

**THE CONSEQUENCES OF EC '92, GATT AND DEVELOPMENTS IN EASTERN
EUROPE FOR EXPORTS FROM DEVELOPING COUNTRIES TO THE EUROPEAN
MARKET**

PRODUCT REPORT: PROCESSED TROPICAL FRUIT AND VEGETABLES

SOMO

Amsterdam, October 1991

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INTRODUCTION

Trading conditions in the European market will change rapidly over the next few years as a consequence of several important developments. First of all there is the process of the realization of the internal market of the European Community. Then there is the final outcome of the GATT Uruguay Round of trade negotiations, which will have effects on EC trade regimes. Finally, a major issue in Europe is the rapid development of closer economic co-operation between the EC and the countries of Eastern Europe. All of these developments will have serious consequences for suppliers from outside Europe and especially for suppliers from developing countries.

In some cases, competition will be heavier, and they will have to meet new demands if they are to be successful on the European market. In other respects Europe will offer them new opportunities and more transparency in marketing conditions.

The aim of this report is to make an inventory of the effects of these developments on the EC market for suppliers of tropical processed fruit and vegetables from developing countries.

In Chapter I the general market situation for this product group is briefly sketched. In Chapter II we go further into the consequences of the process of economic unification in the EC. In Chapter III (likely) outcomes of the GATT-Uruguay round are described and in Chapter IV we estimate the possible effects of developments in Eastern Europe and the closer co-operation between the EC and these countries.

Finally, in Chapter V we formulate general conclusions and recommendations for suppliers from developing countries.

CHAPTER I: THE EUROPEAN MARKET FOR PROCESSED TROPICAL FRUIT AND VEGETABLES

I.1 Consumption

In general the European market for processed fruit and vegetables is not growing at present. This is due to the fact that European consumers have developed a strong preference for fresh food and especially fresh fruit and vegetables, rather than the preserved varieties. Health considerations are becoming more and more important for food consumption as far as European consumers are concerned. They are interested in products which contain less fat, sugar and calories. Organically grown food products are becoming more and more popular. European consumers are also very aware of issues such as pesticide residues, food additives, radiation, etc. In general the health and environmental dimension of food products has become much more important in recent years both for consumers and for retailers trying to adapt their product range to changing consumer habits and who are partially influencing the development of those consumer habits.

Overall consumption of processed fruit and vegetables is therefore growing very slowly. This does not mean, however, that there are no specific growth segments in this market.

The consumption of fruit juices is growing fast in all European markets. Fruit juices, especially fresh ones, are consistent with growing awareness of health, and have become socially acceptable as an alternative to alcoholic beverages.

The consumption of frozen fruit and vegetables is also growing rapidly at the expense of the traditional canned products. Frozen fruit and vegetables are considered more healthy because the process leaves more vitamins in the product.

The consumption of processed tropical fruit and vegetables is also growing at the expense of traditional European fruit and vegetables, leading to an increasing import penetration of the market.

In the canned fruit segment products in syrup are being rapidly replaced by products in their own juice or water. These products contain less sugar and are becoming more popular because they are consistent with current European consumer preferences.

Appendix 1 provides a brief survey of some of the major European markets.

I.2 Imports into the EC and main suppliers

In the following section a short survey is given of total imports into the EC from third countries of the product groups involved in this study. The major supplying countries are also listed.

Pineapples

Imports of pineapple totalled 299322 tons in 1989. Of this total 249296 tons came from developing countries.

Table 1: Main suppliers of preserved pineapple to the EC market in 1989, in tons

	EC12	Germany	France	Italy	UK
Kenya	45347	9314	n.a.	n.a.	14448
Thailand	108615	39189	21582	7269	9303
Philippines	41975	9167	2491	4917	14453
TOTAL	299322	91143	39564	26532	64940

Germany is by far the most important market, followed by the UK. The world market for canned pineapple has been experiencing an overproduction crisis since 1985/86. Production by the major producing countries increased from 845000 tons in 1987 to 906342 tons in 1989. Exports increased from 617000 tons to 669560 tons (see also Appendix 2). A good illustration of the depressed situation on the canned pineapple market is provided by price developments on the French market: in 1984 the mean price was 6.91 Ffr./kg, in 1987 4.31 Ffr./kg, in 1989 it was 4.02 Ffr./kg and in 1990 it had fallen to 3.94 Ffr./kg: a price fall of 57% in less than six years. This situation is not confined to the French market. Overall prices at the end of the 1980s were almost half the level of prices in 1985. Most producers in developing countries were therefore making losses.

Apricots

Imports of processed apricots totalled 29722 tons. The main suppliers from outside the EC were Morocco (17000 tons) and South Africa (9612 tons).

Peaches

Imports of peaches totalled 24371 tons, which are almost entirely supplied by South Africa.

Fruit juices

Imports totalled 850000 tons of which 635000 tons were supplied by developing countries. Main suppliers are Brazil (329000 tons), Israel (171000 tons), Argentina (38000 tons) and Morocco (35000 tons).

Asparagus

Imports of preserved asparagus totalled 53300 tons. The main supplier was China (35100 tons). Other suppliers were Peru (9123 tons), Taiwan (4309), South Africa (1378), Lesotho (634) and Mexico (448). The most important EC market is Germany, which imports 33618 tons, of which 29777 tons were supplied by the People's Republic of China, the other suppliers being Peru (1330 tons), Taiwan (162 tons) and South Africa (1185 tons). Imports to the French market were about 12000 tons net, the most important suppliers being Peru and Spain.

Artichokes

Imports of artichokes from outside the EC totalled only 410 tons. The suppliers were Morocco and Lebanon.

I.3 Distribution channels

I.3.1 Concentration in food retailing

The dominant feature of commercial food distribution outlets in Western Europe (and also in the USA) at this moment is the growing strength of the supermarket chains. An indication of their growing importance is the increasing market share of the supermarkets in total food sales. There are, however, considerable differences in the market share of the supermarkets amongst the EC countries (see also Appendix 3). In Italy and

Belgium the market share of the small independent groceries is still very large, while in Germany, France, the UK and the Netherlands the big supermarket chains have attained a very dominant position in food retailing.

In France self-service supermarkets and hypermarkets now account for about 50% of food sales. This market share is still increasing. The largest French integrated retail supermarket chains are Carrefour, Casino, Printemps and Auchan. Independent retailers have, however, been able to maintain their position by developing new forms of co-operation. The Le Clerc and Intermarche organizations, which rank in the top five French retailers, are based on a hybrid form of organization which combines independence of individual supermarket managers with the advantages of centralized buying.

In the UK the large integrated supermarket chains have a dominant position in food retail sales. The largest companies here are Marks & Spencer, Sainsbury, Tesco and Argyll.

Large integrated supermarket chains and voluntary chains of independent retailers also dominate the picture of food retailing in The Netherlands. Their market share increased considerably during the 1980s, and is now approximately 75% of food turnover. The largest groups are AHOLD, EDAH, VENDEX and ALDI.

In Germany the food retailing sector is equally dominated by large integrated chains of supermarkets and by voluntary associations of independent supermarkets. Together they have a market share of about 80%. Of the integrated chains the most important are ASKO/Schaper/Massa, Allkauf, Plaza, Globus, Hurler, SB-kauf, Mann/Werthauf, and RHG-Leibbrand. Of the groups the most important are REWE, Edeka, Spar and Markant. The most important discount store chain is ALDI.

In Belgium more than 50% of food is sold by independent non-associated retailers. The large integrated supermarket chains have a market share of 30%. The groups of associated retailers have a market share of 17%. The three largest retail companies in Belgium are Delhaize Le Lion, GIB (GB-INNO-BM) and Colruyt.

The low concentration in the Italian retail trade is illustrated by the fact that in 1987 the sales of the five biggest supermarket chains accounted for only 3% of total retail trade. In Italy the traditional grocery store still accounts for 85% of turnover in the food sector. Both in Belgium and Italy, however, the number and the market share of supermarkets and hypermarkets are growing.

Concentration in the food retail sector is gaining pace, not only from the autonomous growth of the supermarket chains, but also from the fast-growing number of takeovers

in the sector.

A third feature of the growing strength of the integrated supermarket chains is their fast-growing international co-operation. One of the best examples of this is Associated Marketing Services AG, based in Switzerland. Participating in this group are ERA, a co-operation group of ARGYLL (GB), CASINO (Fr), AHOLD (NL), MIGROS (CH), Dansk Supermarket (DK), KESKO (SF), ICA (S), Rinascente(It), Mercadone(E) and recently Allkauf in Germany. Associated Marketing Services will develop common marketing, buying and private-label production programmes for its members. This kind of co-operation has far-reaching implications for all suppliers to these concentrated retailer groups. There is a general shift of power from the producers/suppliers to the retailers. The retail-buying combinations will develop joint programmes for new products which they will ask producers to develop for them. If individual retailers are too small to ask the big food-processors to develop special product-lines for them, they can do so much more easily if this product is introduced in several European countries at the same time. Furthermore, the retailers can demand higher product-margins of the producers as well as money to introduce, display and promote new products.

The concentration process in the food-retailing sector, promoted by the large integrated supermarket chains, has had consequences at several levels.

At a horizontal level independent retailers have established central buying organizations from which all associated members can profit. This co-operation is, however, often more loose than in the integrated supermarket chains. Individual managers of associated supermarkets remain responsible for their results and still have considerable autonomy in buying, assortment, promotion etc.

Then at the producers' level we can also see a strong process of concentration. The big European food producers such as Unilever, Nestle, Jacobs-Suchard, Douwe-Egberts, BSN, etc, have repeatedly announced bigger and smaller takeovers in order to buy established brand names and the market shares of other companies.

Then finally the concentration process in retailing has consequences for the wholesale sector. Retail chains are increasingly penetrating into wholesale activities, and even into the importing business itself.

Apart from changes in the structure of food production and distribution, the concentration process in the retail sector has consequences for the whole way the retail business operates. In the following sections we will examine some issues which are of central importance for the food retail business today.

I.3.2

Product positioning and product development

The European food market is saturated. It is therefore essential for all who operate on this market to look carefully for new marketing opportunities (and even to help develop new consumer preferences). In fact we can speak of a "battle for a place on the supermarket shelf". Supermarkets naturally look for ways of optimizing profits and minimising costs in a market not showing substantial overall growth. One of the most important ways of optimizing results is to develop an effective strategy for product positioning and product development. The introduction of new products is carefully studied in order to minimise the risk of failure. This means that only those products are allowed on the supermarket shelves which are almost certain of success in a particular market-niche. It is occurring increasingly often that producers actually have to pay to have their product displayed and promoted by the supermarkets. In some cases producers have to pay a fine if a newly introduced product is not successful. All these developments are reinforced by the fact that the number of new products is rapidly increasing, while supermarket space lags behind.

While producers have concentrated their efforts in recent years on redefining their core activities and strengthening their position in brand names, this strategy is now under attack from the large food multiples, who are developing their own private-label products. We call this backward integration in so far as these products are produced in company-owned production facilities, but in many cases these products are ordered from smaller independent producers. More recently the big food retailers have initiated a process of upgrading their private labels. They are developing new product lines which have a high quality image and compete directly with the established brand-names. This strategy aims at increasing gross margins for retailers because brand-names are usually situated at the high end of the market, and fetch higher prices, while 'private labels' were traditionally situated at the low end (cheapest segment) of the market. Between the products of producers with an established brand name and the private label products of the retailer groups there is hardly any room left for the unknown and unsupported labels of smaller producers and suppliers.

Another factor which is closely related to the concentration process is that both food producers and supermarkets are trying to introduce European brands. This is, however, no easy business. Consumer tastes and habits still vary greatly amongst the various European countries.

While there is little overall growth in sales of processed fruits, they are considered

valuable by supermarkets because they offer a more than average margin and profits. Supermarkets will closely follow developments in consumer preferences for healthier foods and environmental concerns. For processed fruits this means broadening the assortment, with products in their own juice or water, with no sugar added. Smaller portions are also needed, because of smaller households and trends towards individualization.

As is the case with other food products, supermarkets will be very careful when introducing new products onto their shelves. The situation for processed fruit and vegetables is different from that for many other food products because producer concentration is not so high. Nevertheless we can see the same tendency: supermarkets are willing to include in their assortment the well-known brands like Delmonte etc., which are highly priced, while on the other hand developing their own private label products either as low-priced products or as own-brand specialties.

In the UK, for example, Delmonte has a 16% market share in processed fruit, but the share of private labels is growing: private labels now make up half of total sales of processed fruit. In Germany the main suppliers of brand-name processed fruit are Libby (10% market share) and Delmonte (9% market share). But almost 80% of the German market consists of private labels. In France private labels have a market share of 20% in processed fruit, but for marmalades and jams their market share is 40%.

I.3.3 Total quality management

Another very important aspect of food-retailing today - in fact, in all sectors of European business - are the increasing efforts to achieve total quality management. In essence this concept means both for producers and traders that they have absolute control over all aspects of their business and that there is a no-fault relationship with their clients. In the most limited sense total quality control means that products and services delivered have a consistently high quality and do not show any defects. In a broader sense it also implies just-in-time deliveries and a good after-sale service relationship with clients. In food retailing it means primarily that product quality standards are constantly rising and that only those suppliers are accepted who show a consistent overall satisfactory performance in terms of product quality, punctual delivery, and service.

I.3.4

Logistics

The optimizing of financial results in retailing has also meant increased attention to the logistical dimensions of the business. Many different products are sold, all with specific selling characteristics. Some products have a high turn-over speed, others a much lower. Some products are high-volume sellers, while others are specialities sold in small quantities, and so on. Logistical management in retailing aims at assuring a constant supply of all goods in the chosen assortment while on the other hand minimising the costs of transport, storage and stocks. Nowadays all the leading supermarkets have a central distribution system through warehouses managed by themselves or by dedicated outside operators. On the retail side, automation systems are being rapidly introduced which register sales of certain products and relate these to current stocks to facilitate just-in-time ordering of new deliveries, either from the central warehouse or from the manufacturer. Retailers are naturally looking for possibilities to let their suppliers pay for the high costs of buffer-stocks. This rapid development of sophisticated logistical management means that suppliers have to be able to fit into the logistical systems of the retailers. If they are unable to do so, they will never be able to get their product into this marketing outlet, even if they meet all the price and quality demands.

