



International options for EU Mediterranean products



What I am not speaking (a lot) about

1. Multilateralism versus bilateralism and
2. A comprehensive approach to Mediterranean agreement



What I am speaking about

Mediterranean products and in particular:

1. Olive oil and table olives, and
2. Fruit and vegetables



***Some comments on bilateralism
versus multilateralism:
Despite the current difficulties in
the Doha process, it is still
the EU priority***



***A comprehensive approach to
Mediterranean agreement:
- Full liberalisation except a
restrictive list of sensitive
products
- different lists for different
countries***



What I am speaking about: olive oil I

- EU production leader: 79 % of world production
- EU consumer leader: 71%
- EU importer leader: 26 %
- EU exporter leader: 59 %



What I am speaking about: olive oil II

- EU companies are market leaders
- EU and world market without structural surpluses



What I am speaking about: olive oil III

- EU position clear:
- We are leader and we take our responsibilities in:
 - - developing the market
 - - increasing the quality of the production



What I am speaking about: olive oil III

- - fighting against frauds and
- - promoting cooperative strategies with our partners, mainly Mediterranean producers, inside the Olive International Council, in particular in the field of technical cooperation (promoting transfers of technology and knowledge) .



Fruits and vegetables are a different story I

- We are not a production leader but
- We are a major trader, in particular as far as import is concerned

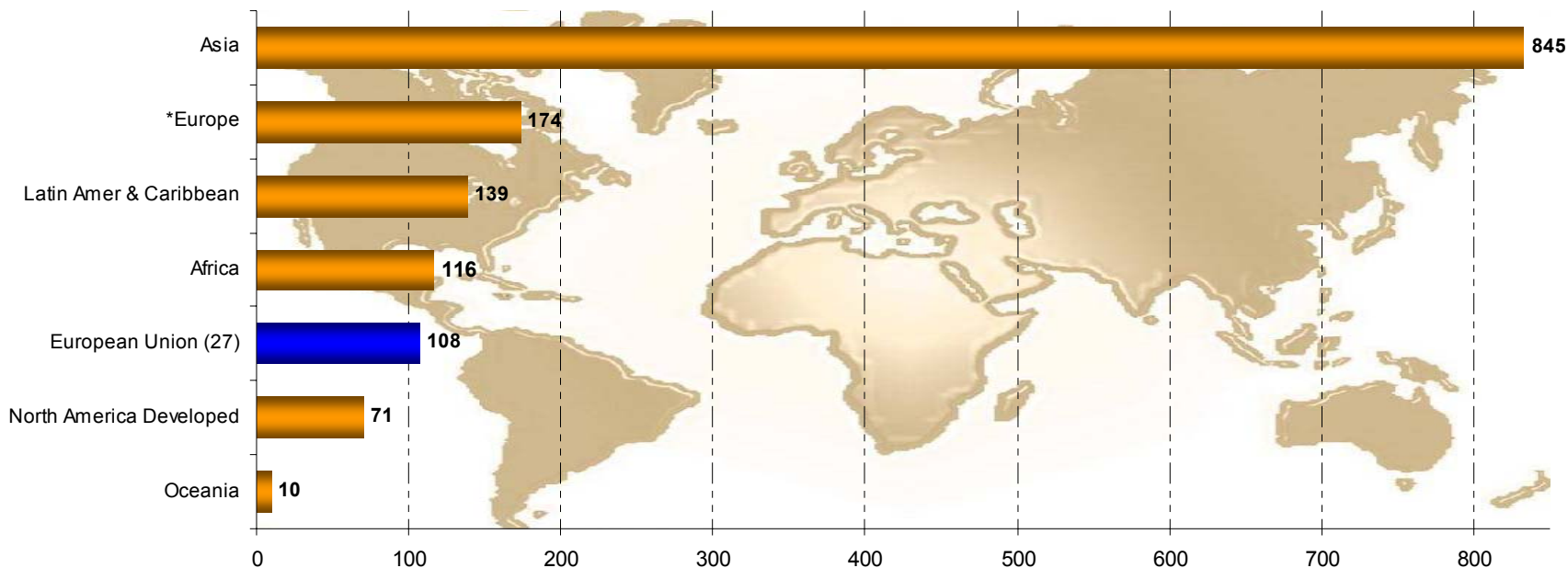
We are not a production leader



European Commission
Agriculture and Rural Development

Main world production by regions (in Mio tonnes, average 2003-2005*) World: 1 314 Mio tonnes

*except Latin America, North America and Oceania 2002-2004



*EU-27 + Albania; Andorra; Belarus; Faeroe Islands; Bosnia and Herzegovina; Gibraltar; Holy See; Iceland; Liechtenstein; Monaco; Moldova, Republic of; Macedonia, The Fmr Yug Rp; Norway; Croatia; Russian Federation; Serbia; Montenegro; San Marino; Switzerland; Ukraine; Channel Islands; Svalbard and Jan Mayen; Isle of Man

