5 FRUIT AND VEGETABLES

BY ERIC TOLLENS

A. The Place of Fruit and Vegetables in the EEC

Trade in fruit and vegetables between the Community and third countries is a complex affair. It involves more than fifty different products, some of which, like apples and pears, are typically grown in temperate regions, while others, like bananas and pineapples, are more suited to a tropical environment. These products are generally perishable, although preservation and processing have extended their economic life. Vegetables are typically annual or seasonal crops and supply can usually easily be adjusted from one year to the next. Most fruit crops are perennial, and supply adjustments are usually more difficult requiring an extended time period.

i. Production*

The production of fresh fruit and vegetables in the Community constitutes around 12 per cent of the value of agricultural production. In the medium term production is fairly stable. The largest variations occur for apples, peaches, tomatoes and cauliflowers.

Fruit production increased rapidly in the early 1960s and, by 1967, the Community had moved into surplus. Production has then been stabilised through programmes of subsidised grubbing of orchards. Fruit production is concentrated in Italy (57 per cent of total production) followed by France (18 per cent) and West Germany (18 per cent). Other Member States are relatively unimportant fruit producers and enlargement from the EEC(6) to the EEC(9) has exerted negligible influence on total fruit production.

Apples, pears and peaches are the most important fruits. Apples are in surplus and production is about equally split between Italy, France and West Germany. Production on new irrigated orchards, and with new American varieties, is on the increase to the detriment of pears and peaches.

The production of vegetables has been relatively stable in the EEC-6 since 1968 and enlargement to the EEC-9 has increased production by about 17 per cent. Due to the annual and seasonal character of the production of vegetables, supply is more easily brought into line with demand than is the case for fruit. This apparent Community-wide stability does however hide an evolution towards, on the one hand, more vegetables produced on larger sized, open fields, often with mechanical harvesting and for the purpose of canning or freezing and, on the other hand, increased production under glass, particularly lettuce, cucumbers and tomatoes - notwithstanding increased fuel costs for heating since 1974.

The three main vegetable producers are Italy (46 per cent), France (19 per cent) and the UK, followed by the Netherlands

---

* This and the next section are primarily based on Ministère de l'Agriculture, Commission des Communautés Européennes (1977) and the annual reports of the European Communities published as: "The Agricultural Situation in the Community". The figures in this section relate to 1975, but they do not vary much from year to year.

and West Germany. About thirty different types of vegetables are produced. The most important are: tomatoes; lettuce; small green peas; onions; cauliflowers; carrots; and artichokes.

ii. Consumption

Consumption increased rapidly during the 1960s following steady increases in standards of living. However, in the 1970s, consumption stabilised in the EEC-6 and even decreased between 1973/74 and 1974/5 as a result of price rises and the general economic recession. Small increases in the per caput consumption of the three new Member States are to be expected given their lower levels of present consumption (see Table 5.1). Thus, in aggregate, small increases in the per caput consumption for the EEC-9 are likely.

Diversification of consumption is taking place. While imports of oranges and bananas are tapering off, the demand for new types of tropical or subtropical fruit is picking up - for example grapefruit, pineapples and avocados. The share of citrus fruit in total fruit consumption is increasing steadily. Something similar holds for vegetables such as cabbages, carrots and turnips, which are losing ground to the more delicate products such as small green peas, green beans and asparagus.

iii. Degrees of Self-sufficiency for Fruit and Vegetables

With enlargement to the EEC of nine states, slowly increasing demand but a fairly stable supply have resulted in degrees of self-sufficiency for fruit and vegetables taking a slightly downward course since 1971-72. Self-sufficiency is still higher for vegetables (96 per cent in 1976 compared with 99 per cent earlier) than for fruit (79 per cent in 1975, 88 per cent earlier). For citrus fruit, the degree of self-sufficiency is only 43 per cent, leaving ample room for large imports from the Mediterranean, and from ACP States.

Table 5.1

Per Capita Human Consumption of Fruit and Vegetables in the EEC (Kg.)

	EEC-6		EEC-9	
	1973/74	1974/75	1973/74	1974/75
Fresh Fruit*	74	65	64	56
of which:				
citrus fruit	26	26	23	23
vegetables**	108	107	99	98

* including preserved fruit and fruit juices.
** including preserved vegetables .

Source: Ministère de l'Agriculture, Commission des Communautés Européennes (1977).

iv. Trade

Intra-Community trade represents only a small fraction of all commercial transactions, 13 per cent for fruit and 8 per cent for vegetables. For fruit, the main flow of trade concerns exports from Italy to West Germany and to the UK. Enlargement to the EEC-9 has favoured French exports to the new Member States. The Netherlands is the main exporter of vegetables which go primarily to the West German market. Intra-Community trade in fresh fruit and vegetables is on the increase, particularly for apples, citrus fruit, table grapes, strawberries, onions and tomatoes.

Trade with third countries is less important for vegetables than it is for fruit. For vegetables, the EEC-9 exported 336,000 mt in 1975 and imported 976,000 mt - net imports of 640,000 mt (half of which went to West Germany). In the same year, the EEC imported 3,794,000 mt of fruit, of which more than two million mt were oranges. Imports of fresh fruit from third countries have been increasing over the last five years. Production and export of fruit and vegetables in ACP countries is covered in detail in the Appendix to this chapter.

v. Prices

It is difficult to establish useful estimates of market prices for fresh fruit and vegetables. There are great differences in prices between markets and between Member States because of the diversity and the perishability of the products.

Average producer prices have however increased considerably since 1968. For fruit, prices have gone up by about 50 per cent. The price of table grapes has more than doubled. For vegetables, the prices of cauliflowers and tomatoes increased by 100 per cent over the same period.

Intervention prices* increased from 1967/68 till 1975/76 by 85 per cent for lemons, 81 per cent for peaches, 76 per cent for tomatoes and mandarins, 60 per cent for table grapes, 50 per cent for cauliflower, 48 per cent for oranges, 41 per cent for pears and 37 per cent for apples.

Consumer prices for fruit and vegetables increased from 1970 to 1976 by between 35 per cent and 150 per cent; between 35 to 85 per cent for the EEC-6 and Denmark, and about 150 per cent for the UK and Ireland.

B. The CAP for Fruit and Vegetables

The Common Market organisation for fruit and vegetables (1035/72 of 18th May 1972, and 2454/72 of 21st November 1972), excluding potatoes and tropical fruits, differs considerably from those of other agricultural products. This is mainly due to the unique features of the production and marketing of fruit and vegetables associated with the perishability of these products.

The policy on fresh fruit and vegetables involves a system of common quality standards (quality, size, presentation, packaging) for 28 products (11 for fruit, 17 for vegetables) in three classes (Extra, I and II); provisions for market intervention; an import system based on common quality standards and customs duties supplemented by a schedule of reference prices, seasonal calendars; and provisions for export subsidies (refunds). In certain conditions, a countervailing tax is provided for in addition to customs duties for citrus fruit, grapes and stone fruit.

Intra-Community trade has been completely free** since 1st July 1968, for all products meeting the quality standards. Class III, a lower quality grade can be created if inadequate market supplies justify trade in poorer quality produce in the interest of consumers. Producers in the EEC are encouraged to set up associations to handle the marketing of fruit and vegetables, to take responsibility for price regulations at the producer level, and to organise market intervention. Member producers are required to market their entire output of the relevant produce through their association. These organisations are authorised in periods of market surpluses to intervene in the market and

---

* The intervention arrangements for fruit and vegetables are described in the next section.

** There are no MCAs on fruit and vegetables.

buy-in at certain fixed maximum prices. For this purpose, they can set up a stabilisation fund with contributions from the members. They can receive financial compensation or special loans for this purpose from the Member States, depending on the product withdrawn from the market.

The Community policy on fruit and vegetables also provides for market intervention by the Member States or by the producer associations for nine important products: cauliflowers; tomatoes; apples; pears; peaches; sweet oranges; mandarins; lemons; and table grapes. Each year, two prices are determined by the Council of Ministers, a base price and a buying-in price (for Class II products, exceptionally for Class III) which is a certain fixed percentage - between 40 and 70 per cent - of the base price. The base price is determined on the basis of average prices reported over the last three years on the representative markets of the Community, taking into account the "returns to producers, the need to stabilise markets, the interests of consumers and the avoidance of structural surpluses".