I.3.5

Packaging

Another consideration which is very important in food retailing is the packaging of the product. There are three major dimensions to packaging: one is that the packaging of food-products has to meet the requirements of the retailers' logistical system. They are constantly looking for new methods of product packaging which reduce space and handling costs. The second dimension to packaging is that it is an instrument of product promotion. The packaging of a product therefore has to match the desired image of the product. The third dimension of packaging, which will become more and more important in the 1990s, is the environmental aspect. From a logistical point of view packaging formats will be more and more standardized, as with the Euro-pallet in the fresh fruit and vegetable trade. Food products will be packed in standard volumes and modules which are easy to handle and transport and which fit well into the supermarket shelves. From the environmental point of view, the most important development will be increasing pressure from the EC and national authorities on the distribution trade and processing industry to reduce the quantity of packaging materials which have eventually to be burned or dumped. Packaging materials have to be developed which are reusable and/or which can be recycled by the trade. The strictest regulations for packaging are expected in the Netherlands and Germany. The new German legislation distinguishes

between three types of packaging: sales-packaging, that is the packaging of a product as it finally reaches the consumer; gross-packaging, i.e. the packaging of a product at the intermediate level; and transport packaging, such as pallets, crates, etc, for transporting the product from producer to distributor. From 1 December 1991, no transport packaging may be deposited at public waste dumps. For gross-packaging the new law comes into effect on 1 April 1992, and for consumer packaging 1 June 1993 is the starting date. This means that the distribution trade and the processing industry will have to develop new systems of either re-using the packaging or for recycling the packaging material. Imported products fall under the same legislation.

A system of collection and recycling has been jointly established by German industry and trade which is called the 'Duales System Deutschland GmbH'. This institution certifies products by way of a so-called 'Green Dot'. Suppliers of products can sign a licence agreement, and pay a certain amount per product for this. Their products are tested for environmental suitability, and if they leave no waste and fit into a recycling system they receive the 'Green Dot'. This has very important implications for products from third countries: if the product does not fit into a recycling system or is not completely waste-free, it will not receive the 'Green Dot' and those products will not be accepted by the retailers, because these can be held personally responsible for the waste problems those products create. In the Netherlands the Ministry for the Environment has negotiated an agreement with the distribution trade and industry to considerably reduce packaging waste. If those goals are not met, the Ministry will introduce new legislation requiring business to reduce packaging waste.

A programme for solving the packaging waste problem is an important component of the recently presented EC internal market programme for the distribution sector. Consultation between the distribution sector and the European Commission will eventually lead to a programme in which the sector commits itself to adopt new methods of packaging which will limit the waste problem.

I.3.6 Implications for trade in processed fruit and vegetables and requirements for suppliers from developing countries

As for other food products the trade in preserved fruit and vegetables is affected by the concentration process in the retail sector. Exporters from developing countries will be increasingly confronted with the centralized buying power of the supermarket chains, while other outlets like small retailers and specialty shops will become less important in terms of volume of sales and market share.

For suppliers from developing countries this means that they have to make a fundamental strategic decision: either they aim at offering a standard product at a very low price or they try to develop a speciality product which supermarkets are willing to accept as 'something special'. The former option has the disadvantage that competition is very fierce and prices are low. It is very difficult for new suppliers to establish themselves on an already saturated market. The second strategy is obviously much more difficult to pursue, but offers good marketing prospects and higher margins.

Quality considerations will also become even more important in the 1990s than they are now. Retailers will accept suppliers from developing countries only if they meet all their requirements. Product quality is one of these. Suppliers from developing countries will have to develop total quality control systems which aim at zero production error. Damage or poor quality in food products is simply not tolerated by the retailers. This is also very true for the product group of processed fruit. In the developed countries this special attention to quality considerations has increased the importance of international norms and standards for top-quality suppliers. For every sector a quality certificate has been developed which is known as the ISO norm. The most recent version of this is the ISO-9002 certificate. Only top-quality suppliers with an integrated quality management system can receive this certificate. Retailers prefer suppliers of 'private label' producers with this quality certificate, because it assures them of top quality deliveries (cf also Chapter II). Apart from these standards, developed by the industry itself, processed food products have to be consistent with all the national and EC regulations on health, quality, ingredients, additives, packaging, and so on. Since all these regulations are being adopted in the context of the realization of the single European market, we shall return to this in Chapter II, which specifically deals with this subject.

Suppliers from developing countries not only have to meet retailers' quality requirements but must also provide appropriate volumes and meet supply deadlines. As we have seen above, automation in the retail business has led to highly professional systems of stock management and distribution. Only those suppliers who can meet the requirements of the present logistical systems of the retailers will be accepted. This means that production and shipments will have to be carefully planned in accordance with the needs and delivery schemes of the importers or retailers. The bulk of the assortment of the supermarkets will be supplied by those who offer the safest and most adequate supply system. Smaller producers who cannot be integrated into the logistical system of the supermarkets will be marginalized and can supply only small shops or occasional sales.

On-line connections with major distributors on the European markets is one of the basic pre-conditions, but overall logistical demands go a lot further: maximum flexibility in product assortment, enough stocks to handle variations in demand, efficient transport systems, and so on. Most retailers have introduced bar-code systems in product labels which enable them to manage stocks and to closely monitor sales developments.

The above-mentioned three aspects of product packaging are also important for processed fruit: suppliers from developing countries will have to be able to meet all these requirements.

In order to fit in with the logistical system of European distributors, products from overseas suppliers will have to be packed in such a way as to fit into the transport and shelving systems of the supermarkets. Handling costs have to be minimised because labour costs are the highest single cost-component in European business. From the promotional point of view, processed fruit products from overseas suppliers will have to fit into the marketing strategies defined by the European marketers for this product: packaging must comply in all respects with what is required in terms of labelling, volumes, and so on.

Thirdly, environmental considerations are very important for this product group. Products from overseas suppliers are subject to the same legislation as those from European suppliers. It is therefore essential that overseas suppliers keep a close watch on any developments in re-using and re-cycling systems which are developed by the distribution trade and the processing industry in Europe. For processed fruit this could mean a switch towards more re-usable packaging made of glass. At the moment, however, the processed fruit industry in Europe is not in favour of this option, but it could well be that they will be forced towards this if other waste-reduction measures prove ineffective.

CHAPTER II: CONSEQUENCES OF THE REALIZATION OF THE EC INTERNAL MARKET

Introduction

The European Community is the denomination of what used to be called the European Economic Community. The term EC also applies to the European Common Market. The EC has twelve members, namely Belgium, Denmark, France Germany, Greece Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain and the United Kingdom.

At the moment, the EC is implementing the unification of the twelve members into an economic and political union. It is envisaged that this unification will lead to a stronger EC. One of the most essential plans will be the removal of trade barriers within the EC. This will allow a free flow of trade to save time and costs in transportation. The economic union, as well as the political union, will allow the member countries to adjust their economic and social systems, reducing differences between the members. Harmonizing laws and regulations, creating uniform standards and quality requirements, simplifying administrative procedures and erecting social and monetary structures will clarify the EC. The objectives of such a harmonization are to facilitate trade between the EC members, stimulate economic activities through enlarged economies of scale, raise competition and economic growth and allow a free flow of capital, goods, services and individuals. The deadline for the realization of the internal market is 31 December 1992.

The effects of the realization of the EC internal market on the processed fruit sector are far-reaching and complicated. In the following we will highlight its most important implications. Generally those effects can be distinguished into two categories:

- 1) The effect of developments in the Common Agricultural Policy.
- 2) The effect of regulations introduced or prepared in the context of the Community programme for the realization of the internal market.

II.1

Effect of developments in the Common Agricultural Policy

Some processed fruit products are still heavily protected by the CAP. These are the same product lines for which the basic fresh product is also heavily protected: peaches, pears, prunes, cherries, pineapple, soft fruit and raisins.

EC Common Agricultural Policy market arrangements and protection measures incorporate the following components:

- Production restitution and minimum producer prices;
- Export restitutions;
- High tariffs for imports from third countries;
- Import restrictions on imports from third countries, including countervailing duties, import quotas, import licenses and 'voluntary export restraints'.

Minimum producer prices and production restitution

These measures are intended to provide EC farmers with a minimum price for their products on the one hand, while on the other hand maintaining competitiveness for European fruit processors on the world market. Processors are paid the difference between world market prices and the internal market price in order to ensure that they can obtain their raw materials at the same price as their competitors from outside the Community.

Minimum prices and production restitution were not increased by the Commission in the last few years, both within the framework of the overall efforts by the EC to reduce CAP expenses and also to reduce the difference between lower world market prices and the internal prices in the Community. The EC sees this as a contribution on its part to invalidate the criticism (expressed in the GATT negotiations) of EC policies on agriculture (see further in Chapter III). Similarly, the Commission has also decided to limit production quantities for which minimum prices and production restitution are paid.

Production thresholds are at this moment:

	production thresholds:	actual production in 1990/91:
Currants	68000	42000
Raisins & sultanas	93000	34000
Muscatel	4000	3500
Williams and rocha pears	102805	76072
Peaches in syrup/water	582000	389344

As we can see, production thresholds are fixed at a higher level than actual production, creating a further impulse to overproduction. These measures are of special importance for Southern European producer countries such as France and Greece. EC production thresholds were also extended to Spain and Portugal when they entered the EC.

For processed pineapple there is also a market regulation providing for minimum producer prices and production restitution. This programme is especially intended for pineapple producers in the French DOM territories.

Table 2: Minimum prices and production restitution, processed pineapple
(in ECU/100 kg.)

	restitution	minimum price
80/81	51.580	21.66
81/82	54.240	23.73
82/83	53.670	26.34
83/84	52.460	28.05
84/85	49.510	29.88
85/86	51.070	31.64
86/87	62.505	31.64
87/88	89.884	31.64
88/89	94.040	31.64
89/90	94.989	31.64

EC expenditure on this product rose from ECU 2.6 million in 1979 to ECU 7.2 million in 1987.

For the total group of processed fruit and vegetables EC expenditure was as follows in recent years (in millions of ECUs):

1985	1986	1987	1988	1989
828.8	429.2	470.7	560.0	575.0

Export restitution

Complementary to internal production-supporting measures, the EC also pays export restitution, once again to bridge the gap between internal market prices and world market prices.

Total EC expenditure in recent years on this was (in millions of ECUs):

1985	1986	1987	1988	1989	1990
11.5	12.0	11.0	16.0	18.0	20.0

Import tariffs and other import restrictions

Import tariffs for processed fruits are very high, ranging from 20-30%, with additional levies for a sugar/starch component.

A detailed overview of normal tariffs is provided in Appendix 4.

Imports from ACP and Least Developed Countries can enter the EC duty-free. In the framework of the EC General System of Preferences, preferences are allowed for certain specified products. These are also enumerated in Appendix 5. Once again, processed pineapple is a special category. There is a small tariff preference for a small quota of imported processed pineapple. These quotas are, however, already exhausted in the first days of January.

Other import restrictions are just as important as the tariffs.

For fruit imports destined for the processing industry a special import licensing system exists. For certain sensitive products the EC has adopted special measures against the most competitive countries, especially those of Eastern Europe. The EC ordered an import quota of 19900 tons annually for sour cherries from Yugoslavia, with minimum import prices. 'Voluntary export restraints' were also ordered against Hungary by the EC. 'Voluntary' minimum export prices for strawberry pulp and other frozen-fruit pulps were also negotiated with Yugoslavia. 'Average import prices' were negotiated with Australia and South Africa. For the 1989/90 season these were 650 ECU/ton CIF European port. European growers have also asked the Commission to impose import

restrictions on East European mushroom producers, but up to now these demands have been rejected.

The future of EC protection of processed fruit is very much interlinked with the whole future of the Common Agricultural Policy, which is under heavy criticism from other countries in the GATT negotiations. This subject is further elaborated on in Chapter III. Future import restrictions against Eastern European producers are also very much interlinked with the overall future relationship between the EC and these countries. This subject is further elaborated on in Chapter IV.

II.2 Effect of regulations introduced or prepared by the Commission in the context of the programme for the realization of the internal market

Norms and standards

Differences amongst national norms and standards for industrial products are the most important remaining obstacles to the free trade of goods within the borders of the Community. Most of the approximately 300 regulations which together form the legal basis for the realization of the internal market are regulations setting EC standards for particular products. In its work to develop European product standards the Commission is supported by standardization institutes like CEN (Comite Europeen de Normalisation), CENELEC (Comite Europeen de Normalisation Electrotechnique), and ETSI (European Telecommunications Standardization Institute). Most of the EC standards are for the following product categories: mechanical equipment, electrotechnical materials, phyto-sanitary measures and food products.

In its policy of developing common standards the EC proceeds from two basic assumptions.

One is mutual recognition. That is, if a product is approved by the authorities in one country it should be accepted for free trade in all other countries. This principle is applied to all non-hazardous products.

The second assumption is the setting of EC regulations to harmonize the existing differences. This approach is applied to the group of products which are defined as hazardous from the point of view of public health, safety or environmental concerns.

During this harmonization process the Commission can choose from different options, depending on the product:

The EC can set minimum requirements for certain products, while at the same time

national member states may still make additional requirements. This is, for example, the case with the minimum requirements for the packaging and labelling of food products.

The EC can also provide an exclusive listing of components. This is, for example, the case with ingredients or additives which are allowed in food products.

Thirdly the EC can set minimum levels, which means that products containing less than these minimum levels are generally acceptable in other member states, but member states may allow higher levels on an individual basis. This was, for example, the case with the first Commission proposal on pesticide residues on fresh fruit and vegetables. In its more recent proposal on this item, the Commission now specifies maximum levels which may not be exceeded.

Finally EC regulations can establish completely uniform regulations which deny national member states the right to apply different rules on the subject.

Products for which harmonized regulations come into force will receive a CE mark. Products which are in conformity with EC regulations will receive this mark. Products with the CE mark can be traded freely within the Community.

The European Commission has for some time now been introducing basic regulations on food products, mainly within the framework of its programme for consumer protection. The speed with which new regulations are being introduced has been stepped up in the context of the programme for the realization of the internal market.

The importance for suppliers from developing countries of complying with these EC standards for food products can only increase. No trader in the Community will accept products which do not comply with EC standards. With consumers critically and increasingly aware of the health and safety dimension of food products, suppliers from developing countries are well-advised to strictly apply health and safety rules and to develop products which contain as few artificial additives, preservatives, etc, as possible. Organic products are becoming increasingly popular with the general public. Here again it is vital that products comply with EC standards for organically grown products. Producers from developing countries will have to press their governments to establish a supervisory body which can certify products and which is accepted by the EC.

Although the harmonization of EC laws on food products is underway, it will take some time for this process to be completed. In the meanwhile national regulations continue to vary from one country to another. This brings with it the risk for foreign suppliers that

their product may well be accepted in one EC state, but not in another. We therefore recommend that foreign suppliers adopt the highest standards set by the strictest EC member state as their product norm. If their products are accepted in the EC country with the highest standards, they will certainly have no difficulty in having them accepted by other member states. Germany and the Netherlands are known to have very high standards for food products. The UK has also had higher standards since the recent introduction of the new Food and Drugs Safety Act.

