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FRUIT AND VEGETABLES

DIRECTORATE-GENERAL FOR AGRICULTURE
Reports, publications, studies and documentation

FRUIT AND VEGETABLES

1995 edition

EUROPEAN COMMISSION

Directorate–General for Agriculture

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INTRODUCTION

The information in this document is arranged in three parts:

- the "analysis" part describes the market situation and the mechanisms of the market organization in the product;
- the "statistics" part gives most of the tables appearing for the product in the annual report on the agricultural situation in the European Union;
- the Council decisions on the agricultural prices provide a vital illustration of the Community's policy in this sector.

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DESCRIPTION OF THE MECHANISMS OF THE COMMON MARKET ORGANIZATION*

A. Fresh fruit and vegetables

The gradual establishment of a fruit and vegetables market organization was provided for in Regulation No 23 of 4 April 1962. This was replaced by Regulation (EEC) No 1035/72 on the common organization of the market in fruit and vegetables, which came into force on 1 June 1972 and was last amended by Regulations (EEC) No 3669/93 and (EC) No 3290/94.

The marketing year differs from product to product.

Expenditure on fresh fruit and vegetables was 2.9% of total EAGGF Guarantee spending in 1994.

1. Economic background¹

Community production of fruit harvested for sale from 1991 to 1993 averaged 31.6 million t, and production of vegetables averaged 47.4 million t during the same period.

Internal consumption (production+imports-exports) of fruit in 1993 came to 32.3 million t including 10.2 million t of citrus fruit. Consumption of vegetables was 47.4 million t.

The self-sufficiency rate in vegetables was 107% in 1992/93, in non-citrus fruit 85% and in citrus fruit 70%.

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

- imports in 1993: 3.7 million t of fruit (of which 1.5 million t of citrus fruit) and 0.8 million t of fresh vegetables,
- exports in 1993: 1.8 million t of fresh fruit (of which 1.3 million t of citrus fruit) and 0.8 million t of vegetables.

* Translated from *Avant-projet de budget général des Communautés européennes pour l'exercice 1996*.

¹ Community production of bananas is not included here.

2. Operation of the market¹

2.1. Price arrangements

For each marketing year, the Council fixes two types of price for certain products:

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

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

- **Withdrawal price:** This is derived from the basic price and the buying-in price and is the price below which producer organizations do not offer their members' products for sale: the latter are paid compensation instead. The arrangement is currently confined to the following basic products and periods: peaches: 1/6 to 30/9; pears: 1/7 to 30/4; apples: 1/8 to 30/5; table grapes: 1/8 to 31/10; oranges: 1/12 to 30/5; mandarins: 16/11 to 28/2; lemons: 1/6 to 30/5; cauliflowers: 1/5 to 30/4; tomatoes: 11/6 to 30/11; aubergines: 1/7 to 31/10; apricots: 1/6 to 31/7; clementines: 1/12 to 15/2; satsumas: 16/10 to 15/1; and nectarines: 1/6 to 31/8. Withdrawal prices may not exceed the buying-in price for quality class II plus 10% of the basic price.
- **Public buying-in price:** Should a serious crisis occur on the market, intervention agencies may buy in surplus products at a price not exceeding the buying-in price, adjusted for quality class II, provided the products meet the standards set for this class, plus other adjustments where appropriate depending on the products being bought in. This provision is, for the time being, only applied in Greece.

¹ For the common organization of the market in bananas see point 3.

2.2. The entry price

The main effect of the GATT Agreement on the fruit and vegetable sector is the replacement of the old reference price scheme by the so-called entry price scheme. Under this new scheme, which applies from the beginning of the 1995 marketing year, the Common Customs Tariff contains different classifications for each of the 16 products concerned, depending on the price of the goods imported (entry price) which means that import charges are different for each category of tariff classification and are calculated on the basis of the entry price. The entry price will be fixed per lot.

Regulation (EC) No 3223/94 of 21 December 1994 lays down the following detailed rules: the customs officer classifies the lot - and thereby fixes the import charges - applying a "standard import value" calculated every day by the Commission, per product and per origin, on the basis of the prices on wholesale import markets in the Community. The importer has, however, the right to accept this classification or to demand a different one based on the specific data for the lot concerned and subject to the lodging of a security. In the latter case, the importer must, moreover, prove the correctness of his declarations, on the basis of the actual retail price of the imported goods.

2.3. Export refunds

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

2.4. Withdrawal operations

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

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

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

2.5. Prices fixed

For the 1995/96 marketing year, the Council decided to freeze the institutional prices.

2.6. Measures accompanying the price mechanisms

2.6.1. Establishment of a Community register of citrus cultivation

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

2.6.2. Promotion measures

(a) Financial compensation to support processing of citrus fruit

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

For oranges and small-fruited citrus, the minimum price is fixed at the level of the highest withdrawal price valid during the periods of substantial withdrawals. For lemons, the minimum price is 105% of the average withdrawal price. A special scheme is applied to satsumas destined for processing.