Source: FAO

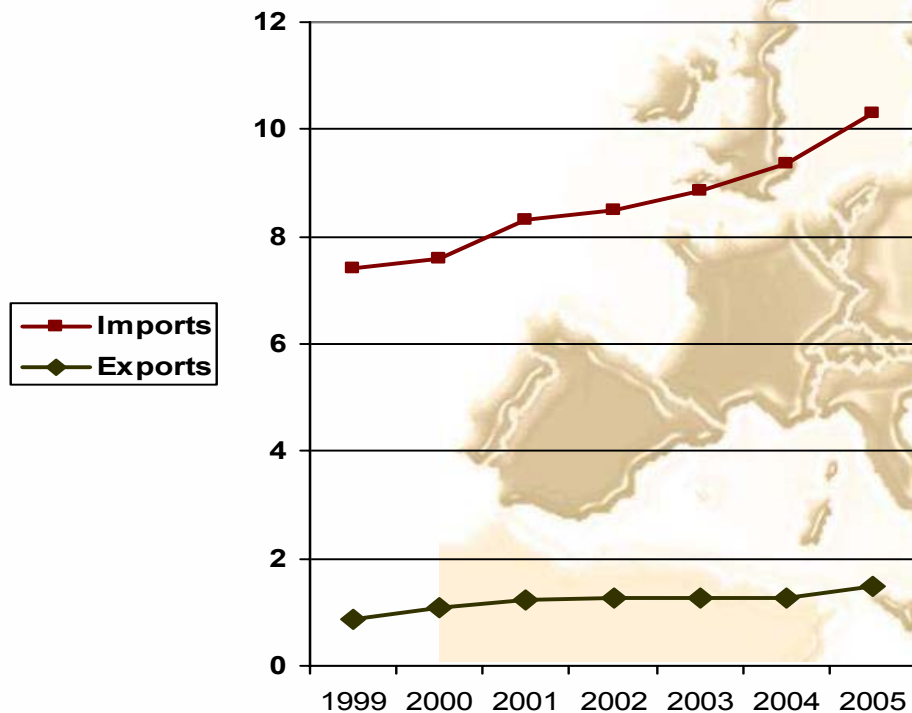
We are a major importer I (EU-25)



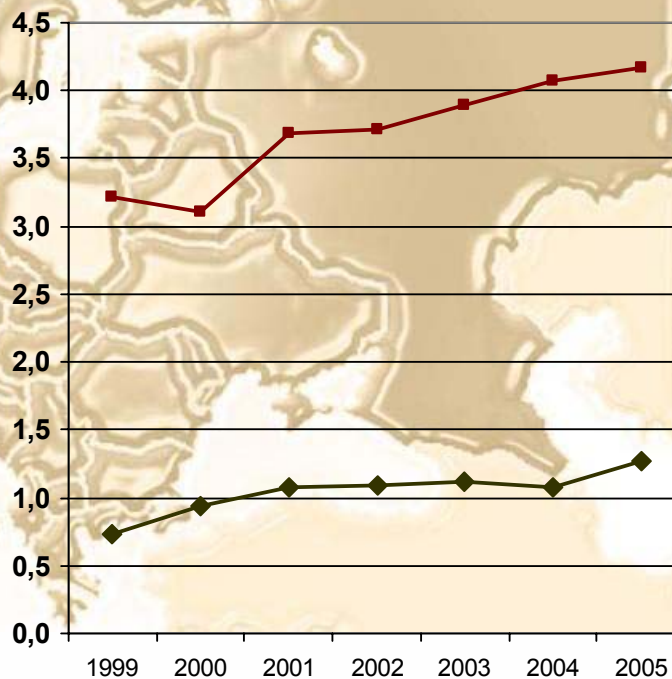
European Commission
Agriculture and Rural Development