Stimulating business to develop certification and quality standards for food products is another component of EC policy. In December 1990 the Commission introduced a proposal for a regulation on the certification of certain food products. This Community certificate of specific character for a group of food products means that these products are guaranteed to have a specific number of characteristics distinguishing them from other food products in the same category. The EC registers the products which are allowed to carry the certificate. If a certain number of requirements are complied with, producers can apply for the certificate. The requirements mainly involve the ingredients used and the method of production.

A second Commission proposal in this field protects the geographical origin of agricultural and food products. This applies if particular products produced in particular regions have specific qualities such as taste, flavour etc. Products may bear the geographical name only if they actually come from those regions.

In addition to the certification of products, there is also certification of producers. Industry has been familiar for some time with the certification of top-quality producers. Formerly there were national systems of certification such as the British Standard 5750 parts 1-3, and the Dutch NEN norms 2426-2648. Since 1987 internationally recognized norms have been issued by ISO (International Organization for Standardization). The ISO 9001-9003 norms guarantee that a producer or supplier who has obtained this certificate complies with the highest standards for processing, quality control and management. In the future these ISO norms will become more and more important. If producers or suppliers can obtain these certificates they will have a definite advantage over their competitors. Producers who cannot meet these standards will be increasingly excluded from trade and industry as suppliers.

The importance for suppliers from developing countries of complying with these international norms is self-evident.

The EC is developing its own standardization system. During 1989 the new standard EN 45000 came into effect. The EN 45000 systems cover producers, their products and their controlling bodies. The European EN 45000 systems are absolutely consistent with the ISO standards.

From the above it is apparent that product standards and producer standards will play an extremely important role as a factor in competition between different suppliers to the European market in the 1990s. Therefore a basic element of strategy for suppliers from developing countries should be to closely monitor developments in this field within the EC, and to develop their own codes of product and processing standards.

Product liability

Another dimension of the realization of the internal market are the new rules on product liability. This regulation, which was adopted in 1988, makes it possible for consumers to sue either producers or traders for damage caused by any defect in their products, if the damage exceeds an amount of 500 ECUs. If a product originates from outside the EC, the importer can be sued instead. The Commission regulation grants individual member states the power to exclude from liability the farmers who delivered the raw material. This clause has by now been passed into law in Germany, the UK and Greece. It is under consideration in Spain and Portugal.

Harmonization of taxes

Tax harmonization is one of the most politically sensitive issues to arise out of the entire programme for realization of the internal market. Two forms of taxes are involved:

- Excise taxes, which many countries levy on luxury products such as coffee, sugar, and especially alcoholic drinks and tobacco.
- Value Added Tax, which all countries levy on products sold by one party to another in the Community.

Tax levels vary greatly amongst the EC countries. The Commission is trying to establish a common range within which individual member states have to set their taxes. A compromise was recently worked out on the issue of VAT, with 5% VAT for the low tariff group of products (including many food products considered to be essential) and 15% VAT for other products.

CHAPTER III: CONSEQUENCES OF THE GATT NEGOTIATIONS

Introduction

The GATT system was established in 1947 by 24 Western countries and now has a membership of 105 countries. GATT's aim is to liberalize world trade, a process involving the abolition of import barriers such as tariffs and quotas. Since the establishment of the GATT system there have been several rounds of international trade negotiations. The most recent round, the so-called Uruguay Round, started in 1987. The Uruguay Round has been prolonged various times as a result of conflicts between GATT members.

III.1 Outcome of the negotiating group on tropical products

The negotiating group on tropical products is more or less an exception within the GATT negotiations because right at the outset the US and the EC made quite concrete proposals in order to commit the developing countries to the whole Uruguay Round. Unfortunately the US linked its offer on tropical products to an agreement with the EC on a whole range of agricultural products which, as we know, is still a long way off at this moment. In May 1989 the EC had already introduced new tariffs on certain processed tropical fruit products as a result of the mid-term review in Montreal. Only tariffs for processed passion fruit, guavas, and tamarinds were fractionally reduced. In its final offer the EC made some further reductions, but again only for those very limited product groups. As we can see from Appendix 6, EC tariffs for processed passion fruit, guavas and tamarinds will vary between 12 and 16%.

All in all we can conclude that the EC offer for tropical fruits is very limited, excluding all competitive products, except for the most important categories of imported tropical fruits, and that it maintains high tariffs for those products included in the offer.

III.2

Outcome of the negotiating group on agricultural products

The final recommendations of this negotiating group are impossible to predict at the moment. Before the final conference in December 1990, the EC was only prepared to reduce internal agricultural support prices and programmes by 30%, with 1986 as its year of reference. This reduction is to be realized over a ten year period, in other words by 1996. More recent discussion proposals by Agricultural Commissioner McSharry aim at replacing internal production support programmes (including intervention prices, import levies, and export subsidies) by an income support mechanism for farmers. If these proposals are to be accepted by the European Council of Ministers and introduced to GATT it will mean a fundamental change by the EC as far as import policies for competitive agricultural products are concerned. It is, however, very much open to question whether this will open up new prospects for exporters from developing countries, because the protectionist lobby of farmers and their organizations is very strong in the EC. This is clearly illustrated by the very tough annual negotiations between the agricultural ministers of the different member states on support prices and other intervention mechanisms for the next season. If we examine the overall picture of recent years, we are forced to conclude that the EC will be very reluctant to increase support prices in the next few years. For some products there may even be price reductions, but this will certainly not mean that the competitive position of non-EC suppliers will improve to any significant extent. It is, however, unfortunately too early to make useful predictions on this issue.

III.3

GATT code on standards

The GATT code on standards is intended to avoid trade discrimination on the basis of differences in technical norms and standards applied in different countries. The GATT code does not itself set product standards, but simply aims to prevent discrimination against imported products on the basis of national standards.

It is the ISO which is intended to elaborate on international product standards. As we saw in Chapter II.2 the EC is developing its own product standards but these are based on the ISO-norms. The outcome of the Uruguay Round will not bring major changes to the GATT code on standards. Proposals have been put forward which aim to avoid 'double testing' of products and to allow national authorities to introduce regulations on the health, safety and environmental aspects of products and production processes. Moreover, it has been proposed that the jurisdiction of the GATT code should be extended to cover not merely end-products but also production processes.

CHAPTER IV: CONSEQUENCES OF DEVELOPMENTS IN EASTERN EUROPE

Introduction

Since 1989, Eastern European countries have been trying to transform their centrally planned economies into free market economies. This is an enormous effort which has caused a lot of problems in the countries concerned. Since the beginning of the political and economic reforms in Eastern Europe the EC has gradually modified its co-operation policy towards these countries. This raises the question as to whether these changing economic relations between Eastern and Western Europe will have important implications for exports to Europe from developing countries. There is no simple answer to this question because new developments are still emerging in Eastern Europe.

It is nevertheless useful to try to make an inventory of potential competition for producers from developing countries, and to try to estimate the potential demand growth in these regions for products from developing countries.

Eastern Europe's agriculture mainly produces products characteristic of the moderate climatic zone. In Northern Europe products like grains, sugar beets and potatoes dominate, whereas in Southern Europe maize, capsicums, grapes, fruit and vegetables dominate. This production of agricultural 'raw materials' is itself reflected in the potential for export of processed fruits. Eastern Europe is a major supplier of soft fruits and cherries to the EC. Eastern European countries, especially Poland, Hungary and Yugoslavia supply processed fruits as well as deep-frozen products for further processing by European industry. The types of fruit mentioned are not in direct competition with suppliers from developing countries. It should, however, be kept in mind that the overall market situation for processed fruits is depressed. A major increase in cheap processed fruits from Eastern Europe would inevitably also have an impact on prices in general and thus on prices of tropical processed fruit in general. We have already seen that the market for canned pineapple - the most important tropical processed fruit item - is very depressed with prices dropping to half the 1985/86 level.

A rapid major increase of imports of processed fruits into the EC is blocked by three factors:

1) Agribusiness in all Eastern European countries is seriously out-dated. Many plants have not been modernized since World War 2. Most of them have a serious shortage of spare parts, and lack the capacity to process all products which can potentially be offered. Production capacity will be privatized very rapidly, but a rapid increase in output is dependent on foreign co-operation and investment. As we have seen, the fruit processing industry in Western Europe is in crisis. This sector therefore has only a limited capacity to finance large investments in Eastern Europe, as is the case in so many other sectors.

2) The export trade was managed until recently by state-controlled bodies. This led to problems such as prices which did not conform to market conditions, the unavailability of hard currency, inefficient collection and distribution of fruit, and a range of problems with the packaging, conditioning and storage of fruit. Joint ventures involving West European importers/exporters and Eastern European producers are rapidly expanding and include the trading arms of the big retailers. It must therefore be predicted that within the next couple of years there will be no more major barriers in trading outlets to the export of processed fruit from Eastern to West Europe.

3) The protectionist policies of the EC against imports of processed fruit from Eastern Europe were very strong, as we saw in Chapter II. These protectionist policies can not be sustained, however, if co-operation between the EC and the Eastern European countries progresses from co-operation and trade agreements to a second-stage, formal relationship of 'association'. This association status is currently being negotiated and in April 1991 the Commission received a mandate from the European Parliament to make concessions in the field of agricultural products as well.

For its part, the EC will stress reciprocity in the liberalization of trade with its Eastern European neighbours. Poland, Hungary and Czechoslovakia will be the first to receive association status. Trade in agricultural products between the EC and Eastern Europe will need at least five years for liberalization, and this provides suppliers from developing countries with an opportunity to adapt themselves to the new circumstances.

For suppliers from developing countries this will mean that they will increasingly be forced towards the market sector for those tropical and exotic products not available in Europe. As we have seen, this sector offers somewhat brighter prospects than the overall market for processed fruits, but the danger of increasing overproduction as more and more developing countries develop processing facilities is very real.

CHAPTER V: CONCLUSIONS AND RECOMMENDATIONS

The European market for processed fruit is saturated and is showing no overall growth. There are, however, some growth areas such as fruit juices and canned fruits in their own juice. Suppliers from developing countries will have to closely monitor these changes in consumer preferences and adapt their product range to these developments. Furthermore, suppliers from developing countries will have to develop a very well-defined marketing strategy if they are to be successful on the European market. In general there is a situation of oversupply because there are very many suppliers of the products concerned.

Like other food products, the trade in processed fruit and vegetables is affected by the concentration process in the retail sector. Exporters from developing countries will be increasingly confronted with the centralized buying power of the supermarket chains, while other outlets such as small retailers and speciality shops will become less important in terms of sales volume and market share.

In view of the present tendency in product positioning in food retailing to stock brand-name products on the one hand and to develop private label products on the other, very little space is left on the market for unknown products.

For suppliers from developing countries this means that they have to make a fundamental strategic decision: either they aim to offer a standard product for a very low price, or they try to develop a speciality product which supermarkets are willing to accept as 'something special'. The former option has the disadvantage that competition is very fierce and prices are low. It is very difficult for new suppliers to establish themselves on a market which is already saturated. The second strategy is obviously much more difficult to pursue, but offers good marketing prospects and higher margins. In order to qualify as suppliers, producers from developing countries will have to meet all the requirements of the European distribution sector in terms of quality, logistics, packaging, and so on. While the big retail chains may make the most sophisticated demands, the requirements of the importing wholesalers or the central buying organizations of the independent retailers are not much lower.

The realization of a free internal market in the EC will mainly have consequences in the field of technical standards and norms for food products.

The importance for suppliers from developing countries of adhering to these EC standards for food products will increase.

No trader in the Community will accept products which do not comply with EC standards. With consumers becoming more and more critically aware of the health and safety dimension of food products, it is advisable for suppliers from developing countries to strictly apply health and safety rules and to develop products which contain as few non-natural additives, preservatives, etc, as possible. Organic products are becoming increasingly popular, and amongst a larger public. Once again, it is vital that such products comply with official standards for organically grown products.

Producers from developing countries will have to press their authorities to establish a supervisory body which can certify products and which is accepted by the EC.

While the harmonization of EC laws on food products is now underway, this process will not be completed in the near future. In the meantime national regulations continue to vary from one country to the next. This brings with it the risk for a foreign supplier that a particular product may well be accepted in one EC state but not in another. It is therefore recommended that foreign suppliers adopt the highest standards applied by the strictest EC member state as their product norm. If their products are accepted by the EC country with the highest requirements, they will certainly experience no difficulty in having their product accepted by other member states. Germany and the Netherlands are known to have very high standards for food products. The UK now also has higher standards since the recent introduction of the new Food and Drugs Safety Act.

Apart from EC regulations, it is also essential for suppliers from developing countries to try to meet the standards set for products, processing systems and producers by the ISO. While it may be very difficult for suppliers from developing countries to meet all these requirements, it is essential to take them as a framework of reference and to try to comply with these international standards as much as possible.

EC import duties on competitive processed fruits will remain at a very high level after the GATT Uruguay Round. While the GSP provides a degree of preferential treatment, imports from the biggest and most competitive group of developing countries will continue to be hindered by very discriminatory high tariff levels, on a market where margins are particularly low.

Even for non-competitive processed fruit such as passion fruit, guavas and tamarinds, import tariffs will remain at a level of 10-16%.

The development in the relations between the EC and the countries of Eastern Europe will lead within five to ten years to more liberal entry into the EC of processed fruit products from these countries. While the Eastern European products compete more directly with the products of the European processed fruit sector itself, and less with the supply of tropical processed fruits, this development will lead to a worsening of the current oversupply of the European market.

APPENDIX 1: Survey of major European markets for processed fruit

THE ITALIAN MARKET

Consumption

Consumption of these products has grown by an average of 5% in real terms over the period 1984-1988, driven mainly by the rapid increase in consumption of pure fruit juices. Consumption of these juices has grown at an average of around 40% during this period. The reasons for their increasing popularity have been mentioned above. The consumption of fruit in syrups is a mature sector with declining sales. Jams are also a mature sector, although consumption here is tending to stagnate rather than to decline. Consumption of 'special jams' has been growing rapidly. This segment now accounts for almost 75% of total demand, leading to fears among suppliers that this sector is also approaching maturity.

Production

Internal production rose by an average of 6% per year in volume terms. Here again we see a rather high growth in the production of fruit juices (by 17%), while production of jams rose by only 3%, and that of fruit in syrup or water fell by 1%.

Imports

Imports account for 11% of apparent consumption. They have been increasing slightly faster than production. Fruit juices account for 62% of total imports of these product groups. Imports of fruit juices have again been growing rapidly, partly because of the increase in the number of importers and foreign suppliers in the Italian market and partly because domestic suppliers have introduced exotic tropical flavours based on imports to complement their traditional product lines. Pineapple and citrus accounted for about 80% of total fruit juice imports. Imports of grapes fluctuate strongly in compensation for variations in the Italian crop. Imports of fruit in syrup or water have also been growing rapidly. They now account for 25% of apparent consumption. In a stagnating overall market this means a rapidly growing import penetration for these products. The most popular imported products are pineapples and other exotic and tropical fruits which are not available as fresh products at moderate prices on the domestic market. Imports have benefited from low commodity prices, which have offered processors and traders ample profit margins in an otherwise price-competitive market. The principal sources of pineapple in syrup or water are Kenya, Swaziland, Thailand and the Ivory Coast. Imports of jams are marginal, but have increased rapidly in recent years.