If the producer prices for a particular product on a representative market remain for three consecutive market days below the buying-in price, a "serious crisis situation" is considered to exist. The Member State may then request financial compensation for the value of the products withdrawn by the producer association from the market or purchased through national intervention agencies. The products withdrawn from the market are to be used in ways which do not disturb regular marketing channels, for instance, distribution to under-privileged persons, animal feeding, distillation, etc. Simple destruction is avoided if possible.

Significant withdrawals from the market for fruit and vegetables occurred in 1967/68 for cauliflowers: in 1971/72 and 1975/76 for tomatoes; in 1967/68, 1969/70 to 1971/72 and again in 1975/76 for apples (about 800,000 mt or 10.6 per cent of production); in 1974/75 and 1975/76 for pears (about 176,000 mt or 7.3 per cent of production): in 1974/75 and 1975/76 for peaches; in 1974/75 (about 188,000 mt or 10.6 per cent of production) and 1975/76 for oranges; and in 1974/75 and 1975/76 for mandarins, (47,000 mt or 12.8 per cent of production). Expenditures from the guarantee section of FEOGA for fruit and vegetables however amounted only to between 2 and 3 per cent of total expenditures.

Structural measures have been necessary to reduce overproduction of apples, pears and peaches. Subsidies for the voluntary grubbing of orchards have been granted between 1970 and 1973 and again in 1976/77 for certain varieties of apples and pears. For citrus fruit, special measures have been taken to stimulate the conversion to new varieties of oranges and mandarins.

Trade with non-member states of the Community is governed by customs duties under the Common External Tariff, a system of reference prices supplemented by countervailing levies, quality standards and export subsidies. The safeguard clause on entry into the EEC or for export from the EEC also applies when serious market disturbances occur, as is the case for all products traded by the Community. Quantitative restrictions (import quotas) on third country products have, in principle, been removed.

Duties of from 4 to 18 per cent for vegetables and from zero to 25 per cent for fruit apply to imports from third countries. Potentially more significant are the reference prices which serve as minimum import prices. A supplementary variable counvervailing levy may be applied on imports if they are offered at entry prices below the reference price, in order to equalise the difference between the two prices. The reference price which is actually fixed for eleven products (tomatoes, cucumbers, oranges, mandarins, lemons, apples, pears, cherries, peaches, plums, grapes), and for certain periods of the year, is partly based on market prices in recent years and includes an element to take account of the level of base- and buying-in prices.

For apricots, table grapes, melons, tomatoes, green beans, lettuce and artichokes, the Member States are individually still allowed to take special protective measures to curb imports from third countries during certain periods.

Article 22 of the regulation provides for special measures during the following periods for imports from outside the EEC:-

lettuce	:	November 15	- June 30
green beans	:	June 1	- September 30
melons	:	July 1	- October 15
table grapes	:	July 1	- January 31
tomatoes	:	May 15	- December 31
artichokes	:	March 15	- June 30
apricots	:	June 5	- July 31

The measures in effect are, according to Agri-Méditerranée, (1977):-

France: borders closed for all seven products with some exceptions for the Maghreb, Spain, Israel, Turkey, Romania and Bulgaria. These exceptions are specified in bilateral agreements and take the following form:-

- imports possible during a short period;
- minimum import price;
- quotas.

Belgium: borders closed for tomatoes and grapes.

Ireland: import of tomatoes subject to import licences according to needs.

Denmark: borders closed for tomatoes from 1st June to 31st October.

UK: restrictions for imports of tomatoes (15th May - 31st October), green beans (1st June - 30th September) and lettuce (15th November - 15th June) from countries with state trading.

These special measures should have been abolished by 1st January, 1973, but the Council of Ministers has not yet acted on this matter. It is expected that these measures will remain in effect as long as a new market organisation for fruit and vegetables is not worked out. This will probably happen when Spain, Greece and Portugal effectively become members of the EEC.

The Community also grants a penetration subsidy to Italy and Corsica (France) for oranges, mandarins, clementines and lemons exported to member countries. The penetration subsidy is fixed annually by the Council of Ministers in ua per 100kg. of produce exported to other Member States. It enables Italian citrus producers to gain a foothold in the citrus markets of the Community outside Italy.

Export subsidies (refunds) are authorised for a number of products (about twelve), depending on the season. In principle, the subsidy is not to exceed the incidence of the Common External Tariff duties plus the countervailing import levies, in so far as they are applied.

Processed fruit and vegetables are covered by separate regulations, as they are easily stored from one year to another. Duties apply as specified in the Common External Tariff to imports from third countries. In addition, a levy based on the added sugar, glucose and glucose syrup content is assessed on imports and an equivalent subsidy is granted on exports. Rules regarding preservatives, colouring and other additives and pesticide residues also affect trade in fruit and vegetables.

Sensitive products in the market organisation for preserved or processed fruit and vegetables are: peeled tomatoes, tomato juice, preserved peaches, preserved mushrooms, dried plums, preserved peas, preserved beans, preserved raspberries and preserved pears. Quantitative control of expected imports from third countries exists with import certificates. Since August 1974, an EC-safeguard clause measure has been in effect for mushroom preserves which limits the importation of this product to a certain percentage of previous imports over a certain period.

Tomato puree (paste) is called a "supersensitive" product. Minimum prices are to be respected for import from third countries and quantitative control of expected imports occurs via import certificates. Subsidies are given to EC-tomato processing plants (peeled tomatoes, tomato concentrate, tomato juice) as a compensation for tariff concessions given to Mediterranean countries and ACP-states. This is particularly important for Italy and France (DOM - Guadeloupe and Martinique) and will be important for Portugal and Greece once they join the EEC.

Citrus fruit processors also receive a subsidy in order to stimulate processing of oranges and lemons and to remain competitive with liberalised imports from third countries. A similar arrangement exists for the processing of pineapples in the French overseas department of Martinique. In addition, imports of citrus fruit juices (except grapefruit juice) from third countries are prohibited in Italy.

Apart from tomato products, a subsidy for the processing of peaches and plums will also be granted in so far as processors pay minimum producer prices to growers in Italy and France, as is the case for tomatces.

Finally, imports of processed fruit and vegetables in the Community from countries with state trading are subject to supervision "before and after", with import documents delivered by Member States before imports occur and "a posteriori" control on the basis of the statistics made up by the customs.

Discussions are now taking place concerning a more developed "Mediterranean policy" for the Community, and this involves, to a considerable extent, the CAP for fruit and vegetables. Italy, and Mediterranean farmers in France, complain about the unequal treatment between northern products (such as dairy products, grain and sugar) and southern products - mainly fruit and vegetables. For northern products, a stronger income guarantee (via target prices, guide prices, threshold prices) exists than for southern products and this is clearly reflected in the annual expenditures of FEOGA. Italy is now pressing for intervention prices for fruit and vegetables to form an income guarantee for their Mediterranean growers. Surpluses need to be processed, preserved, canned and they argue that the processing industry should receive subsidies for that purpose. Intervention for processed fruit and vegetables should also be set up. In other words, the Italians want a full price support system for fruit and vegetables. Presently, the main role of the intervention system is to clear the market in periods of surpluses and to prevent prices from dropping below a minimum buy-in price which, however, is not high enough to stimulate production itself.

The French propose a system of reference prices (minimum price levels) for trade between Member States, and compensating import levies. This system, they affirm, would also prevent disruptive imports from Spain and Greece after entry. But clearly, it would mean the end of a common market for fruit and vegetables.

The farmers' organisation (COPA) are bargaining for an extension of the reference price system to all fruit and vegetables imported and for an increase of the reference price in relation to increased production costs in the EEC. They want the safeguard clause to apply automatically when certain minimum quantities are bought in to intervention, and not only as a rescue operation when the damage has already been incurred. However, new quantitative restraints have little chance of being accepted by political leaders in the EEC. For processed fruit and vegetables common quality standards for fruit and vegetables to be processed and for the processed products are being recommended. They also argue for intervention for processed products and believe that there is insufficient protection against imports of processed fruit and vegetables in the EEC.