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

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

(b) Measures to increase consumption of apples and citrus fruit

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

- (c) Special measures for the transport of certain fruit and vegetables originating in Greece

Financial compensation for transport by lorry or refrigerated van to Member States other than Italy, Spain and Portugal is paid to the consignor in order to cover transport costs that arise because of the conflict in former Yugoslavia.

3. Common organization of the market in bananas

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

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

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

The marketing year runs from 1 January to 31 December.

3.1. Aid scheme

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

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

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

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

- (d) A single premium of ECU 1 000 per hectare, which may be adjusted, chargeable to the EAGGF Guarantee Section, is granted to Community producers who cease to grow bananas.

3.2. Import and export arrangements

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

A tariff quota of 2.2 million tonnes (net weight) is opened each year for imports of bananas from third countries and non-traditional ACP imports. As a result of the agreement concluded with certain Latin American States in the framework of the Uruguay Round negotiations, this quota is split up into partial quotas between Latin American and ACP States or groups of States.

Under this tariff quota imports of bananas from third countries are subject to a levy of ECU 75 a tonne, while imports of non-traditional ACP bananas are subject to zero duty.

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

Outside the quota:

- imports of bananas from third countries are subject to a Common Customs Tariff duty (ECU 850/t, reduced in accordance with the Uruguay Round conclusions);
- imports of non-traditional ACP bananas are subject to a duty equal to the one mentioned above, less ECU 100.

Import licences are issued on the basis of reference quantities based on the quantities put on the market during a reference period.

A percentage of 30% is reserved for type B operators (i.e. operators who were traders in Community bananas and/or traditional ACP bananas in the past).

3.5% is reserved for type C operators (i.e. newcomers in the banana trade in third country and/or non-traditional ACP bananas). The import licence system is managed on a quarterly basis.

Note:

The full application of this common market organization for Austria, Finland and Sweden is, in principle, scheduled for 1995. It contains:

- an increase of the tariff quota,
- the registration of the operators according to category and function, and the fixing of their right to import within the tariff quota.

B. Processed fruit and vegetables

The processed fruit and vegetables market organization came into operation in 1968. It is governed by Regulation (EEC) No 426/86, as last amended by Regulations (EEC) No 549/94 and (EC) No 3290/94.

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

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

Aid for the production of processed citrus fruit, on the other hand, is covered by the common market organization for fresh fruit and vegetables.

Expenditure on products processed from fruit and vegetables came to 1.8% of total EAGGF Guarantee spending in 1994.

1. Economic background

Production of fruit and vegetables eligible for production aid in 1991, 1992 and 1993 averaged 6.4 million t, the bulk of which was for tomatoes.

In 1992, the external trade balance for all processed fruit and vegetables showed the following trends:

- imports dropped slightly from 2.32 million t in 1991 to 2.28 million t in 1992,
- exports rose from 1.2 million t in 1991 to 1.3 million t in 1992.

2. Operation of the market

2.1. Specific market instruments

2.1.1. External trade arrangements

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

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

2.1.2. Aid for processed fruit and vegetables

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

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

The scheme covers tomato products, peaches and pears in syrup and/or natural fruit juice, prunes and dried figs and dried grapes. The last two products benefit from a storage aid.

The Commission decided as part of the 1990/91 prices package to fix the processing aid for all products except dried grapes in such a way as to offset the difference between the cost of the raw material used in the Community and that of the raw material from the main competing non-Community countries.

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

2.1.3. Stabilisation mechanisms

- (a) System limiting the grant of aid to certain quantities fixed in advance: it is used today for processed tomatoes
 - Processed tomatoes: this system was established by Council Regulation No 1320/85.

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

This volume is divided up as follows:

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

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

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

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

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

- Peaches in syrup and natural fruit juice: the threshold is 582 000 t for the Community (Regulation (EEC) No 1205/90).
- Williams and Rocha pears in syrup: since the introduction of a production aid, aid has been limited to a fixed quantity. This quantity, changed into a guarantee threshold for Williams and Rocha pears in syrup and/or natural fruit juice by the Council as part of the 1989/90 prices decisions, is currently 102 805 t.
- Dried grapes:

(a) the guarantee thresholds for dried grapes in the Community of Twelve are as follows: currants: 68 000 t, sultanas: 93 000 t, and moscatel: 4 000 t;

- (b) as regards aid per hectare, the reduction applies if the areas under dried grapes exceed the maximum guaranteed area set at 53 000 ha.

2.2. Prices fixed

The change in minimum prices and aids for 1995/96 will be decided by the Commission for each product before the beginning of the relevant marketing year under the management committee procedure.

2.3. Production aid for tinned pineapple

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

2.4. Special measures

2.4.1. Special action scheme for raspberries for processing

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

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

2.4.2. Special measures for dried grapes

These measures are governed by Council Regulation (EEC) No 399/94 of 21 February 1994.