Suppliers

Domestic manufacturers fall roughly into three categories:

- Large diversified food companies such as Parmalat, Campbells and Star.
- Companies with diversified activities in the processed food market, usually active in several sectors of the fruit juice and preserving industry, such as Conserve Italia, Colombani Lusuco, Massalombarda and Parmasole.
- Companies specialized in fruit processing, usually active in several sectors of the industry, such as Zuegg, Confruit, Menz & Gasser and Saiace.

There tends to be a rapid turnover amongst the smaller companies in the fruits in syrup/water sector. A lot of small companies enter this market, often with the help of EC subsidies, and leave again after a short production and sales campaign. The small companies in the fruit juices and jams sector tend to be more permanent.

The leading importers include a small number of important foreign suppliers, such as Hero and Delmonte, an increasing number of domestic manufacturers who are complementing their own production with imported varieties, and a large number of specialist importers.

Prices and margins

A feature of the Italian market for fruit juices and preserves has been the intense price competition and the evident inability of the suppliers to raise prices in line with inflation. Wholesalers take markups of about 10-15% on jams and processed fruit. Retail prices are 35 to 40% above ex-factory prices.

Advertising expenditure has increased rapidly, in spite of the reputed difficulty in establishing brand loyalties in this industry. A very high proportion of the advertising is accounted for by a few leading suppliers.

Prospects

Sales of fruit juices are expected to continue growing rapidly in the coming years. The prospects for jams are less rosy: jams are currently losing market share to chocolate spreads. On the other hand, the sector could benefit from the increasing importance of breakfast and the adoption of more 'Northern European' breakfast styles in Italy. The market for fruit in syrup and water will continue to decline by 2-3% a year as a result of the greater consumer interest in fresh products.

THE UK MARKET

Consumption

Overall sales of canned fruit stagnated in the UK over the period 1984-1988. Growth is now expected only in the segments for fruit cocktails and exotic fruits. Peaches, pineapples, fruit cocktails, and pears account for 68% of the total market. As in other European markets, the UK market for canned fruits has been showing a long-term decline because consumers have a growing preference for fresh fruit. The only growth segment is fruit in juice products. It is estimated that 46% of canned fruit buyers now purchase products in natural juice. Overall prospects are not particularly encouraging for the developing country exporter. Falling demand and competition from EC countries make it increasingly difficult for the new supplier to enter the market successfully.

Production

In line with the trend for overall sales, the production of canned fruit in the UK stagnated in the period 1984-1988 at a level between 35000 and 40000 tons. Domestic suppliers account for only 20% of the market. UK canning is limited to home-grown soft varieties such as strawberries, raspberries, prunes and plums.

Imports

There is a strong import penetration on the UK market with imported fruit accounting for between 80-90% of the market.

Deciduous fruit, citrus fruit and pineapples are the most important product groups, with fruit cocktails and mixed fruits growing in importance. Imports over the 1984-1988 period did not show a strong increase. However, certain segments continue to grow: imports of pineapple and peaches for example, especially those for retailers' own labels. The bulk of UK imports is sourced from within the EC, with Italy as the single most important supplier. The two traditional suppliers, South Africa and Australia, have lost much trade to the UK as a result of the high tariffs imposed on non-EC/ACP country imports. Major suppliers of canned pineapple are Kenya, the Philippines, Thailand, Malaysia, Swaziland and South Africa.

THE BELGIAN MARKET

Consumption

Consumption of processed fruit stagnated in Belgium during the 1984-1989 period at a level of BFr 1.5 billion at current prices. Consumption of jams has risen from BFr 2.4 billion in 1985 to BFr 3.2 billion in 1989, which is however only slightly above the 1984 level of BFr 2.8 billion.

Production

Domestic production of processed fruit rose from 35800 tons in 1984 to 42800 tons in 1988. In 1989 production dropped to a level of 39500 tons, a decrease of 7.7%. Production of jams, however, shows the same tendency as consumption: production rose from 18900 tons in 1985 to 23700 tons in 1989, but this is still below the 1984 level of 24100 tons.

Imports

Imports of processed fruit rose slightly from BFr 2.797 billion in 1988 to BFr 3.010 billion in 1989. Imports of jams and jellies rose from BFr 1.200 billion in 1988 to BFr 1.266 billion in 1989.

THE FRENCH MARKET

Consumption

Household consumption of processed fruit and jams rose only slightly in France, from FFr 3527 million Frs in 1986 to 3739 million in 1988. At constant 1980 prices this means a rise of 3%. Of this, households account for 65% of sales, and catering 35%. According to data from the Confederation Francaise de la Conserve, apparent consumption of fruit processed with sugar, excluding pineapple, stagnated at a level between 170000 and 180000 tons in the period 1982-1990. The only segments showing any growth are low-calorie jams and fruit compotes, which have been boosted by the launching of individual portions, slim-line varieties and a broader range of fruits.

Production

Domestic production of processed fruit and jams rose from 377600 tons in 1986 to 444300 tons in 1990, an annual growth of 3%. However, this growth was almost entirely recorded during the last two years, 1989 and 1990.

Development of production by segments:

- production of fruit in syrup stagnated at a level of around 100000 tons. The main products are peaches and pears.
- Compotes and purees rose from 100000 tons to about 140000 tons.
- Production of jams and marmalades remained at a level of about 130000 tons, but the individual portions segment increased to 20000 tons.

According to the CFC the domestic industry is under pressure, not being able to realize sufficient prices and margins to maintain a satisfactory level of investment. Pressure comes - according to the same source - from imports of processed pineapple and, for the

frozen fruit division, from imports of soft fruits from Eastern Europe. Both producers of processed fruit and producers of processed vegetables are facing great difficulties. In the last 6 years half of the processed vegetable producers disappeared, and in the processed fruit sector this figure was 20%.

The most important domestic suppliers of processed fruit are St. Mamet (30% in 1988), Fruibourg (15-20% in 1988), and Murville (8% in 1988)). At the moment French domestic producer brands account for almost 44% of the market. 30-40% of the market comes from imported brands. Supermarket private labels have a market share of around 18%

Domestic producers have lost market share in recent years both to imported brands and private labels.

For jams and marmalades, ANDROS is the leading brand with a 25% market share. Dominant in this segment are the private labels, with 40%.

A special situation in France is the production of processed pineapple produced in the DOM, especially in Martinique. Production declined sharply over the past three years as a result of the world market overproduction crisis in 1985/86. We touched on this subject in Chapter II, on EC trade regimes.

Development of French production of processed pineapple (gross tons)

1984/85	1986/87	1988/89	1989/90	1990/91
13800	11020	5300	5800	5750

Imports of processed fruit rose from 160000 tons in 1986 to 183000 tons in 1988, an annual increase of almost 7%. Apricots accounted for 24% of the tonnage, of which 46% is of Greek origin. Pineapple is second with a 22% share of tonnage. The main sources are Thailand (49%), Kenya (15%), and Martinique (9%). Imports of jams and fruit purees rose steeply, from 6000 tons in 1986 to 12000 tons in 1988 (an annual growth of 45%). In 1989 this tendency continued with imports rising to 20540 tons (+75%). The import of fruit juices and concentrates is also rising very fast. 80% of this are citrus fruits. The main suppliers in 1989 were Israel (49720 tons), Brazil (24635 tons), the United States (22230 tons) and Morocco (19670 tons).

THE GERMAN MARKET

Consumption

German consumption of canned fruit is approximately 500000 tons. Pineapple (34%) and peaches (28%) are the largest product groups. Consumption is generally stagnating. Only the segment for unsweetened canned fruit is growing.

Production

Domestic production of canned fruit declined from 129000 tons in 1987 to 106000 tons in 1989 (an annual decrease of 10%). Production of jams and jellies rose slightly, from 267000 tons to 301000 tons in 1989 (an annual increase of 6%). The dominance of ALDI in the distribution chain and the dominance of imported products create a difficult situation for domestic producers. There is strong competition for cherries from imports from Yugoslavia.

Imports of canned fruits declined from 226000 tons in 1987 to 209000 tons in 1989. The main imported products are pineapples (-2%); and peaches (+6%). Imports of jams and purees rose from 45600 tons in 1987 to 49800 tons in 1989 (annual increase: +4,6%).

Prices and margins

Gross margins on canned fruit are between 26 and 30%, and are above the average in food retailing. These products are consequently attractive for retailers to sell in their shops. They have a positive capital-profitability (from 9.4% - 13%). But turnover is below average. Fruit in cans - mostly imported - is usually very low-priced. On the other hand there is a market segment for high-quality glace fruits which fetch much higher prices.

APPENDIX 2: Canned fruit production in certain countries

Canned fruit production in certain countries; by varieties
(tonnes)

	1986	1987	1988		1986	1987	1988
UNITED KINGDOM				FRANCE			
Plums	2,206	3,382	1,800	Cherries	6,300	15,300	7,700
Strawberries	1,331	2,123	2,903	Fruit mixtures	22,500	20,800	20,000
Raspberries	3,015	4,511	3,140	Peaches	34,700	33,400	33,000
Rhubarb	3,966	5,615	4,690	Pears	18,900	26,900	19,300
Prunes	5,841	5,725	5,771	Plums and prunes	6,400	6,500	..
Other kinds	17,517	20,024	17,110	Total	88,900	102,900	80,000
Total	34,756	41,380	35,714	WEST GERMANY			
AUSTRALIA				Peaches	290	382	..
Peaches	39,300	40,700	26,000	Cherries	44,798	51,435	..
Pears	35,600	42,200	32,000	Plums and prunes	8,170	15,177	..
Apricots	5,200	7,300	8,200	Total	53,258	66,994	..
Mixed fruit	28,100	27,600	..	ITALY			
Total	108,800	117,800	66,200	Cherries	9,000	8,000	6,000
SOUTH AFRICA				Fruit mixtures	72,000	85,000	70,000
Peaches	70,524	69,134	67,500	Peaches	80,000	90,000	70,000
Pears	28,890	30,234	22,500	Pears	43,000	55,000	50,000
Apricots	10,212	12,242	11,320	Total	204,000	238,000	196,000
Fruit mixtures	41,510	41,027	38,500	GREECE			
Total	151,136	152,637	139,730	Apricots	50,575	61,534	36,407
UNITED STATES				Fruit mixtures	28,520	34,680	21,522
Peaches	295,257	302,687	352,370	Peaches	170,000	179,268	225,000
Pears	147,149	186,258	185,748	Total	277,095	275,482	282,929
Apricots	10,308	26,148	28,189	SPAIN			
Mixed fruits	183,217	190,778	189,300	Apricots	28,200	28,000	11,200
Total	635,933	705,821	755,607	Peaches	76,000	90,000	60,000
ARGENTINA				Pears	5,000	18,000	11,220
Fruit mixtures	5,000	6,300	6,600	Total	109,200	136,000	82,420
Peaches	36,000	45,000	40,000	JAPAN			
Total	41,000	51,000	46,600	Cherries	10,954	9,164	11,000
CHILE				Fruit mixtures	3,853	3,620	3,500
Mixed fruit	2,000	1,500	1,350	Peaches	28,010	26,080	23,000
Peaches	22,500	31,500	28,000	Pears	556	430	400
Total	24,500	33,000	29,350	Total	43,373	39,276	36,900

Notes: The annual canned deciduous fruit packs in the Southern Hemisphere countries (Australia, South Africa, etc.) generally commence in November of each year and become seasonally heavy in the following January or February. In the above table, such packs are aligned with the US packing season, which commences the following summer. For example, the Southern Hemisphere packs of 1985 crop completed in early 1986, are shown under the column for 1986.

Table 2 - Production and exports of processed pineapple in selected countries
(tonnes)

Country	PRODUCTION			EXPORTS		
	1987	1988	1989	1987	1988	1989
Canned Pineapple a						
Australia	40,100	40,200	40,100	5,759	5,216	5,510
Kenya	44,325	40,000	-	44,400	40,000	-
Malaysia	40,220	41,300	45,500	40,499	38,177	40,000
Côte d'Ivoire	17,400	1,150	800	2,134	300	-
South Africa	66,286	65,087	62,600	55,295	49,209	55,000
United States	136,677	128,839	133,248	7,243	12,495	12,500
Mexico	19,500	16,500	19,500	13,739	7,144	8,750
Philippines	211,288	211,185	216,458	183,725	182,840	185,000
Thailand	257,000	341,000	380,000	259,807	300,000	360,000
Taiwan	12,204	8,934	8,136	4,584	2,974	2,800
Total	845,000	874,195	906,342	617,176	638,355	669,560
Single Strength Juice c						
Australia	24,900	27,600	28,500	2,355	2,576	2,600
Kenya	544	407	513	327	196	200
Malaysia	1,220	1,170	1,300	597	470	500
Côte d'Ivoire	4,870	2,200	3,400	2,763	1,000	1,400
South Africa	1,772	1,422	1,250	1,566	1,134	950
Mexico	6,740	4,500	4,000	31	-	-
Philippines	46,200	44,090	45,648	30,423	29,348	30,000
Taiwan	2,520	2,700	3,240	189	124	100
Total	88,766	84,079	87,851	38,251	33,848	35,830
Concentrated Juice d						
Kenya	9,602	9,417	9,550	8,600	8,811	9,620
South Africa	4,391	8,085	9,000	3,829	5,618	8,500
Mexico	2,650	1,500	2,500	2,420	1,012	1,500
Philippines	36,960	35,264	38,921	31,894	29,099	32,000
Thailand	32,600	40,700	44,000	28,221	30,000	43,000
Total	85,203	94,616	103,971	74,964	74,540	94,620

a One tonne is equivalent to 48.99 standard cases of 24 2-1/2 cans (21kg net), or 71.1 cases of 24/2 cans (14kg net). b USDA estimates based on the assumption of a 34 per cent cannery yield. c One tonne of single strength juice is equivalent to approximately 950 litres. d Concentration levels vary from country to country, although the average brix is assumed to be 61. One tonne at 61 brix is equivalent to 7.4 litres.

