

How will the EU's Response to the GATT Round affect Developing Countries?

Christopher Stevens and Jane Kennan

The paper makes an initial analysis of the trade policy changes that the EU will implement to give effect to its GATT Round commitments. It focuses mainly on tariff changes in three areas: industrial products of interest to developing countries, temperate agricultural products, and goods on which sub-Saharan Africa might face an erosion of preferences. There is a need for a tight focus because the effects of change can be gauged only by analysis at the most detailed level. The tentative conclusion is that the effects in all three areas will be modest.

The authors are indebted to Adrian Wood, Reginald H. Green, Raphael Kaplinsky and John Humphrey for many helpful comments and suggestions on earlier versions.

Contents

Summary	1
Introduction	3
The nature of the debate	3
The focus of the Working Paper	3
Background to the GATT Round	5
Methodology	8
Product and country selection	8
Tariff analysis	9
Industrial Products imported from Developing Countries	13
Tariff changes	13
The need for product selection	13
The broad pattern of tariffs	14
Proposed cuts on mid-range tariffs	16
EU changes on most important sensitive products	18
Non-tariff barriers - the MFA	18
Temperate Agricultural Products imported from Developing Countries	22
EU changes on the heartland products	22
EU changes on less sensitive items	22
The products selected	22
Importance of the changes	23
The Potential Implications for Sub-Saharan Africa	29
The reason for concern	29
Africa's main exports	30
EU tariff changes	31
The products selected	31
The changes made	34
The scale of change	37
EU non-tariff changes	37
Conclusion	40
Annex 1	41
Annex 2	45
References	59

Summary

In the area of merchandise trade the impact of the GATT Uruguay Round on developing countries will be heavily influenced by the detailed changes to tariff policy that contracting parties have agreed to make in order to give effect to their new obligations. These changes are voluminous, running to many thousands of lines for each contracting party. This Working Paper represents a first step in the analysis of the tariff changes being introduced by one contracting party, the EU.

It presents the findings of an analysis of the EU tariff changes from three perspectives.

- The first examines industrial products of particular concern to developing countries. In addition to a review of the tariff changes that the EU proposes to implement, it reports on the first step in the phase-out of the Multifibre Arrangement (MFA).
- The second assesses changes on temperate agricultural products under two headings: 'heartland products' such as livestock products and cereals; and less sensitive items such as horticulture.
- The third shifts the analysis from products to countries, and considers how far sub-Saharan Africa's trade preferences with the EU will be eroded as a result of the liberalisation of most favoured nation (MFN) treatment.

It seems likely, from this initial analysis, that the effect on developing countries of the EU's tariff liberalisation on industrial products will be mixed. On the positive side, when the implementation period is completed a large proportion by value of the items currently imported by the EU from developing countries will enter either duty free or with a tariff of less than 6%. But, for items that are 'sensitive' the changes will be modest. The great majority of significant imports that currently face tariffs of between 11% and 20% will benefit from reductions of 2 percentage points or fewer.

Because of the enormous number and variety of industrial products the analysis has focused only on a select group. However, this group has been chosen on the basis of criteria related to their importance to developing countries. The static effect of the tariff reductions that the EU will introduce over a six-year period is equivalent to less than 5% of the value of EU imports from developing countries of the items analysed. To the extent that there are gains, they will accrue largely to the East and South East Asian states.

It would appear that on the non-tariff barrier (NTB) front, there will be virtually no change in the EU's effective quotas for clothing and textile items under the MFA in the short term. The MFA will be phased out in four steps between 1994 and 2004. The first phase proposed by the EU will have virtually no impact on developing countries. No further changes are required until the end of 1997.

It seems even less likely that there will be substantial changes to the import regime for 'heartland' Common Agricultural Policy (CAP) products this century. The tariffs with which the EU is proposing to replace the existing variable import levies are sufficiently high that, even after subsequent liberalisation, they will still represent a formidable obstacle to imports.

In the less sensitive temperate agricultural areas, however, there may be some liberalisation of importance to developing countries. Although the tariff cuts on floriculture, horticulture and fruits are small relative to the value of trade (in the region of 6% of EU 1992 imports from developing countries), the products in question are of potential importance to a large number of countries. Many are Mediterranean or African, Caribbean and Pacific (ACP) states (which receive significant preferences over MFN levels and so may not, in practice, benefit), but there is a good sprinkling of countries with limited, if any, preferences, such as Chile, Brazil and South Africa. Various categories of winter flowers, winter potatoes and summer carnations will feel the greatest change.

Fears have been expressed that the EU's preferred suppliers will lose as a result of the Round, since the margin of preference will be eroded. Since any such deterioration would be particularly serious for sub-Saharan Africa, the analysis has focused on this region. A review of all the most important sub-Saharan African exports to the EU suggests that the erosion of preference *as a result of the GATT Round* will be modest: of the order of 4% of total exports, of which over one-half is accounted for by a single product, coffee. The reason for the emphasis in the previous sentence is that the situation could change substantially if the GATT Round is followed by a reduction in the EU's tariffs under the Generalised System of Preferences (GSP). Until the rates applying under the proposed new EU GSP are known, the extent of the erosion cannot be calculated.

In addition to directing a shaft of light into three obscure corners of EU regulations, the Working Paper also throws up some pointers to subjects for the next phase of work. There are many more analyses that need to be undertaken. These should include:

- closer scrutiny of the industrial trade changes to identify the reasons for the apparent modest extent of tariff reductions with a significant effect on developing countries;
- an examination of tariff escalation after the Round;
- and the extension of the erosion of preferences analysis to other preferred regions, notably the Mediterranean and North Africa.

Introduction

The nature of the debate

The GATT Uruguay Round is a slippery subject to assess, and discussion on it tends often to result in unproductive mutual misunderstanding between the protagonists. This Working Paper is confined to one corner of the large canvas on which discussion occurs. It is intended to throw light on some of the detailed changes in EU trade policy post-GATT that are likely to affect developing countries.

There are several reasons for the wide-ranging nature of the GATT debate.

- First, the Round has carried with it a substantial intellectual baggage. The text, although highly technical and detailed, is underlaid by a broad theoretical view of the role of trade in growth and development, and the appropriate role of the state in relation to trade. Discussion easily slips from the narrowly technical to the broadly theoretical and even ideological level.
- Second, the agreement is an exceedingly complex document (or, rather, set of documents) which will take a very long time to digest. The process of understanding precisely what was being agreed during the negotiations was complicated because of the high degree of secrecy in which they were conducted and the tendency of most protagonists to use public statements as a negotiating tool. Hence, many hopes and fears were engendered during the negotiations about what *might* transpire, and the task of checking whether or not the final agreements bear these out is still far from complete. In the meantime, unproductive debates rage between those who fear the worst, and assume that their concerns have not been adequately addressed until it has been demonstrated conclusively that they have, and those who expect the best, believing that potential problems have been dealt with until it can be shown that they have not.
- Third, there is considerable uncertainty as to how the contracting parties will implement what has been agreed on paper. The agreements provide many areas in which contracting parties have discretion over the speed or the extent of change. In addition, there is every reason to expect on past form that countries will flout the spirit, if not the letter, of what has been agreed.

The focus of the Working Paper

This Working Paper represents an initial step along the path of coming to grips with the new agreement. It is focused on the narrow, technical provisions of what has been agreed on paper rather than either a broader analysis of the implications for policy prescriptions of the Round's success or a politico-economic assessment of the likely changes in the balance of negotiating power between rich and poor states.

This focus is not designed to duck the broader issues, which are very relevant. Rather, it is hoped that one use of the Working Paper will be to inform such debates. The reason for the

narrow focus on just one trading bloc is purely practical: analysis at the very detailed level required to draw any useful conclusions about what will happen over the next six years is a dauntingly massive task. Each contracting party has to alter its domestic law to give effect to the changes agreed in the Round. This includes changing tariff schedules. The EU's proposed tariff changes approach 20,000 lines in length. This Working Paper is just a first step in this process - it needs to be replicated a hundred times for other aspects of EU policy and for other GATT contracting parties.

For this reason, the term 'narrow focus' used above is a relative one: even the limited analyses in this Working Paper of the detailed trade policy changes being made by a single contracting party as a result of the Uruguay Round represent a substantial effort. Some strict selection criteria have been required for this initial analysis to focus attention on areas of particular potential concern.

The Working Paper assesses the EU policy changes in three areas, two established in terms of product type and one geographically defined. In all three cases a similar methodology has been used for identifying the products to analyse and for estimating the scale of the changes.

- The two product types are defined in terms of the initial level of EU protection. A review has been made of the proposed changes, first on industrial and then on temperate agricultural products, that are of particular interest to developing countries and which have faced the highest tariff protection in the EU market heretofore. The Working Paper assesses the extent to which this protection will be reduced as a result of the Round.
- The geographical focus is sub-Saharan Africa, one of the regions of the world least likely to gain substantially as a result of the Uruguay Round. The Working Paper throws light on the extent to which sub-Saharan Africa will witness an erosion of its competitive position in the European market following the changes in MFN tariffs.

Background to the GATT Round

This Working Paper is intended primarily for those working in the area of post-Uruguay Round changes. This is because it is designed as an input into the wider work on interpreting these changes and as a vehicle for seeking clarification on many technical questions that have arisen in this analysis of EU data. For these reasons, it does not seem to be an appropriate use of space to give a full account of the background and coverage of the GATT Round.

Nonetheless, some readers may be specialists in other areas who have an interest in the findings on industrial/agricultural products or on sub-Saharan Africa, but have not followed the Uruguay Round negotiations in sufficient detail to be able to locate the topics covered in this Working Paper in the broader picture. This section of the Working Paper is designed primarily to help non-specialist readers and also to explain the reasons for selecting the three slices of EU data that are described in this paper.

The background to the Round and its coverage are explained in Annex 1, which contains the entire text of an *IDS Policy Briefing Paper*, 'After the GATT Uruguay Round: Implications for Developing Countries', of April 1994. In addition, Box 1 highlights some important characteristics of the Round.

Box 1 Key features of the Uruguay Round

The Uruguay Round of multilateral trade negotiations (so called because it was launched in Punta del Este in Uruguay in September 1986) involved 117 states, almost three-quarters of them developing countries. The eighth in a series dating from 1947, it was launched to assert some multilateral influence over the increasing diversity of trade-related policies by including new areas (such as temperate agriculture and services), by reinforcing the institutional framework for trade monitoring and adjudication, and by continuing the process of lowering tariff and non-tariff barriers to trade.

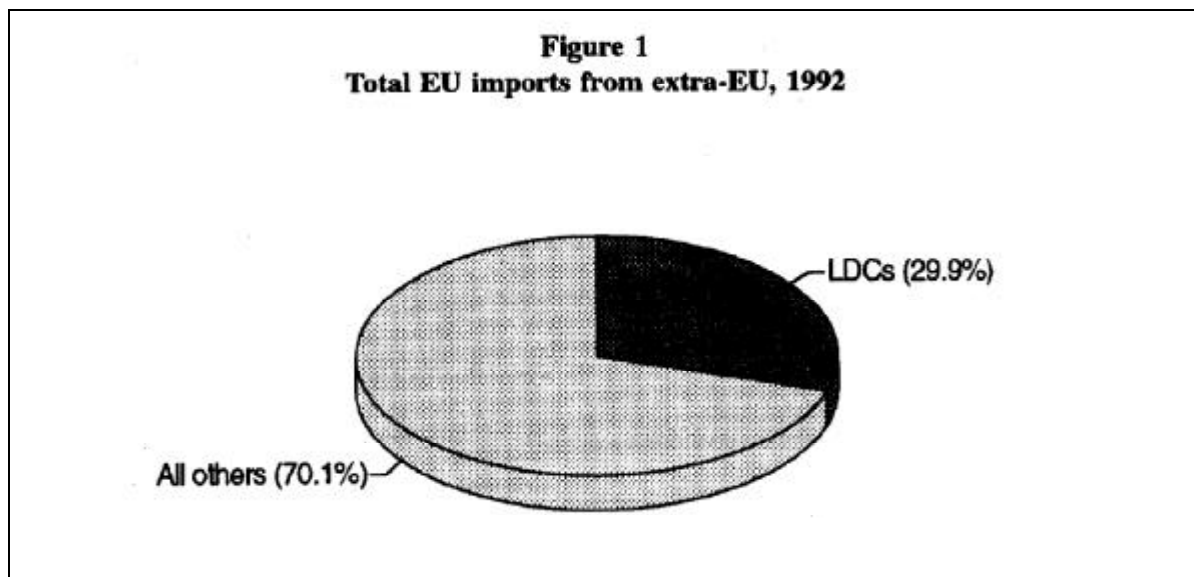
There are two main sets of products from the negotiations. The first is a collection of documents covering general principles and agreed rules for trade. These were signed in Marrakech in April 1994. The second comprises the changes to trade policy that each contracting party agreed during the Round to make. A large part of these consist of lengthy tariff schedules listing the alterations to tariffs that will be introduced over the next six years. These run into thousands, probably hundreds of thousands, of pages. And, since the devil is in the detail, the precise changes that will occur to world trade are as likely to be found in the second set of documents as in the first.

Seven years of, often tough, negotiations smoothed many of the hard edges of the original proposals. Nonetheless, there are a number of notable innovations resulting from the Round. These include:

- the creation of a World Trade Organisation, which will replace the GATT Secretariat;
- the application over time to temperate agriculture of rules more akin to those that have applied to manufactures for decades;
- the phasing out over the period to 2005 of the Multifibre Arrangement;
- the erosion of differential treatment between developed and developing countries (apart from the least developed);
- the extension of an agreed framework of the rules for trade-related intellectual property rights and services.

A large part of the Round was concerned with issues that are primarily of intra-*OECD* interest.

These are not of direct concern to this Working Paper, which concentrates as narrowly as possible on trade with developing countries. Since this is a minority of EU trade (30% of EU imports in 1992 - see Figure 1), readers should be cautious about drawing broader conclusions on the overall impact of all EU tariff changes.



Three important features of the Uruguay Round, all of which had as an underlying objective the reinforcement of a multilateral framework for trade regulation, were:

- to continue the process of lowering tariffs on industrial goods and primary products other than temperate agriculture;
- to integrate into normal GATT rules sectors that had been subject to strong NTBs, such as clothing and textiles;
- and to extend GATT-type rules into areas of trade that had not previously been subject to them (e.g. temperate agriculture, services and TRIPs).

The three snapshots of EU tariff policy change covered in this Working Paper have been selected in the light of these underlying objectives of the Round. Continued liberalisation of trade in **industrial products** (which relates to the first set of analyses of EU policy) has formed the backbone of most GATT negotiating Rounds. Because of this, those products that still face relatively high tariff barriers are precisely those for which the OECD states, including the EU, find liberalisation politically most sensitive.

The section on EU tariff reductions on industrial products is intended to give an indication of how far Europe is planning to move to liberalise on these sensitive items. The section also reports the EU's proposed first moves in the process of transferring clothing and textile items from MFA rules to normal GATT disciplines.

One of the major extensions of the GATT achieved in the Uruguay Round was the elaboration of new rules to apply to **temperate agriculture**. The EU was intimately involved in these

negotiations, which are of potential importance to a wide range of developing countries in terms both of the potential effects on their exports and of the implications for their imports of agricultural products. Hence, the second set of analyses covers this area.