C. Effect of the EEC-Enlargement on the CAP for Fruit and Vegetables

The enlargement of the Community to include Greece, Portugal and Spain calls into question some of the essential elements of the CAP for fruit and vegetables, particularly the reference price system and intervention, and the regulation of trade with ACP states and third countries.

Portugal's external trade in fruit and vegetables is negligible, except for tomato concentrate, but Greece, and particularly Spain, have a well developed export oriented fruit and vegetable sector and the possibilities for production expansion are considerable. With irrigation, they can grow almost anything they want.

This section discusses short term changes in market supply and external trade balances caused by enlargement for most products under the intervention and reference price system. The discussion is based on Hormann (1977) (see Table 5.2). It should be emphasised that these considerations do not yet take into account possible shifts in seasonal production patterns as well as an overall expansion of (low cost) production in these potential new Member States.

In the case of tomatoes, there will be a considerable reduction in the import needs from November to April (the out-of-season production) because of deliveries from Spain (Canary Islands). The estimated monthly degree of self-sufficiency, which varies at this time from between 18 and 72 per cent, will rise to 85-90 per cent. A total or near total reduction of the import requirements for cucumbers in the months of November to March is to be expected because of deliveries from Greece and the Canaries. With regard to cauliflower, the degrees of self-sufficiency are not affected very much by enlargement.

For apples, there is no change - at least in the short term. With pears, the membership of Spain will lead to a certain reduction in the import requirements in July, and to a considerable extension of the export surplus in August.

Table 5.2

Estimates of Seasonal Degrees of Self-Sufficiency
Before and After the Proposed EEC-Enlargement
with Greece, Spain and Portugal*
(Average of 1973/74 and 1974/75)

Products	Month												Year
	J	A	S	O	N	D	J	F	M	A	M	J	
Tomatoes													
EUR 9	100	100	101	93	70	18	24	37	50	72	84	94	88
EUR 12**	100	100	101	99	91	85	88	89	88	91	90	97	97
Cauliflower													
EUR 9	100	100	100	100	101	101	102	103	104	104	104	101	102
EUR 12	100	100	100	100	100	101	102	102	103	104	103	101	102
Peaches													
EUR 9	98	98	100	-	-	0	0	0	0	0	92	95	98
EUR 12	104	105	103	-	-	0	0	0	0	0	100	102	104
Grapes													
EUR 9	82	99	101	95	72	67	39	-	0	0	0	8	91
EUR 12	95	100	102	107	110	110	99	-	0	0	0	37	103

* Gross values of sales by professional producers incl. market losses, excl. industrial uses, processing and animal feed.

** Without domestic market supply in Greece and Portugal.

Source: Hörmann, 1977.

The import needs of the EEC-9 in peaches during the whole of the European season will develop into far greater export surpluses. For the extended Community, values of between 100 and 105 per cent of the degree of self-sufficiency are estimated for the whole season, mainly because of the high domestic consumption in the countries of production.

During the European harvest period, a considerable reduction is to be expected in the import needs of oranges. For November, the trade balance is epected to be equal but will develop to a clear export surplus in December. After enlargement, a diversion of Greek oranges into the EEC market is likely. Previously, these were to a great extent delivered to Comecon countries.

As far as mandarins, tangerines, etc. are concerned, there will probably be almost an equalisation of the monthly balance of external trade. For third countries, there would only be limited sales opportunities for these products. As regards the EEC-9's supplies of grapes, enlargement would have the effect of producing considerable export surpluses, instead of import opportunities, in the months of November and December. While the estimated degree of self-sufficiency does not alter in August and September, it increases from 95 per cent to 107 per cent in October and from 72 per cent to 110 per cent in November. With cherries a certain reduction of imports would result in July. For plums, there are only changes at the beginning of the season. The high import needs in July will become a certain export surplus.

Spain and Greece have a favourable climate, a well developed irrigation network, cheap labour, chronically overvalued exchange rates but also small, fragmented farms and a poorly developed organisation of production and commercialisation, except for citrus. But a considerable expansion in production is expected with enlargement. The present reference price system and the intervention system will then undoubtedly come under great strain. Price stabilisation with intervention in the market may easily develop into a policy of price supports as is already the case for Italian citrus production. In 1975, 44.6 million ua were paid out by the FEOGA for intervention in fruit and vegetables; in 1976, this sum amounted to 127.9 million ua and in 1977, to 90.5 million ua. These amounts are likely to rise considerably with enlargement, principally because of Spain. With the actual production potential of fruit cultivation in Spain, large quantities presently not picked in case of a market glut could be offered for intervention. Production for intervention* may occur if the present level of intervention prices is not drastically reduced.

With enlargement, Southern Europe could gain a much stronger voice in EEC policy making. Thus, strong requests for more protectionist measures in relation to supply from ACP and third countries, particularly other Mediterranean countries: Israel, Morocco and also South Africa, are to be expected. Moreover, enlargement may lead to domestic market fluctuations becoming more frequent and more pronounced and thus may have a detrimental effect on the established external trade flows between the EEC, ACP states and third countries. It is clear that enlargement will call for a revision, or rather a rethinking, of the common market organisation for fruit and vegetables.

D. Trade Concessions and Other Provisions Relevant to ACP Exports of Fruit and Vegetables**

i. Trade Concessions

The preferential arrangement for ACPs has to a large extent been eroded by concessions offered through the 'global Mediterranean policy' of the Community and by association and preferential trade agreements with Mediterannean countries, particularly Spain, Israel and the Mahgreb. (See Appendix 3). These concessions are in the form of tariff reductions (CCT duties) for various products, particularly for processed fruit and vegetables but also for vegetables and oranges, subject to seasonal calendars to ensure that imports occur during the "out-of-season" period for European growers. Bilateral agreements have been concluded between the Community and several Mediterranean countries to limit the import of fruit salad preserves to certain quotas which are fixed annually. For preserved tomatoes, auto-limitation has been negotiated and agreed upon. Duty reductions exist for some products under the

---

* That is, producers regarding it as profitable to plan to supply at the intervention price, rather than intervention merely providing a floor to the market in times of serious over-supply.

** The Appendix to this Chapter gives details of Production and Export of Fruit and Vegetables by ACP countries.

Community's GSP. Details of concessions granted to ACP countries are given in Table 5.3. All these concessions were subject to the safeguard clause, either nationally or on a Community basis. This clause allows the EEC to take restrictive action when trade concessions are threatening the market for a product in the Community. With the clause, the Community guards itself against any imports which may seriously disturb the market. It empowers the Community to suspend imports or exports, or to impose extra (countervailing) duties or quotas. It is also an indication of the pragmatic way and of the "wait and see" attitude in EEC policy making for fruit and vegetables. For instance, under EEC regulations, the safeguard clause can be invoked at any time intervention on "large" quantities of cauliflower, tomatoes, table grapes, peaches, apples or pears is necessary, although the Community has yet to apply the clause in such a situation. But the mechanism for "exporting" market disequilibria to third countries, once market surpluses occur, is there.

At present the value of exports of ACP fruit and vegetables to the EEC is small in comparison with Mediterranean exports (except for bananas and canned pineapples) and thus, no serious problems arise. But, if production and export of fruit and vegetables in ACP states should develop, then the present concessions would come under strain and new arrangements would probably have to be worked out. An example is fresh or refrigerated tomatoes (07.01 B) where Senegal, potentially a large producer, received only a reduction of 60 per cent of the CCT for a quota of 1,000 mt of fresh or refrigerated tomatoes for the period November 15th - April 15th.* The minimum tariff of two EUA per 100 kg. still applies. If ACP exports develop considerably, non-tariff barriers on trade - such as disease and plant health restrictions (particularly virus infections) and quality standards - could become serious obstacles, as has already been the case for certain flowers and ornamental plants.

ii. Arrangements for Bananas

According to Protocol no.6(on bananas) of the Lomé Convention, a joint endeavour will be undertaken by the ACP States and the Community to enable ACP States, particularly Somalia, to increase their banana exports to their traditional Community markets and to gain a foothold in new Community markets.