APPENDIX 3: Percentage retail food distribution by form of organization

Database name: Retailing and Retail Distribution
 Sector name: Hypermarkets and Superstores
 Title: Food Distribution by Form of Organisation 1987
 Unit: % value share

	Co-op	Multi	Affi	Inde	Other	Total	Notes
EEC members							
Belgium		48	30	18	5	100	
Denmark	38	21	37	4		100	
France	3	30	25		42	100	a
West Germany	11	24	59		8	100	
Greece							
Ireland							
Italy	13	10	22	55		100	
Luxembourg							
Netherlands	1	50	24		25	100	
Portugal	1	10		86	3	100	b
Spain		15	1	80	4	100	
United Kingdom	12	58			30	100	
EFTA members							
Austria	15	44	36		5	100	a
Finland	31	3	63		3	100	a
Iceland							
Norway	23	23			54	100	
Sweden	21	8	44		27	100	a
Switzerland	40	12			48	100	
CMEA members							
Bulgaria							
Czechoslovakia							
East Germany							
Hungary							
Poland							
Romania							
USSR							
Others							
Albania							
Cyprus							
Gibraltar							
Liechtenstein							
Malta							
Monaco							
Turkey							
Yugoslavia							

Source: Euromonitor Retail Database
 Notes: a Independents included with affiliated
 b Affiliated included with independents
 Co-op Co-operated
 Multi Food multiples
 Affi Voluntary associations and buying groups
 Inde Non-affiliated independents
 Other Department and variety stores, specialists

APPENDICES

4 - 6:

EC normal, preferential and proposed tariffs and import duties

2. The content of various sugars expressed as sucrose (sugar content) of the products classified within this chapter corresponds to the figure indicated by a refractometer (used in accordance with the method prescribed in the Annex to Regulation (EEC) No 543/86 at a temperature of 20 °C and multiplied by the factor :
- 0,93 in respect of products of subheadings 2008 20 to 2008 80, 2008 92 and 2008 99, or
 - 0,95 in respect of products of the other headings.
3. The products classified under subheadings 2008 20 to 2008 80, 2008 92 and 2008 99 shall be considered as containing added sugar when the 'sugar content' thereof exceeds by weight the percentages given hereunder, according to the kind of fruit or edible part of plant concerned :
- pineapples and grapes : 13 %,
 - other fruits, including mixtures of fruit, and other edible parts of plants : 9 %.
4. For the purposes of subheadings 2008 30 11 to 2008 30 39, 2008 40 11 to 2008 40 39, 2008 50 11 to 2008 50 59, 2008 60 11 to 2008 60 39, 2008 70 11 to 2008 70 59, 2008 80 11 to 2008 80 39, 2008 92 11 to 2008 92 39 and 2008 99 11 to 2008 99 39, the following expressions shall have the meanings hereby assigned to them :
- 'actual alcoholic strength by mass' : the number of kilograms of pure alcohol contained in 100 kg of the product;
 - '% mas' : the symbol for alcoholic strength by mass.
5. The added sugar content of products classified under heading No 2009 corresponds to the 'sugar content' less the figures given hereunder, according to the kind of juice concerned :
- lemon or tomato juice : 3,
 - apple juice : 11,
 - grape juice : 15,
 - other fruit or vegetable juices, including mixtures of juices : 13.
6. For the purposes of subheadings 2009 60 51 and 2009 60 71 'concentrated grape juice (including grape must)' means grape juice (including grape must) for which the figure indicated by a refractometer (used in accordance with the method prescribed in the Annex to Regulation (EEC) 543/86) at a temperature of 20 °C is not less than 50,9 %.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2001	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid :			
2001 10 00	— Cucumbers and gherkins	22	22	—
2001 20 00	— Onions	22	20	—
2001 90	— Other :			
2001 90 10	— — Mango chutney	22	Free	—
2001 90 20	— — Fruit of the genus Capsicum other than sweet peppers or pimentos	7,5	10	—
2001 90 30	— — Sweet corn (Zea mays var. saccharata)	20,8 + MOB	8 + MOB	—

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2001 90 40	-- Yams, sweet potatoes and similar edible parts of plants containing 5 % or more by weight of starch	20.8 + MOB	13 + MOB	—
2001 90 50	-- Mushrooms	22	20	—
2001 90 60	-- Palm hearts	15	20	—
2001 90 80	-- Other	22	20	—
2002	Tomatoes prepared or preserved otherwise than by vinegar or acetic acid :			
2002 10	-- Tomatoes, whole or in pieces :			
2002 10 10	-- Peeled	18	18	—
2002 10 90	-- Other	18	18	—
2002 90	-- Other :			
2002 90 10	-- With a dry matter content of less than 12 % by weight	18	18	—
2002 90 30	-- With a dry matter content of not less than 12 % but not more than 30 % by weight	18	18	—
2002 90 90	-- With a dry matter content of more than 30 % by weight	18	18	—
2003	Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid :			
2003 10	-- Mushrooms :			
2003 10 10	-- Cultivated	23 ⁽¹⁾	—	—
2003 10 90	-- Other	23	—	—
2003 20 00	-- Truffles	20	18	—
2004	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen :			
2004 10	-- Potatoes :			
2004 10 10	-- Cooked, not otherwise prepared	19	18	—
	-- Other :			
2004 10 91	-- -- In the form of flour, meal or flakes	19.6 + MOB	11 + MOB	—
2004 10 99	-- -- Other	24	22	—
2004 90	-- Other vegetables and mixtures of vegetables :			
2004 90 10	-- Sweet corn (<i>Zea mays</i> var. <i>saccharata</i>)	20.8 + MOB	8 + MOB	—
2004 90 30	-- Sauerkraut, capers and olives	20	—	—
2004 90 50	-- Peas (<i>Pisum sativum</i>) and immature beans of the species <i>Phaseolus</i> spp., in pod	24	24	—
	-- Other, including mixtures :			
2004 90 91	-- -- Onions, cooked, not otherwise prepared	19	18	—
2004 90 95	-- -- Artichokes	24	22	—
2004 90 99	-- -- Other	24	22	—

⁽¹⁾ In certain conditions an additional amount is provided for in addition to the customs duty.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen :			
2005 10 00	- Homogenized vegetables	24	22	—
2005 20	- Potatoes :			
2005 20 10	- - In the form of flour, meal or flakes	19,6 + MOB	11 + MOB	—
2005 20 90	- - Other	24	22	—
2005 30 00	- Sauerkraut	20	—	—
2005 40 00	- Peas (<i>Pisum sativum</i>)	24	24	—
	- Beans (<i>Vigna</i> spp., <i>Phaseolus</i> spp.) :			
2005 51 00	- - Beans, shelled	24	22	—
2005 59 00	- - Other	24	24	—
2005 60 00	- Asparagus	22	22	—
2005 70 00	- Olives	20	—	—
2005 80 00	- Sweet corn (<i>Zea mays</i> var. <i>saccharata</i>)	20,8 + MOB	8 + MOB	—
2005 90	- Other vegetables and mixtures of vegetables :			
2005 90 10	- - Fruit of the genus <i>Capsicum</i> other than sweet peppers or pimentos	20	10	—
2005 90 30	- - Capers	20	—	—
2005 90 50	- - Artichokes	24	22	—
2005 90 90	- - Other	24	22	—
2006 00	Fruit, nuts, fruit-peel and other parts of plants, preserved by sugar (drained, glacé or crystallized) :			
2006 00 10	- Ginger	25	Free	—
	- Other :			
	- - With a sugar content exceeding 13 % by weight :			
2006 00 31	- - - Cherries	25 + AGR	25 + AD S/Z	—
2006 00 39	- - - Other	25 + AGR	25 + AD S/Z	—
2006 00 90	- - Other	25	25	—
2007	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter :			
2007 10	- Homogenized preparations :			
2007 10 10	- - With a sugar content exceeding 13 % by weight	30 + AGR	30 + AD S/Z	—
2007 10 90	- - Other	30	30	—
	- Other :			
2007 91	- - Citrus fruit :			
2007 91 10	- - - With a sugar content exceeding 30 % by weight	30 + AGR	25 + AD S/Z	—
2007 91 30	- - - With a sugar content exceeding 13 % but not exceeding 30 % by weight	30 + AGR	25 + AD S/Z	—
2007 91 90	- - - Other	30	27	—

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2007 99	- - Other :			
	- - - With a sugar content exceeding 30 % by weight :			
2007 99 10	- - - - Plum purée and plum paste, in immediate packings of a net content exceeding 100 kg, for industrial processing ⁽¹⁾	30	28 + AD S/Z	—
2007 99 20	- - - - Chestnut purée and paste	30 + AGR	30 + AD S/Z	—
	- - - - Other :			
2007 99 31	- - - - - Of cherries	30 + AGR	30 + AD S/Z	—
2007 99 33	- - - - - Of strawberries	30 + AGR	30 + AD S/Z	—
2007 99 35	- - - - - Of raspberries	30 + AGR	30 + AD S/Z	—
2007 99 39	- - - - - Other	30 + AGR	30 + AD S/Z	—
	- - - With a sugar content exceeding 13 % but not exceeding 30 % :			
2007 99 51	- - - - Chestnut purée and paste	30 + AGR	30 + AD S/Z	—
2007 99 59	- - - - Other	30 + AGR	30 + AD S/Z	—
2007 99 90	- - - Other	30	30	—
2008	Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included :			
	- Nuts, ground-nuts and other seeds, whether or not mixed together :			
2008 11	- - Ground-nuts :			
2008 11 10	- - - Peanut butter	25	20	—
	- - - Other, in immediate packings of a net content :			
2008 11 91	- - - - Exceeding 1 kg	17	14 ⁽²⁾	—
2008 11 99	- - - - Not exceeding 1 kg	22	16 ⁽³⁾	—
2008 19	- - Other, including mixtures :			
2008 19 10	- - - In immediate packings of a net content exceeding 1 kg	17	14	—
2008 19 90	- - - In immediate packings of a net content not exceeding 1 kg	22	16	—
2008 20	- Pineapples :			
	- - Containing added spirit :			
	- - - In immediate packings of a net content exceeding 1 kg :			
2008 20 11	- - - - With a sugar content exceeding 17 % by weight	32 + AGR	—	—
2008 20 19	- - - - Other	32	—	—
	- - - In immediate packings of a net content not exceeding 1 kg :			
2008 20 31	- - - - With a sugar content exceeding 19 % by weight	32 + AGR	—	—
2008 20 39	- - - - Other	32	—	—

⁽¹⁾ Entry under this subheading is subject to conditions laid down in the relevant Community provisions.

⁽²⁾ Duty rate of 12 % for roasted ground-nuts.

⁽³⁾ Duty rate of 14 % for roasted ground-nuts.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	-- Not containing added spirit :			
	-- -- Containing added sugar, in immediate packings of a net content exceeding 1 kg :			
2008 20 51	-- -- -- With a sugar content exceeding 17 % by weight	23 + AGR	22 + 2 AD S/Z	—
2008 20 59	-- -- -- Other	23	22	—
	-- -- Containing added sugar, in immediate packings of a net content not exceeding 1 kg :			
2008 20 71	-- -- -- With a sugar content exceeding 19 % by weight	27 + AGR	24 + 2 AD S/Z	—
2008 20 79	-- -- -- Other	27	24	—
	-- -- Not containing added sugar, in immediate packings of a net content :			
2008 20 91	-- -- -- Of 4,5 kg or more	23	(1)	—
2008 20 99	-- -- -- Of less than 4,5 kg	25	23	—
2008 30	-- Citrus fruit :			
	-- -- Containing added spirit :			
	-- -- -- With a sugar content exceeding 9 % by weight :			
2008 30 11	-- -- -- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 30 19	-- -- -- Other	32 + AGR	—	—
	-- -- -- Other :			
2008 30 31	-- -- -- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 30 39	-- -- -- Other	32	—	—
	-- -- Not containing added spirit :			
	-- -- -- Containing added sugar, in immediate packings of a net content exceeding 1 kg :			
2008 30 51	-- -- -- Grapefruit segments	23 + AGR	17 + 2 AD S/Z	—
2008 30 55	-- -- -- Mandarins (including tangerines and satsumas); clementines, wilkings and other similar citrus hybrids	23 + AGR	21 + 2 AD S/Z	—
2008 30 59	-- -- -- Other	23 + AGR	20 + 2 AD S/Z	—
	-- -- -- Containing added sugar, in immediate packings of a net content not exceeding 1 kg :			
2008 30 71	-- -- -- Grapefruit segments	27 + AGR	17 + 2 AD S/Z	—
2008 30 75	-- -- -- Mandarins (including tangerines and satsumas); clementines, wilkings and other similar citrus hybrids	27 + AGR	20 + 2 AD S/Z	—
2008 30 79	-- -- -- Other	27 + AGR	24 + 2 AD S/Z	—

(1) See Annex.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	--- Not containing added sugar, in immediate packings of a net content:			
2008 30 91	--- Of 4,5 kg or more	23	(1)	—
2008 30 99	--- Of less than 4,5 kg	25	23	—
2008 40	— Pears :			
	--- Containing added spirit :			
	--- In immediate packings of a net content exceeding 1 kg :			
	--- With a sugar content exceeding 13 % by weight :			
2008 40 11	--- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 40 19	--- Other	32 + AGR	—	—
	--- Other :			
2008 40 21	--- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 40 29	--- Other	32	—	—
	--- In immediate packings of a net content not exceeding 1 kg :			
2008 40 31	--- With a sugar content exceeding 15 % by weight	32 + AGR	—	—
2008 40 39	--- Other	32	—	—
	--- Not containing added spirit :			
	--- Containing added sugar, in immediate packings of a net content exceeding 1 kg :			
2008 40 51	--- With a sugar content exceeding 13 % by weight	23 + AGR	20 + 2 AD S/Z	—
2008 40 59	--- Other	23	20	—
	--- Containing added sugar, in immediate packings of a net content not exceeding 1 kg :			
2008 40 71	--- With a sugar content exceeding 15 % by weight	27 + AGR	22 + 2 AD S/Z	—
2008 40 79	--- Other	27	22	—
	--- Not containing added sugar, in immediate packings of a net content:			
2008 40 91	--- Of 4,5 kg or more	23	21	—
2008 40 99	--- Of less than 4,5 kg	25	21	—
2008 50	— Apricots :			
	--- Containing added spirit :			
	--- In immediate packings of a net content exceeding 1 kg :			
	--- With a sugar content exceeding 13 % by weight :			
2008 50 11	--- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 50 19	--- Other	32 + AGR	—	—

1) See Annex.