The Community finances between 70 and 100% of the costs arising from the application of special measures in the areas of quality and promotion of dried grapes set up by the representative associations in the sector.

C. Special measures

There are a number of Regulations introducing special measures:

- Regulation (EEC) No 3119/93 laying down special measures to encourage the processing of certain citrus fruits;
- Regulation (EEC) No 1035/77 laying down special measures to encourage the marketing of products processed from lemons, as last amended by Regulation (EEC) No 1199/90;
- Regulation (EEC) No 1198/90 establishing a Community register of citrus cultivation;
- Regulation (EEC) No 3438/92 laying down special rules for the transport of certain fresh fruit and vegetables originating in Greece;
- Regulation (EEC) No 3816/92 providing for the abolition of the compensation mechanism in trade between Spain and the other Member States and allied measures;
- Regulations (EEC) Nos 1195/90 and 1201/90 on measures to increase the consumption and utilization of citrus fruit and apples;
- Regulation (EEC) No 789/89 instituting specific measures for nuts and locust beans and amending Regulation (EEC) No 1035/72.

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

- Vegetables: 0702 00 to 0708 and 0709, with the exception of codes 0709 60 91, 0709 60 95, 0709 60 99, 0709 90 31, 0709 90 39 and 0709 90 60;
- Fruit: 0802 (with the exception of code No 0802 90 30), 0803 00 11, 0804 20 10, 0804 30 00, 0804 40, 0804 50 00, 0805, 0806 10 11, 0806 10 15, 0806 10 19, 0807 to 0810 and ex 0813 50 30 (mixtures exclusively of nuts of codes 0801, 0802 and 1212 10 10);
- Locust beans: 1212 10 10.

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

Trend in appropriations*

(ECU)

Article	Heading	Appropriations 1995	Appropriations 1996
B1-150	FRESH FRUIT AND VEGETABLES		
B1-1500	Export refunds	99 000 000	96 000 000
B1-1501	Compensation for withdrawals and buying-in and for free distribution operations	460 000 000	367 000 000
B1-1502	Compensation to promote Community citrus fruits	p.m.	p.m.
B1-1503	Compensation to encourage processing of citrus fruits	206 000 000	204 000 000
B1-1504	Citrus register	3 600 000	p.m.
B1-1505	Measures to improve production	123 000 000	73 000 000
B1-1506	Promotion measures	10 000 000	13 000 000
B1-1507	Nuts	106 000 000	103 000 000
B1-1508	Bananas	162 000 000	153 000 000
B1-1509	Other intervention	55 000 000	56 000 000
Total of Article B1-150 (fresh fruit and vegetables)		1 224 600 000	1 065 000 000
B1-151	PROCESSED FRUIT AND VEGETABLES		
B1-1510	Export refunds	26 000 000	14 000 000
B1-1511	Production aid for processed tomato products	393 000 000	367 000 000
B1-1512	Production aid for fruit-based products	106 000 000	105 000 000
B1-1513	Production aid and intervention for processed dried grape products	138 000 000	135 000 000
B1-1514	Production aid for tinned pineapple	11 000 000	12 000 000
B1-1516	Production aid for processed raspberries	2 000 000	2 000 000
B1-1519	Other intervention	p.m.	p.m.
Total of Article B1-151 (processed fruit and vegetables)		676 000 000	635 000 000
TOTAL OF CHAPTER B1-15 (Fruit and vegetables)		1 900 600 000	1 700 000 000

* For 1995, amounts refer to approved appropriations; for 1996, requested appropriations.

THE SITUATION OF THE MARKETS*

A. Fresh fruit and vegetables

World situation

Statistical information on the fresh fruit and vegetable sector worldwide is still very fragmented. International trade is significant above all in apples and citrus fruit. Expansion of world production of oranges for processing has continued following the planting of new groves in some of the main non-Community producer countries.

Trade with non-member countries

The European Union is still the world's largest importer of fresh fruit and vegetables, in particular apples and citrus fruit. Although imports only account for a relatively low proportion of annual Community requirements for the sector, they play an important role in supplying the market out of season and can influence price stability in season. Both imports and exports rose during the 1994/95 marketing year, by 44% and 40% respectively.

Community fruit exports in 1994 increased sharply on 1993 exports (+146%), in particular in the case of peaches (+72.5%) and pears (47.2%). Only lemon exports fell, by 12.7%.

There was also a large increase in fruit imports (+100%) and vegetable imports (5%), but results varied according to product. Lemon imports rose sharply (+77.3%) as did cucumber imports (+51.3%). By contrast, cauliflower imports fell by 55.7%.

Community prices and market

In 1994/95 the producer prices of pilot products, those for which the Council decides basic prices and buying-in prices generally rose in comparison with the previous marketing year, except for peaches (-20%), nectarines (-17%) and apricots (-15%). In the case of apricots, however, there was a rise of 16% in Spain but a fall of 41% in France. Similarly, the prices of pears fell in Spain and Portugal, but increased sharply in Belgium (+52%) and the Netherlands (+58%).