In 1976, the EEC imported 1,850,770 mt of fresh bananas of which only 321,566 mt (17.4 per cent) came from ACP States, less than any previous year since 1973, as illustrated in Table 5.4. The most important ACP exporters to the Community are Ivory Coast, Cameroun, Jamaica, Somalia and Surinam. Only Cameroun, Belize and Martinique increased their exports to the Community steadily over the last four years. From Table 5.5 we can see that some ACP countries also export considerable tonnages of bananas to third countries. This is particularly true for Somalia's export to the Middle East. The West Indies (PTOM) and the French overseas departments of Martinique and Guadeloupe are also quite important suppliers of bananas to the EEC. (The production of bananas in different countries is covered in the Appendix).

---

* In principle, the CCT duty of 18 per cent applies to imports of tomatoes from ACP or third countries. However, certain duty reductions have been granted to various countries for imports during a specific time period. In this respect, the ACP Council of Ministers at their meeting in Lusaka in December, 1977, noted that import taxes for fresh or refrigerated tomatoes, during this period, were 11 per cent for Senegal (ACP state), 4 per cent for the Mahgreb, 5 per cent for Greece and 6 per cent for Spain, with a minimum duty of two EUA per 100kg. (The Courier, No. 47).

Table 5.3

Concessions Offered to ACP Countries

Vegetables (Chapter 7 of the CCT)

- exemption of customs duties of the CCT for:

  leguminous plants (peas and haricots), "Mooli", ground sweet peppers, frozen vegetables (except olives), vegetables preserved in water (onions, cucumbers, gherkins... except olives). No seasonal calendar.

- exemption of customs duties of the CCT and a levy reduced by 0.15ua per 100 kg for "arrow-root".

Fruit (Chapter 8 of the CCT)

- total exemption of customs duties of the CCT: grapefruit, pawpaw, passion fruit (passiflores).

- reduction by 80 per cent of the customs duties of the CCT for oranges, mandarins, (08.02 A and 08.02 B of the CCT) together with observance of reference price. No seasonal calendar is in effect.

Products processed from fruit and vegetables (Chapter 20 of the CCT)

- general rule: exemption of customs duties of CCT except for jams and grape juice.

- suppression of levy for tinned pineapples, grapefruit, mixtures of pineapples, granadillas, pineapple juice, mixtures of pineapple, pawpaw and granadillas juice.

- abolition of the additional duty on sugar (ads) in preserves and juices of pineapple and of mixtures of pineapple, pawpaw and pomegranate.

The main exporters of bananas to the EEC are third countries of Central and South America and their banana trade is in the hands of powerful multinational companies which have a strong grip on the Community banana market. ACP countries are traditionally considered the preferential suppliers to three member states: France, the UK, and Italy. In the other countries, the powerful multinational banana trading firms dominate the market. It is difficult for others to compete with the efficiency and organisational capacity of the multinationals to box, ship, ripen and market bananas in the shortest possible time. Due to lower labour costs, Latin American bananas are cheaper than ACP bananas and, because of stricter quality controls, the Latin American bananas are often of better quality and more attractive to consumers.

Table 5.4

Imports of Fresh Bananas in the EEC

Q (Quantity) = M.tons: V (Value) = 1000 EUA; - = nil or negligible.

Country of origin	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Cameroun	62,253	11,775	70,680	16,185	74,674	22,842	79,246	25,358
Ivory Coast	106,619	19,888	125,915	28,789	124,132	39,410	87,676	30,149
Jamaica	111,614	19,917	68,021	15,538	68,839	18,134	74,394	18,943
Kenya	1,428	215	-	-	-	-	-	-
Madagascar	5,739	1,147	6,382	1,448	3,481	1,012	5,986	1,736
Somalia	63,523	5,435	40,452	6,405	34,214	6,171	39,149	9,801
Surinam	27,408	4,032	34,090	6,180	37,620	7,892	35,114	9,062
PTOM								
Belize	643	82	1,294	237	1,422	234	5,249	915
West Indies	96,120	19,680	110,487	29,075	92,105	28,252	102,766	30,242
DOM								
Guadeloupe	119,492	25,903	122,121	31,163	111,425	37,261	108,121	37,794
Martinique	147,894	32,430	185,851	46,680	167,728	55,315	202,409	71,146
Total ACP	378,584	62,409	345,530	74,545	342,960	95,461	321,566	95,049
ACP/Extra EEC %	18.3%	18.7%	17.6%	18.5%	17.9%	19.7%	17.4%	19.0%
Total Extra EEC	2,069,896	333,455	1,968,279	402,806	1,912,026	483,970	1,850,770	498,962
Total World	2,107,881	339,808	1,979,028	405,206	1,917,520	485,330	1,855,792	500,299

Total Extra EEC: corresponds to the total exchanges of the EEC-9 with the rest of the world, i.e. net imports of the Community.

Total World: corresponds to the total exchanges of each of the nine countries of the EEC with all other countries of the world, including the Member States of the EEC.

Source: As Table 5A.1

Table 5.5

Exports of Bananas to all Destinations: 1974-1976

Q (Quantity) = 1000 mt; V (Value) = 1000 US$

Country of origin	1974		1975		1976	
	Q	V	Q	V	Q	V
AFRICA	459	54,836	353	56,996	325	58,739
ACP						
- Cameroun	75	13,174	74	20,371	75	20,000
- Ethiopia	10	1,400	11	1,936	12	2,474
- Ivory Coast	175	15,240	136	13,967	99	13,365
- Somalia	107	10,304	82	10,922	73	10,500
Non-ACP						
- Angola	66	11,439	35	7,500	45	9,500
- Mozambique	7	818	4	448	5	550
N.C. AMERICA	3,331	356,756	3,000	447,639	3,460	502,183
ACP						
- Grenada	8	1,596	13	3,183	13	3,200
- Jamaica	73	12,571	68	16,141	84	14,885
- Surinam	35	2,700	38	3,400	36	3,500
DOM						
- Guadeloupe	124	26,957	109	30,999	105	29,500
- Martinique	173	31,807	168	45,816	200	52,000
SOUTH AMERICA	1,890	164,896	2,015	216,586	1,797	199,708
ASIA	878	71,346	1,007	102,432	962	103,068
EUROPE	27	7,171	35	11,449	25	7,207
OCEANIA	7	919	9	1,329	9	1,352
WORLD	6,592	655,924	6,418	836,431	6,578	872,257

Source: FAO Trade Yearbook, vol. 30, 1976, table 48.

The Commission ruled in December 1975 that United Brands, an American-controlled multinational, had abused its dominant position on the Benelux, German, Danish and Irish banana markets. The European Court of Justice upheld three of the four infringements cited by the Commission and fined the company 850,000 EUA.

ACP bananas enter duty-free in all EEC markets. There is an imposition of a 20 per cent duty on third country imports, with the exception of Germany, which is allowed to import a quota of bananas originating in Latin American countries duty free, and quantitative restrictions in France, the UK and Italy.

The FAO estimates that with regard to the medium term there is considerable excess supply which will continue to result in downward pressure on banana prices. UNCTAD included bananas on the list of the Integrated Programme on

Commodities in Nairobi in 1976. The first step towards the conclusion of an international agreement on bananas has been taken. ACP (and DOM) - countries would not be subject to quotas but they would have to agree on a figure, based on past performance, for their total exports with the Latin American producers.

Commission experts feel that EDF funds should be spent on ways of improving the quality of ACP bananas and on aid for research rather than on large increases in productive capacity.

On the ACP side, a common organisation of ACP banana exporting countries will be set up in order to defend their interests. An EEC-ACP permanent joint group called the "Permanent Mixed Group on Bananas" has been created with the mission of examining the progress achieved in the field of banana exports by the ACP states to the EEC and formulating recommendations which it judges appropriate. Discussion in this group has shown that there are differences of view between the ACPs and the EEC on the interpretations of the Protocol.

In conclusion, the protocol on bananas of the Lómé Convention has had no tangible effect on the promotion of ACP banana exports to the Community. A rewriting of the protocol is needed and a new approach for promoting ACP banana exports to the EEC will have to be worked out if this situation is to be improved upon.

iii. STABEX

For fruit and vegetables, only fresh bananas are included in the list of commodities covered by the STABEX scheme. The following ACP countries meet the dependence threshold with respect to bananas for the period 1974-1976:-

Somalia, Jamaica, Guinea, Grenada and Tonga.