Fresh fruits. Extra EU-25 trade ('000 Mio €)
EU: Net importer of fresh fruit

All fresh fruits



Only temperate (non tropical) fruits



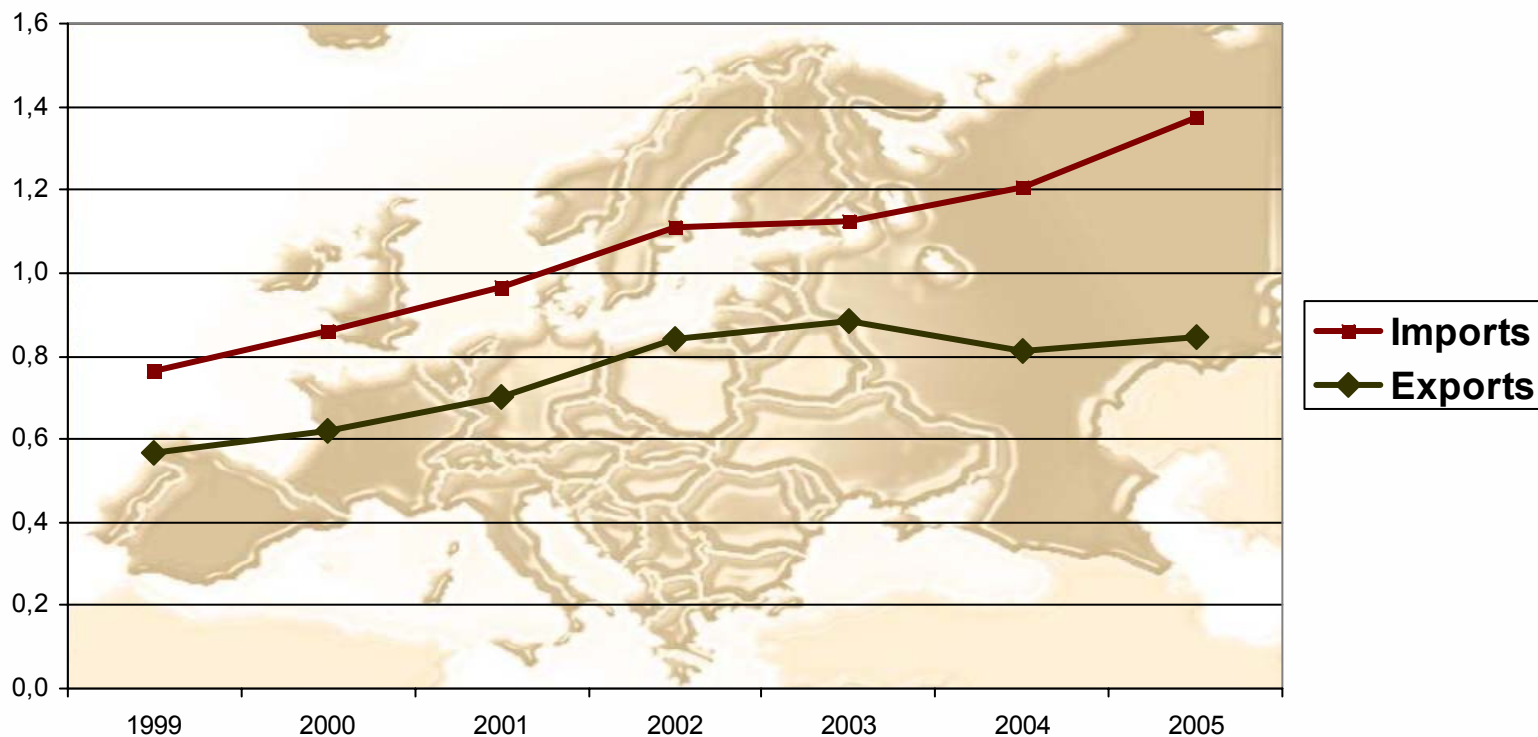
Source: Eurostat (Comext)

We are a major importer II (EU-25)



European Commission
Agriculture and Rural Development

Fresh vegetables. Extra EU-25 trade ('000 Mio €)
EU: Net importer of fresh vegetables



Source: Eurostat (Comext)



Fruits and vegetables are a different story II

- Perishable products, no easy storage
- Production and consumption depend on climatology
- Prices very sensitive to any market imbalance.



Fruits and vegetables are a different story III

- No EU companies able to exercise market leadership in the production side
- Strong imbalance in the food chain, with a reduced number of retailers imposing their conditions
- An imbalance market with availabilities increasing faster than consumption



Fruits and vegetables are a different story IV

- Increasing quality private labelling request by the retailers
- No International Organisation able to monitor the markets



But “working together” strategies are still useful I

- **Statistical documents**
- **Monitoring of quantities of apple imports**
- **Sector reports: flowers, potatoes, soft fruits**

http://ec.europa.eu/agriculture/markets/fruitveg/publi/index_en.htm



But “working together” strategies are still useful II

On the fruit and vegetable reform:

- Proposal, impact assessment, press release, presentations available

http://ec.europa.eu/agriculture/capreform/fruitveg/index_en.htm



A new role for the EU public service

- Market monitoring is more and more needed
- Market monitoring is each time less market intervention
- Market monitoring is sharing information, promoting cooperation strategies, increasing market transparency, developing economic analysis



CONCLUSION:

What an excitant job for agricultural economist!

Thank you !!!