In the vegetable sector the price of cauliflowers rose by 44% in Belgium and 65% in France. In the other Member States increases varied between 16% and 35%, except in Portugal where there was a fall of 19%.

* Extract from *The agricultural situation in the European Union. 1995 report.*

The producer price of "round" tomatoes increased in 1994/95, the highest rises being in Germany (62%) and in Greece (56%) for tomatoes grown in the open.

Community production of *apples* in 1994/95 rose from that of 1993/94 to reach 9.2 million tonnes, because of major increases in Germany (+20%) and the Netherlands (+18%). By contrast, production fell in Portugal and the United Kingdom. Italy is still the leading apple producer in the Union (24%), closely followed by France (23%) and Germany (22%). Despite higher production levels, the quantity of apples withdrawn was 36% lower than in 1993/94, totalling 629 000 tonnes. This was because of higher apparent consumption and an increase in end-of-year stocks.

Community *pear* production in 1994/95 was 2.7 million tonnes, a slight increase on 1993/94 because of better production in France (+37%), Spain (+15%) and the Netherlands (+10%). On the other hand production fell very sharply in the United Kingdom (-37%) and Greece (-23%). The leading Community producer of pears is still Italy, with 910 000 tonnes, or 34% of total production. The quantity of pears withdrawn was 91 000 tonnes, or 3.4% of production, as against 1.6% of production in 1993/94.

In the *citrus fruit* sector, no overall figures for 1994/95 are yet available. Provisional data indicate an overall increase in production.

Production of *peaches* in 1994/95 was similar to that in 1992/93 and reached 3.5 million tonnes. It increased slightly on 1993, with a major increase in France (+16%). Italy is the leading producer in the Community (35%), followed closely by Greece (28%), then Spain (25%). Almost a quarter (23%) of production was withdrawn and 82% of the withdrawals were in Greece.

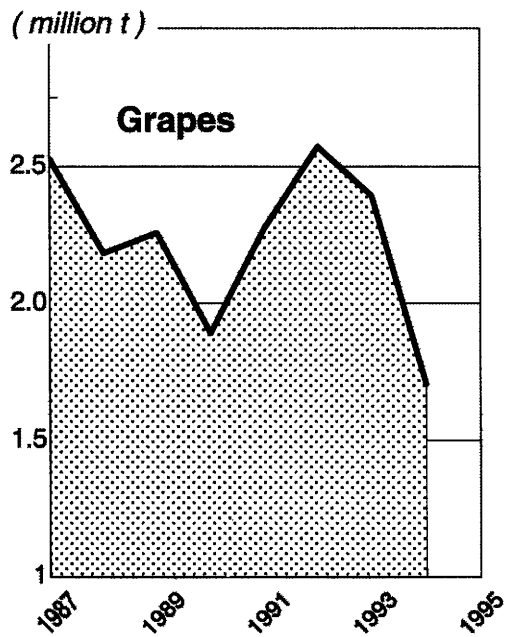
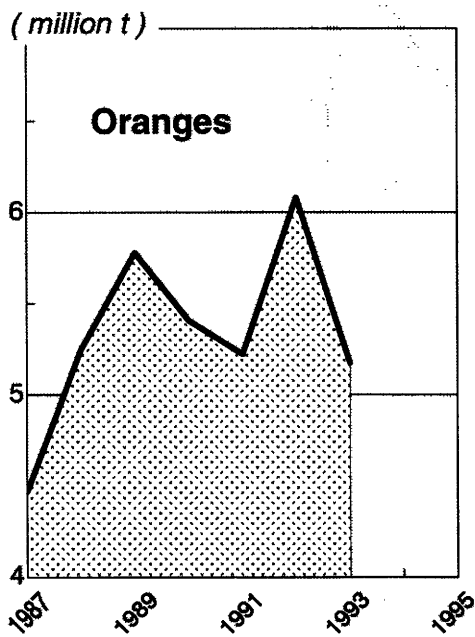
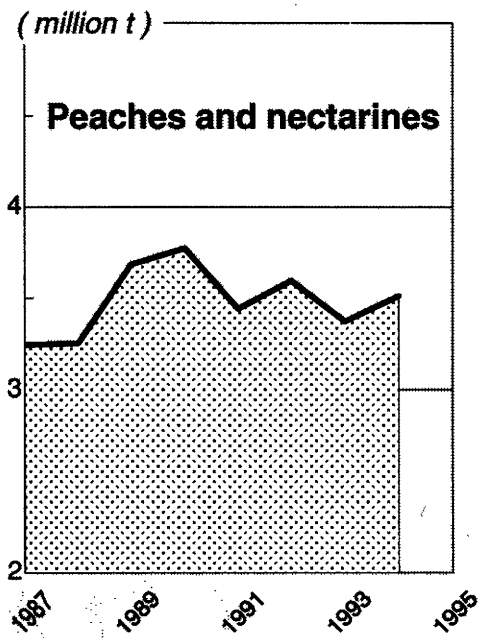
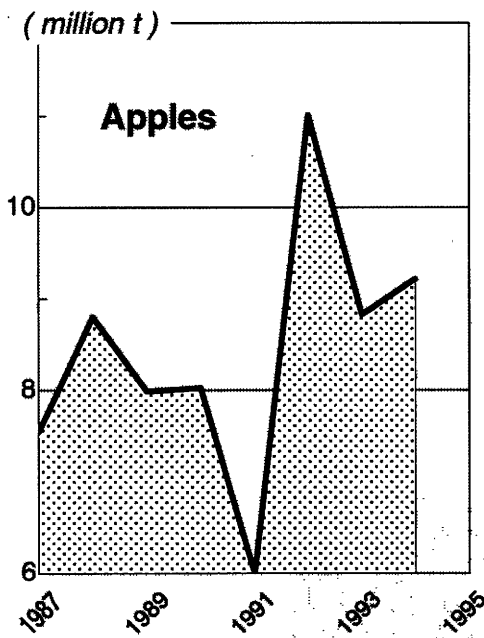
Production of *apricots* has increased by comparison with 1993, without, however, reaching 1992 levels. Withdrawals in 1994 accounted for 8.8% of production as opposed to 16.2% in 1993.