CN code	Description	Rate of duty		Supplementary unit	
		autonomous (%) or levy (AGR)	conventional (%)		
1	2	3	4	5	
	----- Other :				200
2008 50 31	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—	
2008 50 39	----- Other	32	—	—	
	----- In immediate packings of a net content not exceeding 1 kg :				
2008 50 51	----- With a sugar content exceeding 15 % by weight	32 + AGR	—	—	20
2008 50 59	----- Other	32	—	—	20
	----- Not containing added spirit :				
	----- Containing added sugar, in immediate packings of a net content exceeding 1 kg :				20
2008 50 61	----- With a sugar content exceeding 13 % by weight	23 + AGR	22 + 2 AD S/Z	—	20
2008 50 69	----- Other	23	22	—	20
	----- Containing added sugar, in immediate packings of a net content not exceeding 1 kg :				
2008 50 71	----- With a sugar content exceeding 15 % by weight	27 + AGR	24 + 2 AD S/Z	—	20
2008 50 79	----- Other	27	24	—	20
	----- Not containing added sugar, in immediate packings of a net content :				
2008 50 91	----- Of 4,5 kg or more	17	(1)	—	
2008 50 99	----- Of less than 4,5 kg	25	23	—	20
2008 60	----- Cherries :				20
	----- Containing added spirit :				
	----- With a sugar content exceeding 9 % by weight :				
2008 60 11	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—	20
2008 60 19	----- Other	32 + AGR	—	—	20
	----- Other :				
2008 60 31	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—	20
2008 60 39	----- Other	32	—	—	20
	----- Not containing added spirit :				
	----- Containing added sugar, in immediate packings of a net content exceeding 1 kg :				
2008 60 51	----- Sour cherries (<i>Prunus cerasus</i>)	23 + AGR	20 + 2 AD S/Z	—	20
2008 60 59	----- Other	23 + AGR	20 + 2 AD S/Z	—	20
	----- Containing added sugar, in immediate packings of a net content not exceeding 1 kg :				
2008 60 61	----- Sour cherries (<i>Prunus cerasus</i>)	27 + AGR	24 + 2 AD S/Z	—	20

(1) See Annex.

CN code	Description	Rate of duty		Supplementary unit
		autonomous - (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2008 60 69	--- Other	27 + AGR	24 + 2 AD S/Z	—
	--- Not containing added sugar, in immediate packings of a net content:			
	--- Of 4,5 kg or more:			
2008 60 71	--- Sour cherries (<i>Prunus cerasus</i>)	23	(1)	—
2008 60 79	--- Other	23	(1)	—
	--- Of less than 4,5 kg:			
2008 60 91	--- Sour cherries (<i>Prunus cerasus</i>)	25	23	—
2008 60 99	--- Other	25	23	—
2008 70	— Peaches:			
	— Containing added spirit:			
	--- In immediate packings of a net content exceeding 1 kg:			
	--- With a sugar content exceeding 13 % by weight:			
2008 70 11	--- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 70 19	--- Other	32 + AGR	—	—
	--- Other:			
2008 70 31	--- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 70 39	--- Other	32	—	—
	--- In immediate packings of a net content not exceeding 1 kg:			
2008 70 51	--- With a sugar content exceeding 15 % by weight	32 + AGR	—	—
2008 70 59	--- Other	32	—	—
	--- Not containing added spirit:			
	--- Containing added sugar, in immediate packings of a net content exceeding 1 kg:			
2008 70 61	--- With a sugar content exceeding 13 % by weight	23 + AGR	22 + 2 AD S/Z	—
2008 70 69	--- Other	23	22	—
	--- Containing added sugar, in immediate packings of a net content not exceeding 1 kg:			
2008 70 71	--- With a sugar content exceeding 15 % by weight	27 + AGR	22 + 2 AD S/Z	—
2008 70 79	--- Other	27	22	—
	--- Not containing added sugar, in immediate packings of a net content:			
2008 70 91	--- Of 4,5 kg or more	19	(1)	—
2008 70 99	--- Of less than 4,5 kg	25	23	—

(1) See Annex.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2008 80	- Strawberries :			
	- - Containing added spirit :			
	- - - With a sugar content exceeding 9 % by weight :			
2008 80 11	- - - - Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 80 19	- - - - Other	32 + AGR	—	—
	- - - Other :			
2008 80 31	- - - - Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 80 39	- - - - Other	32	—	—
	- - Not containing added spirit :			
2008 80 50	- - - Containing added sugar, in immediate packings of a net content exceeding 1 kg	23 + AGR	20 + 2 AD S/Z	—
2008 80 70	- - - Containing added sugar, in immediate packings of a net content not exceeding 1 kg	27 + AGR	24 + 2 AD S/Z	—
	- - - Not containing added sugar, in immediate packings of a net content :			
2008 80 91	- - - - Of 4,5 kg or more	23	(1)	—
2008 80 99	- - - - Of less than 4,5 kg	25	23	—
	- Other, including mixtures other than those of subheading 2008 19 :			
2008 91 00	- - Palm hearts	16	20	—
2008 92	- - Mixtures :			
	- - - Containing added spirit :			
	- - - - With a sugar content exceeding 9 % by weight :			
2008 92 11	- - - - - Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32 + AGR	30 + 2 AD S/Z	—
2008 92 19	- - - - - Other	32 + AGR	—	—
	- - - - Other :			
2008 92 31	- - - - - Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 92 39	- - - - - Other	32	—	—
	- - - Not containing added spirit :			
	- - - - Containing added sugar :			
2008 92 50	- - - - - In immediate packings of a net content exceeding 1 kg	23 + AGR	20 + 2 AD S/Z	—
	- - - - - Other :			
2008 92 71	- - - - - Mixtures of fruit in which no single fruit exceeds 50 % of the total weight of the fruits	27 + AGR	15 + 2 AD S/Z	—

(1) See Annex.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2008 92 79	----- Other	27 + AGR	22 + 2 AD S/Z	—
	----- Not containing added sugar, in immediate packings of a net content :			
2008 92 91	----- Of 4,5 kg or more	23	(1)	—
2008 92 99	----- Of less than 4,5 kg	25	23	—
2008 99	----- Other :			
	----- Containing added spirit :			
	----- Ginger :			
2008 99 11	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	16	20	—
2008 99 19	----- Other	24	—	—
	----- Grapes :			
2008 99 21	----- With a sugar content exceeding 13 % by weight	32 + AGR	—	—
2008 99 23	----- Other	32	—	—
	----- Other :			
	----- With a sugar content exceeding 9 % by weight :			
	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas :			
2008 99 25	----- Passionfruit and guavas	20 + 2 AD S/Z	30 + 2 AD S/Z	—
2008 99 27	----- Other	32 + AGR	30 + 2 AD S/Z	—
	----- Other :			
2008 99 32	----- Passionfruit and guavas	20 + AGR	—	—
2008 99 34	----- Other	32 + AGR	—	—
	----- Other :			
2008 99 35	----- Of an actual alcoholic strength by mass not exceeding 11,85 % mas	32	30	—
2008 99 39	----- Other	32	—	—
	----- Not containing added spirit :			
	----- Containing added sugar, in immediate packings of a net content exceeding 1 kg :			
2008 99 41	----- Ginger	23	Free	—
2008 99 43	----- Grapes	23 + AGR	22 + 2 AD S/Z	—
2008 99 45	----- Plums	23 + AGR	20 + 2 AD S/Z	—
	----- Other :			
2008 99 46	----- Passionfruit, guavas and tamarinds	10 + 2 AD S/Z	20 + 2 AD S/Z	—
2008 99 48	----- Other	23 + AGR	20 + 2 AD S/Z	—

(1) See Annex.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	--- -- Containing added sugar, in immediate packings of a net content not exceeding 1 kg:			
2008 99 51	--- -- -- Ginger	27	Free	—
2008 99 53	--- -- -- Grapes	27 + AGR	24 + 2 AD S/Z	—
2008 99 55	--- -- -- Plums	27 + AGR	24 + 2 AD S/Z	—
	--- -- -- Other:			
2008 99 61	--- -- -- -- Passionfruit and guavas	12 + 2 AD S/Z	24 + 2 AD S/Z	—
2008 99 69	--- -- -- -- Other	27 + AGR	24 + 2 AD S/Z	—
	--- -- -- Not containing added sugar:			
	--- -- -- -- Plums, in immediate packings of a net content:			
2008 99 71	--- -- -- -- -- Of 4,5 kg or more	19	(1)	—
2008 99 79	--- -- -- -- -- Of less than 4,5 kg	25	23	—
2008 99 85	--- -- -- -- -- Maize (corn), other than sweet corn (<i>Zea mays</i> var. <i>saccharata</i>)	20,8 + MOB	8 + MOB	—
2008 99 91	--- -- -- -- -- Yams, sweet potatoes and similar edible parts of plants, containing 5 % or more by weight of starch	20,8 + MOB	13 + MOB	—
2008 99 99	--- -- -- -- -- Other	23	(1)	—
2009	Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter:			
	--- -- -- -- -- Orange juice:			
2009 11	--- -- -- -- -- -- Frozen:			
	--- -- -- -- -- -- -- Of a density exceeding 1,33 g/cm ³ at 20 °C:			
2009 11 11	--- -- -- -- -- -- -- -- Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 11 19	--- -- -- -- -- -- -- -- Other	42	—	—
	--- -- -- -- -- -- -- Of a density not exceeding 1,33 g/cm ³ at 20 °C:			
2009 11 91	--- -- -- -- -- -- -- -- Of a value not exceeding ECU 30 per 100 kg net weight and with an added sugar content exceeding 30 % by weight	21 + AGR	19 + AD S/Z	—
2009 11 99	--- -- -- -- -- -- -- -- Other	21	19 + AD S/Z (2)	—
2009 19	--- -- -- -- -- -- Other:			
	--- -- -- -- -- -- -- Of a density exceeding 1,33 g/cm ³ at 20 °C:			
2009 19 11	--- -- -- -- -- -- -- -- Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 19 19	--- -- -- -- -- -- -- -- Other	42	—	—

(1) See Annex.

(2) Duty rate of 13 % for frozen concentrated orange juice, without added sugar, having a degree of concentration of up to 50° Brix, in containers of two litres or less, not containing blood orange concentrate, within the limits of an annual tariff quota of 1 500 tonnes to be granted by the competent authorities. Qualification for this, is governed by, conditions laid down in the relevant Community provisions.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	— — — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
2009 19 91	— — — — Of a value not exceeding ECU 30 per 100 kg net weight and with an added sugar content exceeding 30 % by weight	21 + AGR	19 + AD S/Z	—
2009 19 99	— — — — Other	21	19 + AD S/Z	—
2009 20	— Grapefruit juice :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
2009 20 11	— — — Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 20 19	— — — Other	42	—	—
	— — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
2009 20 91	— — — Of a value not exceeding ECU 30 per 100 kg net weight and with an added sugar content exceeding 30 % by weight	21 + AGR	15 + AD S/Z	—
2009 20 99	— — — Other	21	15 + AD S/Z	—
2009 30	— Juice of any other single citrus fruit :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
2009 30 11	— — — Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 30 19	— — — Other	42	—	—
	— — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
	— — — Of a value exceeding ECU 30 per 100 kg net weight :			
2009 30 31	— — — — Containing added sugar	21	18 + AD S/Z	—
2009 30 39	— — — — Other	21	19	—
	— — — Of a value not exceeding ECU 30 per 100 kg net weight :			
	— — — — Lemon juice :			
2009 30 51	— — — — — With an added sugar content exceeding 30 % by weight	21 + AGR	18 + AD S/Z	—
2009 30 55	— — — — — With an added sugar content not exceeding 30 % by weight	21	18 + AD S/Z	—
2009 30 59	— — — — — Not containing added sugar	21	19	—
	— — — — Other citrus fruit juices :			
2009 30 91	— — — — — With an added sugar content exceeding 30 % by weight	21 + AGR	18 + AD S/Z	—
2009 30 95	— — — — — With an added sugar content not exceeding 30 % by weight	21	18 + AD S/Z	—
2009 30 99	— — — — — Not containing added sugar	21	19	—
2009 40	— Pineapple juice :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
2009 40 11	— — — Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 40 19	— — — Other	42	—	—
	— — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
2009 40 30	— — — Of a value exceeding ECU 30 per 100 kg net weight, containing added sugar	22	19 + AD S/Z	—
	— — — Other :			
2009 40 91	— — — — With an added sugar content exceeding 30 % by weight	22 + AGR	19 + AD S/Z	—

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
2009 40 93	— — — — With an added sugar content not exceeding 30 % by weight	22	19 + AD S/Z	—
2009 40 99	— — — — Not containing added sugar	22	20	—
2009 50	— Tomato juice :			
2009 50 10	— — Containing added sugar	21	20 + AD S/Z	—
2009 50 90	— — Other	21	21	—
2009 60	— Grape juice (including grape must) :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
2009 60 11	— — — Of a value not exceeding ECU 22 per 100 kg net weight	50 + AGR	—	—
2009 60 19	— — — Other	50 ⁽¹⁾	—	—
	— — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
	— — — Of a value exceeding ECU 18 per 100 kg net weight :			
2009 60 51	— — — — Concentrated	28 ⁽¹⁾	28 + AD S/Z	—
2009 60 59	— — — — Other	28 ⁽¹⁾	28 + AD S/Z	—
	— — — Of a value not exceeding ECU 18 per 100 kg net weight :			
	— — — — With an added sugar content exceeding 30 % by weight :			
2009 60 71	— — — — — Concentrated	28 + AGR ⁽¹⁾	28 + AD S/Z	—
2009 60 79	— — — — — Other	28 + AGR ⁽¹⁾	28 + AD S/Z	—
2009 60 90	— — — — Other	28 ⁽¹⁾	28 + AD S/Z	—
2009 70	— Apple juice :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
2009 70 11	— — — Of a value not exceeding ECU 22 per 100 kg net weight	42 + AGR	—	—
2009 70 19	— — — Other	42	—	—
	— — Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
2009 70 30	— — — Of a value exceeding ECU 18 per 100 kg net weight, containing added sugar	25	24 + AD S/Z	—
	— — — Other :			
2009 70 91	— — — — With an added sugar content exceeding 30 % by weight	25 + AGR	24 + AD S/Z	—
2009 70 93	— — — — With an added sugar content not exceeding 30 % by weight	25	24 + AD S/Z	—
2009 70 99	— — — — Not containing added sugar	25	25	—
2009 80	— Juice of any other single fruit or vegetable :			
	— — Of a density exceeding 1,33 g/cm ³ at 20 °C :			
	— — — Pear juice :			
2009 80 11	— — — — Of a value not exceeding ECU 22 per 100 kg net weight	42 + AGR	—	—
2009 80 19	— — — — Other	42	—	—

⁽¹⁾ In addition to the customs duty, the application of a countervailing charge is provided for under certain conditions.

