but under 21 cm |
| 56 mm and over but under 61 mm | C | 17,5 cm and over but under 19 cm |
| 51 mm and over but under 56 mm | D | 16 cm and over but under 17,5 cm |

The minimum size allowed for the 'Extra' class is 17,5 cm (circumference) and 56 mm (diameter).

Sizing is compulsory for all classes.

IV. PROVISIONS CONCERNING TOLERANCES

Tolerances in respect of quality and size shall be allowed in each package for produce not satisfying the requirements for the class indicated.

A. Quality tolerances

(i) *'Extra' class*

5 % by number or weight of peaches or nectarines not satisfying the requirement for the class, but meeting the requirements for class I or, exceptionally, coming within the tolerances for that class.

(ii) *Class I*

10 % by number or weight of peaches or nectarines not satisfying the requirements for the class, but meeting the requirements for class II or, exceptionally, coming within the tolerances for that class.

(iii) *Class II*

10 % by number or weight of peaches or nectarines not satisfying the requirements for the class or the minimum requirements, excluding, fruit affected by rotting, pronounced bruising or any other deterioration rendering it unfit for consumption.

B. Size tolerances

For all classes, 10 % by number or weight of peaches up to 1 cm larger or smaller than the size stated on the package in the case of sizing by circumference and up to 3 mm larger or smaller in the case of sizing by diameter.

However, for fruit in the smallest class, this tolerance shall apply only to peaches or nectarines of a size smaller by not more than 6 mm (circumference) or 2 mm (diameter) than the specified minimum size.

V. PROVISIONS CONCERNING PRESENTATION**A. Uniformity**

The contents of each package must be uniform and contain only peaches or nectarines of the same origin, variety, quality, degree of ripeness and size, and for 'Extra' class, the contents must also be uniform in colour.

The visible part of the contents of each package must be representative of the entire contents.

B. Packaging

The peaches or nectarines must be packed in such a way as to ensure that they are suitably protected.

The materials used inside the package must be new, clean and of a quality such as to avoid causing any external or internal damage to the produce. The use of materials and particularly of paper or stamps bearing trade specifications is allowed provided that the printing or labelling has been done with a non-toxic ink or glue. Packages must be free from all foreign matter.

C. presentation

The peaches and the nectarines may be presented in one of the following ways:

- in small packages,
- in a single layer, in the case of 'Extra' class; each individual fruit in this category must be separated from its neighbours,
- in classes I and II
 - in one or two layers, or
 - not more than four layers where the fruit is placed in rigid pockets so arranged that they do not rest on the fruit in the layer immediately below.

VI. PROVISIONS CONCERNING MARKING

Each package must bear the following particulars in letters grouped on the same side, legibly and indelibly marked and visible from the outside:

A. Identification

Packer
and/or
Despatcher } Name and address or officially issued or accepted code mark.

B. Nature of produce

- name of the product, if the contents of the package are not visible from the outside,
- name of the variety for classes 'Extra' and I.

C. Origin of produce

- country of origin and, optionally, district where grown, or national, regional or local place name.

D. Commercial specifications

- class,
- size expressed as minimum and maximum diameter or minimum and maximum circumference or according to the coding set out in Section III 'Sizing',
- Number of units (optional).

E. Official control mark (optional).

Annex- 2 Notes on Visits to Private Firms

(訪問会社)



Annex-2 Notes on Visits to Private Firms (訪問会社)

(1) TAT A.S,

TAT is Turkey's first and most modern tomato paste and canned food factory and was founded in 1967. The company is the top exporter of tomato paste, also producing the highest percentage of the related product for domestic consumption in Turkey. TAT has a total annual production capacity of 70,000 tons of tomato paste (expressed as 28/30 brix), 7,500 tons of diced tomato and 20,000 tons of canned vegetables. TAT also produces tomato ketchup and a wide variety of fruit juices for domestic and foreign markets. TAT also play a leading role in Turkey's agricultural development; it contracts about 10,000 hectares of land to its tomato and vegetable production capacity through contracts with some 13,000 independent farmers to whom it renders assistance in technical matters.

The TAT company possesses about 9,000 people trained labor force employed in the production of tomato paste. The production is controlled by TAT company itself and through signed contracts with the producers, who specifically use the seeds imported or provided by the TAT company itself in their fields. The stages that the TAT company goes through are first of price determination through discussions with the relevant co. producer, advance payment for the amount and kind of the production activity to be undertaken, the supply of necessary fertilizers and the control of production at all stages by the TAT company's experts. TAT company assumes the position of being the first company starting the contract based production activities with the producer and the company. TAT, as being one of the top processed food companies in Turkey represents partnerships of Japanese KAGOME and SUMITOMO organizations.

TAT has established important position in the world of processing food industry in line with the fact that among the countries producing processed tomato paste, Turkey comes third following the USA and Italy in this subject. Greece is the fourth country in the order. In Turkey there are about thirty accountable firms involved in the production; among them are three most important firms including TAT and the other two are VANTAN and TAMEK. However, TAT is the first among the three firms.