Somalia received 1,296,907 EUA (non-repayable) in 1975 to cover its decrease in export earnings for bananas due to the drought. This transfer constitutes 1.80% of the total transfer payments of STABEX in 1975 and 21.0% of the export receipts for bananas of Somalia in 1974, the previous year.

Tonga received 72,719 EUA in 1977 for bananas after the Council had decided to guarantee its export earnings whatever their destination.

At present, STABEX for fruit and vegetables is only of importance for stabilising export earnings for Somalia where bananas made up about 14% of total export proceeds for the period 1974-1976. The STABEX scheme is discussed in more detail in Part III.

iv. European Development Fund

A number of projects aimed at developing fruit and vegetable production in ACP countries have been financed by the EDF. These are listed in Table 5.6. It is expected that the 5th EDF will put more emphasis on small-scale projects for the production and marketing of fruit and vegetables.

v. COLEACP

There exists in the European Community a professional organisation of producers and traders of tropical and out-of-season fruit and vegetables of ACP-origin, called COLEACP from its French initials (Liaison Committee for ACP Fruit and Vegetables). its aim is to exchange information and to increase consumption of such fruit and vegetables in the EEC through promotional campaigns in the markets of the Community and to try and ensure that the ACP countries produce sufficient and regular quantities. For this purpose, the production and marketing possibilities in ACP countries need to be known in detail (quantities, regularity of supply, freight rate structure). COLEACP is now undertaking such a study, in the ACP states, which is supported in part by the

European Commission. It is expected that this study will be followed up by a sales promotion campaign in the Community, after the study has ended.**

Table 5. 6.

European Development Fund Fruit And

Vegetable Projects in ACP Countries *

Country	Project Type and Comments	E.D.F.	Units of Account
SENEGAL	Vegetables (1,000 ha. of market gardening BUD-SENEGAL)	2nd and 3rd fund	4,321,000
SENEGAL	Fruits (mangos,avocados citrus, bananas, pineapples)	4th fund (special loan)	4,563,000
UPPER VOLTA	Vegetables (market gardening)	4th fund	346,000
IVORY COAST	Vegetables (360 ha.of market gardening)	3rd and 4th fund	1,168,000
SOMALIA	Fruit (1,300 ha. grapefruit)	3rd and 4th fund	4,143,000
JAMAICA	Bananas (2000 acres)	4th fund (special loan)	3,067,000
GABON	Vegetables (20 ha.of market gardening)	3rd fund	-

* This list is not necessarily exhaustive.

Source: The Courier published by European Commission (various editions).

E. Lomé II Negotiations with respect to Fruit and Vegetables

The current value of exports of fruit and vegetables from ACP countries to the Community is very low in comparison to total Community imports, with the exception of a few products such as bananas and fresh and canned pineapples.It is very difficult, if not impossible, to detect a pronounced positive trade creation effect in fruit and vegetables from ACP states as a result of Lomé I. Imports of preserved pineapples are slowly on the increase but this is mainly the result of Kenya increasing its share in the EEC-market.

Imports of cut flowers, ornamental plants and other non-edible horticultural products in the EEC from ACP countries are steadily increasing, mainly from Kenya and the Ivory Coast. However, they are beyond the scope of this study.

i. Trade Concessions

Much has already been given to Lomé I in the area of trade concessions for fruit and vegetables, including processed products, such as abolition of seasonal calendars and a reduction or exemption of CCT duties for some products. But the fact that some fruit and vegetables are still subject to customs duties indicates that some of these products are "sensitive" in the Community. This applies to tomatoes,tomato concentrate,other fresh or refrigerated

** See Courier, No. 43 (p XVI).

vegetables, certain citrus and other fruits,and thus, further concessions for these"exceptions" to the general scheme will be difficult to negotiate. Furthermore, it is expected that, pending enlargement of the EEC-9 to the EEC-12, no major new trade concessions will be made. It is the view of France and Italy that too generous concessions have already been granted to Mediterranean and ACP countries.

ACP countries could negotiate that any duty or other concessions granted to non-ACP states such as the Maghreb, Spain, Greece, etc. for a particular product (and usually subject to a seasonal calendar)automatically apply to them on an equal basis.

A more precise definition of when ACP imports may become subject to the safeguard clause and how this clause will be applied could help in building up stable trade flows in fruit and vegetables between the EEC and ACP countries.

ii. EEC Enlargement

The accession of Spain,Greece and Portugal to the EEC would have a profound effect on the Common organisation for fruit and vegetables. It would reduce the import needs and ever lead to some export business surpluses for almost all European and Mediterranean type fruit and vegetables. The seasonal character of imports of fruit and vegetables into the EEC would be narrowed down considerably and market fluctuations might become more frequent and more pronounced. As Southern Europe will gain a stronger voice in EEC policy making, an appeal for more protectionist measures and for price policy as an instrument of income support will be made. A new CAP for fruit and vegetables will emerge and this could have a detrimental effect on established imports from ACP and third countries. Because of the possible implications of enlargement, measures to safeguard existing ACP trade flows need to be considered. However, with respect to the two main ACP exports to the Community, bananas and pineapples, enlargement would have a minimal effect.

iii. Bananas

Protocol no.6 (on bananas) of the Lome Convention has not fulfilled its objectives. Moreover, there are different interpretations over the terms of the protocol. In fact, what is lacking in the protocol is a clear description of the measures that need to be taken in order to increase ACP exports of bananas to the Community. ACP banana exporting countries need to improve the quality and also the marketing of their product.

EDF funds for this purpose could be solicited. In so far as multinational companies are monopolising trade in non-ACP bananas in some countries of the EEC, particularly West Germany, Benelux, Denmark and Ireland, quantitative restrictions on their imports of Latin American non-ACP bananas could be considered.

iv. STABEX

Although an extension of the list of commodities covered by STABEX to other fruit and vegetables than bananas could be desirable, it is difficult to find a single product which would meet the dependence threshold specified in the scheme. Fruit and vegetables, with the exception of bananas, do not constitute a sizeable element in export earnings for any particular ACP country although they are nevertheless a welcome source of export revenue. Thus, only vegetables, fresh or preserved, or fruit, fresh or preserved, in aggregate, are possible candidates for coverage by STABEX. This could be important particularly for Kenya, Senegal and Ethiopia.

v. Promotion of the Processing of Fruit and Vegetables	There are no import duties imposed on proposed fruit and vegetables from ACP countries. Canned fruit and vegetables enter the Community duty free, against tariffs of 20% for canned fruit juices and 22% for canned pineapple or grapefruit from third countries. In this area, ACP states gained real preference but they have not yet fully exploited these opportunities as Table 5A.9 illustrates. Kenya and the Ivory Coast are an exception here. A particular effort for the setting-up of processing facilities for fruit and vegetables in ACP countries should be made and aid from EDF and from the Industrial Development Centre could be solicited in this respect.
	There is a trend towards collaboration between multinational companies and aid-giving agencies, including the EDF, for the setting-up of small grower schemes in export horticulture, e.g. BUD-Senegal. This relocation of horticultural production, at times through direct industrial control of production, but generally through the institution of contracting, has only begun and it is likely to increase in the future, especially for processing. Such developments may need a critical examination. According to Maureen Mackintosh (Food Policy, November 1977), if large multinationals are permitted to dominate large numbers of small horticultural farms in LICs, there is a danger that contracting and small-farmer systems may turn out in years to come to have been just as detrimental in their effects on rural areas as the much criticised plantations.
vi. Mechanism for Consultation and Exchange of Information	Regular consultations between representatives of ACP states and the Commission to assist in the promotion of trade in fruit and vegetables may foster trade creation. Such a permanent joint group has been set up with respect to bananas and, although effective results are still to be gained, discussion has helped to highlight some ways to promoting trade and some of the differences of view that exist in this respect. This initiative, spelled out in Protocol no.6, could be generalised to a broader category of commodities and to some key countries,as was the case with Somalia for bananas. Consultations with respect to quality standards as they apply to imports from ACP countries could prove helpful in the future as they may become a crucial non-tariff barrier on trade when imports from ACP countries increase.