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	--- Other :			
	--- Of a value not exceeding ECU 30 per 100 kg net weight :			
2009 80 32	--- Juices of passionfruit and guavas	21 + AGR	—	—
2009 80 34	--- Other	42 + AGR	—	—
2009 80 39	--- Other	42	—	—
	--- Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
	--- Pear juice :			
2009 80 50	--- Of a value exceeding ECU 18 per 100 kg net weight, containing added sugar	25	24 + AD S/Z	—
	--- Other :			
2009 80 61	--- With an added sugar content exceeding 30 % by weight	25 + AGR	24 + AD S/Z	—
2009 80 63	--- With an added sugar content not exceeding 30 % by weight	25	24 + AD S/Z	—
2009 80 69	--- Not containing added sugar	25	25	—
	--- Other :			
2009 80 80	--- Of a value exceeding ECU 30 per 100 kg net weight, containing added sugar	24	21 + AD S/Z	—
	--- Other :			
	--- With an added sugar content exceeding 30 % by weight :			
2009 80 83	--- Juices of passionfruit and guavas	15 + AGR	21 + AD S/Z	—
2009 80 85	--- Other	24 + AGR	21 + AD S/Z	—
2009 80 93	--- With an added sugar content not exceeding 30 % by weight	24	21 + AD S/Z	—
	--- Not containing added sugar :			
2009 80 95	--- Juice of fruit of the species <i>Vaccinium macrocarpon</i>	24	22	—
2009 80 99	--- Other	24	22	—
2009 90	--- Mixtures of juices :			
	--- Of a density exceeding 1,33 g/cm ³ at 20 °C :			
	--- Mixtures of apple and pear juice :			
2009 90 11	--- Of a value not exceeding ECU 22 per 100 kg net weight	42 + AGR	—	—
2009 90 19	--- Other	42	—	—
	--- Other :			
2009 90 21	--- Of a value not exceeding ECU 30 per 100 kg net weight	42 + AGR	—	—
2009 90 29	--- Other	42	—	—
	--- Of a density not exceeding 1,33 g/cm ³ at 20 °C :			
	--- Mixtures of apple and pear juice :			
2009 90 31	--- Of a value not exceeding ECU 18 per 100 kg net weight and with an added sugar content exceeding 30 % by weight	25 + AGR	—	—
2009 90 39	--- Other	25	—	—

CN code	Description	Rate of duty		Supplementary unit
		autonomous (%) or levy (AGR)	conventional (%)	
1	2	3	4	5
	--- Other :			
	---- Of a value exceeding ECU 30 per 100 kg net weight :			
	---- Mixtures of citrus fruit juices and pineapple juice :			
2009 90 41	---- Containing added sugar	22	19 + AD S/Z	—
2009 90 49	---- Other	22	20	—
	---- Other :			
2009 90 51	---- Containing added sugar	24	21 + AD S/Z	—
2009 90 59	---- Other	24	22	—
	---- Of a value not exceeding ECU 30 per 100 kg net weight :			
	---- Mixtures of citrus fruit juices and pineapple juice :			
2009 90 71	---- With an added sugar content exceeding 30 % by weight . .	22 + AGR	19 + AD S/Z	—
2009 90 73	---- With an added sugar content not exceeding 30 % by weight	22	19 + AD S/Z	—
2009 90 79	---- Not containing added sugar	22	20	—
	---- Other :			
2009 90 91	---- With an added sugar content exceeding 30 % by weight . .	24 + AGR	21 + AD S/Z	—
2009 90 93	---- With an added sugar content not exceeding 30 % by weight	24	21 + AD S/Z	—
2009 90 99	---- Not containing added sugar	24	22	—

ANNEX I

List of products subject to fixed reduced-duty amounts

Order No	CN code	Description	Rate of duty	Fixed reduced-duty amount (in tonnes)
(1)	(2)	(3)	(4)	(5)
50.0015	ex 2008 20 51 ex 2008 20 59 ex 2008 20 71 ex 2008 20 79 ex 2008 20 91 ex 2008 20 99	Preserved pineapples, in slices, half slices or spirals	15 % + AD S/Z (1)	32 850
50.0025	ex 2008 20 51 ex 2008 20 59 ex 2008 20 71 ex 2008 20 79 ex 2008 20 91 ex 2008 20 99	Preserved pineapples, other than in slices, half slices or spirals	12 % + AD S/Z (1)	48 030
50.0030	ex 2101 10 11	Extracts of coffee, obtained by a water method of extraction from roasted coffee, put in powder form, granulated, in grains, in tablets or in a similar solid form	9 %	19 200
50.0040	2401 10 10 2401 20 10	Unmanufactured tobacco — Flue-cured Virginia type	6 % with min. of ECU 16 and max. of ECU 27/100 kg net weight	67 954
50.0050	2401 10 50 2401 10 70 2401 10 80 2401 10 90 2401 20 50 2401 20 70 2401 20 80 2401 20 90	Unmanufactured tobacco — Other, excluding the sun-cured oriental type	14 % with min. of ECU 28 and max. of ECU 31/100 kg net weight	20 000

(1) Additional duty on sugar. To be levied where the sugar content exceeds 17 % by weight in the case of products falling within CN code ex 2008 20 51 and 19 % by weight for products of CN code ex 2008 20 71.

(1)	(2)	(3)	(4)
52.2590	ex 1903 00 00	Tapioca and substitutes therefor prepared from starch, in the form of flakes, grains, pearls, siftings or similar forms, excluding those obtained from potato starch	2 %
52.2600	1904 10 10 1904 10 30 1904 10 90	Prepared foods obtained by the swelling or roasting of cereals or cereal products (for example, corn flakes); cereals, other than maize (corn), in grain form, pre-cooked or otherwise prepared Prepared food obtained by the swelling or roasting of cereals or cereal products	Free
52.2610	1904 90 10	Of rice	3 %
52.2620	1904 90 90	Of other cereals	2 %
52.2630	1905 10 00	Crispbread	Free
52.2640	1905 20 10 1905 20 30 1905 20 90	Gingerbread and the like	Free
52.2660	1905 90 10	Matzos	Free
52.2670	1905 90 20	Communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products	Free
52.2680	1905 90 30	Bread	4 %
52.2690	2001 20 00	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid Onions	14 %
52.2695	2001 90 20	Fruit of the genus <i>Capsicum</i> other than sweet peppers and pimentos	5 %
52.2700	2001 90 50 ex 2001 90 80	Mushrooms Other, excluding 'mixed pickles' and sweet peppers	14 %
52.2710	2001 90 30	Sweet corn	3 %
52.2720	2001 90 60	Palm hearts	7 %
52.2730	ex 2001 90 80	Papaya chutney	9 %
	2003 20 00	Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid Truffles	14 %
52.2740	2004 90 10	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen Sweet corn	3 %
52.2750	ex 2004 90 30	Sauerkraut	15 %
	ex 2004 90 30	Capers	12 %
52.2760	ex 2004 90 99	Asparagus	20 %
	ex 2004 90 99	Bamboo shoots	11 %
	ex 2004 90 99	<i>Moringa oleifera</i> (drumsticks)	Free

(1)	(2)	(3)	(4)
52.2770	2005 30 00	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen Sauerkraut	15 %
52.2780	2005 60 00	Asparagus	20 %
52.2790	2005 80 00	Sweet corn	3 %
52.2795	2005 90 10	Fruit of the genus <i>Capsicum</i>	5 %
52.2800	2005 90 30	Capers	12 %
52.2810	ex 2005 90 90	Bamboo shoots	11 %
	ex 2005 90 90	<i>Moringa oleifera</i> (drumsticks)	Free
52.2820	ex 2006 00 39	Fruits, nuts, fruit-peel and other parts of plants, preserved by sugar (drained, glacé or crystallized) Other, with a sugar content exceeding 13 % by weight Fruit falling within heading Nos 0801, 0803, 0804 (except figs and pineapples), 0805 40 00, 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	6 %
52.2830	ex 2006 00 90	Other, than with a sugar content not exceeding 13 % Fruit falling within heading Nos 0801, 0803, 0804 (except figs and pineapples), 0805 40 00, 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	6 %
52.2840	ex 2007 10 90	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter Other Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs and pineapples), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.2850	ex 2007 91 10 ex 2007 91 30	Jams and marmalades of citrus fruit With a sugar content exceeding 30 % by weight, excluding orange jam and marmalade With sugar content exceeding 13 % but not exceeding 30 % by weight, excluding orange jam and marmalade	18 %
52.2860	ex 2007 91 90	Other, excluding orange jam and marmalade	19 %
52.2863	2007 99 10	Plum purée and plum paste, in immediate packings of a net content exceeding 100 kg for industrial processing, with a sugar content exceeding 30 % by weight (e)	24 %
52.2865	2007 99 31	Jams, jellies, marmalades, purées and pastes of cherries, with a sugar content exceeding 30 % by weight	25 %
52.2870	ex 2007 99 39	With a sugar content exceeding 30 % by weight Fruit falling within heading Nos 0801, 0803, 0804 (except figs and pineapples) 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.2880	ex 2007 10 10 ex 2007 99 59	With a sugar content exceeding 13 % but not exceeding 30 % by weight Fruit falling within heading Nos 0801, 0803, 0804 (except figs and pineapples), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.2890	ex 2007 99 90	Other Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs and pineapples), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %

(e) Entry under this subheading is subject to conditions laid down in the relevant Community provisions.

(1)	(2)	(3)	(4)
52.2900	2008 11 91 2008 11 99 ex 2008 19 10	Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included Ground-nuts Other, including mixtures in immediate packings of a net content exceeding 1 kg, excluding almonds, walnuts and hazelnuts	6 %
52.2910	ex 2008 19 10	Other including mixtures in immediate packings of a net content exceeding 1 kg Almonds, walnuts and hazelnuts	12 % (*)
52.2920	ex 2008 19 90	Other, in immediate packings of a net content not exceeding 1 kg, excluding almonds, walnuts and hazelnuts	6 %
	ex 2008 19 90	Other, in immediate packings of a net content not exceeding 1 kg Almonds, walnuts and hazelnuts	11,5 % (*)
52.2930	2008 20 11	Pineapples, in immediate packings of a net content Of 1 kg or more, with a sugar content exceeding 17 % by weight	10 %
52.2940	2008 20 19	Other	10 %
52.2950	2008 20 31	Of 1 kg or less, with a sugar content exceeding 19 % by weight	10 %
52.2960	2008 20 39	Other	10 %
52.2970	2008 30 11 2008 30 19	Citrus fruit containing added spirit, with a sugar content exceeding 9 % by weight	25 %
52.2980	2008 30 31 2008 30 39	Other citrus fruit	25 %
52.2990	2008 30 51	Containing added sugar, in immediate packings of a net capacity of more than 1 kg Grapefruit segments	9 %
52.3000	2008 30 55	Mandarins (including tangerines and satsumas); clementines, wilkings and other similar citrus hybrids	19 % (*)
52.3010	2008 30 71	Containing added sugar, in immediate packings of a net capacity of 1 kg or less Grapefruit segments	9 %
52.3020	2008 30 75	Mandarins (including tangerines and satsumas), clementines, wilkings and other similar citrus hybrids	18 % (*)
52.3030	2008 40 11 2008 40 19 2008 40 31	Pears with a sugar content exceeding 13 % by weight	25 %
52.3040	2008 40 21 2008 40 29 2008 40 39	Pears, other	25 %
52.3050	2008 50 11 2008 50 19 2008 50 51	Apricots with a sugar content exceeding 13 % by weight	25 %

(1)	(2)	(3)	(4)
52.3060	2008 50 31 2008 50 39 2008 50 59	Apricots, other	25 %
52.3065	2008 60 61	Sour cherries (<i>Prunus cerasus</i>), containing added sugar, in immediate packings of a net content not exceeding 1 kg	18 %
52.3070	2008 70 11 2008 70 19 2008 70 51	Peaches with a sugar content exceeding 13 % by weight	25 %
52.3080	2008 70 31 2008 70 39 2008 70 59	Peaches, other	25 %
52.3090	2008 80 11 2008 80 19	Strawberries	25 %
52.3100	2008 80 31 2008 80 39	Strawberries	25 %
52.3110	2008 91 00	Palm hearts	7 %
52.3120	2008 92 11 2008 92 19	Mixtures	25 %
52.3130	2008 92 31 2008 92 39	Mixtures	25 %
52.3140	ex 2008 92 50	Mixtures of two or more fruits falling within heading Nos 0801, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80, in which no single fruit exceeds 50 % of the total weight of the fruits	9 %
52.3150	ex 2008 92 71	Mixtures of two or more fruits falling within heading Nos 0801, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	7 %
52.3160	ex 2008 92 91	Mixtures of two or more fruits falling within headings Nos 0801, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80, in which no single fruit exceeds 50 % of the total weight of the fruits	9 %
52.3170	ex 2008 92 99	Mixtures of two or more fruits falling within heading Nos 0801, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80, in which no single fruit exceeds 50 % of the total weight of the fruits	10 %
52.3180	2008 99 11 2008 99 19	Ginger	10 %
52.3190	2008 99 21	Grapes, with a sugar content exceeding 13 % by weight	25 %
52.3200	2008 99 23	Other grapes	25 %
52.3210	2008 99 27 2008 99 34	Other fruits, with a sugar content exceeding 9 % by weight	25 %
52.3220	2008 99 35 2008 99 39	Other containing added spirit	25 %

(1)	(2)	(3)	(4)
52.3230	2008 99 43	Grapes, in immediate packings of a net content exceeding 1 kg	18 % (*)
52.3240	ex 2008 99 46 ex 2008 99 48	Passion fruits and guavas, not containing added spirit Fruit falling within heading Nos 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	6 %
52.3250	ex 2008 99 46	Tamarind	7 %
52.3260	2008 99 53	Grapes	19 % (*)
52.3265	ex 2008 99 61 ex 2008 99 69	Passion fruits and guavas Fruit falling within heading, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	7 %
52.3270	2008 99 85	Maize (corn), other than sweet corn	3 %
52.3280	ex 2008 99 99	Fruit falling within heading Nos 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	6 %
52.3290	2009 20 11	Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter Grapefruit juices	28 %
52.3300	2009 20 19	Grapefruit juice	28 %
52.3310	2009 20 91 2009 20 99	Grapefruit juice	7 %
52.3320	ex 2009 30 31 ex 2009 30 39	Citrus fruit juices (excluding lemon juices) containing added sugar Citrus fruit juices (excluding lemon juices) not containing added sugar	13 % (*)
52.3340	2009 30 91 2009 30 95	Other citrus fruit juices With an added sugar content exceeding 30 % by weight With an added sugar content not exceeding 30 % by weight	14 % (*)
52.3350	ex 2009 30 99	Lime juice (<i>Citrus aurantifolia</i> var. <i>Lumio</i> and var. <i>Limetta</i>), not containing added sugar	13 % (*)
	ex 2009 30 99	Other, not containing added sugar	15 % (*)
52.3360	2009 40 30	Pineapple juice	17 % (*)
52.3370	2009 40 91	Pineapple juice	17 % (*)
52.3380	2009 40 93 2009 40 99	With an added sugar content not exceeding 30 % by weight Pineapple juice not containing added sugar	17 % (*)
52.3385	2009 70 30 2009 70 93 2009 70 99	Apple juice, of a density not exceeding 1,33 g/cm ³ at 20 °C Of a value exceeding ECU, 8 per 100 kg net weight, containing added sugar Of a value not exceeding ECU, 8 per 100 kg net weight, with an added sugar content not exceeding 30 % by weight Not containing added sugar	12 %