One of the major exceptions to the MFN principle, that is supposed to apply widely to the GATT contracting parties but in practice applies to only a minority of them, has been the spread of preferential trade agreements with developing countries. The most extensive set of EU preferences is that with the 70 ACP signatories of the Lomé Conventions. These countries have expressed the concern that the Uruguay Round will result in an erosion of their preference margins so that they will be worse, rather than better, off as a result of the Round. Hence, the third set of analyses examines the validity of this concern in respect of **sub-Saharan Africa** which, because of its heavy concentration on trade with the EU and difficult economic problems, would probably be most seriously affected by any preference erosion. Most simulations of the Round's effects indicate at best modest relative gains for Africa, and at worst losses. These results do not arise only because preferences are being eroded, but this is one of the factors at work.

Methodology

This section of the Working Paper provides a general review of the methodology that applies to all of the succeeding sections, together with some broader information to enable readers to assess the relative importance of the product selections made below.

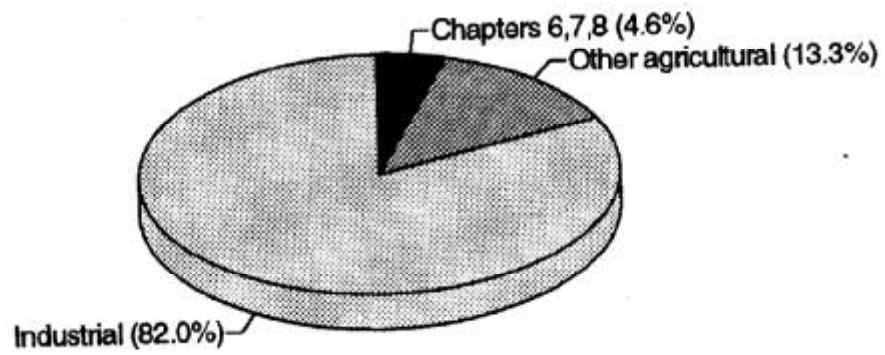
Although the precise criteria employed in each of the three main analyses are different, all follow the same basic approach. This is to focus attention on a succession of product lists, each of which is more narrowly defined than its predecessor. The basis on which these selections are made is to use *a priori* expectations on the areas of most importance to developing countries together with pragmatically determined thresholds relating to the value of EU imports, the number of developing country suppliers to the EU and the level of the existing and new tariffs.

Product and country selection

The first selection of products was made by the decision to concentrate on industrial products, temperate agricultural items, and the most important exports of sub-Saharan Africa. The selection was made entirely on the basis of *a priori* expectations that these three areas are of particular importance. The reasons for this are explained above.

The relative importance of the product groups is indicated in Figure 2 (which should not be taken as dividing imports into primaries and manufactures/processed goods, since the agricultural chapters include some processed items whilst the industrial chapters include minerals). In 1992 82% of EU imports from developing countries were in the industrial chapters, while 5% were in the three temperate agricultural chapters (6, 7 and 8) subject to special analysis. The selection of products within these two groups was made by reference to the EU's Combined Nomenclature. The nature of this classification system is described in Box 2, while Box 3 lists the principal chapter headings into which traded goods are divided. Hence, for example, the section on industrial products deals with Chapters 25-97 (Chapters 98 and 99 being residual categories).

Figure 2
Total EU imports from developing countries by product type, 1992



Box 2
The Harmonised Nomenclature

Since the end of the 1980s the main industrialised countries have changed their trade classification system to the Harmonised Nomenclature (HN). Like the SITC, this classifies traded goods at different levels of precision. At the highest level of aggregation, goods are divided into 2-digit categories (or 'chapters'), each of which is split into a large number of 4-, 6-, 8- and 10-digit sub-categories.

The first 6 digits are common to all countries using the HN. The remaining sub-categories are applied by each country individually. The EU, for example, routinely goes to 8 digits, and in the case of very many products to 10 digits. The EU's classification is known as the Combined Nomenclature (CN).

The HN represents a compromise between the need to provide a logical grouping of traded goods and the desire by participating states to protect, often narrowly defined, sectors of economic activity. For this reason, some chapters are divided into many more 4-, 6-, 8- and 10-digit items than others. As a rule of thumb, the greater the number of items the more intense the protectionism!

This creates a methodological problem in interpreting the relative importance of lists of tariff changes. The length of the list of products on which the EU proposes to cut tariffs is not an unambiguous indicator of the degree of liberalisation in that sub-sector. Almost half of the 20 industrial products listed in Table 3, for example, are various kinds of footwear. This should not be taken to imply that footwear is being liberalised more than some other industrial sector. It may reflect simply the fact that there are very many more footwear categories than there are for electric motors, for example.

Within each of these product groups an attempt was made to identify those items of particular importance to developing countries. The precise criteria used to make this selection are detailed in the relevant section. The reason for focusing the spotlight in this way is that it is important to specify products very precisely. EU tariffs are set at the 8- and 10-digit level. The tariff cuts to be introduced as a result of the Uruguay Round are, similarly, specified at this highly disaggregated level. The average tariff of a 4-digit group may conceal wide variations between the rates applying to specific items. Hence, an analysis that focuses on 4-digit aggregates will not indicate accurately whether the products on which tariffs are being cut are of importance to developing countries or are other varieties of the good in question.

The extent of the third set of analyses, of sub-Saharan Africa, was defined in geographical terms. For ease of computing, the initial analysis includes the whole of sub-Saharan Africa (plus islands such as Madagascar and Mauritius). With the exception of South Africa, this is wholly justifiable since all these countries share identical terms of access to the EU market for the products considered. South Africa, since it has traded only on MFN terms until now, is an exception. However, it has proved possible to identify in the tables the prominent items in which South Africa is the overwhelmingly important African supplier and to make appropriate allowances in the analysis. As can be seen from Figure 3, sub-Saharan Africa accounts for 15% of EU imports from developing countries.

Tariff analysis

In all three sets of analyses, a comparison is made between the MFN tariff rates that the EU currently imposes on the items considered and the new tariffs that will apply at the end of the implementation period. The former are described as 'the base rate' and the latter as 'the bound

rate'. Where the bound rate is lower than the base rate, the reduction will be made

Box 3
EU Combined Nomenclature chapter headings

- 01: Live animals
- 02: Meat and edible meat offal
- 03: Fish and crustaceans, molluscs and other aquatic invertebrates
- 04: Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included
- 05: Products of animal origin not elsewhere specified or included
- 06: Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage
- 07: Edible vegetables and certain roots and tubers
- 08: Edible fruit and nuts; peel of citrus fruits or melons
- 09: Coffee, tea, mate and spices
- 10: Cereals
- 11: Products of the milling industry; malt; starches; inulin; wheat gluten
- 12: Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medical plants; straw and fodder
- 13: Lacs; gums, resins and other vegetable saps and extracts
- 14: Vegetable plaiting materials; vegetables not elsewhere specified or included
- 15: Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes
- 16: Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates
- 17: Sugars and sugar confectionery
- 18: Cocoa and cocoa preparations
- 19: Preparations of cereals, flour, starch or milk; pastrycooks' products
- 20: Preparations of vegetables, fruit, nuts or other parts of plants
- 21: Miscellaneous edible preparations
- 22: Beverages, spirits and vinegar
- 23: Residues and waste from the food industries; prepared animal fodder
- 24: Tobacco and manufactured tobacco substitutes
- 25: Salt; sulphur; earths and stone; plastering material, lime and cement
- 26: Ores, slag and ash
- 27: Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes
- 28: Inorganic chemicals: organic or inorganic compounds of precious metals, of rare-earth metals, of radioactive elements or of isotopes
- 29: Organic chemicals
- 30: Pharmaceutical products
- 31: Fertilizers
- 32: Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring matter; paints and varnishes; putty and other mastics; inks
- 33: Essential oils and resinoids; perfumery, cosmetic or toilet preparations
- 34: Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes, polishing or scouring preparations, candles and similar articles, modelling pastes, 'dental waxes' and dental preparations with a basis of plaster
- 35: Albuminoidal substances; modified starches; glues; enzymes
- 36: Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations
- 37: Photographic or cinematographic goods
- 38: Miscellaneous chemical products
- 39: Plastics and articles thereof
- 40: Rubber and articles thereof
- 41: Raw hides and skins (other than furskins) and leather
- 42: Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silk-worm gut)
- 43: Furskins and artificial fur; manufactures thereof
- 44: Wood and articles of wood; wood charcoal
- 45: Cork and articles of cork
- 46: Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork
- 47: Pulp of wood or of other fibrous cellulosic material; waste and scrap of paper or paperboard
- 48: Paper and paperboard; articles of paper pulp, of paper or of paperboard
- 49: Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans

Box 3 (continued)

- 50: Silk
- 51: Wool, fine or coarse animal hair; horsehair yarn and woven fabric
- 52: Cotton
- 53: Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn
- 54: Man-made filaments
- 55: Man-made staple fibres
- 56: Wadding, felt and non-wovens; special yarns; twine, cordage, ropes and cables and articles thereof
- 57: Carpets and other textile floor coverings
- 58: Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery
- 59: Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use
- 60: Knitted or crocheted fabrics
- 61: Articles of apparel and clothing accessories , knitted or crocheted
- 62: Articles of apparel and clothing accessories , not knitted or crocheted
- 63: Other made up textile articles; sets; worn clothing and worn textile articles; rags
- 64: Footwear, gaiters and the like; parts of such articles
- 65: Headgear and parts thereof
- 66: Umbrellas, sun umbrellas, walking-sticks, seat-sticks, whips, riding-crops and parts thereof
- 67: Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles of human hair
- 68: Articles of stone, plaster, cement, asbestos , mica or similar materials
- 69: Ceramic products
- 70: Glass and glassware
- 71: Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin
- 72: Iron and steel
- 73: Articles of iron or steel
- 74: Copper and articles thereof
- 75: Nickel and articles thereof
- 76: Aluminium and articles thereof
- 78: Lead and articles thereof
- 79: Zinc and articles thereof
- 80: Tin and articles thereof
- 81: Other base metals; cermets; articles thereof
- 82: Tools, implements, cutlery, spoons and forks , of base metal; parts thereof of base metal
- 83: Miscellaneous articles of base metal
- 84: Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof
- 85: Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles
- 86: Railway or tramway locomotives, rolling-stock and parts thereof; railway or tramway track fixtures and fittings and parts thereof; mechanical (including electro-mechanical) traffic signalling equipment of all kinds
- 87: Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof
- 88: Aircraft, spacecraft, and parts thereof
- 89: Ships, boats and floating structures
- 90: Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof
- 91: Clocks and watches and parts thereof
- 92: Musical instruments; parts and accessories of such articles
- 93: Arms and ammunition; parts and accessories thereof
- 94: Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name-plates and the like; prefabricated buildings
- 95: Toys, games and sports requisites; parts and accessories thereof
- 96: Miscellaneous manufactured articles
- 97: Works of art, collectors' pieces and antiques
- 98: Component parts of complete industrial plant
- 99: Other products

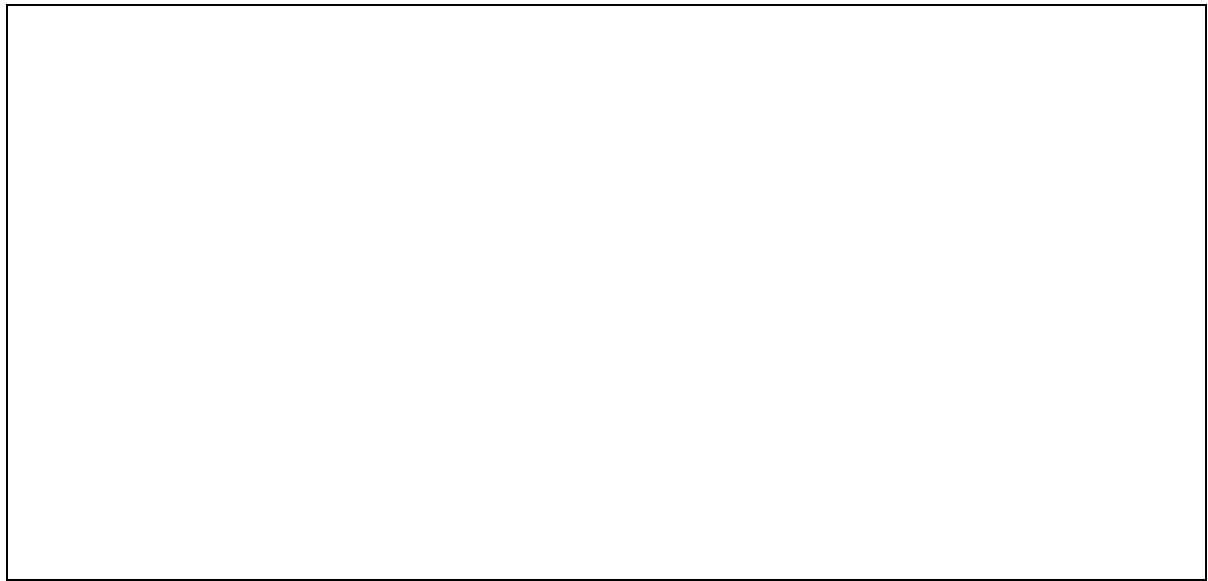


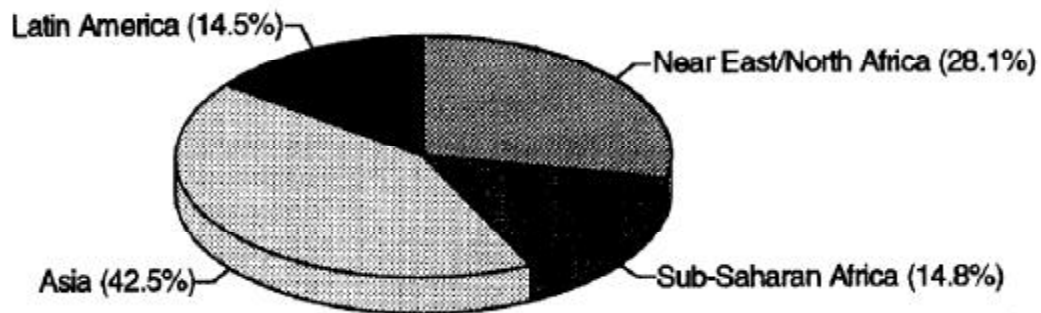
Figure 3
Total EU imports from developing countries by region, 1992

(u
Ju

ig 1

A
te
va
re
ex
pi
cc

Ti
ga
Ti



oad
rent
the
by
J is
ing

atic
EU
may

accrue to middlemen), and there will also be dynamic gains in many cases. However, the figure is provided as a broad indicator to show whether the changes are likely to be very important, moderately important or insignificant. In the case of the African analysis, a similar logic is employed - but in reverse. The assumption is that African exporters could maintain their current position *vis-à-vis* their MFN competitors by reducing the unit value of their exports by the same margin as the EU's tariff cut. Hence, in this case the foreign exchange equivalent represents the foreign exchange losses that sub-Saharan African would incur in order to offset the erosion.

Industrial Products imported from Developing Countries

The implications of the Uruguay Round negotiations for particular exports can be gauged only from a case-by-case analysis of the tariff changes that will be implemented. The principal areas of interest for developing countries in the provisions of the GATT agreement on industrial products are:

- the smoothing of tariff peaks (i.e. particularly high tariffs) on items in which developing countries compete strongly with developed country producers;
- the elimination of escalation (whereby tariffs increase with the level of processing);
- the phasing out of NTBs, especially those on clothing and textiles;
- controls on the growing misuse of anti-dumping actions as covert protectionism.