APPENDIX TO 5 PRODUCTION AND EXPORT OF FRUIT AND VEGETABLES IN ACP COUNTRIES

Production and Export of Fruit and Vegetables in ACP countries

In general, the ACP countries are relatively unimportant producers of the following products which are traded in the EEC-9: artichokes; cauliflower; cucumbers (except for Jamaica, Martinique and Trinidad); dry onions; garlic; carrots (except for Madagascar, Guadeloupe,Martinique and Jamaica); watermelons (except for Sudan); grapes (except for Madagascar); apples; pears; peaches and nectarines (except for Madagascar); plums (except for Madagascar); apricots; strawberries; raspberries and currants; hazelnuts;pistachios; almonds; chestnuts and walnuts. What is produced of these products is mainly for national consumption. For these fruit and vegetables, the Maghreb, Machrak and other Mediterranean countries are far more important producers.

Imports of fresh or refrigerated vegetables into the EEC (Table 5A.1) from ACP countries are about 3% of total imports of such vegetables in quantity terms, but about 7% in value - on the whole, therefore, rather unimportant. However, the discrepancy between quantity and value shares does indicate that ACP exports are of high per unit value as is the case for out-of-season produce,air freighted to Europe.

Kenya and Senegal are the principal ACP exporters of fresh or refrigerated vegetables to the EEC, followed by Guadeloupe and Martinique. Senegal's exports increased rapidly over the last four years. Kenya primarily exports green beans, melons and green peppers to the Community. Senegal's exports are made up of green beans, green peppers, melons, fresh tomatoes and eggplant (aubergines). Guadeloupe and Martinique produce a variety of European type out-of-season vegetables;green beans, carrots,green peas, etc.

Dried pulses: The Community imported about 13.1% of its beans and peas from ACP countries in 1976. These beans are mainly for the market in baked beans. Ethiopia is by far the most important ACP exporter of pulses to the EEC with about 56% of total ACP exports in 1976. Next are Tanzania,Kenya and Madagascar. The last two countries lost in importance over 1973-1976 while Tanzania almost doubled its exports over the same period (Table 5A.2).

Tomatoes: ACP states are relatively unimportant exporters of fresh tomatoes compared to Mediterranean countries and Eastern Europe state trading countries (Table 5A.3). The principal ACP exporter is Senegal with about 750mt per year. A processing plant for tomatoes (capacity 30,000mt per year) has been established in North-West Senegal but resulted in failure probably because of inadequate prices to farmers. In the EEC, the Netherlands is the main exporter of fresh tomatoes (produced under glass), over 300,000mt per year.

The major ACP producer of tomatoes is Nigeria followed by Sudan. The production of these countries is almost entirely for national consumption. Egypt is by far the largest tomato producer in Africa, ahead of Morocco, Tunisia and South Africa. Turkey is the largest producer in the Middle East. In Europe, Italy, Spain and Greece are the main producing and processing countries and are also large consumers (Table 5A.4).

Green Peppers: No data on ACP exports of green peppers are available. Nigeria produces over half the crop in Africa (570,000mt out of 843,000mt in 1976). Other important African ACP producers are Ivory Coast with 18,000mt and Sudan with 4,000mt. Important non-ACP African producers are Egypt (129,000mt) and Tunisia (118,000mt). Turkey is by far the most important producer of the Middle East 378,000mt. In Europe, Italy (495,000mt), Spain (462,000mt), Yugoslavia (315,000mt), Bulgaria (274,000mt), Hungary (179,000mt), Romania (150,000mt), Czechoslovakia (50,000mt) and Greece (42,000mt) are important producers.

Eggplant (aubergines): No data on ACP exports of eggplant are available. Egypt (230,000mt in 1976)produces about two-thirds of the African production. Sudan is the most important ACP producer (76,000mt) followed by Ghana (29,000mt) and Ivory Coast (17,000mt). In the Middle East, Turkey is by far the most important producer with 496,000mt in 1976; the other important producing countries are Syria (122,000mt), Iraq (88,000mt) and Jordan(40,000mt). In Europe, Italy leads with 334,000 mt,then comes Spain (90,000mt), Greece (62,000mt) and France (29,000mt).

Oranges: ACP states are unimportant exporters of oranges to the EEC. Ghana leads production among the ACP states followed by Zaire, Madagascar, Sudan and Jamaica (Table 5A.5). Most, if not all of the production is for national consumption. The major producers and exporters for the EEC market are Italy,Spain, Israel,Greece,Morocco and South Africa. Egypt and Turkey are also important producers in the Middle East. North and Central America lead world production with the USA as the principal producer (Florida and California).

Tangerines, Mandarins,Clementines and Satsumas: Japan leads world production with 3,873,000mt in 1976 followed by the USA (666,000mt) and the Mediterranean countries of Europe, Asia and Africa; Spain (656,000mt), Italy(547,000mt), Turkey(115,000mt), Morocco (158,000mt), Algeria(150,000mt), Egypt(103,000mt) and Tunisia(31,000mt). In South America, Brazil(320,000mt) and Argentina (212,000mt) are by far the most important producers. The most important ACP producers are Ethiopia with 7,000mt and Jamaica with 6,000mt. Exports of tangerines etc.to the EEC are relatively unimportant compared to exports from Mediterranean countries.

Jamaica exported 2,000mt of oranges, tangerines and clementines, and 2,000mt of other citrus fruits in 1976. Trinidad exported 600mt and 310mt respectively. Mozambique is also an important exporter of oranges,tangerines and clementines, about 16,000mt in 1976. Statistics are not available to determine what share of these exports went to the EEC.

Lemons and Limes: Italy leads production with 817,000mt in 1976 followed by the USA (653,000mt), Mexico (600,000mt), India (453,000mt),Turkey(280,000mt), Spain (233,000mt), Argentina (224,000mt), Greece (180,000mt), Peru (92,000mt), Lebanon (81,000mt), etc. The most important ACP producers are Sudan (36,000mt), Ghana (32,000mt) and Jamaica (20,000mt). ACP exports to the EEC are insignificant.

Grapefruit and Pomelo: the USA count for more than half of the world production (2,585,000mt out of a world total of 4,000,000mt in 1976). The second major producer is Israel with 460,000mt. The most important ACP producers are Sudan (53,000mt), Jamaica (30,000mt) and Trinidad (11,000mt). No data are available on ACP exports to the EEC.

TABLE 5A.1 IMPORTS OF FRESH OR REFRIGERATED VEGETABLES IN THE EEC

Q (Quantity)=M. tons ; V (Value) = 1,000EUA; . information not available; - zero or negligible.

	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Cameroun	-	-	-	-	-	-	206	114
Ivory Coast	601	325	799	410	11,597	390	152	113
Ethiopia	8,530	4,539	5,827	3,294	3,203	1,536	1,583	988
Upper Volta	331	254	452	300	650	580	826	964
Jamaica	438	129	521	197	833	291	442	183
Kenya	5,551	3,616	6,182	4,869	6,858	5,818	7,892	7,456
Mali	189	110	394	252	540	468	689	549
Niger	209	152	209	157	162	178	292	349
Rwanda	89	63	488	333	344	267	462	389
Senegal	2,753	1,878	3,117	2,181	4,030	3,684	6,298	5,518
Surinam	236	223	255	261	402	402	349	468
Trinidad and Tobago	19	22	62	58	211	180	-	-
DOM								
Guadeloupe	.	.	.	.	4,135	2,520	3,645	2,793
Martinique	.	.	.	.	3,242	2,099	2,175	1,914
PTOM								
West Indies	.	.	.	.	949	451	1,110	557
Total ACP	18,946	11,311	18,306	12,312	17,830	13,814	19,191	17,091
ACP/Extra EEC%	3.1%	7.4%	2.9%	7.6%	3.0%	8.1%	2.7%	6.7%
Total Extra EEC	613,586	153,088	626,351	162,805	601,184	170,756	702,796	253,656
Total World	.	.	.	.	2,353,005	644,677	2,516,802	889,710

Total Extra EEC: corresponds to the total exchanges of the EEC-9 with the rest of the world, i.e. net imports of the Community.

Total World: corresponds to the total exchanges of each of the nine countries of the EEC with all other countries of the world, including the Member States of the EEC.