(1)	(2)	(3)	(4)
52.3390	2009 80 32 ex 2009 80 34	Of passion fruit and guavas Of other fruit falling within heading Nos 0801, 0803, 0804 (excluding figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.3400	ex 2009 80 39	Date juice	Free
	ex 2009 80 39	Fruit falling within heading Nos 0801, 0803, 0804 (except figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.3410	ex 2009 80 80	Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
	ex 2009 80 80	Other fruit and vegetable juices, containing added sugar, excluding apricot and peach juice	17 %
52.3420	2009 80 83 ex 2009 80 85	Juices of passion fruit and guavas Of other fruit and vegetable juices with an added sugar content exceeding 30 % by weight Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
	ex 2009 80 85	Other, excluding apricot and peach juices	17 %
52.3430	ex 2009 80 93	Other fruit and vegetable juices with an added sugar content of 30 % or less, by weight Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
	ex 2009 80 93	Other, excluding apricot and peach juices	17 %
52.3440	2009 80 95 ex 2009 80 99	Other fruit and vegetable juices, not containing added sugar Of fruit falling within heading Nos 0801, 0803, 0804 (excluding figs), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
	ex 2009 80 99	Other, excluding apricot and peach juices	18 %
52.3450	ex 2009 90 21	Mixtures of juices of a value not exceeding ECU 30 per 100 kg net weight Fruit falling within heading Nos 0801, 0803, 0804 (excluding figs and pineapples), 0807 20 00, 0810 20 90, 0810 30 90, 0810 40 10, 0810 40 50, 0810 40 90, 0810 90 10, 0810 90 30 and 0810 90 80	8 %
52.3460	ex 2009 90 51	Mixtures of juices of a value exceeding ECU 30 per 100 kg net weight, excluding mixtures containing, either separately or together, over 25 % of grape, citrus fruit, pineapple, apple, pear apple, pear, tomato, apricot or peach juice containing added sugar	17 % (*)
52.3470	ex 2009 90 59	Other, not containing added sugar	18 % (*)

(1)	(2)	(3)	(4)
52.3480	ex 2009 90 91	Mixtures of juices Of a value not exceeding ECU 30 per 100 kg net weight, excluding mixtures containing, either separately or together, over 25 % of grape, citrus fruit, pineapple, apple, pear, tomato, apricot or peach juice with an added sugar content exceeding 30 % by weight	17 % (*)
52.3490	ex 2009 90 93	With an added sugar content not exceeding 30 % by weight	17 % (*)
52.3500	ex 2009 90 99	Not containing added sugar	18 % (*)
52.3510	ex 2101 10 11 ex 2101 10 19	Extracts, essences and concentrates, of coffee, tea or maté and preparations with a basis of these products or with a basis of coffee, tea or maté; roasted chicory and other roasted coffee substitutes, and extracts, essences and concentrates thereof Essences of coffee	9 %
52.3520	ex 2101 20 10	Extracts, essences or concentrates of tea or maté and preparations with a basis of those extracts, essences or concentrates	Free
52.3530	2101 30 19 2101 30 99	Roasted chicory and other roasted coffee substitutes Other Extracts, essences and concentrates of roasted chicory and other roasted coffee substitutes Other	2 %
52.3540	2102 10 10	Yeasts (active or inactive), other single-cell micro-organisms, dead (but not including vaccines of heading No 3002); prepared baking powders Culture yeast	8 %
52.3550	2102 10 31 2102 10 39	Bakers' yeast	4 %
52.3560	2102 10 90	Other yeast	10 %
52.3570	2102 20 11	Inactive yeasts In tablet, cube or similar form, or in immediate packings of a net capacity of 1 kg or less	6 %
52.3580	2102 20 19 2102 20 90	Other	Free
52.3590	2102 30 00	Prepared baking powder	3 %
52.3600	ex 2103 10 00	Sauces and preparations thereof; mixed condiments and mixed seasoning, mustard flour and meal and prepared mustard Soya sauce not with a vegetable oil basis	5 %
52.3610	ex 2103 20 00	Sauces with a basis of tomato purée	6 %
52.3620	2103 30 10	Mustard flour	Free
52.3630 52.3640	2103 30 90 ex 2103 90 90	Prepared mustard Products with a tomato ketchup basis	7 %
	ex 2103 90 90	Other, excluding sauces with a vegetable oil basis	5 %

APPENDIX 6: EC proposal in GATT negotiations for tariff reduction

Detailed illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Proposal
<u>11. Tropical Fruits (1)</u>						
0804	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried :					
0804 50 00	Guavas, mangoes and mangosteens	6	0	B	4	
0807	Melons (including watermelons) and papaws (papayas), fresh :					
0807 20 00	Papaws (papayas)	6	0	B	2	
0810	Other fruit, fresh :					
0810 90	-- Other					
0810 90 30	--- Tamarinds, cashew apples, lychees, jackfruit, sapodilla plums	11	0	B	7.5	
<u>12. Processed Fruit and Fruit Products (1)</u>						
0811	Fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter :					
0811 90	Other :					
	-- containing added sugar or other sweetening matter					
0811 90 10	-- With sugar content exceeding 13% by weight	26 + AD S/Z	13+ AD S/Z	B	-	
0811 90 30	-- Other	26	13	B	-	
	-- Other :					
0811 90 90	--- Other	18	9	B	-	
0812	Fruit and nuts, 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 :					
0812 90 30	-- Papaws (papayas)	5.5	2.3	B	3	
0812 90 90	-- Other	11	5.5	B	-	

(1) The tropical fruits referred to are tamarinds cashew apples, mangoes, mangosteens, papayas, lychees, jackfruit, guavas, papaws, sapodilla plums and similar fruit. Similar means those fruits accepted as tropical by the Community.

Detailed Illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Pro-posal
0813	Fruit, dried, other than that of heading n° 0801 to 0806; mixtures of nuts or dried fruits of this chapter (1) :					
0813 40 50	-- Papaws (papayas)	4	2	B	2	
0813 40 60	-- Tamarind	6	3	B	0	
0813 40 99	-- Other	6	3	B	-	
0813 50	- Mixtures of nuts or dried fruits of this chapter :					
	-- Fruit salads of dried fruit, other than that of heading n° 0801 to 0806					
0813 50 11	--- Not containing prunes	8	4	B	-	
0813 50 30	-- Mixtures exclusively of dried nuts of heading n° 0801 and 0802	8	4	B	-	
0813 50 91	--- Not containing prunes of figs	10	5	B	-	
0813 50 99	--- Other	12	6	B	-	
2001	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid: (1)					
2001 90	Other :					
2001 90 20	-- Fruit of the genus Capsicum other than sweet peppers or pimentos	10	5	B	7.5	
2001 90 60	-- Palm hearts	20	10	B	15	
2001 90 90	-- Other	20	10	B	10	
2006	Fruit, nuts, fruit-peel and other parts of plants, preserved by sugar (drained, glacé or crystallized): (1)					
	- Other :					
	-- With a sugar content exceeding 13% by weight :					
2006 00 39	--- Other	25+ AD S/Z	13.5+ AD S/Z	B	-	
2006 00 90	-- Other	25	6	B	-	
2007	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter :(1)					
2007 10	- Homogenized preparations :					
2007 10 10	-- With a sugar content exceeding 13% by weight	30+ AD S/Z	15+ AD S/Z	B	-	
2007 10 90	-- Other	30	15	B	15	

(1) Footnote 2 on page 9 and footnote 1 on page 10 apply

Detailed illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Proposal
2007 99	-- Other :					
	--- With a sugar content exceeding 30% by weight :					
	---- Other :					
2007 99 39	---- Other	30+ AD S/Z	15+ AD S/Z	B	-	
	--- With a sugar content exceeding 13% but not exceeding 30% :					
2007 99 59	---- Other	30+ AD S/Z	15+ AD S/Z	B	-	
2007 99 90	---- Other	30	4	B	-	
2008	Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit not elsewhere specified or included (1)					
	- Other, including mixtures other than those of subheading 2008 19 :					
2008 91 00	-- Palm hearts	20	10	B	16	
	-- Mixtures :					
	--- Containing added spirit :					
	---- With a sugar content exceeding 9% by weight :					
2008 92 11	---- Of an actual alcoholic strength by mass not exceeding 11,85% mas	30 + 2 AD S/Z	15+2 AD S/Z	B	-	
2008 92 19	---- Other	32+ AGR	16+ AD S/Z	U	-	
	---- Other :					
2008 92 31	---- Of an actual alcoholic strength by mass not exceeding 11,85% mas	30	15	B	-	
2008 92 39	---- Other	32	16	U	-	
	--- Not containing added spirit :					
	---- Containing added sugar :					
2008 92 50	---- In immediate packing of a net content exceeding 1 kg	20 + 2 AD S/Z	10+2 AD S/Z	B	-	
	---- Other :					
2008 92 71	---- Mixtures of fruit in which no single fruit exceeds 50% of the total weight of the fruits	15 + 2 AD S/Z	7.5+2 AD S/Z	B	-	
2008 92 79	---- Other	22 + 2 AD S/Z	11+2 AD S/Z	B	-	

(1) Footnote 2 on page 9 and footnote 1 on page 10 apply

Detailed illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Pro-bascl
	----- Not containing added sugar, in immediate packing of a net content :					
2008 92 91	----- Of 4,5 kg or more (1)	23	11.5	U	-	
2008 92 99	----- Of less than 4,5 kg	23	11.5	B	-	
2008 99	-- Other :					
	---- Containing added spirit :					
	----- Ginger :					
2008 99 11	----- Of an actual alcoholic strength by mass not exceeding 11,85% mas	20	10	B	16	
2008 99 19	----- Other	32	16	U	24	
	----- Other :					
	----- With a sugar content exceeding 9% by weight :					
	----- Of an actual alcoholic strength by mass not exceeding 11,85% mas					
2008 99 25	----- Passionfruit and guavas	30 + 2 AD S/Z	15+2 AD S/Z	B	20 + 2 AD S/Z	
2008 99 27	----- Other	32+ AGR	16+ AGR	U	-	
	----- Other					
2008 99 32	----- Passionfruit and guavas	32+ AGR	16+ AGR	U	20+AGR	
2008 99 34	----- Other	32+ AGR	16+ AGR	U	-	
	----- Other :					
2008 99 35	----- Of an actual alcoholic strength by mass not exceeding 11,85% mas	30	15	B	-	
2008 99 39	----- Other	32	16	U	-	
	---- Not containing added spirit :					
	---- Containing added sugar, in immediate packings of a net content exceeding 1 kg :					
	----- Other					
2008 99 46	----- Passionfruit, guavas and tamarind	20 + 2 AD S/Z	10+2 AD S/Z	B	10 + 2 AD S/Z	
2008 99 48	Other	20 + 2 AD S/Z	10+2 AD S/Z	B	-	

(1) of 4.5 kg but less than 5 kg - duty 23% bound

Detailed illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Proposal
	----- Other					
2008 99 61	----- Passionfruit and guavas	24 + 2 AD S/Z	12+2 AD S/Z	B	12 + 2 AD S/Z	
2008 99 69	----- Other	24 + 2 AD S/Z	12+2 AD S/Z	B	-	
	Not containing added sugar					
2008 99 99	Other (1)	23	11.5	U	-	
2009	Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter : (2)					
2009 80	- Juice of any other single fruit or vegetable :					
	-- Of a density > 1,33 g/cm ³ at 20°C					
	---- Other :					
	----- Of a value not > 30 ECU per 100 kg net weight					
2009 80 32	----- Juices of passionfruit and guavas	42+AGR	21+AGR	U	21+AGR	
2009 80 34	----- Other	42+AGR	21+AGR	U	-	
2009 80 39	----- Other	42	21	U	-	
	-- Of a density not > 1,33 g/cm ³ at 20°C					
	---- Other :					
2009 80 80	----- Of a value > 30 ECU per 100 kg net weight, containing added sugar	21+ AD S/Z	10.5 AD S/Z	B	-	
	---- Other:					
	----- With added sugar exceeding 30% by weight					
2009 80 83	----- Juices of passionfruit and guavas	21+ AD S/Z	10.5 AD S/Z	B	15 + AD S/Z	
2009 80 85	----- Other	21 + AD S/Z	10.5 AD S/Z	B	-	
2009 80 91	----- With an added sugar content > 30% by weight	21+ AD S/Z	10.5+ AD S/Z	B	-	
2009 80 93	----- With an added sugar content not > 30% by weight	21+ AD S/Z	10.5 AD S/Z	B	-	
	----- Not containing added sugar :					
2009 80 99	----- Other	22	11	B	-	
	- Mixtures of juices :					
	-- Of a density > 1,33 g/cm ³ at 20°C					
	---- Other :					

(1) Other fruit in immediate packing of less than 5 kg - bound rate at 23%

(2) Footnote 1 on page 10 applies

Detailed illustration of the application of the Community's proposal (MTN GNG/NG6/W/13)

CN Code	DESCRIPTION OF PRODUCTS	Base Rate %	Illustration %	Consolidation Code	Remark Mid-term Offer %	Tariff Proposal
2009 90 21	----- Of a value not > 30 ECU per 100 kg net weight	42+ AGR	21+ AGR	U	-	
2009 90 29	----- Other -- Of a density not > 1,33 g/cm ³ at 20°C : ---- Other : ----- Of a value > 30 ECU per 100 kg net weight : ----- Other :	42	21 + AGR	U	-	
2009 90 51	----- Containing added sugar	21+ AD S/Z	10.5 AD S/Z	B	-	
2009 90 59	----- Other Of a value not > 30 ECU per 100 kg net weight ----- Other :	22	11	B	-	
2009 90 91	----- With an added sugar content > 30% by weight	21+ AD S/Z	10.5+ AGR	B	-	
2009 90 93	----- With an added sugar content not > 30% by weight	21+ AD S/Z	10.5 AD S/Z	B	-	
2009 90 99	----- Not containing added sugar	22	11	B	-	
	<u>12. Jute and Hard Fibres - Yarn and Fabrics</u>					
5307	Yarn of jute or of other textile bast fibres of heading No 5303:					
5307 10	- Single:					
5307 10 10	-- Measuring 1000 decitex or less (10 metric number or more)	5.3	2.7	B	0	4.0
5307 10 90	-- Measuring more than 1000 decitex (less than 10 metric number)	5.3	2.7	B	0	4.0
5307 20 00	- Multiple (folded) or cabled	5.3	2.7	B	0	4.0
5308	Yarn of other vegetable textile fibres; paper yarn:					
5308 90	- Other:					
	-- Ramie yarn:					
5308 90 11	--- Measuring 833,3 decitex or more (not exceeding 12 metric number)	4.6	2.3	B	-	3.7
5308 90 13	--- Measuring less than 833,3 decitex but not less than 277,8 decitex (exceeding 12 metric number but not exceeding 36 metric number)	4.6	2.3	B	-	3.5
5308 90 19	--- Measuring less than 277,8 decitex (exceeding 36 metric number)	3.8	1.9	B	-	2.9

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