This Working Paper deals with only two of these. The first two parts of this section concentrate on the EU's proposed tariff changes, while the proposed changes on the MFA are described in the third part. Further work is desirable to assess changes in the area of tariff escalation. The impact of the new anti-dumping rules will become clear only as 'case law' develops.

Tariff changes

The need for product selection

Provisional analysis by the GATT Secretariat of the Uruguay Round shows the share of developed country imports of industrial goods from developing countries entering duty free doubling (from 22% to 45%). But some manufactures of particular interest to developing countries still face relative discrimination. The four product groups with the smallest changes in duty-free treatment are fish and fish products, textiles and clothing, transport equipment, and leather and footwear. Some 6% of developed country imports of clothing and textiles from developing countries will continue to attract tariffs in excess of 25%, while 19% will face tariffs of over 15%.

Can similar conclusions be drawn for the EU? Since the number of industrial products of interest to developing countries is vast, a great deal of focusing is required in an initial analysis such as this. Even the term 'most important' can be defined from a variety of perspectives, resulting in differing lists of the products covered.

For this analysis, the term 'most important' is defined as referring to those industrial items in which EU imports from developing countries are substantial and which have faced significant tariff barriers in the past. Of course, such a definition runs into the major methodological problem that it excludes those industrial products that are of great potential interest as developing country exports to the EU but which have been stifled by past protectionism. However, it is not easy to see how a counterfactual could be constructed easily to identify such products at a general level. Probably, the most sensible first approach will be to undertake a

selective, country-by-country analysis which will illuminate products which, while not important as exports to the EU at present, could become so if European protection were reduced.

As explained in the section on methodology, two types of criterion were employed to make the initial selection of 'most important' products in all three analyses: one relating to the relative value of EU imports from developing countries and one relating to the level of tariffs. In the case of industrial products the two criteria used were the value of EU imports from developing countries and the absolute level of EU protection.

Because the industrial chapters of the CN are so numerous (almost three-quarters of the total), a first step was to review the overall picture both to identify the pattern of EU tariff protection and to discover whether there exist more specific areas in which the spotlight should be trained in the initial analyses. The EU's imports from developing countries in 1992 were analysed to discover the most important (by value) industrial chapters. It was discovered that only 12 chapters accounted for more than 1% each of total trade and that, combined, they accounted for as much as 77% of the total. These were Chapters 26, 27, 44, 61, 62, 64, 71, 74, 84, 85, 87 and 88.

The broad pattern of tariffs

The pattern of trade and tariffs was then identified for these 12, most important, chapters. EU imports in 1992 were analysed to identify two characteristics of each of the 8-digit items (2,668 in all) falling within them:

- whether they were insignificant, moderately important or very important in value terms;
- whether the post-Uruguay Round tariff applying to them would be severe, moderate or zero.

This information is summarised in Tables 1 and 2. In each there are five value and six tariff bands. The value band of '< Ecu 1 million' is designed to identify trivial and anomalous flows, for which the figures may simply represent mis-classification of consignments, re-exports or the like. The value band of '>= Ecu million but < 10 million' is designed to identify modest exports. The maximum figure represents 0.01% of the total value of EU imports of the chapters covered. The two bands from Ecu 10 million to Ecu 100 million represent products that are moderately important, in the sense either that they are substantial but only for a limited number of exporting states or that there are many exporters but the mean value per country is moderate. Substantial exports are covered by the final category of '>= Ecu 100 million'.

The tariff bands are based on the bound rate that will apply after the Uruguay Round changes have been implemented. Again, they have been divided into categories designed to identify both duty-free access and tariffs in ascending order of severity.

In Table 1 the cells indicate the number of 8-digit items falling into each value/tariff band. At first sight, it appears to show a liberal post-Uruguay Round trade regime. One-fifth of the

Table 1
The distribution of major EU industrial imports from developing countries between value and tariff bands (number)^(a)

<i>New tariff band (%)</i>	<i>0</i>	<i>1-5</i>	<i>6-10</i>	<i>11-15</i>	<i>16-20</i>	<i>21+</i>	<i>No. of products</i>
<i>Value band (Ecu)</i>							
< 1 million	305	671	57	77	18	7	1,135
=>1 million but <10 million	122	447	82	122	9	1	783
=>10 million but <50 million	52	157	59	98	6	-	372
=>50 million but <100 million	11	30	9	26	2	-	78
=>100 million	29	28	18	31	2	-	108
No. of products	519	1,333	225	354	37	8	2,476
Total value (Ecu '000)	50,744,570	17,712,491	6,440,479	13,185,338	821,797	3,693	88,908,368

Note:

(a) Each cell (apart from the bottom row) shows the number of items (at the 8-digit level) for which total EU imports from developing countries in 1992 in the 12 major chapters fell into the indicated value band, and for which the new bound tariffs will fall into the indicated tariff band.

items will face no tariff when the changes are completed, and for over two-thirds of those that will still be subject to a tariff this will be of less than 6%. Once account is taken of the value distribution of items, however, a different picture seems to emerge. Most of the duty-free items (59% of the total) are in the 'trivial' value band of '< Ecu 1 million'; very few are in the upper value blocs. By contrast, the items in the higher tariff bands tend to be in the modest and moderate value bands. In the case of both the 6-10% and 11-15% tariff bands, for example, around two-thirds of items are in the Ecu 1-50 million value bands.

To shed further light on this distribution, the information is presented in a different form in Table 2. In this case, the cells show the value of imports of the items falling into the value/tariff band as a percentage of total EU imports from developing countries in the 12 chapters. At first sight, too, this seems to confirm the EU's liberality. No less than 57% of the value of the products covered will be duty free by the end of the implementation period. Moreover, overwhelmingly the largest entry in any cell is in that denoting very large value/duty-free access. However, this very large entry is accounted for in substantial part by a single crude petroleum product which, alone, represents 36% of the total value of EU imports in the 12 chapters. If this is removed from consideration, the duty-free access column of the table remains the largest, with the 1-5% column being the second largest. However, there remain substantial industrial imports facing tariffs in the 11-15% band. Moreover, the deterrent effect of very high tariffs, noted above, may account for the low value showing of the two columns above 16%.

Proposed cuts on mid-range tariffs

A closer examination of the items in the two critical bands, 11-15% and 16-20%, revealed that the vast majority will end the Uruguay Round liberalisation process in the same band in which they began it. In other words, most items which will have a bound rate of 11-15% after the changes currently have a base rate of 11-15%. 99.4% of the items shown in the 11-15% tariff band and 97.3% of those in the 16-20% band will not be liberalised sufficiently to result in a change of band. This finding, in itself, provides a powerful comment on the limited scale of the proposed tariff reductions for important products from developing countries that currently face heavy protection. The vast majority of items are subject to tariff cuts of less than 4 percentage points (indeed, in most cases the cut will be of 2 percentage points or fewer).

In order to identify the limited number of products that are currently heavily protected but will be significantly liberalised EU import data for 1992 and EU documents on the post-GATT changes were analysed to identify the products with the following characteristics:

- All items from Chapter 25 onwards of the Harmonised Nomenclature (see Boxes 2 and 3) on which the EU base rate of duty is 15% or more. This produced a list of 112 products (equivalent to 1% of EU industrial product imports from developing countries), given in full in Annex 2, Table 1.

- From this list of 112 items, a further selection was made of the goods in which EU imports from developing countries exceeded Ecu 5 million in 1992. This produced a list of 20 items. For these, the five most important suppliers to the European market were identified.

Table 2
The distribution of major EU industrial imports from developing countries between value and tariff bands (% of value)^(a)

<i>New tariff band (%)</i>	<i>0</i>	<i>1-5</i>	<i>6-10</i>	<i>11-15</i>	<i>16-20</i>	<i>21+</i>	<i>Total</i>
<i>Value band (Ecu)</i>							
< 1 million	0.1	0.2	0.0	0.0	0.0	0.0	0.4
=>1 million but <10 million	0.5	1.8	0.4	0.6	0.0	0.0	3.3
=>10 million but <50 million	1.7	3.9	1.8	2.7	0.2	-	10.3
=>50 million but <100 million	0.8	2.2	0.8	2.1	0.1	-	6.0
=>100 million	54.0	11.7	4.3	9.4	0.6	-	80.1
Total	57.1	19.9	7.3	14.8	0.9	0.0	100.0

Note:

(a) Each cell shows the percentage of the total value of EU imports from developing countries in 1992 in the 12 major chapters which fell within the indicated value band, distributed between the tariff bands indicated.

EU changes on most important sensitive products

The list of products that emerged from this two-stage process is given in Table 3. This indicates the base and bound rates of duty, the value of EU imports, the foreign exchange equivalent (using the assumptions described in the Methodology section) and the main EU suppliers.

Perhaps the most striking feature of the table is how short it is and how modest the value of trade. From the 112 items initially identified, there are only 20 in which EU imports from all developing countries exceeded Ecu 5 million. Yet the full list of 112 products includes many in which developing countries are believed to have a strong comparative advantage. Part of the reason for the small number of items in Table 3 might be that the EU protection has been successful - the high tariffs have suffocated imports from developing countries. But it seems implausible that this is the main reason since the base duties are not so grotesquely high as to seem likely to eliminate trade altogether.

One lesson to be drawn is, perhaps, that NTBs are a more important restriction on trade than are tariffs. Another possible answer points in the opposite direction - that EU tariffs are already below the 15% cut-off used in this exercise. A working paper such as this cannot do more than highlight the apparent anomaly as a beacon for further work. In the particular case of clothing and textiles, both explanations are true: MFN tariffs on most items are of the order of 14% or less, but the main form of protection is the MFA.

To the extent that tariffs are important, the static analysis of potential effects suggests that they will be very modest. The foreign exchange equivalent of the tariff cuts on the full list of 112 products (in Annex 2, Table 1) represents only some 3.4% of the value of EU imports from developing countries of these items. The shorter analysis in Table 3 suggests that the principal beneficiary countries will be in East and South East Asia. The states that figure most frequently in the 'top five suppliers' list are East Asian. China is included for the largest number of items (14), followed by Indonesia, Taiwan and Korea (with 11 apiece) and Thailand (9). The most frequently cited non-Asian state is Brazil (in the top five for 7 items). Developed countries are found in the lists, but to a limited extent only. Japan has the highest score (6 items), followed by countries from the former EFTA and from Eastern Europe.

Non-tariff barriers - the MFA

The most important EU NTB for developing countries as a group is the MFA. The world clothing and textile trade has been so distorted for so long that it would be unwise to forecast how the pattern of production and exports will change as the MFA is phased out. What is feasible is to identify how rapidly this phase out will occur.

What has been agreed in the Uruguay Round is that the MFA is to be phased out over the period to 2005 in stages. In each, importing states will transfer from the

MFA to normal GATT rules a tranche of products of a size related to the share of the items in their total 1990 import volume. The phasing agreed will allow states to delay into the next century the bulk of the transfers.

Table 3
Industrial products: most important developing country exports

<i>EU GATT offer tariff item no./ (CN code)^(a)</i>	<i>Description of products</i>	<i>Base rate of duty (Ecu '000)</i>	<i>Bound rate of duty (Ecu '000)</i>	<i>EU imports from developing countries 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Main suppliers to EU (by value, 1992)</i>
56072100	Binder/baler twine of sisal/other agave	25.0	12.0	6,013	782	Brazil, Tanzania, Cuba, Hungary, Norway
64041100	Sports footwear; tennis shoes, basketball shoes, gym shoes,	20.0	17.0	322,988	9,690	Korea Rep., China, Indonesia, Thailand, Taiwan
64041910	Slippers and other indoor footwear	20.0	17.0	29,718	892	China, Indonesia, Austria, Thailand, Korea Rep.
64041990	Footwear, o/s rubber/plastics, uppers textile	20.0	17.0	191,072	5,732	China, Thailand, Indonesia, Taiwan, Korea Rep.
64021900	Sport footwear (excl. ski-ing), o/s & uppers rubber/plastics	20.0	17.0	60,237	1,807	China, Indonesia, Korea Rep., Taiwan, Thailand
64029190	Footwear covering ankle, uppers plastics	20.0	17.0	27,844	835	China, Korea Rep., Indonesia, Taiwan, Thailand
64029931	Footwear, uppers plastic, sole+heel height >3cm	20.0	17.0	7,614	228	China, Thailand, Taiwan, Morocco, Indonesia
64029939	Footwear, uppers plastic, sole+heel height =<3cm	20.0	17.0	18,001	540	China, Thailand, Taiwan, Brazil, Indonesia
64029991	Footwear, uppers plastic, insoles <24 cm	20.0	17.0	26,794	804	China, Indonesia, Thailand, Hong Kong, Philippines
82119290	Knives with fixed blades (excl. table knives)	17.0	8.5	9,514	809	Switzerland, Japan, Taiwan, Brazil, China
82119390	Knives (excl. with fixed blades)	17.0	8.5	5,944	505	Switzerland, China, Japan, Taiwan, USA
82152010	Assorted articles of stainless steel	17.0	8.5	36,122	3,070	Korea Rep., China, Indonesia, Japan, Taiwan
82159910	Stainless steel cutlery (excl. assorted sets)	17.0	8.5	42,568	3,618	Korea Rep., China, Japan, Singapore, Brazil
87120090	Bicycles/tricycles with ballbearings	17.0	15.0	357,503	7,150	Taiwan, China, USA, Thailand, Indonesia
(51121910)	Woven fabrics, cont. >=85% wt combed wool/animal hair, wt 200-375 g/m2	16.0	8.0	16,733	1,339	Uruguay, Switzerland, Czechoslovakia, Poland,
				Turkey		
58012200	Cut corduroy of cotton	15.0	8.0	7,964	557	Czechoslovakia, Hong Kong, China, Colombia, Brazil
58013500	Warp pile fabrics, cut, of manmade fibres	15.0	8.0	6,059	424	Korea Rep., Switzerland, Austria, Turkey, Pakistan
85401110	Cathode-ray TV picture tubes, colour, diag. measurement =<42 cm	15.0	14.0	48,565	486	Austria, Korea Rep., Japan, Singapore, Malaysia
85401130	Cathode-ray TV picture tubes, colour, diag. measurement 42-52 cm	15.0	14.0	9,548	95	Poland, Korea Rep., Japan, Brazil, Austria
(29224200)	Glutamic acid and its salts	15.0	0.0 or 6.5 ^(b)	19,418	1,651	Korea Rep., Taiwan, Brazil, Indonesia, Switzerland
				1,250,219	41,014	

Notes:

- (a) The codes in brackets are CN codes identified from the product description for items for which the EU documents do not give a tariff item number.
(b) 6.5% applies to monosodium glutamate; 0% to 'other' glutamic acids/salts. It is not possible to determine from the EU import statistics which product is being imported. The foreign exchange equivalent has been calculated using the 8.5 percentage point difference between 15% and 6.5%.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

The first phase is due to be completed by the end of 1994 and is to cover items which accounted for at least 16% of 1990 imports. Phase two, which must be completed by the end of 1997, adds a minimum further 17%. An additional 18% (minimum) is to be integrated by the end of 2001. The remaining products (up to one-half of 1990 imports) need not be integrated until the end of 2004.

Evidence on the EU's strategy for implementing these changes confirms that the most sensitive products will be tackled later rather than sooner. According to an analysis by Germanwatch and the World Development Movement, the EU Commission's draft proposal for stage 1 of the MFA phase-out is concentrated on items that were not previously restricted. Only 0.12% of the total trade to be integrated into GATT by the EU was previously restricted [WDM, 1994:5-6]. Under the Commission's proposals:

- Two-thirds of the products fulfilling the 16% target are non-MFA-restricted items such as hats, umbrellas and parachute parts.
- None of the remaining products, while on the overall MFA list, is currently subject to quantitative restrictions in the EU market. Removing these products from the MFA therefore gives developing countries no additional market access.
- The only liberalisation is the integration into GATT of three product categories - accounting for 0.12% of trade - previously covered by a global quota on Vietnam.