Data available on *fresh vegetables* for 1994/95 indicate that overall tomato production has increased, with a sharp rise in Portugal (+73%), but a fall in the Netherlands (-13%) and in Belgium (-11%). Tomato withdrawals did not change from 1993 levels, and amounted to 0.4% of total production.

13.5% of *cauliflowers* produced in 1994/95 were withdrawn, which represents an increase of 79% on 1993/94 levels. 76% of the withdrawals were carried out in France. Overall, the trend in withdrawals for 1994/95 has been favourable. They amounted to 244 920 tonnes for vegetables and 2 059 006 tonnes for fruit, totalling 2.3 million tonnes as against 2.5 million in 1993/94 and 4.4 million in 1992/93, a marketing year in which production reached record levels.

Fruit

Harvested crop of



Source: European Commission, DG for Agriculture.

The main developments in legislation and policy

For the 1995/96 marketing year the Council has maintained the basic prices and buying-in prices in force in 1994/95. Because certain intervention thresholds were exceeded in 1994/95, the basic prices and buying-in prices were reduced for apples (-9%), peaches (-20%), nectarines (-20%), lemons (-10%), oranges (-9%), mandarins (-2%) and cauliflowers (-5%) in application of the stabilizer system.

As part of the implementation of the Uruguay Round, a new harmonized system of export refunds was established with effect from 1 July. The new system provides for the introduction of export licences with or without advance fixing so as to enable the European Union to fulfil its obligations in the framework of the WTO.

Under the new import system, specific entry prices were fixed for *cucumbers* for processing and *sour cherries* (previously subject to a minimum import price) to take account of the characteristics of the markets for these products and the supply needs of the Community processing industry.

Under the import scheme for preserved *mushrooms* a special quota of 2 200 tonnes was opened for China for the second half of 1995 to take account of the enlargement of the Union.

The Commission extended by one year the mechanism for controlling garlic imports originating in China and the suspension of imports from Vietnam. The safeguard mechanism applicable to garlic imported from Taiwan was replaced by a system of compulsory certificates of origin, in agreement with the authorities of that country.

For 1995 the application of the minimum price was not triggered for *soft fruit* since the market was very quiet. Prices increased sharply in comparison with the previous year.

In line with its 1994 communication on trends in the fruit and vegetables sector, the Commission proposed to the Council a reform of the common organization of the market. This proposal aims to consolidate the positive features of the current system (market orientation, decentralization, organization of supply) by applying it more flexibly and eliminating current weaknesses (the operation of certain producer organizations, subsidized withdrawals that have become structural, the poor image of quality standards and gaps in statistics).

B. Processed fruit and vegetables

World market and Community market

As in the case of fresh products, the world market in products processed from fruit and vegetables is greatly influenced by exports to the European Union but, thanks to the possibilities offered by processing and preserving, the imbalance between supply and demand in this sector is not so pronounced as in the fresh fruit and vegetable sector. However, specific problems do arise occasionally.

Although there are no complete recent data on world market prices, it is nevertheless possible to note certain trends during the 1994/95 marketing year. In the case of frozen raspberries, chronic under-supply has kept prices very high, often at twice the minimum price fixed for reduced-duty imports from eastern Europe. The market for frozen strawberries has also continued to become stronger, although supply of this product, which is very important for the food industry, does not appear to be causing any problems. In the case of the market in frozen blackcurrants, the production surplus throughout Europe has fallen. After tomatoes and orange juice, dried grapes are the most important product in the sector for world trade. The same applies to the market in dried figs and the still substantial markets in peaches in syrup, exports of which have risen, and pears in syrup.