Source: Evolution des échanges commerciaux entre la Communauté et les Etats ACP, première partie: classement par produits, Brussels, Commission des Communautés Européennes, VIII-A-3, VIII/373/78-F, 3 avril 1978, p.17.

TABLE 5A.2 IMPORTS OF DRIED (SHELLED) PULSES IN THE EEC

Q (Quantity) = M. tons ; V (Value) = 1,000EUA; . information not available; - zero or negligible.

	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Djibouti	.	.	.		701	242	-	-
Ethiopia	50,825	10,509	46,579	19,943	51,990	15,753	41,107	12,984
Kenya	10,004	2,446	4,760	2,021	7,035	2,460	7,219	2,519
Madagascar	15,457	2,595	8,082	3,761	5,969	2,301	7,090	2,698
Malawi	8,293	1,082	1,122	317	1,021	289	1,591	708
Sudan	1,033	312	1,143	572	327	108	1,308	578
Tanzania	8,548	2,171	9,585	3,528	13,633	6,582	15,315	8,313
Total ACP	94,160	19,115	71,271	30,142	60,676	27,735	73,630	27,800
ACP/Extra EEC%	13.0%	11.5%	14.8%	15.4%	15.9%	16.5%	13.1%	14.1%
Total Extra EEC	722,158	165,566	482,815	196,130	506,128	168,508	563,727	196,769
Total World	.	.	.	.	649,726	215,510	700,295	244,962

Source and Explanatory Notes: As Table 5A.1.

TABLE 5A.3 EXPORTS OF FRESH TOMATOES: 1974 - 1976

Q (Quantity) = M. tons; V (Value) = 1,000$

Country	1974		1975		1976	
	Q	V	Q	V	Q	V
AFRICA	148,689	42,978	147,512	43,862	120,689	33,304
ACP States						
- Ethiopia	100	20	100	25	100	25
- Kenya	56	20	1	.	45	18
- Senegal	357	103	752	204	750	200
- Tanzania	16	9	10	1	19	14
- Tonga	44	30	53	34	62	38
- Trinidad	35	28	39	28	39	28
Non-ACP States						
- Morocco	145,698	42,082	144,054	42,630	115,000	32,000
-S.Africa	340	95	340	96	45	16
- Egypt	1,976	613	2,188	856	4,700	1,000
- Tunisia	22	3	2	1	.	.
N.C. AMERICA	378,984	134,222	424,496	199,034	454,828	162,293
STH AMERICA	4,966	1,346	3,046	1,186	2,398	961
ASIA	130,519	10,767	83,679	9,190	84,624	10,716
EUROPE						
- Bulgaria	130,340	17,000	103,718	18,500	129,499	21,000
- Netherlands	327,942	183,957	302,737	213,953	321,654	210,568
- Romania	136,800	35,000	106,100	32,877	117,000	34,000
- Spain	172,986	41,906	216,398	74,259	116,840	71,347
OCEANIA	367	304	337	287	377	302
WORLD	1,503,456	495,896	1,469,627	632,170	1,543,777	583,859

Source: FAO, Trade Yearbook, vol 30, 1976, table 58.

TABLE 5A. 4 PRODUCTION OF TOMATOES IN 1,000 mt.

Country	1961-65	1974	1975	1976
AFRICA	2,198	3,410	3,942	4,120
- ACP States				
- Ethiopia	9	9	9	9
- Ghana	17	103	90	97
- Nigeria	186	220	230	235
- Senegal	2	10	15	15
- Sudan	99	135	140	142
- Tanzania	8	14	14	15
- Non-ACP States				
- Algeria	124	121	135	135
- Egypt	1,069	1,729	2,107	2,230
- Libya	55	100	192	204
- Morocco	233	250	315	322
- S. Africa	184	225	250	260
- Tunisia	96	238	267	275
MIDDLE EAST				
- Israel	101	190	278	210
- Syria	133	396	375	450
- Turkey	1,199	2,150	2,300	2,355
EUROPE	8,207	13,133	12,704	11,881
- Bulgaria	738	864	569	768
- France	525	563	639	600
- Greece	408	1,635	1,627	1,500
- Italy	2,875	3,637	3,512	3,015
- Netherlands	257	372	347	360
- Portugal	333	768	840	630
- Romania	465	1,232	968	1,200
- Spain	1,300	2,399	2,488	2,054
N.C. AMERICA	6,144	9,259	10,586	8,629
- Trinidad	3	11	10	10
SOUTH AMERICA	1,278	2,174	2,071	2,240
ASIA	5,618	8,858	9,703	9,993
OCEANIA	192	237	233	239
- Tonga		1	1	2
WORLD	25,957	40,881	42,830	40,802

Source: FAO Production Yearbook, vol 30, 1976, table 43.

TABLE 5A.5 PRODUCTION OF ORANGES IN 1,000 mt.

Country	1961-65	1974	1975	1976
AFRICA	1,788	3,066	2,883	3,080
- ACP States				
- Ghana	26	160	165	165
- Kenya	6	12	12	13
- Madagascar	14	91	83	84
- Senegal	3	12	16	16
- Sudan	29	40	41	42
- Zaire	60	95	98	102
- Non ACP States				
- Algeria	283	350	337	340
- Egypt	289	819	856	900
- Morocco	465	677	477	566
- S. Africa	461	632	600	640
- Tunisia	58	59	76	86
MIDDLE EAST				
- Israel	563	1,266	1,052	1,200
- Gaza Strip	68	138	145	152
- Iran	42	100	117	119
- Turkey	240	510	551	561
EUROPE	2,964	4,397	4,263	4,034
- Greece	319	583	538	540
- Italy	890	1,770	1,580	1,624
- Spain	1,623	1,921	2,016	1,737
- Portugal	127	114	120	123
N.C. AMERICA	5,847	10,876	12,194	12,404
- Jamaica	72	39	40	41
- Trinidad etc	16	12	3	12
S. AMERICA	3,202	8,033	8,102	9,134
ASIA	2,810	4,799	4,643	4,892
OCEANIA	207	349	371	393
WORLD	16,855	31,642	32,609	34,091

Source: FAO Production Yearbook, vol 30, 1976, table 62.

TABLE 5A.6 PRODUCTION OF PINEAPPLES IN 1,000 m.t.

Country	1961-65	1974	1975	1976
AFRICA	322	738	738	789
- ACP States				
- Cameroon	2	18	18	18
- Ghana	21	35	16	27
- Guinea	12	13	14	15
- Ivory Coast	32	228	233	240
- Kenya	22	45	73	100
- Madagascar	7	54	53	46
- Swaziland	4	21	21	21
- Tanzania	38	44	45	46
- Zaire	26	31	31	31
- Non-ACP States				
- Angola	11	22	22	25
- Mozambique	16	18	12	13
- S. Africa	123	193	184	190
N. C. AMERICA	1,232	1,095	1,119	1,166
- Martinique	18	25	30	32
- USA	829	635	617	626
S. AMERICA	473	840	991	982
ASIA	1,537	2,450	2,396	2,431
EUROPE	3	2	2	2
OCEANIA	93	126	113	129
- Fiji	1	1	1	1
- Papua N. Guinea	5	8	8	8
- Somoa	3	5	5	5
WORLD	3,660	5,250	5,357	5,499

Source: FAO Production Yearbook, vol 30, 1976, table 64.

TABLE 5A.7 IMPORTS OF PINEAPPLES IN THE EEC

Q (Quantity) = M. tons; V (Value) = 1,000 EUA; . information not available; - nil or negligible .

Country of origin	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Cameroon	.	759	2,991	1,066	3,371	1,457	5,050	2,308
Ivory Coast	.	13,445	50,361	17,482	57,207	23,655	52,272	23,713
Kenya	.	1,093	1,910	1,155	1,774	1,066	1,339	849
DOM								
Guadeloupe	.	75	-	-	-	-	-	-
Martinique	.	1,037	1,618	621	-	-	1,088	347
Total ACP	.	15,298	55,262	19,703	62,352	26,179	58,661	26,870
ACP/Extra EEC%	.	85.3%	90.9%	89.9%	91.0%	92.1%	82.7%	86.8%
Total Extra EEC	.	17,934	60,791	21,914	68,250	28,406	70,884	30,959
Total World	.	19,046	62,069	22,401	69,756	29,089	71,885	31,470

Source and Explanatory Notes: As Table 5A.1.