Instead of integrating 25% of products from each of the four product groups covered by the MFA, the Commission has taken a very unbalanced selection. Analysis of the choice of products for integration from each of the four product groups shows that none will significantly benefit developing countries:

- *Fabrics.* Over half the products are from the fabrics group - almost none of which are on the MFA list. The only significant MFA category included is jute-fabrics, on which no quotas are imposed at present or, since Bangladesh is the only notable producer worldwide, are ever likely to be imposed.
- *Yarns.* The least restricted group under the MFA, yarns is the second biggest group chosen for integration. Again the integration of jute may give some benefits to Bangladesh, but restrictions are not currently imposed on it.
- *Made-up textiles.* In this group, the only products chosen for integration which are covered by the MFA, but without quantitative restrictions, are jute bags. Since the GATT agreement specifies that these cannot be restricted, early integration is of no additional benefit.
- *Clothing.* Only 2.3% of the products to be integrated are clothing

products, even though the 41 MFA categories covering clothing account for 25% of the total volume of EU imports in 1990. This is the most vital export for poor countries.

Unfortunately, little may be said with certainty at this stage about the changes in NTBs other than the MFA that will be implemented or their impact. There is little reason to suppose that the less formalised NTBs on sensitive items other than clothing and textiles will be treated in a more generous fashion than is being proposed for the MFA. The best conclusion that can be reached at this stage, therefore, is that the Uruguay Round will not result in any substantial improvement in developing country access to the European market in the short term. Perhaps by the end of this century and the beginning of the next there may start to be important openings. But they are not yet in evidence.

Temperate Agricultural Products imported from Developing Countries

An analysis of the proposed changes to the trade regime on CAP products has been made. This confirms expectations that the main impact of the Uruguay Round on the 'heartland' of the CAP (i.e. cereals and livestock) will be to introduce trade policies that have been long associated with industrial products, but only very slowly. It is unlikely that there will be any major improvements in developing country access to the European market for these products over the next six years. Substantial market access will occur, if at all, only after subsequent negotiations.

Where there may be some movement in terms of market access under the CAP is on those items for which trade concessions are already given to preferred suppliers. The EU already makes some concessions on temperate agriculture, notably to preferred suppliers in Mediterranean countries and the ACP, but these are heavily restricted. For this reason, a more detailed analysis has been made of the proposed EU policy changes on such products. The most important groups are horticulture, floriculture and fruits, covered in Chapters 6, 7 and 8 of the Harmonised Nomenclature (see Box 2).

EU changes on the heartland products

The EU, along with other developed countries, has agreed a complex range of changes to temperate agriculture designed to reduce producer and export subsidies and open up domestic markets to foreign supplies. However, the evidence thus far suggests that it will be a long time before there are substantial opportunities for developing countries to supply EU cereal and livestock product markets.

One aspect of the GATT agreement is that all import controls have to be converted into tariffs (a process known as tariffication), which are then to be reduced by an average of 36% over six years. The EU's proposed tariffs on cereal products are shown in Table 4. This indicates the initial specific tariff that the EU has proposed (expressed in Ecu per tonne) and a calculated *ad valorem* equivalent based on the unit value of 1993 imports. In each case, the EU proposes to reduce these tariffs in equal instalments by a total of 36% by the year 2000. Even at the end of the century, therefore, most items will face very high tariffs. The Uruguay Round agreement also specifies that there must be minimum access for imports of 3% of consumption, rising to 5%. However, these figures are established only in relation to *broad* product groups. Moreover, the Uruguay Round agreement permits the imposition of special safeguard import controls if imports surge. The overall conclusion, therefore, must be that the EU market will remain relatively closed to developing country suppliers for the rest of this century.

EU changes on less sensitive items

The products selected

EU import statistics were assessed to identify all the items in Chapters 6, 7 and 8 in which EU imports from developing countries in 1992 equalled or exceeded Ecu 5 million. This

Table 4
Tariffication by the EU on cereals

	<i>Initial tariff (Ecu/T)</i>	<i>Ad valorem^(a) (%)</i>	<i>Reduction by 2000 (%)</i>
Durum wheat	231	134	36
Spelt, common wheat and meslin	149	89	36
Barley	145	141	36
Oats	139	108	36
Semi-/wholly-milled rice	650	128	36
Wheat and meslin flour	268	88	36

Note:

(a) Calculated by applying the initial specific tariff to 1993 unit import values.

produced a list of 89 products, given in Annex 2, Table 2, equivalent to 98% of total EU imports under Chapters 6-8 from developing countries.

For many of these items the EU is retaining special safeguard measures (as explained above), which makes it imprudent to assume that there will be any substantial liberalisation. For others, the initial level of protection is quite low. In order to focus attention on those items that are important to developing countries, but which also face significant tariff barriers at present which may be reduced under the Uruguay Round, the list of 89 products was refined to identify all those with a base rate tariff of 10% or more and for which the EU is not proposing to have special safeguards. This cut-off is lower than that used in the analysis of industrial products (for which 15% was the threshold). This is simply because the relevant agricultural population is smaller, so that a 10% threshold produced a more manageable list than would have been the case for the industrial product group. The resulting list of 40 products is given in Table 5, and represents 17% by value of the items in Annex 2, Table 2.

As in the case of industrial products, the most striking feature of the list is its brevity, although the reasons for this may be different. As explained in Box 2, the HN definitions are a compromise between a logical categorisation of different goods and the need to protect sensitive economic activities. The balance achieved between these two objectives in temperate agriculture is different from that in sensitive manufactures - hence no straight comparison can be made between the length of the lists in Tables 3 and 5.

A second - and more important - impression is of the small size of the proposed tariff cuts. In under half of the cases are tariff cuts of 5 percentage points or more being proposed. Hence, only limited liberalisation is being envisaged.

Importance of the changes

The lists in Table 5 and Annex 2, Table 2, seek to identify the most important products for developing countries, but the problem of defining 'importance' noted above applies with particular vigour in the case of temperate agriculture. Present

trade patterns provide a very imperfect guide to comparative advantage. The CAP affords very strong protection to domestic producers. Hence current levels of imports may not paint a realistic picture of the

Table 5
Horticulture, floriculture and fruits: most important developing country exports

<i>CN code</i>	<i>EU GATT offer tariff</i>	<i>Brief description</i>	<i>EU imports from developing</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c)</i>	<i>Main suppliers to EU (by value, 1992)</i>	<i>No. of EU suppliers</i>
	<i>item no.^(a)</i>		<i>countries, 1992 (Ecu '000)</i>			<i>(Ecu '000)</i>		<i>1992</i>
06031013	06031020	Carnations, 1 June-31 Oct.	36,016	24.0	12.0	4,322	Colombia, Kenya, Turkey, Morocco, Israel	24
06031029	06031020	Other flowers, 1 June-31 Oct.	14,275	24.0	12.0	1,713	Israel, Kenya, South Africa, Zimbabwe, Colombia	46
06031015	06031020	Orchids, 1 June-31 Oct.	10,197	24.0	12.0	1,224	Thailand, New Zealand, Singapore, South Africa, Australia	23
06031011	06031020	Roses, 1 June-31 Oct.	6,717	24.0	12.0	806	Israel, Canaries, Zimbabwe, Colombia, Kenya	24
07019059		New potatoes, 16 May-30 June	24,828	21.0	13.4	1,887	Cyprus, Malta, Egypt, Morocco, Tunisia	13
07108090	07108075	Frozen vegetables	28,239	18.0	14.4	1,017	Poland, Peru, China, South Africa, Guatemala	47
08119090	08119091/92?	Frozen fruit/nuts, unsweetened	16,224	18.0	9.0 or 14.4	1,460	Yugoslavia, Poland, Sweden, Turkey, Israel	59
08112031	08112060	Frozen raspberries, unsweetened	14,408	18.0	14.4	519	Yugoslavia, Chile, Hungary, Bosnia-Herzegovina, Poland	19
07102200		Frozen beans (Vigna spp., Phaseolus spp.)	10,957	18.0	14.4	394	Morocco, Poland, USA, Hungary, Cameroon	28
07019090		New potatoes, other	7,931	18.0	11.5	516	Cyprus, Egypt, Morocco, Switzerland, Israel	23
07082090		Beans (Vigna spp., Phaseolus spp.), 1 July-30 Sept.	5,170	17.0 ^(d)	13.6 ^(d)	176	Kenya, Surinam, Zimbabwe, Morocco, Turkey	20
06031069	06031060	Other flowers, 1 Nov.-31 May	85,051	17.0	8.5	7,229	Israel, Kenya, Zimbabwe, South Africa, Peru	73
06031053	06031060	Carnations, 1 Nov.-31 May	84,142	17.0	8.5	7,152	Colombia, Israel, Kenya, Turkey, Morocco	37
06031051	06031060	Roses, 1 Nov.-31 May	62,856	17.0	8.5	5,343	Israel, Zimbabwe, Morocco, Colombia, Canaries	40
06031055	06031060	Orchids, 1 Nov.-31 May	17,145	17.0	8.5	1,457	Thailand, Singapore, Malaysia, Colombia, Canaries	30
06031065	06031060	Chrysanthemums, 1 Nov.-31 May	9,745	17.0	8.5	828	Israel, Canaries, Zimbabwe, Colombia, South Africa	31
07099090		Fresh/chilled vegetables	31,637	16.0	12.8	1,012	Kenya, Morocco, Thailand, Israel, Surinam	79
07122000		Dried onions	15,674	16.0	12.8	502	USA, Egypt, Hungary, India, Syria	33
07123000		Dried mushrooms/truffles	9,889	16.0	12.8	316	China, Yugoslavia, Bulgaria, Pakistan, India	43
07092000		Asparagus	9,772	16.0	10.2	567	USA, Peru, Chile, Argentina, Poland	31
07129090	07129060	Dried vegetables/mixtures of vegetables	8,709	16.0	12.8	279	China, USA, Hungary, Turkey, Poland	57
08053090		Fresh/dried limes	7,234	16.0	12.8	231	Brazil, Mexico, USA, El Salvador, Venezuela	29
07094000		Celery other than celeriac	5,184	16.0	12.8	166	Israel, USA, Poland, Egypt, Turkey	9
07019051		New potatoes, 1 Jan.-15 May	107,660	15.0	9.6	5,814	Egypt, Morocco, Israel, Cyprus, Tunisia	21
08112059	08112055	Frozen blackberries/mulberries, unsweetened	7,579	15.0	12.0	227	Chile, Yugoslavia, Hungary, Bosnia-Herzegovina, Poland	19
08101090		Strawberries, 1 Aug.-30 April	12,714	14.0	11.2	356	USA, Morocco, Colombia, Mexico, Israel	32
07082010		Beans (Vigna spp., Phaseolus spp.), 1 Oct.-30 June	56,142	13.0 ^(d)	10.4 ^(d)	1,460	Kenya, Burkina Faso, Morocco, Senegal, Egypt	53
06029970	06029985	Indoor rooted cuttings/young plants (excl. cacti)	26,442	13.0	6.5	1,719	Costa Rica, Guatemala, Sri Lanka, Israel, Poland	55
06029999	06029985	Indoor plants/cacti (excl. rooted cuttings, young plants)	18,619	13.0	6.5	1,210	China, Singapore, Guatemala, USA, Canaries	66
08041000		Dates	63,229	12.0	7.7	2,719	Tunisia, Algeria, USA, Israel, Iran	30
07032000		Garlic, fresh/chilled	28,138	12.0	9.6	675	Argentina, China, USA, Mexico, Chile	29
07031019	07031050	Onions, fresh/chilled	10,540	12.0	9.6	253	New Zealand, Australia, Poland, Argentina, Chile	31

Table 5 (continued)

<i>CN code</i>	<i>EU GATT offer tariff</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c) (Ecu '000)</i>	<i>Main suppliers to EU (by value, 1992)</i>	<i>No. of EU suppliers 1992</i>
08071090	08071050	Fresh melons (excl. watermelons)	61,407	11.0	8.8	1,351	Brazil, Israel, Guadeloupe, Costa Rica, Martinique	60
08109010		Kiwi fruit	40,316	11.0	8.8	887	New Zealand, Chile, Australia, South Africa, Argentina	16
08109080	08109092?	Fresh fruit	25,249	11.0	8.8	555	Malaysia, Colombia, Thailand, Israel, Austria	88
08109030	08109091	Tamarinds, cashew-apples, lychees, jackfruit, sapodilla plums	17,912	11.0	0.0	1,970	Madagascar, South Africa, Thailand, Mauritius, Israel	27
08129020	08129092	Oranges, provisionally preserved	5,796	11.0	8.8	128	Israel, Austria, Morocco	3
06049190	06049150	Parts of plants (excl. flowers/buds) for ornamental purposes	48,039	10.0	2.5	3,603	USA, Costa Rica, Guatemala, South Africa, Israel	56
07081010		Peas, 1 Sept.-31 May	11,276	10.0	8.0	226	Guatemala, Zimbabwe, Morocco, Zambia, Kenya	23
07096099		Fruits of genus Capsicum or Pimenta, other	8,138	10.0	6.4	293	Morocco, Turkey, Kenya, Thailand, Gambia	54
			1,071,196			62,561		

Notes:

- (a) The tariff item numbers used in the GATT offer do not always coincide with the Combined Nomenclature (CN) codes used in the trade statistics from which this table is derived. In such cases, a judgement has been made on which of the GATT offer tariff item numbers approximates most closely to SSA exports, and the number identified is indicated in this column.
- (b) Alternative figures in this column denote that different tariffs apply for different sub-items of the 8-digit product group, and that it has not been possible to identify from the EU import statistics which of these sub-items is being imported.
- (c) Where alternative percentage point differences are shown in the preceding column, the foreign exchange equivalent calculation has been made using the larger of the two.
- (d) Plus a specific tariff of min. 2 Ecu/100 kg net reducing to min. 1.6 Ecu/100 kg net.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

potential competitiveness of developing countries in producing agricultural goods or the relative importance of different items.

For this reason, Table 5 provides several possible indicators of 'importance':

- the foreign exchange equivalent of the tariff cuts;
- the number of developing country suppliers;
- and the most important sources of EU imports.

The 'foreign exchange equivalent' column of Table 5 follows the methodology described above. It suggests gains at the expense of the EU Treasury in the region of Ecu 63 million, or 5.8% of 1992 imports.

Although this is not large, the gains are of potential importance for a large number of countries. The table indicates the total number of suppliers to the EU in 1992 of the products in question. In almost all cases these are in double figures, and many are over 30.

The list of main suppliers suggests that in most cases it is developing rather than developed countries that are the principal sources of imports. Many are Mediterranean or ACP states that have received significant preferences over MFN levels, but there is a good sprinkling of countries with limited, if any, preferences, such as Chile, Brazil and South Africa. The effect of tariff cuts on preference-receiving states is analysed in the next section, but at least for those countries subject to standard MFN treatment liberalisation is likely to result in improved market access.

In order to focus attention on the products in which short-term gains appear most likely to accrue to developing countries, some of the information in Table 5 is duplicated in Table 6, but presented in declining order of foreign exchange equivalent gains. This suggests that various categories of winter flowers, winter potatoes and summer carnations will feel the greatest change. All have a substantial number of suppliers to the European market, but the most important ones are the Mediterranean states plus a few sub-Saharan African countries and Colombia.