In the case of peaches in syrup, production in 1994/95 fell to 484 000 tonnes. As regards market management, the minimum price for peaches intended for processing in 1994/95 followed the trend of withdrawal prices for fresh peaches (+3.79%).

In the case of pears in syrup, production fell but, despite the constant level of minimum prices and the overrun of the intervention threshold, production aid was increased by 4.4% following a sharp fall in world prices for the raw material.

Processing aid for pineapples in 1994/95 was raised by 13% to compensate for the fall in prices in non-member countries. The minimum price remained unchanged.

The main developments in legislation and policy

Although the common organization of the market which governs this sector covers, in principle, all products processed from fruit and vegetables, Community support is concentrated on certain products: mushrooms (duty-free quotas), soft fruit (minimum prices for imports coming from countries benefiting from reduced customs duties), dried grapes (minimum price and storage and aid per-hectare aid), dried figs (storage aid and production aid), prunes, pineapples, peaches, pears in syrup and tomatoes (production aid). Raspberries for processing and dried grapes also benefit from specific measures to improve product quality and marketing. In the case of dried grapes, this measure was adopted by the Council in May 1994.

Trends in processing aid during the 1995/96 marketing year in relation to the levels during 1994/95 were as follows: prunes (+3.2%), pineapples (+9.25%), dried figs (+0.84%), peaches (0%), pears (-7.16%).

Minimum producer prices remained the same, except in the cases of peaches, for which they were reduced by 5.1% in the light of basic price trends for fresh peaches. The basic amount of aid per hectare for dried grapes was kept at ECU 2 785. This aid is only paid for areas under specialized cultivation which meet certain yield criteria, which were made stricter.

The reform of the common organization of the market for this sector, proposed by the Commission to the Council at the same time as it submitted its proposal for fresh products, provides for a general consolidation of the previous system.

C. Bananas

1995 was marked by the introduction of the Community import arrangements for bananas adopted in Marrakech during the final stages of the Uruguay Round negotiations.

The tariff quota originally fixed at 2 million tonnes was raised to 2.2 million tonnes (net weight) for banana imports from non-member countries and non-traditional ACP¹ bananas. Within the tariff quota, imports of bananas from non-member countries are subject to a duty of ECU 75 per tonne (instead of the initial ECU 100²), while no duty is levied on non-traditional ACP bananas.

Beyond the tariff quota, the import duty is ECU 850 per tonne for banana imports from non-member countries and ECU 750 per tonne for non-traditional ACP bananas. These duties will be reduced proportionally every year on the basis of the conclusions of the Uruguay Round on tariffs.

The quantities of traditional bananas per ACP country are not included in the quota and are imported at zero duty up to a maximum quantity of 857 700 tonnes.

In order to ensure that Community production is maintained, Council Regulation (EEC) No 404/93³ provides for compensatory aid to offset the loss of income that may arise from the application of the new arrangements. The amount of the compensatory aid for Community bananas marketed during 1994 is ECU 17.2⁴ per 100 kilograms. The amount is ECU 21.2⁴ per 100 kilograms for bananas produced in Madeira because of very unfavourable production conditions. Total Community production for 1994 was 584 622 tonnes. The aid total was therefore ECU 122.4 million⁴.

¹ ACP = African, Caribbean and Pacific States.

² ECU 120.75 if the monetary coefficient is applied.

³ Regulation (EEC) No 404/93 of 13 February 1993 (OJ No L 47, 25.2.1993, p.1).

⁴ To be multiplied by 1.207509 for comparison with the current amounts.

It should be noted that following the accession of the three new Member States the Commission adopted in 1995 the rules necessary to ensure satisfactory supply to the enlarged Union, since the Council had not reached a formal decision concerning the proposed 353 000 tonne increase in the tariff quota.

Because of the effects of hurricane Debbie on Guadeloupe, Martinique and some ACP countries (Saint Lucia and Dominica) in 1994, the Commission extended to the first two quarters of the 1995 the ad hoc measures that it had adopted for the fourth quarter of 1994. The measures involve an exceptional increase in the tariff quota to assist operators who are or directly represent producers affected by the storm (an increase of 64 900 tonnes for both quarters) in order to maintain supplies to the market and give operators reference quantities for 1995 for the purposes of future participation in the tariff quota arrangements.

Because of the damage done by hurricanes Iris, Luis and Marilyn during August and September 1995 in Guadeloupe, Martinique and some ACP countries (Saint Lucia, Dominica and Saint Vincent), the Commission adopted the same measures for the fourth quarter of 1995. The ad hoc increase in the tariff quota for that quarter is 90 800 tonnes.

COUNCIL PRICE DECISIONS

Basic and buying-in prices

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

Pending these proposals on a reform of the common market organization for fruit and vegetables, the Council decided that the basic and buying-in prices be kept at their present level. It will take appropriate action if it emerges that intervention thresholds have been exceeded when the final withdrawal figures for the 1994/95 marketing year are known.