As claimed by the authorities, technology wise TAT has the capacity to apply the latest and top standard of modern technology. The equipment used in the process is acquired from Italy, and Japanese technology of reverse osmosis is practiced.

TAT is the sixth company in the world in terms of the highest amount of tomato paste production. The raw materials used in the tomato paste production are cubic tomatoes and pilled tomatoes. Ketchup is also an important product of the TAT company. All tomato paste produced by the company are stored in aseptic cups for industrial exports. Tin cans produced by the company are being used.

TAT has been and is exporting tomato paste to more than 25 countries in the world. The average amount of exports of the TAT company is 45,000 tons annually, of which 30,000 tons, are of tomato paste, 7000 tons cubic tomatoes and 3,000-5,000 tons are of peeled tomatoes. The most important countries of export are Japan, all countries of Europe, USA, Canada, Australia and New Zealand, North Africa and finally the Far East.

TAT products are shipped over to various countries in specially designed containers. Within Europe highways are used in transportation. The costs are met by the receiving party if it is FOB; if it is not the costs are met by the company itself. The company works with various transportation and shipment companies, which therefore prevents running into problems in transportation. The specifications for the amount and packaging are agreed upon with the receiving parties in Europe which enables full control of quality and assurance of EC standards. The company has its own packaging facilities.

Canned vegetable products usually are required to fulfill domestic demand and also are exported to Europe to meet the necessities of mainly Turkish population residing in those countries. It is important to note that TAT has not only been specialized in the production of tomato paste, rather has expanded its product range to ready made food, fruit juice, marmalade also to fill up the company's product range.

The TAT company is also engaged in seed production along with the top seed producing countries like Europe, USA and Japan. The seed production is also concentrated on high quality industrial tomato type seed to achieve high quality products. The advantages that the TAT company is in the possession of high quality products with the usage of high quality seeds, control at all stages of production, convenience of seeds in using which do not put the producer under burdens, rather simplify the project. The usage of hybrid seeds is also an advantage that the TAT company points out.

TAT claims that it holds the top quality of seed production in Turkey. There are about 100 seed producing or importing firms. The actual number of firms producing high quality firms, however are only 5 to 10. The machinery that TAT is using in this

sector is imported from Japan. The seeds are exported to all countries over the world including Japan.

(2) VANTAN A.S

VANTAN is another major firm involved in tomato processing and can be rated as second in Turkey. The factory is situated in Karacabey (65 km from Bursa) in a land of 260,000 sq. m. and adjacent to Istanbul - Izmir highway. The factory was expanded in 1972, 1976, 1984 and 1990. The factory works 12 months a year and has an average of 300 persons employed.

The production capacities are as follows.

| | | |
|----|----------------------------------|-------------|
| a) | Tomato paste | 25,000 tons |
| b) | Vegetables in cans | 7,000 tons |
| c) | Ready meals | 2,000 tons |
| d) | Boiled vegetables | 2,000 tons |
| e) | Red peppers in cubes and stripes | 2,400 tons |
| f) | Jam and marmalade | 200 tons |

Tomato paste production was initiated in 1967 and large plants were established after 1970 through means of encouragement provided by the state in food sector. The production capacity of tomato paste was 145,000 tons in 1982 and it had reached to 300,000 tons in 1990 as result of positive developments achieved in the foreign markets.

(3) SAPEKSA

SAPEKSA, a seed company located in Adana, involved in wheat, soybean, maize and vegetables namely cucumber, cabbage, cauliflower, broccoli, lettuce. It has joint-venture business with Japanese firm for vegetables seeds, with French firm for Hybrid maize and USA firm for soybean. SAPEKSA has production permit from MARA for producing seeds as well as registration of variety.

SAPEKSA has about 5000 tons of processing/storage facilities in Adana for soya bean, wheat and maize, and its marketing facilities are located throughout Turkey.

According to the General Manager, production of winter vegetables is recommended, particularly broccoli, lettuce, Brussels sprout and cauliflower for European markets. Vegetable production is recommended but not vegetable seeds. Tomato processing is not feasible in Adana region because there are other alternatives for farmers to produce other agricultural products. The yield of tomato is low in this region. Marmara region is good for tomato.

SAPEKSA produces standard broccoli seed for export. Hybrid broccoli seeds are imported for domestic uses. Hybrid seeds are preferred because it matures same

time, uniform in quality and size and high yield. Standard seeds can be used for local area because of low cost of product.

(4) TUFEKCI (Izmir)

TUFEKCI, located in Buca in Izmir, was established in 1961 and is the biggest firm dealing in fresh fruits/vegetables in the Mediterranean area. It mainly exports oranges, tomatoes, potatoes, watermelons. It has a capacity of 50,000 MT/year and its turnover last year was \$25 million. About 20% of the products are from its own farm and the rest 80% are procured from other farms. It has two systems of procurement (1) rent the farm for 5-10 years & and cultivate using its inputs and labor, etc., and (2) purchase from farms with fixed price (contract farming). In 1993 Tufekci exported 50,000 tons of oranges/lemons/mandarins, and 20,000 tons of watermelons and tomatoes. The company has dormitory for workers; in normal seasons there are 100 people and 450 people during peak season.