Table 6
Horticulture, floriculture and fruits: most important developing country exports in declining order of foreign exchange equivalent gains

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Main suppliers to EU (by value, 1992)</i>	<i>No. of EU suppliers 1992</i>
06031069	06031060	Other flowers, 1 Nov.-31 May	85,051	7,229	Israel, Kenya, Zimbabwe, South Africa, Peru	73
06031053	06031060	Carnations, 1 Nov.-31 May	84,142	7,152	Colombia, Israel, Kenya, Turkey, Morocco	37
07019051		New potatoes, 1 Jan.-15 May	107,660	5,814	Egypt, Morocco, Israel, Cyprus, Tunisia	21
06031051	06031060	Roses, 1 Nov.-31 May	62,856	5,343	Israel, Zimbabwe, Morocco, Colombia, Canaries	40
06031013	06031020	Carnations, 1 June-31 Oct.	36,016	4,322	Colombia, Kenya, Turkey, Morocco, Israel	24
06049190	06049150	Parts of plants (excl. flowers/buds) for ornamental purposes	48,039	3,603	USA, Costa Rica, Guatemala, South Africa, Israel	56
08041000		Dates	63,229	2,719	Tunisia, Algeria, USA, Israel, Iran	30
08109030	08109091	Tamarinds, cashew-apples, lychees, jackfruit, sapodilla plums	17,912	1,970	Madagascar, South Africa, Thailand, Mauritius, Israel	27
07019059		New potatoes, 16 May-30 June	24,828	1,887	Cyprus, Malta, Egypt, Morocco, Tunisia	13
06029970	06029985	Indoor rooted cuttings/young plants (excl. cacti)	26,442	1,719	Costa Rica, Guatemala, Sri Lanka, Israel, Poland	55
06031029	06031020	Other flowers, 1 June-31 Oct.	14,275	1,713	Israel, Kenya, South Africa, Zimbabwe, Colombia	46
08119090	08119091/92?	Frozen fruit/nuts, unsweetened	16,224	1,460	Yugoslavia, Poland, Sweden, Turkey, Israel	59
07082010		Beans (Vigna spp., Phaseolus spp.), 1 Oct.-30 June	56,142	1,460	Kenya, Burkina Faso, Morocco, Senegal, Egypt	53
06031055	06031060	Orchids, 1 Nov.-31 May	17,145	1,457	Thailand, Singapore, Malaysia, Colombia, Canaries	30
08071090	08071050	Fresh melons (excl. watermelons)	61,407	1,351	Brazil, Israel, Guadeloupe, Costa Rica, Martinique	60
06031015	06031020	Orchids, 1 June-31 Oct.	10,197	1,224	Thailand, New Zealand, Singapore, South Africa, Australia	23
06029999	06029985	Indoor plants/cacti (excl. rooted cuttings, young plants)	18,619	1,210	China, Singapore, Guatemala, USA, Canaries	66
07108090	07108075	Frozen vegetables	28,239	1,017	Poland, Peru, China, South Africa, Guatemala	47
07099090		Fresh/chilled vegetables	31,637	1,012	Kenya, Morocco, Thailand, Israel, Surinam	79
08109010		Kiwi fruit	40,316	887	New Zealand, Chile, Australia, South Africa, Argentina	16
06031065	06031060	Chrysanthemums, 1 Nov.-31 May	9,745	828	Israel, Canaries, Zimbabwe, Colombia, South Africa	31
06031011	06031020	Roses, 1 June-31 Oct.	6,717	806	Israel, Canaries, Zimbabwe, Colombia, Kenya	24
07032000		Garlic, fresh/chilled	28,138	675	Argentina, China, USA, Mexico, Chile	29
07092000		Asparagus	9,772	567	USA, Peru, Chile, Argentina, Poland	31
08109080	08109092?	Fresh fruit	25,249	555	Malaysia, Colombia, Thailand, Israel, Austria	88
08112031	08112060	Frozen raspberries, unsweetened	14,408	519	Yugoslavia, Chile, Hungary, Bosnia-Herzegovina, Poland	19
07019090		New potatoes, other	7,931	516	Cyprus, Egypt, Morocco, Switzerland, Israel	23
07122000		Dried onions	15,674	502	USA, Egypt, Hungary, India, Syria	33
07102200		Frozen beans (Vigna spp., Phaseolus spp.)	10,957	394	Morocco, Poland, USA, Hungary, Cameroon	28
08101090		Strawberries, 1 Aug.-30 April	12,714	356	USA, Morocco, Colombia, Mexico, Israel	32
07123000		Dried mushrooms/truffles	9,889	316	China, Yugoslavia, Bulgaria, Pakistan, India	43
07096099		Fruits of genus Capsicum or Pimenta, other	8,138	293	Morocco, Turkey, Kenya, Thailand, Gambia	54
07129090	07129060	Dried vegetables/mixtures of vegetables	8,709	279	China, USA, Hungary, Turkey, Poland	57
07031019	07031050	Onions, fresh/chilled	10,540	253	New Zealand, Australia, Poland, Argentina, Chile	31
08053090		Fresh/dried limes	7,234	231	Brazil, Mexico, USA, El Salvador, Venezuela	29
08112059	08112055	Frozen blackberries/mulberries, unsweetened	7,579	227	Chile, Yugoslavia, Hungary, Bosnia-Herzegovina, Poland	19

Table 6 (continued)

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Main suppliers to EU (by value, 1992)</i>	<i>No. of EU suppliers 1992</i>
07081010		Peas, 1 Sept.-31 May	11,276	226	Guatemala, Zimbabwe, Morocco, Zambia, Kenya	23
07082090		Beans (Vigna spp., Phaseolus spp.), 1 July-30 Sept.	5,170	176	Kenya, Surinam, Zimbabwe, Morocco, Turkey	20
07094000		Celery other than celeriac	5,184	166	Israel, USA, Poland, Egypt, Turkey	9
08129020	08129092	Oranges, provisionally preserved	5,796	128	Israel, Austria, Morocco	3
			1,071,196	62,561		

Notes:

(a) The tariff item numbers used in the GATT offer do not always coincide with the Combined Nomenclature (CN) codes used in the trade statistics from which this table is derived. In such cases, a judgement has been made on which of the GATT offer tariff item numbers approximates most closely to SSA exports, and the number identified is indicated in this column.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

The Potential Implications for Sub-Saharan Africa

The reason for concern

The most important aspect of the Uruguay Round in the short term for sub-Saharan Africa is that its margin of preference in its traditional market (the EU) will be eroded; North African states may be affected in a similar way [see Stevens, 1994].¹ A second major concern is that the cost of food imports will rise while the value of the Lomé protocols on beef and sugar exports will fall substantially following the relaxation of EU agricultural protectionism but, as is clear from the previous section, this will not happen in the short term.

The present situation is that a high proportion of total sub-Saharan African exports is sent to the EU, where the countries of the region benefit from more liberal tariff and non-tariff access than is made available to most other developing countries by the Europeans. To the extent that the Uruguay Round results in a reduction of the barriers that the EU applies to Africa's competitors (either directly through a cut in MFN tariffs or through the domino effect of an extension to the GSP) the value to Africa of its trade preferences will be reduced.

It has been pointed out, quite correctly, that such losses in the European market need to be set against potential gains in other markets, such as the USA and Japan, where Africa is not the most favoured beneficiary of trade preferences and will see its competitors' margins of preference reduced instead. However, such offsetting gains are likely to occur, if at all, only in the longer term. Africa's exports are heavily concentrated geographically on Europe. This focus cannot be explained plausibly by the existence of onerous restrictions in non-EU markets.

Rather, the solution has to be sought in other factors (such as poor marketing and structural constraints - including post-colonial pressures) which may take some time to overcome.

Another line of argument is that the loss of preference in the EU is not significant and/or will actually be beneficial for African states. It is argued that a quarter of a century of preference has failed to result in dynamic exports from many African states; if they have not been useful in the past, their loss will not be detrimental in the future. Indeed, it has been suggested that, to the extent that the preferences confer on exporting states part of the economic rent resulting from an artificial restriction of supply, they may have discouraged diversification and increased dependency on a limited range of exports.

There is some evidence in support of these arguments, but they do not present the whole picture. The main reason why EU trade preferences have had little impact is the simple one that most African exports have not benefited from them. The region's exports are concentrated on a relatively small range of products, most of which face low or zero MFN tariffs and, hence, insignificant preference margins. Over half of exports (by value) are normally accounted for by petroleum, gold, diamonds, copper and wood, all of which face zero MFN tariffs. Only if

¹ This analysis concerns sub-Saharan Africa, defined geographically - i.e. including South Africa and Mauritius but excluding the countries on the Northern shore of the continent from Morocco in the west to Egypt in the east. All of these states except South Africa are parties to the Lomé Convention, and therefore have similar access to the EU market. South Africa has not had any preferences in the past, but is currently negotiating to be given better-than-MFN treatment.

countries diversify into products where MFN rates are higher will the zero or reduced duty provisions of the Lomé Convention result in their exports having a significant price advantage, after clearing EU customs, over their less-preferred competitors. This is beginning to happen, but only relatively recently. A minority, but a not insignificant minority, of African states have begun to diversify their exports, principally into items on which preferences are more substantial [McQueen and Stevens, 1989]. Often the preferences are not over tariffs but in respect of NTBs that restrict imports from other third parties (quotas, minimum import prices and variable import levies). If the loss of preferences does have an adverse effect on Africa it will be largely because it hinders this process of diversification.

There can be little doubt that the preferences available to African (and Caribbean/Pacific) states under the Lomé Convention do, in certain cases, confer economic rents, and that these are sometimes very substantial. It is quite likely that the rents available to Caribbean states on sugar and bananas have had a negative effect on diversification [Stevens, 1991]. However, there are no analogous cases in sub-Saharan Africa. Those countries that have high-rent quotas (Swaziland, Malawi and Zimbabwe for sugar, Botswana, Kenya, Madagascar, Swaziland and Zimbabwe for beef) have not experienced an ossification of exports that could plausibly be explained in this light.

In addition to these considerations, a general case can be made that Africa - like other regions of the world - will benefit in broad terms from any impetus to world growth occasioned by the Uruguay Round liberalisation. However, once again, this positive effect is likely to occur in the longer term, and may well be relatively small in the case of Africa unless and until exports are diversified into items with a higher income and price elasticity of demand than the region's traditionals.

Africa's main exports

The analysis in this section of the Working Paper is based on a review of sub-Saharan Africa's most important exports to the EU. In the short term the impact of any preference erosion will be a function of:

- the importance of the product for sub-Saharan Africa;
- the extent of any reduction in EU MFN tariffs.

In the longer term there may be additional effects if sub-Saharan African states find it more difficult to break into new, non-traditional products (which are too small to figure on the list of most important exports at present) because, with lower preferences, they face stiffer competition from established exporters. It is always difficult to gauge the scale of such hypothetical future changes. However, by casting the net for Africa's 'most important exports' widely, it should be possible to identify most of these potential 'new exports': if very few African states have begun to export them, even on a modest basis, the likelihood of their becoming important exports for a large number of states in the medium term is low.

Accordingly, an analysis has been made of all sub-Saharan African exports to the EU which fulfilled one of two criteria:

- either the value of exports from all sub-Saharan African states in 1992 exceeded Ecu 10 million (or 0.04% of the total);
- or, for products with aggregate sub-Saharan African exports below this threshold but above Ecu 1 million, the item was exported by ten or more of the 47 states.

On the basis of these criteria, 266 products specified at the 8-digit level were identified. The full list of these products is given in Annex 2, Table 3. They represent 91% of total sub-Saharan African exports to the EU in 1992. The table also indicates the current MFN tariff rate, the level to which the EU has agreed to reduce tariffs by July 2000 and the difference between the two (in terms of percentage point change).

EU tariff changes

The products selected

This long and varied list of items was analysed further to identify the products in which tariff changes were most likely to have an importance for Africa (non-tariff changes are dealt with later). The criteria selected took account both of the importance of the export for Africa (in terms of the value of exports or number of exporting states) and of the intended cuts in the size of EU MFN levels. Products were selected from the list of 266 important exports if they also satisfied a criterion on the degree of tariff change. Only those items in which the difference between the EU's base and bound tariff rates is 5 percentage points or more were included.

The results are presented in Table 7, which covers a much more manageable 39 products. The total value of sub-Saharan African exports of these items in 1992 was Ecu 1.3 billion, equivalent to 5.2% of the region's exports to the EU in that year. Most of these items are important to a substantial number of states: in two-thirds of cases, the number of sub-Saharan African exporting states is in double figures.

The most important items in terms of the total value of African exports are coffee (overwhelmingly the most important, accounting for almost half the total), frozen shrimps and prawns, fresh table grapes and fresh/chilled fish. Of these, grapes are an anomaly - almost all of the African supplies are from South Africa, which currently has no preference to be eroded. But the other products are widely spread in Africa.

As these examples suggest, the list is dominated in value terms by primary products, which accounted for almost two-thirds (under one-third if coffee is excluded) of the total value of the exports. In terms of numbers, processed and manufactured items appear quite important, accounting for 41% of the total, but in value terms they are of low significance. The relatively large number of items partly reflects the role of the CN as a protectionist device (see Box 2). The low value score in this table of manufactures (5% of the total) is partly because the most important EU changes on the most important manufactured items for Africa (clothing) will be the eventual rolling back of the MFA rather than tariff reduction. For this reason, clothing is dealt with separately below.