Processing of citrus fruit

The Community aid scheme for the processing of citrus fruit includes, in the context of contracts between producers and processors, the grant of a premium to processors on condition they pay a minimum price to producers beforehand.

For economic and financial reasons, certain processors seem to be finding it increasingly difficult to pay the minimum price to producers before receiving the processing aid.

This situation should be taken into account and provision should be made, for a transitional period until the reform of the sector is implemented, for the possibility of direct payment of the aid to producers, so that the processor will only have to bear the cost of the charge to the industry (minimum price - aid). This measure will be accompanied by provisions to ensure that the correct minimum price is paid to producers. It will not affect the level of the aid to be paid, which will be the same, whether it is paid to producers or to processors.

Fruit and vegetables

Basic prices

(ECU/100 kg net)

	1995						1996					
	June	July	August	September	October	November	December	January	February	March	April	May
Cauliflowers	24.92	22.13	22.13	23.90	24.79	29.82	29.82	29.82	27.82	29.26	29.62	-
Tomatoes	(11-20) 28.41 (21-30) 25.87	23.34	20.93	22.20	23.53	28.28	-	-	-	-	-	-
Aubergines	-	17.74	17.74	17.74	17.74	-	-	-	-	-	-	-
Peaches	45.31	42.92	42.92	42.92	-	-	-	-	-	-	-	-
Nectarines	59.07	54.69	54.69	-	-	-	-	-	-	-	-	-
Apricots	41.68	41.68	-	-	-	-	-	-	-	-	-	-
Lemons	42.47	43.48	43.05	38.67	36.50	35.49	34.86	35.87	34.61	36.00	37.65	38.53
Pears	-	28.62	26.72	25.57	26.59	26.98	27.35	27.60	27.60	27.60	27.60	-
Table grapes	-	-	36.25	32.45	32.45	(1-20) 32.45	-	-	-	-	-	-
Apples	-	-	26.46	26.46	26.46	27.17	29.56	31.96	31.96	31.96	31.96	31.96
Mandarins	-	-	-	-	-	(16-30) 36.85	36.47	35.97	34.31	-	-	-
Satsumas	-	-	-	-	(16-31) 28.65	25.41	27.57	(1-15) 26.49	(1-15) 36.33	-	-	-
Clementines	-	-	-	-	-	-	33.76	31.57	-	-	-	-
Oranges	-	-	-	-	-	-	34.36	30.81	31.43	33.34	33.97	33.97

STATISTICAL TABLES¹

Market balance - processed tomatoes - processed peaches

EUR 15

	1000 t				% TAV
	1990/91 (2)	1991/92 (2)	1992/93 (2)	1993/94 (2)	1993/94 1992/93
1	2	3	4	5	6
<i>Processed tomatoes</i>					
Usable production	6790	6427	6231	7200	15,6
Imports	597	602	341	382	12,0
Exports	1674	1543	1906	1763	-7,5
Intra-EU trade	2578	2996	2849	3410	19,7
Change in stocks				x	
Internal use	5713	5486	4666	5819	24,7
of which:					
- losses (market)	0	0	0	x	
- human consumption (1)	5713	5486	4666	5819	24,7
Human consumption (kg/head)		16	14	16	14,3
Self-sufficiency (%)	119	117	134	124	-7,3
<i>Processed peaches</i>					
Usable production	460	566	647	484	-25,2
Imports	156	145	191	192	0,5
Exports	213	252	285	364	27,7
Intra-EU trade	735	746	740	872	17,8
Change in stocks	0	30	0	0	x
Internal use	403	429	553	312	-43,6
of which:					
- losses (market)	0	0	0	0	x
- human consumption (1)	403	429	553	312	-43,6
Human consumption (kg/head)	1,2	1,3	1,5	1,5	0,0
Self-sufficiency (%)	114	132	125	155	24,1

Source: Eurostat.

(1) According to the market balance.

(2) EUR 12.