TABLE 5A.8 IMPORTS OF PRESERVED PINEAPPLES (CANS AND PACKAGES OF DIFFERENT WEIGHTS) IN THE EEC

Q (Quantity) = M. tons; V (Value) = 1000 EUA; . information not available.

Country of origin	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Ivory Coast	.	.	51,601	23,663	45,633	23,463	49,010	28,317
Kenya	.	.	5,840	2,774	11,656	6,017	15,295	9,263
Swaziland	.	.	2,177	974	4,767	2,045	4,559	2,328
DOM								
Martinique	.	.	7,944	3,510	10,557	5,430	10,909	5,991
Total ACP	.	.	59,618	27,411	62,056	31,525	68,864	39,908
Total ACP/Extra EEC%	.	.	35.6%	37.4%	38.2%	41.1%	40.9%	44.3%
Total Extra EEC	.	.	167,448	73,254	162,382	76,726	168,198	90,003
Total World	.	.	168,562	73,894	163,765	77,544	170,395	91,206

Source and Explanatory Notes: As Table 5A.1.

TABLE 5A.9 IMPORTS OF PRESERVED FRUIT (WITH OR WITHOUT ALCOHOL OR SUGAR), INCLUDING PINEAPPLES IN THE EEC

Q (Quantity) = M.tons; V (Value) = 1,000 EUA; . information not available; - nil or negligible.

Country of origin	1973		1974		1975		1976	
	Q	V	Q	V	Q	V	Q	V
ACP								
Ivory Coast	52,643	17,865	53,076	24,211	50,198	25,860	53,938	30,902
Jamaica	2,637	1,097	2,689	1,237	3,526	1,901	1,422	748
Kenya	9,917	2,995	6,517	3,054	13,318	6,536	18,552	11,030
Malawi	-	-	-	-	-	-	783	546
Trinidad and Tobago	445	167	1,447	622	251	112	-	-
Swaziland	5,610	1,866	5,500	2,586	7,053	3,041	8,429	4,062
PTOM								
Belize	.	.	.	.	1,229	623	1,386	743
DOM								
Martinique	.	.	.	.	11,012	5,652	11,335	6,192
Total ACP	71,252	23,990	69,229	31,710	74,346	35,450	83,124	47,288
ACP/Extra EEC%					10.2%	10.6%	9.6%	11.7%
Total Extra EEC	.	.	.	.	729,099	334,039	863,963	404,251
Total World					957,898	461,759	1,125,346	558,771

Source and Explanatory Notes: As Table 5A.1.

Other Citrus Fruits NES : the major ACP producers are Sierra Leone (110,000mt, 1976), Swaziland (75,000mt), Ivory Coast (56,000mt) and Tanzania (33,000mt). Angola is also an important producer with 80,000mt. Swaziland is the principal ACP exporter with 49,500mt in 1976.

Pineapples: Ivory Coast and Kenya are large ACP producers of pineapples and have an important export trade in fresh and preserved pineapples. Particularly the Ivory Coast has developed its production and export considerably since 1961-65, see Tables 5A.6, 5A.7, and 5A.8.

Over 80% of the fresh pineapples imported in the Community originate in ACP states and the Ivory Coast takes up about 90% of the ACP exports of pineapples to the EEC; the remainder is filled by Cameroun and Kenya. Something similar, although less pronounced, applies with respect to preserved pineapples, where ACP states take about 40% of the imports in the EEC and whereby the Ivory Coast fills about 71% of the ACP share. The rest is taken up by Kenya and Swaziland. Martinique is also an important supplier of canned pineapple in the EEC market.

Over the last five years, Ivory Coast's production and exports to the EEC have remained fairly stable while Kenya's production and trade have increased considerably each year. The production of Madagascar, Swaziland, Tanzania and Zaire, other main producers in Africa, remains stable around the 1974 level.

Preserved Fruit: Imports of preserved fruit from ACP countries in the Community are about 10% of total imports in the Community. The Ivory Coast is the principal supplier (65% of total ACP imports in the EEC in 1976) followed by Kenya and Swaziland. Imports from Martinique are also important (Table 5A.9). Kenya's share in the ACP imports is steadily increasing from 14% in 1973 to 22% in 1976. Most if not all of the ACP imports of preserved fruit in the Community are canned pineapples.

Avocados: Cameron is the major African producer with 21,000mt in 1976 followed by South Africa (14,000mt), Zaire (11,000mt), Madagascar(6,000mt) and Ghana (4,000mt). Martinique (4,000mt) and Jamaica (3,000mt), are important producers in the Caribbean. Mexico is the leading producer in the world with 293,000mt in 1976, followed by the Dominican Republic (131,000mt) and Brazil (125,000mt). No data were available on ACP exports to the EEC.

Mangoes: India (8,847,000mt in 1976) leads world production, followed by Brazil (635,000mt), Pakistan (600,000mt),Mexico (425,000mt), Bangladesh (290,000mt), Haiti(283,000mt), and the Philippines (210,000mt). The most important ACP producers are Tanzania (172,000mt), Zaire (70,000mt), Sudan (61,000mt) and Sierra Leone (52,000mt). No data are available on ACP exports to the EEC.

Papayas: the major producers are India (200 mt in 1976), Mexico (183mt), Brazil (114mt) and Ecuador (78mt). The most important ACP producer is Jamaica (37mt). The major African producers are Mozambique (36mt) and South Africa (20mt). No data are available on ACP exports to the EEC.

Cashew Nuts: the major producers in Africa in descending order are Mozambique (200,000mt in 1976), Tanzania (83,397mt) and Kenya (20,000mt). The other major producers in the world are India (243,000mt) and Brazil (27,000mt). No data are available on ACP exports to the EEC.

Bananas: Table 5A.10 showing the production of bananas for different countries indicates that several African countries, such as Burundi, Tanzania and Uganda, which are not exporters are nevertheless important producers and consumers of bananas. However a confusion with cooking bananas (plantains) in the compilation of production statistics may have occurred.

TABLE 5A.10 PRODUCTION OF BANANAS IN 1,000 mt

Country	1961-65	1974	1975	1976
AFRICA	3,014	4,124	4,207	4,319
-ACP States				
-Burundi	690	846	897	915
-Cameroon	205	94	96	96
-Cent.Afr.Emp.	45	68	70	71
-Comoros Isl.	75	93	93	96
-Ethiopia	38	63	65	67
-Guinea	87	65	60	70
-Ivory Coast	128	208	194	170
-Kenya	132	183	187	192
-Liberia	55	62	63	64
-Madagascar	144	325	421	395
-Somalia	126	160	130	150
-Sudan	35	80	80	83
-Tanzania	468	720	750	770
-Uganda	293	320	320	327
-Non-ACP States				
-Angola	195	320	250	300
-Egypt	58	110	112	115
-Mozambique	25	68	60	65
-South Africa	41	96	100	105
N.C. AMERICA	4,526	6,621	6,902	7,065
-ACP States				
-Jamaica	202	132	127	140
-DOM				
-Guadeloupe	164	162	140	140
-Martinique	163	220	184	196
-Non-ACP States				
-Costa Rica	462	1,151	1,240	1,240
-Dominican Rep.	318	302	302	302
-Guatemala	337	500	520	550
-Honduras	750	1,360	1,400	1,400
-Mexico	856	1,070	1,241	1,340
-Nicaragua	224	305	310	314
- Panama	561	977	989	990
S.AMERICA	8,446	13,226	12,499	13,963
-ACP States				
-Surinam	6	46	46	46
-Non-ACP States				
-Brazil	4,087	6,974	7,081	8,121
-Colombia	577	954	1,050	1,100
-Ecuador	2,661	3,397	2,569	3,000
-Venezuela	749	937	860	890
ASIA	7,984	11,377	12,258	11,771
EUROPE	372	427	385	355
-Portugal	31	26	23	26
-Spain	340	399	361	327
OCEANIA	828	989	1,001	1,032
-ACP States				
-Samoa	39	22	22	36
-Papua N. Guinea	650	825	840	855
WORLD	25,180	36,763	37,252	38,504

Source: FAO Production Yearbook, Vol.30, 1976, Table 65.