Table 7
Most important sub-Saharan African exports facing significant MFN changes

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>Total SSA exports to EU 1992 (Ecu '000)</i>	<i>No. of exporting SSA states</i>	<i>% point difference base rate to bound rate^(b)</i>	<i>Rank by value^(c)</i>	<i>Remarks</i>
03061100		Frozen rock lobster and other sea crawfish	1,283	16	12.5	37	
03062100		Rock lobster and other sea crawfish	6,371	11	12.5	26	
06031029	06031020	Fresh cut flowers/buds, 1 June-31 Oct.	7,721	10	12.0	24	
08109030	08109091	Tamarinds, cashew apples, jackfruit, lychees, sapodilla plums, fresh	24,765	7	11.0	9	
06039000		Dried etc. flowers	1,758	12	10.0	32	
09041190		Dried pepper	1,956	11	10.0	29	
16025090		Prepared/preserved bovine meat/offal, cooked	11,626	5	9.4	20	
21011011	21011015	Solid extracts/essences/concentrates of coffee	30,045	7	9.0	7	
06031051	06031060	Roses, 1 November to 31 May	15,799	8	8.5	14	
06031053	06031060	Carnations, 1 November to 31 May	14,266	7	8.5	16	
06031065	06031060	Chrysanthemums, 1 Nov.-31 May	1,534	10	8.5	34	
06031069	06031060	Other flowers, 1 November to 31 May	33,186	16	8.5	5	
03033300		Frozen sole `solea spp.'	3,788	10	7.5	28	
03037998	03037999	Frozen saltwater fish	18,020	23	7.5	12	
03042057		Frozen fillets of hake `merluccius'	27,866	5	7.5	8	
06029999	06029985	Indoor plants & cacti	1,349	12	6.5	35	
08061015		Fresh table grapes, 1 November to 14 July	80,660	4	6.5	3	
03061390		Frozen shrimps and prawns	140,060	25	6.0	2	
08045000		Fresh/dried guavas, mangoes, mangosteens	16,816	25	6.0	13	
44182090	44182000	Doors/frames/thresholds of wood	11,178	10	6.0	22	
44201019	44201000	Statuettes/other ornaments of wood	1,934	29	6.0	30	
94016900		Seats with wooden frames, non-upholstered	1,761	15	5.6	31	
94035000		Wooden bedroom furniture	11,943	10	5.6	19	
94036010		Wooden dining/living room furniture	9,101	21	5.6	23	
94036090		Wooden furniture	6,774	22	5.6	25	
09050000		Vanilla	18,893	3	5.5	11	
28092000		Phosphoric acid and polyphosphoric acids	15,575	1	5.5	15	
18031000		Cocoa paste (excl. defatted)	30,528	3	5.4	6	
72104910		Flat-rolled products of iron/non-alloy steel	11,252	4	5.3	21	See note ^(d)
72171290		Wire of iron/non-alloy steel	12,834	3	5.3	17	See note ^(d)
90189090		Surgical/dental etc. instruments	1,107	16	5.3	39	
84314980	84314990	Parts of machinery (various)	1,305	20	5.2	36	
09011100		Coffee (excl. roasted and decaffeinated)	640,072	28	5.0	1	
20089271	20089272/3	Mixtures of fruits, added sugar but no spirit, packings of net content <= 1kg	12,580	5	3.4 or 8.5	18	
85438080	85438090	Electrical machines/apparatus with individual functions	5,242	12	3.3 or 7.0	27	
90318039		Electronic instruments for measuring/checking, n.e.s. in Ch. 90	1,559	20	3.2 or 7.2	33	
90318099		Instruments for measuring/checking, n.e.s. in Ch. 90	1,243	19	1.8 or 5.8	38	

Table 7 (continued)

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>Total SSA exports to EU 1992 (Ecu '000)</i>	<i>No. of exporting SSA states</i>	<i>% point difference base rate to bound rate^(b)</i>	<i>Rank by value^(c)</i>	<i>Remarks</i>
03026998	03026995	Fresh/chilled fish	43,083	22	0 or 7.5	4	
03042097	03042099	Frozen fillets of saltwater fish	22,338	14	0 or 7.5	10	
			1,299,171	Avg. 13			

Notes:

Unless otherwise specified, reductions shall be implemented in equal annual instalments beginning 1 July 1995 and ending 1 July 2000.

- (a) The tariff item numbers used in the GATT offer do not always coincide with the Combined Nomenclature (CN) codes used in the trade statistics from which this table is derived. In such cases, a judgement has been made on which of the GATT offer tariff item numbers approximates most closely to SSA exports, and the number identified is indicated in this column.
- (b) Alternative figures in this column denote that different tariffs apply for different sub-items of the 8-digit product group, and that it has not been possible to identify from the EU import statistics which of these sub-items is being imported.
- (c) The order of the 39 products by value (1 = largest, 39 = smallest).
- (d) Reduction (to 0%) to be phased in over ten years.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

The changes made

Most of these products are covered by the GSP. To the extent that Africa's most serious competitors are other developing countries, therefore, it is the current GSP rather than MFN tariff rates that determine the margin of preference. For this reason, the products listed in Table 7 are re-presented in Table 8, but with additional information on the current standard GSP rate applying to the products in question. (Table 8 does not include the superior tranche of the GSP - the 'Super GSP' - that is available to all countries on the UN list of least developed states plus, for a limited period and to varying degrees, the states of the Andean Pact and Central America).

Where the current GSP tariff rate is lower than the bound rate of duty, the Uruguay Round will not, of itself, alter the relative competitive position of sub-Saharan Africa and other developing countries in relation to tariffs. If, as is likely, the conclusion of the Round results in a new EU GSP scheme, with different tariff levels, then this may produce an erosion of preferences. But, until the proposed new GSP tariffs are published, it is not possible to quantify this. There are 5 (or possibly 6) products for which the current GSP tariff is lower than the level to which the EU has committed itself to reduce MFN rates.

For the other items in the list (where the current GSP tariff exceeds the bound MFN rate) there will be some erosion of preference (although not necessarily immediately, as the tariff cuts are to be phased), even if GSP rates remain unchanged. An attempt is made in the table to quantify in broad terms the possible scale of this erosion.

In static terms, the effect of according preferential tariffs to some suppliers is that the importing state forgoes some tax revenue which accrues to another party. Identifying this other party is not straightforward. Undoubtedly, there are wide variations between products, countries and even consignments. In some cases the gain accrues wholly to the importers (who pay less for their goods, but can on-sell at the same price as for full tariff consignments). In other cases the gain may accrue to a party in the exporting state (the exporting agency, the government, producers, etc., in some combination). It may even accrue partly to the shippers, who are able to charge higher rates than would otherwise be bearable by the market.

In addition to these static effects there may also be dynamic changes if, as a result of the lower tariffs, imports from a preferred source increase either at the expense of other sources or as a result of growth in total demand. To the extent that the gains accrue to the importers, they increase the relative attractions of supplies from the preferred source. To the extent that they accrue to the exporters, the higher returns may induce an increase in supply.

Depending on the current distribution of the tariff revenue foregone, the erosion of preferences will tend, *ceteris paribus*, to reduce any gains currently accruing to parties in the exporting state or to importers. If the former, this will tend to reduce the incentive to supply; if the latter, it will tend to reduce demand for imports from the preference-receiving state. It is not feasible to attempt a quantification of any supply effect at such an aggregated level. However, it is feasible to make a broad estimate of the impact of the erosion in cases where the gains accrue to the importers or where supply is price inelastic. As explained in the Methodology section, such a calculation is based on the assumption that sub-Saharan African exporters could reduce their prices by the same degree as the preference erosion in order to

Table 8
Potential foreign exchange implications of EU tariff cuts

<i>CN code</i> ^(a)	<i>Base rate of duty</i>	<i>Bound rate of duty</i> ^(b)	<i>Standard GSP</i> <i>(b), (c)</i>	<i>% point difference: bound rate to GSP</i> ^(b)	<i>Forex equivalent (Ecu '000)</i> ^(d)	<i>Remarks</i>
03061100	25.0	12.5	7.0	-5.5		
03062100	25.0	12.5	7.0	-5.5		
06031029	24.0	12.0	15.0 or 20.0	3 or 8	618	
08109030	11.0	0.0	6.0	6.0	1,486	
06039000	20.0	10.0	7.0	-3.0		
09041190	10.0	0.0	0.0	0.0	0	
16025090	26.0	16.6	17.0 or 26.0	0.4 or 9.4	1,093	
21011011	18.0	9.0	9.0 or 18.0	0 or 9	2,704	
06031053	17.0	8.5	15.0	6.5	927	
06031051	17.0	8.5	15.0	6.5	1,027	
06031069	17.0	8.5	15.0	6.5	2,157	
06031065	17.0	8.5	15.0	6.5	100	
03042057	15.0	7.5	15.0	7.5	2,090	GSP subject to compliance with the reference price fixed or to be fixed
03033300	15.0	7.5	15.0	7.5	284	
03037998	15.0	7.5	15.0	7.5	1,352	
08061015	18.0	11.5	18.0	6.5		Special safeguard. Plus specific tariff of max 120 Ecu/T reducing to max 96 Ecu/T if unit value less than 500 Ecu/T
06029999	13.0	6.5	8.0 or 12.0	1.5 or 5.5	74	
44182090	6.0	0.0	0.0(C) or 6	0 or 6	671	
44201019	6.0	0.0	0.0	0.0	0	
08045000	6.0	0.0	4.0	4.0	673	
03061390	18.0	12.0	4.5	-7.5		
94016900	5.6	0.0	0.0	0.0	0	
94036090	5.6	0.0	0 (Q/C)-5.6	0-5.6	379	
94036010	5.6	0.0	0 (Q/C)-5.6	0-5.6	510	
94035000	5.6	0.0	0 (Q/C)-5.6	0-5.6	669	
09050000	11.5	6.0	11.5	5.5	1,039	
28092000	11.0	5.5	0.0	-5.5		
18031000	15.0	9.6	11.0	1.4	427	
72171290	5.3	0.0	0 (Q/C)-5.3	0-5.3	680	
72104910	5.3	0.0	0 (Q/C)-5.3	0-5.3	596	
90189090	5.3	0.0	0.0	0.0	0	
84314980	5.2	0.0	0.0	0.0	0	
09011100	5.0	0.0	4.0	4.0	25,603	
20089271	17.0	8.5 or 13.6	7 or 15 + 2 AD S/Z	0.5 or 3.4	428	
85438080	7.0	0.0 or 3.7	0.0	0-3.7	194	

Table 8 (continued)

<i>CN code</i> ^(a)	<i>Base rate of duty</i>	<i>Bound rate of duty</i> ^(b)	<i>Standard GSP</i> ^{(b), (c)}	<i>% point difference: bound rate to GSP</i> ^(b)	<i>Forex equivalent (Ecu '000)</i> ^(d)	<i>Remarks</i>
90318039	7.2	0.0 or 4.0	0.0	0 or 4.0	62	0% to be implemented immediately
90318099	5.8	0.0 or 4.0	0.0	0 or 4.0	50	0% to be implemented immediately
03026998	15.0	7.5 or 15	15.0	0 or 7.5	3,231	
03042097	15.0	7.5 or 15	10.0 or 15.0	0 or 2.5	558	
					49,682	

Notes:

Unless otherwise specified, reductions shall be implemented in equal annual instalments beginning 1 July 1995 and ending 1 July 2000.

(a) For product descriptions and EU GATT offer tariff item numbers, see Table 1.

(b) Alternative figures in these columns denote that different tariffs apply for different sub-items of the 8-digit product group, and that it has not been possible to identify from the EU import statistics which of these sub-items is being imported.

(c) C = ceiling; Q = quota; 2 AD S/Z indicates that the applicable rate of the additional duty on sugar is fixed at a standard rate of 2% of the customs value of the goods.

(d) In all cases where alternative percentage point differences are shown in the preceding column, the foreign exchange equivalent calculation has been made using the larger of the two.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

retain the current relative position of non-preferred and preferred supplies to the importing state.

The scale of change

The maximum level of any such price cutting will be set by the difference between the base MFN rate (or base GSP rate, if it is lower) and the bound rate. Table 8 applies these tariff differences to the value of 1992 exports from sub-Saharan Africa in order to obtain a figure for the foreign exchange equivalent of the required cuts. It suggests that, in order to maintain the same relative post-customs price as at present, the value of sub-Saharan African exports would have to be reduced by some Ecu 49.7 million (excluding grapes), or 4.1% of the total export value of the other 38 products in 1992. Over half of this is accounted for by coffee; the next largest cut (fresh/chilled fish) accounts for only 6% of the total.

It is important to distinguish between the absolute and relative scale of such an impact. Given the fragile external balance of many African states, it would be rash to claim that such a cut in export revenue is insignificant. On the other hand, in relative terms it is quite small. Certainly, the one-off change required to match reductions in MFN levels is small by comparison with the declines most African states have experienced in world market prices for traditional exports over the past decade or so. (Although, of course, it would be additional to such falls).

One reason to focus on the small *relative* change is that it gives hope of the feasibility of finding remedies. One suggestion is that the erosion of preference margins should be offset by improved preferences. There remain many products on which, even after the Uruguay Round, EU protectionism will remain high. Some of these are of potential or actual importance to Africa, especially those products falling under the CAP for which the Lomé Convention provides preferences, many of them covered in the section on temperate agriculture. These preferences are often limited through quotas, the partial nature of tariff cuts or calendars (which provide preferences only at certain times of the year, e.g. during the EU winter). It should not be difficult to identify further improvements to the Lomé provisions that offer Africa the opportunity to recoup part of this loss. The EU's proposed MFN tariff changes on the largest groups of these products were described in the section above on temperate agriculture.

EU non-tariff changes

The analysis on Africa, thus far, has concerned only tariff cuts, but with the growing importance of NTBs in the protectionist arsenal relief from such restrictions has become one of the most valuable aspects of trade preferences. The most important 'NTB preference' for Africa has been its exemption from either the MFA or the bilateral agreements which the EU has concluded with Mediterranean suppliers of clothing and textiles.

The most important sub-Saharan African clothing and textile exports to the EU are listed in Table 9. These are the clothing/textile items identified in Annex 2, Table 3, following the initial trawl of EU trade data. There are 23 such items, presented in the table in declining order of trade value in 1992. The most important (in terms both of value and the number of exporters) are T-shirts and various knitwear items. Woven clothing is present in the list, but

Table 9
Most important sub-Saharan African clothing and textile exports to the EU

<i>CN code</i>	<i>Brief description</i>	<i>Total SSA exports to EU, 1992 (Ecu '000)</i>	<i>No. of exporting SSA states</i>	<i>Main suppliers to EU (by value, 1992)</i>
61091000	T-shirts, singlets, vests of cotton, knitted/crocheted	96,503	26	Turkey, India, Bangladesh, Hong Kong, Mauritius
61101091	Women's/girls' jerseys, pullovers etc. of wool, knitted/crocheted	52,901	9	Hong Kong, Macao, China, Mauritius, Korea Rep.
62052000	Men's/boys' cotton shirts, woven	44,229	14	Hong Kong, India, Bangladesh, Turkey, Korea Rep.
61101031	Men's/boys' jerseys, pullovers etc. of wool, knitted/crocheted	41,268	8	Mauritius, Hong Kong, Switzerland, Austria, Jamaica
61102099	Women's/girls' jerseys, pullovers etc. of cotton, knitted/crocheted	37,343	11	Turkey, Hong Kong, Mauritius, Macao, India
62034231	Men's/boys' cotton denim trousers, woven	26,541	15	Tunisia, USA, Hong Kong, Morocco, Japan
61051000	Men's/boys' cotton shirts, knitted/crocheted	26,262	12	Hong Kong, Turkey, Mauritius, Thailand, China
51052900	Wool tops and combed wool	23,004	2	Uruguay, South Africa, Brazil, Israel, Australia
62034235	Men's/boys' cotton trousers, woven	19,280	15	Tunisia, Morocco, Hong Kong, Turkey, China
52051200	Single cotton yarn of uncombed fibres	15,362	12	Turkey, Egypt, Pakistan, Austria, India
61102091	Men's/boys' cotton jerseys etc., knitted or crocheted	14,733	10	Turkey, India, Hong Kong, Korea Rep., Mauritius
52094200	Denim	13,446	5	USA, Switzerland, Turkey, Tunisia, Japan
61103099	Women's/girls' jerseys etc., manmade fibres, knitted or crocheted	12,727	8	Taiwan, Korea Rep., Hong Kong, Morocco, Indonesia
62031100	Men's/boys' suits of wool/fine animal hair, woven	11,829	3	Switzerland, Turkey, Morocco, Hungary, Yugoslavia
52081295	Unbleached plain cotton weave, weight 130-200 g/m2, width 145-165 cm	10,988	12	India, Indonesia, China, Pakistan, Egypt
62053000	Men's/boys' shirts, manmade fibres, woven	8,620	12	Bangladesh, Hong Kong, India, Morocco, Turkey
62046231	Women's/girls' cotton denim trousers, woven	8,353	12	Hong Kong, Tunisia, Turkey, Morocco, USA
52081299	Unbleached plain cotton weave, weight 130-200 g/m2, width >165 cm	7,516	12	Pakistan, India, Turkey, Egypt, Switzerland
52091100	Unbleached plain cotton weave, weight >200 g/m2	6,639	11	India, Turkey, Brazil, Austria, Pakistan
61046210	Women's/girls' cotton trousers, knitted or crocheted	3,401	12	Turkey, China, Pakistan, Hong Kong, India
61142000	Garments of cotton, knitted or crocheted	2,995	12	China, Turkey, India, Thailand, Hong Kong
62044200	Women's/girls' cotton dresses, woven	2,511	11	India, Turkey, Hong Kong, Hungary, Thailand
62045200	Women's/girls' cotton skirts, woven	1,731	12	Hong Kong, China, Tunisia, India, Turkey
		488,182	Avg. 11	

Source: Eurostat, 1993.

suffers from onerous rules of origin that restrict Africa's capacity to benefit from the Lomé preferences [see McQueen and Stevens, 1989].