¹ Extract from *The agricultural situation in the European Union. 1995 report.*

cont.2

	Area						Yield						Harvested production							
	1000 ha		1984		1983		100 kg/ha		1983		1982		1000 t		1983		1984		% TAV	
	1991	1992	1984	1983	1982	1981	1982	1983	1984	1983	1982	1981	1982	1983	1984	1983	1984	1984	1983	1984
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16					
B.2 Oranges	305	310	286		X	167	199	161		X	5092	6160	5172		X					
EIiáda	36 **	38	37		X	185	248	230		X	702	943	806		X					
España	141	143	141		X	188	205	178		X	2651	2926	2509		X	2663				6,1
France	0 **	0	0		X	111	111	114	153	X	2	2	2		X	1				-30,0
Italia	110	109	88		X	149	194	179		X	1642	2112	1591		X					
Portugal	18	20	19	19	0,0	55	86	88	94	X	95	177	164		X	180				9,8
EUR 12	305	310	286		X	167 **	199 **	181 **		X	5092	6160	5172		X					
B.3 Lemons	103	100	95		X	147	162	160		X	1513	1619	1516		X					
EIiáda	13 **	13	13		X	172	92	100		X	224	119	130 **		X					
España	48	46	44		X	121	162	138		X	555	743	611		X	606				-1,0
France	0	0	0		X	1	10	10	10	X	1 **	0	0		X					
Italia	39	39	37		X	183	193	208		X	713	746	765		X					
Portugal	5	2	1	1	30,0	40	53	89	87	X	20 **	11	10		X	11				10,0
EUR 12	103 **	100 **	95		X	147 **	162 **	160 **		X	1513	1619	1516		X					
B.4 Mandarins	32	32	32		X	100	124	120		X	319	398	385		X					
EIiáda	5 **	6 **	6 **		X	88	85	85		X	44	51	51 **		X					
España	6	8	11		X	112	143	121		X	67	121	135		X	140				3,7
France	0	0	0		X	0	0	0	10	X	0	0	0		X					
Italia	14	13	11		X	131	148	153		X	183	194	167		X					
Portugal	7	5	4	4	0,0	36	64	72	98	X	25 **	32	32		X	41				28,1
EUR 12	32 **	32 **	32		X	100 **	124 **	120 **		X	319	398	385		X					
B.5 Clementines	75	75	71		X	156	183	183		X	1169	1374	1269		X					
EIiáda	2 **	2 **	2 **		X	145	110	120		X	29	22	24 **		X					
España	52	52	54		X	167	196	197		X	866	1027	1072		X	1182				10,3
France	2 **	2 **	2	2	0,0	145	183	137	98	X	29	20	29		X	22				-24,1
Italia	19	19	13		X	129	57	135		X	245	305	174		X					
EUR 12	75 **	75 **	71		X	156 **	183 **	183 **		X	1169	1374	1269		X					
B.6 Satsumas	17	16	16		X	242	236	268		X	411	378	428		X					
EIiáda	1 **	0 **	0		X	40	X	X		X	4	4	4 **		X					
España	16	16	16		X	254	238	256		X	407	374	424		X	430				1,4
EUR 12	17 **	16 **	16		X	242 **	236 **	268 **		X	411	378	428		X					
B.7 Other citrus fruit	4	3	1		X	133	187	180		X	53	56	18		X					
EIiáda	0	0	0		X	4	X	X		X	4	3	3 **		X					
España	2	1	1		X	75	141	16		X	15	16	13		X	13				0,0
Italia	2	0	0		X	170	189	165		X	34	37	2		X					
EUR 12	4	3	1		X	133 **	187 **	180 **		X	53	56	18 **		X					

cont.4

	Area						Yield						Harvested production						
	1000 ha		1000 ha		1000 ha		100 kg/ha		100 kg/ha		1000 t		1000 t		1000 t		1000 t		
	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
C.3 Tomatoes	1	1	234	1	0,0	3140	3425	3668	3242	x	314	330	12378	309	-11,0	x			
EUR 15	0 **	0	0	0	0,0 x	x	x	x	3242	x	16	20	347	20	33,3	x			
Belgique/Belgie	0	0	0	0	0,0 x				789	x	32	30	15	24	0,0				
Danmark	45	41	39		0,0 x	420	434	x			1891	1781	1888	1900	0,0				
B.R. Deutschland	80	56	57	82	7,6	444	474	491	498	x	2685	2647	2606	3062	9,1				
Eλλάδα	13	12	11	11	0,0	625	667	676	740	x	812	777	756	798	5,7				
Espana	0	0	0	0 **	0,0 x						9	12	11 **						
France	190	118	115	118	0,9	446	466	455	475	x	5788	5483	5223	5538	8,0				
Irlande	2	2	1	1	20,0	3180	4332	4360	4230		636	652	808	525	-13,4				
Italia	0	0	0	0	0,0	622	620	604	664		14	8	9	15	66,7				
Nederland	20	20 **	8	14	55,6	447	320	542	815		894	640	509	878	72,7				
Österreich**	0	0	0	0	0,0	2502	2535	2562	2837	x	30	30	31	35	12,9				
Portugal	0	0	0	0	0,0						30								
Suomi/Finland**	1	1	1	1	0,0	1410	2648	2627	2878	x	141	136	134	133	-0,7				
Sverige**	272	251 **	234		x	488 **	498 **	528 **	2878		13210	12503	12319						
United Kingdom																			
EUR 12																			
C.4 Aubergines																			
EUR 15	3	3	3		x	207	274	267			62	80	80						
Eλλάδα	4	4	4		x	350	323	339			140	136	137						
Espana	1	1	1	1	0,0	240	283	297	301		24	25	27	27	0,0				
France	11	10	10	11	10,0	269	265	306	270		286	303	314	308	-2,5				
Italia	0	0	0	0	0,0						30	29	30 **						
Nederland	19	18	18		x	290 **	318 **	327 **			552	573	588						
EUR 12																			

Source: Eurostat

European Commission

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