(5) OZLER S.A. (Adana)

OZLER, established in 1930, is a leading grower, packer and exporter company of fruit and vegetables in Adana. It has a total area of more than 300 ha under cultivation for citrus, 20 ha of greenhouse for vegetables and 80 ha for wheat, corn, etc. OZLER also purchases citrus and vegetables from selected farms on contract basis; cash payment of 35-40 percent during growing and 65-60 percent during harvest time. OZLER's production consists of 80 percent of citrus (20% orange, 40% lemon, 30% grapefruit & 10% mandarin) and 20 percent of other fruits and vegetables (5% lettuce, 10% melon & watermelons, 5% of cherry, tomatoes, eggplants, potatoes and onion). Seventy percent of its production are exported to countries, namely Germany, France, Belgium, Denmark, Sweden, Poland, Romania and Russia. According to the production manager, transport to Germany takes six days from Adana at 40 fennic/kg for vegetables and 30 fennic/kg for fruits and citrus. (i.e. 6000 DM to 8000 DM a refrigerated truck of 20 tons).

Annex- 3 List of References

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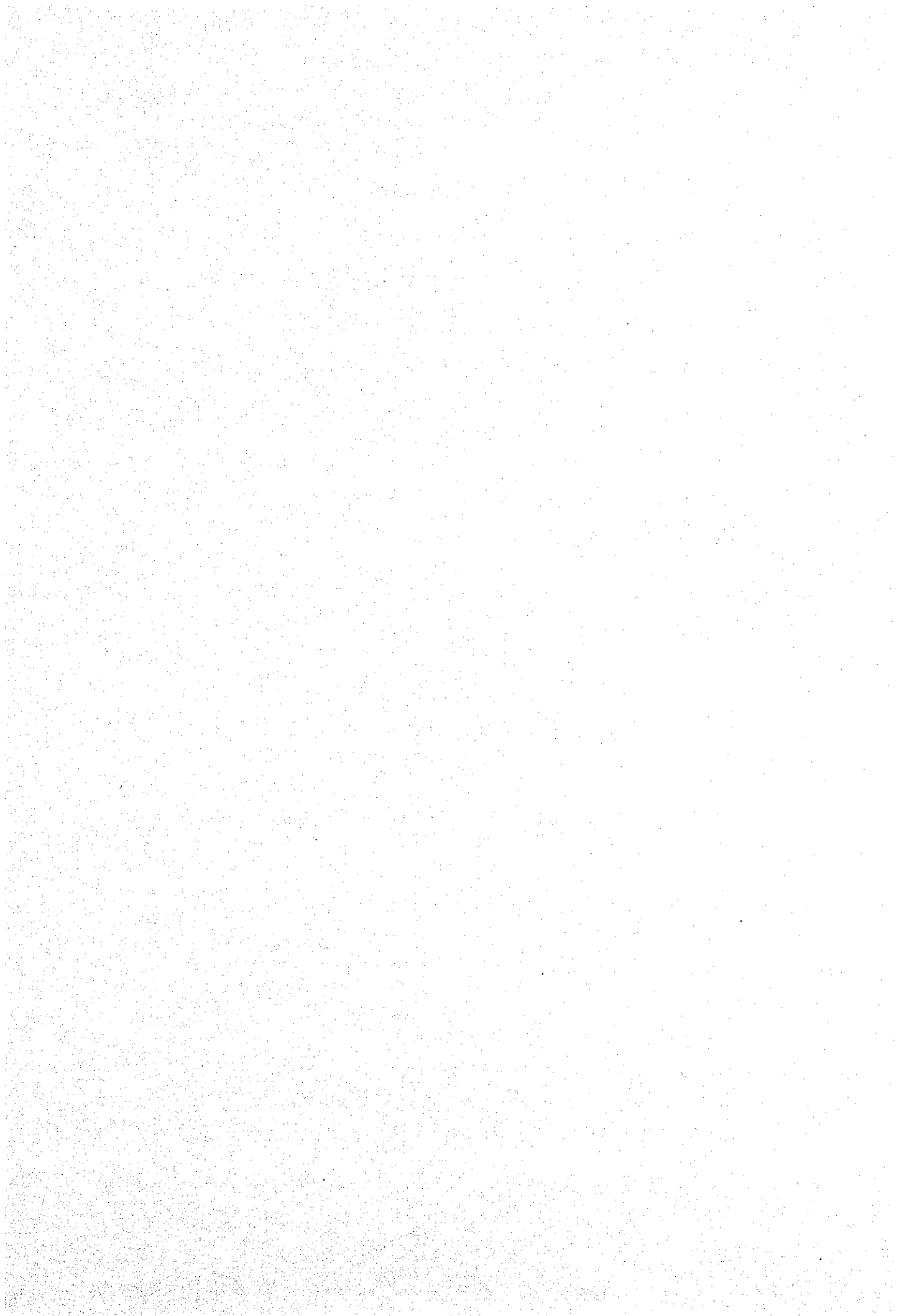
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注) ● はトルコ語の資料であることを示す。



JICA