Despite the negligible effect of the first tranche of the phase-out, described in the section on industrial products, it must be assumed that in due course significant MFA restrictions will be relaxed. Given the uncertainties on both the timing and the effect of such reintegration of clothing and textiles into more normal GATT rules, Table 9 simply identifies the most important suppliers to the EU market of those items that are currently of most significance for sub-Saharan Africa. If these suppliers are countries known to be heavily restricted by the MFA, there may be some grounds for supposing that the phase-out of the MFA will result in a significant erosion of African NTB preferences. The MFA phase-out may not increase their exports (there is a view that their current market position is protected by the competition-reducing effects of the MFA). But it is likely to increase competition from other sources, to the detriment of less efficient suppliers whose present exports are dependent on the rents induced by the artificial restriction of supply. If, by contrast, the principal suppliers are countries that are relatively lightly restricted under the MFA, the impact on Africa's NTB preferences may be more modest. As can be seen, the East Asian states that are strongly restricted by the MFA figure prominently in the list, but they are not alone. Turkey (represented for 17 items in Table 9, including the most important), Mauritius and Morocco (6 items), and Tunisia (5) all currently receive better-than-MFA treatment. Hence, their exports will not be as greatly affected by the phase-out of the MFA as will those of the East Asian states.

Conclusion

This Working Paper represents the first step in what must be a long series of complementary analyses. As such, it is prudent to avoid strongly generalised conclusions. However, it seems reasonable to conclude that, at the least, talk about the death of EU protectionism is, as Mark Twain might have said, greatly exaggerated. If there are to be substantial improvements to market access for a swathe of products in which the believed comparative advantage of developing countries is being heavily suppressed by protectionism, these are more likely to appear in the next century than this.

The modest apparent changes in the short to medium term do not mean that the GATT agreement is a charade or a damp squib. The EU's tariff changes represent only one part of one aspect of the GATT agreement. Moreover, it can reasonably be pointed out that, small though they may be, they represent a step in the right direction.

But the analysis of the Working Paper does suggest that, in the specific areas studied, the claims and counter-claims of GATT's ardent supporters and critics have been overblown. Both the potential positive features (removal of barriers to industrial and agricultural imports from developing countries) and the potential negative features (erosion of Africa's position in the EU market) will be modest.

One function of a preliminary analysis is to focus attention on the next set of enquiries that should be made. There are many more analyses that need to be undertaken. These should include:

- closer scrutiny of the industrial trade changes to identify the reasons for the apparent modest extent of tariff reductions with a significant effect on developing countries;
- an examination of tariff escalation after the Round;
- and the extension of the erosion of preferences analysis to other preferred regions, notably the Mediterranean and North Africa.

Annex 1

Annex 2

Table 1
Industrial products: selected important EU imports from developing countries

<i>EU GATT offer tariff item no./ (CN code)^(a)</i>	<i>Description of products</i>	<i>Base rate of duty (Ecu '000)</i>	<i>Bound rate of duty (Ecu '000)</i>	<i>EU imports from developing countries 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Remarks^(b)</i>
56072100	Binder/baler twine of sisal/other agave	25.0	12.0	6,013	782	
56072910	Twine/rope etc. of sisal/other agave, >100,000 decitex	25.0	12.0	177	23	
56072990	Twine/rope etc. of sisal/other agave, =<100,000 decitex	25.0	12.0	558	73	
87042131	Motor vehicles for transport of goods, =<5 tonnes, new	22.0	22.0	370	0	
87042139	Motor vehicles for transport of goods, =<5 tonnes, used	22.0	22.0	154	0	
87042291	Motor vehicles for transport of goods, >5 tonnes, new	22.0	22.0	449	0	
87042299	Motor vehicles for transport of goods, >5 tonnes, used	22.0	22.0	1,007	0	
87042391	Motor vehicles for transport of goods, >20 tonnes, new	22.0	22.0	939	0	
87042399	Motor vehicles for transport of goods, >20 tonnes, used	22.0	22.0	175	0	
87043131	Motor vehicles for transport of goods, =<5 tonnes, new	22.0	22.0	595	0	
87043139	Motor vehicles for transport of goods, =<5 tonnes, used	22.0	22.0	4	0	
87043291	Motor vehicles for transport of goods, >5 tonnes, new	22.0	19.0	0	0	
87043299	Motor vehicles for transport of goods, >5 tonnes, used	22.0	19.0	28	1	
29400090	Sugars, chemically pure	20.0	6.5	57	8	Ex Pharma.:0
64041100	Sports footwear; tennis shoes, basketball shoes, gym shoes,	20.0	17.0	322,988	9,690	
64041910	Slippers and other indoor footwear	20.0	17.0	29,718	892	
64041990	Footwear, o/s rubber/plastics, uppers textile	20.0	17.0	191,072	5,732	
64011010	Waterproof footwear with toecap, uppers rubber	20.0	17.0	222	7	
64011090	Waterproof footwear with toecap, uppers plastics	20.0	17.0	217	7	
64019110	Waterproof footwear covering knee, uppers rubber	20.0	17.0	370	11	
64019190	Waterproof footwear covering knee, uppers plastics	20.0	17.0	293	9	
64019210	Waterproof footwear covering ankle, uppers rubber	20.0	17.0	4,839	145	
64019290	Waterproof footwear covering ankle, uppers plastics	20.0	17.0	3,246	97	
64019910	Waterproof footwear, uppers rubber	20.0	17.0	401	12	
64019990	Waterproof footwear, uppers plastics	20.0	17.0	850	26	
64021100	Ski-boots and cross-country ski footwear	20.0	17.0	2,554	77	
64021900	Sport footwear (excl. ski-ing), o/s & uppers rubber/plastics	20.0	17.0	60,237	1,807	
64022000	Footwear with upper straps or thongs assembled to the sole by plugs	20.0	17.0	2,032	61	
64023010	Footwear with toecap, uppers rubber	20.0	17.0	5	0	
64023090	Footwear with toecap, uppers plastics	20.0	17.0	382	11	
64029110	Footwear covering ankle, uppers rubber	20.0	17.0	434	13	
64029190	Footwear covering ankle, uppers plastics	20.0	17.0	27,844	835	
64029910	Footwear, uppers rubber	20.0	17.0	2,808	84	
64029931	Footwear, uppers plastic, sole+heel height >3cm	20.0	17.0	7,614	228	

Table 1 (continued)

<i>EU GATT offer tariff item no./ (CN code)^(a)</i>	<i>Description of products</i>	<i>Base rate of duty (Ecu '000)</i>	<i>Bound rate of duty (Ecu '000)</i>	<i>EU imports from developing countries 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Remarks^(b)</i>
64029939	Footwear, uppers plastic, sole+heel height =<3cm	20.0	17.0	18,001	540	
64029950	Slippers and other house footwear	20.0	17.0	4,032	121	
64029991	Footwear, uppers plastic, insoles <24 cm	20.0	17.0	26,794	804	
64029995	Men's footwear, uppers plastic, insoles =>24 cm	20.0	17.0	0	0	
64029999	Women's footwear, uppers plastic, insoles =>24 cm	20.0	17.0	0	0	
64042010	Slippers and other indoor footwear	20.0	17.0	486	15	
64042090	Footwear, o/s leather/composition leather, uppers textile	20.0	17.0	2,671	80	
64059010	Footwear, o/s of rubber/plastics/leather/composition leather	20.0	17.0	4,423	133	
87012010	Road tractors for semi-trailers, new	20.0	16.0	207	8	
87012090	Road tractors for semi-trailers, used	20.0	16.0	554	22	
87021011	Motor vehicles, 10 or more passengers, diesel/semi-diesel, new	20.0	16.0	929	37	
87021019	Motor vehicles, 10 or more passengers, diesel/semi-diesel, used	20.0	16.0	736	29	
87029011	Motor vehicles, 10 or more passengers, spark ignition, new	20.0	16.0	34	1	
87029019	Motor vehicles, 10 or more passengers, spark ignition, used	20.0	16.0	94	4	
87060011	Chassis of vehicles of 8703 10 10 to 8702 90 90 and 8704 10 11	20.0	19.0	454	5	
29121200	Ethanal (acetaldehyde)	19.2	5.5	7	1	
29182310	Methyl salicylate and phenyl salicylate (salol)	17.6	6.5	0	0	
29335110	Phenobarbital (INN) and its salts	17.5	0.0	0	0	Pharma.
29331190	Phenazone `antipyrin' and its derivatives (excl. propyphenazone)	17.0	6.5	842	88	Ex Pharma.: 0
51112000	Woven fabrics, cont. <85% wt carded wool/animal hair, mixed mainly/solely with manmade filaments	17.0	8.0	124	11	
51113010	Woven fabrics, cont. <85% wt carded wool/animal hair, mixed mainly/solely with manmade staples, wt =<300 g/m2	17.0	8.0	57	5	
51113030	Woven fabrics, cont. <85% wt carded wool/animal hair, mixed mainly/solely with manmade staples, wt 300-450 g/m2	17.0	8.0	20	2	
51113090	Woven fabrics, cont. <85% wt carded wool/animal hair, mixed mainly/solely with manmade staples, wt >450 g/m2	17.0	8.0	17	2	
51119091	Woven fabrics, cont. <85% wt carded wool/animal hair, wt =<300 g/m2	17.0	8.0	13	1	
51119093	Woven fabrics, cont. <85% wt carded wool/animal hair, wt 300-450 g/m2	17.0	8.0	151	14	
51119099	Woven fabrics, cont. <85% wt carded wool/animal hair, wt >450 g/m2	17.0	8.0	23	2	
51122000	Woven fabrics, cont. <85% wt combed wool/animal hair, mixed mainly/solely with manmade filaments	17.0	8.0	116	10	
51123010	Woven fabrics, cont. <85% wt combed wool/animal hair, mixed mainly/solely with manmade staples, wt =<200 g/m2	17.0	8.0	80	7	
51123030	Woven fabrics, cont. <85% wt combed wool/animal hair, mixed mainly/solely with manmade staples, wt 200-375 g/m2	17.0	8.0	361	32	
51123090	Woven fabrics, cont. <85% wt combed wool/animal hair, mixed mainly/solely with manmade staples, wt >375 g/m2	17.0	8.0	42	4	
51129091	Woven fabrics, cont. <85% wt combed wool/animal hair, wt =<200 g/m2	17.0	8.0	55	5	
51129093	Woven fabrics, cont. <85% wt combed wool/animal hair, wt 200-375 g/m2	17.0	8.0	35	3	

Table 1 (continued)

<i>EU GATT offer tariff item no./ (CN code)^(a)</i>	<i>Description of products</i>	<i>Base rate of duty (Ecu '000)</i>	<i>Bound rate of duty (Ecu '000)</i>	<i>EU imports from developing countries 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Remarks^(b)</i>
51129099	Woven fabrics, cont. <85% wt combed wool/animal hair, wt >375 g/m2	17.0	8.0	83	7	
82111000	Sets of assorted knives	17.0	8.5	3,903	332	
82119190	Table knives with fixed blades	17.0	8.5	0	0	
82119290	Knives with fixed blades (excl. table knives)	17.0	8.5	9,514	809	
82119390	Knives (excl. with fixed blades)	17.0	8.5	5,944	505	
82151010	Sets of assorted articles of stainless steel, cont. at least one coated with precious metal	17.0	8.5	0	0	
82152010	Assorted articles of stainless steel	17.0	8.5	36,122	3,070	
82159910	Stainless steel cutlery (excl. assorted sets)	17.0	8.5	42,568	3,618	
87041011	Dumpers for off-highway use	17.0	0.0	310	53	
87120010	Bicycles/tricycles without ballbearings	17.0	15.0	4,012	80	
87120090	Bicycles/tricycles with ballbearings	17.0	15.0	357,503	7,150	
29152100	Acetic acid	16.8	5.5	2,609	295	
27111211	Propane of purity >=99%, liquefied	16.0	8.0	0	0	
39122011	Collodions and celloidin in primary forms	16.0	6.5	7	1	Ex Pharma.: 0
(51111100)	Woven fabrics, cont. >=85% wt carded wool/animal hair, wt =< 300 g/m2	16.0	8.0	859	69	
(51111910)	Woven fabrics, cont. >=85% wt carded wool/animal hair, wt 300-450 g/m2	16.0	8.0	885	71	
(51111990)	Woven fabrics, cont. >=85% wt carded wool/animal hair, wt > 450 g/m2	16.0	8.0	414	33	
(51121100)	Woven fabrics, cont. >=85% wt combed wool/animal hair, wt =< 200 g/m2	16.0	8.0	2,712	217	
(51121910)	Woven fabrics, cont. >=85% wt combed wool/animal hair, wt 200-375 g/m2	16.0	8.0	16,733	1,339	
(51121990)	Woven fabrics, cont. >=85% wt combed wool/animal hair, wt > 375 g/m2	16.0	8.0	3,710	297	
29152200	Sodium acetate	15.2	5.5	35	3	
29335130	Barbital (INN) and its salts	15.2	0.0	0	0	Pharma.
58011000	Woven pile/chenille fabrics of wool/fine animal hair	15.0	8.0	61	4	
58012200	Cut corduroy of cotton	15.0	8.0	7,964	557	
58012300	Weft pile fabrics of cotton	15.0	8.0	124	9	
58012400	Warp pile fabrics, uncut, of cotton	15.0	8.0	11	1	
58012500	Warp pile fabrics, cut, of cotton	15.0	8.0	299	21	
58012600	Chenille fabrics of cotton	15.0	8.0	76	5	
58013200	Cut corduroy of manmade fibres	15.0	8.0	752	53	
58013300	Weft pile fabrics of manmade fibres	15.0	8.0	2,039	143	
58013400	Warp pile fabrics, uncut, of manmade fibres	15.0	8.0	95	7	
58013500	Warp pile fabrics, cut, of manmade fibres	15.0	8.0	6,059	424	
58013600	Chenille fabrics of manmade fibres	15.0	8.0	86	6	
58019010	Woven pile/chenille fabrics of flax	15.0	8.0	0	0	
58019090	Woven pile/chenille fabrics of textile materials	15.0	8.0	1,878	131	
58022000	Terry towelling/similar woven terry fabrics	15.0	8.0	22	2	
58023000	Tufted textile fabrics	15.0	8.0	65	5	
85401110	Cathode-ray TV picture tubes, colour, diag. measurement =<42 cm	15.0	14.0	48,565	486	

Table 1 (continued)

<i>EU GATT offer tariff item no./ (CN code)^(a)</i>	<i>Description of products</i>	<i>Base rate of duty (Ecu '000)</i>	<i>Bound rate of duty (Ecu '000)</i>	<i>EU imports from developing countries 1992 (Ecu '000)</i>	<i>Forex equivalent (Ecu '000)</i>	<i>Remarks^(b)</i>
85401130	Cathode-ray TV picture tubes, colour, diag. measurement 42-52 cm	15.0	14.0	9,548	95	
85401190	Cathode-ray TV picture tubes, colour, diag. measurement >52 cm	15.0	14.0	0	0	
85401210	Cathode-ray TV picture tubes, mono, diag. measurement =<42 cm	15.0	7.5	1,349	101	
85401230	Cathode-ray TV picture tubes, mono, diag. measurement 42-52 cm	15.0	7.5	94	7	
85401290	Cathode-ray TV picture tubes, mono, diag. measurement >52 cm	15.0	7.5	36	3	
88021190	Helicopters of unladen wt =<2,000 kg	15.0	7.5	0	0	
(29224200)	Glutamic acid and its salts	15.0	0.0 or 6.5 ^(c)	19,418	1,651	Pharma.
				1,316,474	44,275	

Notes:

- (a) The codes in brackets are CN codes identified from the product description for items for which the EU documents do not give a tariff item number.
- (b) These remarks, from the EU documents, require further clarification.
- (c) 6.5% applies to monosodium glutamate; 0% to 'other' glutamic acids/salts. It is not possible to determine from the EU import statistics which product is being imported. The foreign exchange equivalent has been calculated using the 8.5 percentage point difference between 15% and 6.5%.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

Table 2
Horticulture, floriculture and fruits: selected important EU imports from developing countries

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c) (Ecu '000)</i>	<i>Remarks</i>
Base rate > 10%, no special safeguard							
06031013	06031020	Carnations, 1 June-31 October	36,016	24.0	12.0	4,322	
06031029	06031020	Other flowers, 1 June-31 Oct.	14,275	24.0	12.0	1,713	
06031015	06031020	Orchids, 1 June-31 October	10,197	24.0	12.0	1,224	
06031011	06031020	Roses, 1 June-31 October	6,717	24.0	12.0	806	
07019059		New potatoes, 16 May-30 June	24,828	21.0	13.4	1,887	
07108090	07108075	Frozen vegetables	28,239	18.0	14.4	1,017	
08119090	08119091/92?	Frozen fruit/nuts, unsweetened	16,224	18.0	9.0 or 14.4	1,460	
08112031	08112060	Frozen raspberries, unsweetened	14,408	18.0	14.4	519	
07102200		Frozen beans (Vigna spp., Phaseolus spp.)	10,957	18.0	14.4	394	
07019090		New potatoes, other	7,931	18.0	11.5	516	
07082090		Beans (Vigna spp., Phaseolus spp.), 1 July-30 Sept.	5,170	17.0 ^(d)	13.6 ^(d)	176	
06031069	06031060	Other flowers, 1 Nov.-31 May	85,051	17.0	8.5	7,229	
06031053	06031060	Carnations, 1 Nov.-31 May	84,142	17.0	8.5	7,152	
06031051	06031060	Roses, 1 Nov.-31 May	62,856	17.0	8.5	5,343	
06031055	06031060	Orchids, 1 Nov.-31 May	17,145	17.0	8.5	1,457	
06031065	06031060	Chrysanthemums, 1 Nov.-31 May	9,745	17.0	8.5	828	
07099090		Fresh/chilled vegetables	31,637	16.0	12.8	1,012	
07122000		Dried onions	15,674	16.0	12.8	502	
07123000		Dried mushrooms/truffles	9,889	16.0	12.8	316	
07092000		Asparagus	9,772	16.0	10.2	567	
07129090	07129060	Dried vegetables/mixtures of vegetables	8,709	16.0	12.8	279	
08053090		Fresh/dried limes	7,234	16.0	12.8	231	
07094000		Celery other than celeriac	5,184	16.0	12.8	166	
07019051		New potatoes, 1 Jan.-15 May	107,660	15.0	9.6	5,814	
08112059	08112055	Frozen blackberries/mulberries, unsweetened	7,579	15.0	12.0	227	
08101090		Strawberries, 1 Aug.-30 April	12,714	14.0	11.2	356	
07082010		Beans (Vigna spp., Phaseolus spp.), 1 Oct.-30 June	56,142	13.0 ^(d)	10.4 ^(d)	1,460	
06029970	06029985	Indoor rooted cuttings/young plants (excl. cacti)	26,442	13.0	6.5	1,719	
06029999	06029985	Indoor plants/cacti (excl. rooted cuttings, young plants)	18,619	13.0	6.5	1,210	
08041000		Dates	63,229	12.0	7.7	2,719	
07032000		Garlic, fresh/chilled	28,138	12.0	9.6	675	

Table 2 (continued)

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c) (Ecu '000)</i>	<i>Remarks</i>
07031019	07031050	Onions, fresh/chilled	10,540	12.0	9.6	253	
08071090	08071050	Fresh melons (excl. watermelons)	61,407	11.0	8.8	1,351	
08109010		Kiwi fruit	40,316	11.0	8.8	887	
08109080	08109092?	Fresh fruit	25,249	11.0	8.8	555	
08109030	08109091	Tamarinds, cashew-apples, lychees, jackfruit, sapodilla plums	17,912	11.0	0.0	1,970	
08129020	08129092	Oranges, provisionally preserved	5,796	11.0	8.8	128	
06049190	06049150	Parts of plants (excl. flowers/buds) for ornamental purposes	48,039	10.0	2.5	3,603	
07081010		Peas, 1 Sept.-31 May	11,276	10.0	8.0	226	
07096099		Fruits of genus Capsicum or Pimenta, other	8,138	10.0	6.4	293	
Base rate < 10% and/or special safeguard:							
08030010	8030012	Fresh bananas	2,040,693	850 Ecu/T	680 Ecu/T		Special safeguard
07149011		Fresh/frozen arrowroot, etc.	6,870	148 Ecu/T	95 Ecu/T		Special safeguard
07141099		Manioc, fresh/dried, whole/sliced	1,168,706	148 Ecu/T	95 Ecu/T		Special safeguard
07099060		Sweet corn	8,842	147 Ecu/T	94 Ecu/T		Special safeguard
08093000		Peaches, incl. nectarines	14,365	22.0	17.6	632	Special safeguard & specific tariff of max 163 Ecu/T reducing to max 130 Ecu/T if unit value less than that stipulated for each sub-period
08061019		Fresh table grapes, 15 July-31 Oct.	7,885	22.0	14.1 or 17.6	623	Special safeguard & specific tariff from 21 July-31 Oct. of 22% + max 120 Ecu/T reducing to 17.6% + max 96 Ecu/T if unit value less than 570 Ecu/T
08051041	08051050/62/66	Sanguines, 16 Oct.-31 March	14,600	20.0	16.0	584	Special safeguard & specific tariff from 1 Dec. to 31 March of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
08052090	08052020/48/49	Fresh/dried citrus hybrids	32,448	20.0	16.0	1,298	Special safeguard & specific tariff from 1 Nov. to end Feb. of max 132 Ecu/T reducing to max 106 Ecu/T if unit value less than 312 Ecu/T
08052010	08052020/41/42	Fresh/dried clementines	45,561	20.0	16.0	1,822	Special safeguard & specific tariff from 1 Nov. to end Feb. of max 132 Ecu/T reducing to max 106 Ecu/T if unit value less than 675 Ecu/T
08051045	08051050/62/66	Navels, etc., 16 Oct.-31 March	71,074	20.0	16.0	2,843	Special safeguard & specific tariff from 1 Dec. to 31 March of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
08052030	08052020/48/49	Fresh/dried monreales/satsumas	5,514	20.0	16.0	221	Special safeguard & specific tariff from 1 Nov. to end Feb. of max 132 Ecu/T reducing to max 106 Ecu/T if unit value less than 312 Ecu/T

Table 2 (continued)

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c) (Ecu '000)</i>	<i>Remarks</i>
08061015		Fresh table grapes, 1 Nov.-14 July	121,408	18.0	11.5 or 14.4	7,892	Special safeguard & specific tariff from 1-20 Nov. of 18% + max 120 Ecu/T reducing to 14.4% + max 96 Ecu/T if unit value less than 500 Ecu/T
07070011		Cucumbers, 1 Nov.-15 May	22,665	16.0	12.8	725	Special safeguard & specific tariff of max 473 Ecu/T reducing to max 378 Ecu/T if unit value less than that stipulated for each sub-period
08051015	08051012/16	Navels, etc., 1-30 April	43,618	13.0	10.4	1,134	Special safeguard & specific tariff of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
07020010		Tomatoes, 1 Nov.-14 May	264,141	11.0	8.8	5,811	Special safeguard & specific tariff of max 372 Ecu/T reducing to max 298 Ecu/T if unit value less than that stipulated for each sub-period
08082031		Fresh pears, 1 Jan.-31 March	47,364	10.0	8.0	947	Special safeguard & specific tariff of max 297 Ecu/T reducing to max 238 Ecu/T if unit value less than 569 Ecu/T
08043000		Pineapples	130,511	9.0	5.8	4,176	
07096010		Sweet peppers	9,489	9.0	7.2	171	
07104000		Frozen sweet corn	14,208	8.0 ^(e)	5.1 ^(e)	412	Special safeguard
08094019		Fresh plums, 1 Oct.-30 June	16,644	8.0	6.4	266	Special safeguard & specific tariff from 11-30 June of max 129 Ecu/T reducing to max 103 Ecu/T if unit value less than 722 Ecu/T
08053010		Fresh/dried lemons	32,948	8.0	6.4	527	Special safeguard & specific tariff of max 320 Ecu/T reducing to max 256 Ecu/T if unit value less than that stipulated for each sub-period
08023200		Shelled walnuts	12,346	8.0	5.1	358	
08133000		Dried apples	6,262	8.0	6.4	100	
08044090		Avocados, 1 June-30 Nov.	29,772	8.0	5.1	863	
08081093		Fresh apples, 1 Jan.-31 March	25,404	8.0	4.0 or 6.4	1,016	Special safeguard & specific tariff of 8% + max 297 Ecu/T reducing to 6.4% + max 238 Ecu/T if unit value less than 627 Ecu/T
08044010		Avocados, 1 Dec.-31 May	41,501	8.0	4.0	1,660	4% to be applied from 1995
06021090		Unrooted cuttings/slips, other	33,627	8.0	4.0	1,345	
08045000		Guavas, mangos, mangosteens	44,615	6.0	0.0	2,677	
07113000		Provisionally preserved capers	9,081	6.0	4.8	109	
08134080	08134092	Dried fruit	7,665	6.0	4.8	92	
08072000		Pawpaws	11,491	6.0	0.0	689	
08081099		Fresh apples, 1 April-31 July	237,185	6.0	3.8 or 4.8	5,218	Special safeguard & specific tariff of 6% + max 297 Ecu/T reducing to 4.8% + 238 Ecu/T if unit value less than that stipulated for each sub-period
08051025	08051022/26	Navels, etc., 1-15 May	19,654	6.0	4.8	236	Special safeguard & specific tariff of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T

Table 2 (continued)

<i>CN code</i>	<i>EU GATT offer tariff item no.^(a)</i>	<i>Brief description</i>	<i>EU imports from developing countries, 1992 (Ecu '000)</i>	<i>Base rate of duty</i>	<i>Bound rate of duty^(b)</i>	<i>Forex equivalent^(c) (Ecu '000)</i>	<i>Remarks</i>
08082033		Fresh pears, 1 April-15 July	87,705	5.0	4.0	877	Special safeguard & specific tariff of max 297 Ecu/T reducing to max 238 Ecu/T if unit value less than that stipulated for each sub-period
08051039	08051032/36/40	Sweet oranges, 16 May-15 Oct.	5,887	4.0	3.2	47	Special safeguard & specific tariff from 16 to 31 May of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
08051035	08051032/36/40	Navels, etc., 16 May-15 Oct.	84,169	4.0	3.2	673	Special safeguard & specific tariff from 16 to 31 May of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
06049910		Dried parts of plants for ornamental purposes	5,001	4.0	0.0	200	
08062098	08062058	Dried grapes (excl. currants/sultanas), containers >2kg	8,581	3.0	2.4	51	
08054000	08054010/30	Fresh/dried grapefruit	106,976	3.0	1.5 or 2.4	1,605	1.5 = 1 Nov.-30 April and to be applied from 1995; 2.4 = 1 May-31 Oct.
08062092	08062058?	Sultanas, containers >2kg	16,349	3.0	2.4	98	(EU tariff item no. used is for 'dried grapes')
07133990		Dried beans, other (excl. for sowing)	8,970	3.0	0.0	269	
07132090		Chickpeas (excl. for sowing)	28,800	3.0	0.0	864	
07133310		Kidney beans, for sowing	7,436	3.0	0.0	223	
07133390		Kidney beans (excl. for sowing)	42,791	3.0	0.0	1,284	
08025000		Pistachios	229,578	2.0	1.6	918	
08011010	08011050	Desiccated coconut	51,906	2.0	0.0	1,038	
08011090	08011050	Fresh/dried coconuts	10,948	2.0	0.0	219	
08012000		Brazil nuts	12,985	0.0	0.0		
08013000		Cashew nuts	71,313	0.0	0.0		
			6,448,748			115,377	

Notes:

- (a) The tariff item numbers used in the GATT offer do not always coincide with the Combined Nomenclature (CN) codes used in the trade statistics from which this table is derived. In such cases, a judgement has been made on which of the GATT offer tariff item numbers approximates most closely to SSA exports, and the number identified is indicated in this column.
- (b) Alternative figures in this column denote that different tariffs apply for different sub-items of the 8-digit product group, and that it has not been possible to identify from the EU import statistics which of these sub-items is being imported.
- (c) Where alternative tariffs are shown in the preceding column, the foreign exchange equivalent calculation has been made using the larger of the two percentage point differences between the base and bound rates of duty.
- (d) Plus a specific tariff of min. 2 Ecu/100 kg net reducing to min. 1.6 Ecu/100 kg net.
- (e) Plus 147 Ecu/T reducing to 94 Ecu/T.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

Table 3
Most important EU imports from sub-Saharan Africa

<i>CN code</i>	<i>Total SSA exports to EU 1992 (Ecu 000)</i>	<i>% of total SSA exports</i>	<i>No. of exporting SSA states</i>	<i>Brief description</i>	<i>Base rate of duty</i>	<i>Bound rate of duty</i>	<i>% point difference: base rate to bound rate</i>	<i>Remarks</i>
Exports of Ecu 20 million or more:								
08109030	24,765	0.1%	7	Tamarinds, cashew apples, jackfruit, lychees, sapodilla plums, fresh	11.0	0.0	11.0	GATT offer tariff item no. 08109090(a)
21011011	30,045	0.1%	7	Solid extracts/essences/concentrates of coffee	18.0	9.0	9.0	GATT offer tariff item no. 21011015(a)
06031069	33,186	0.1%	16	Other flowers, 1 November to 31 May	17.0	8.5	8.5	GATT offer tariff item no. 06031060(a)
03042057	27,866	0.1%	5	Frozen fillets of hake 'merluccius'	15.0	7.5	7.5	
08061015	80,660	0.3%	4	Fresh table grapes, 1 November to 14 July	18.0	11.5	6.5	Special safeguard & specific tariff from 1-20 Nov. of 18% + max 120 Ecu/T reducing 14.4% + max 96 Ecu/T if unit value less than 500 Ecu/T
03061390	140,060	0.6%	25	Frozen shrimps and prawns	18.0	12.0	6.0	
18031000	30,528	0.1%	3	Cocoa paste (excl. defatted)	15.0	9.6	5.4	
09011100	640,072	2.5%	28	Coffee (excl. roasted and decaffeinated)	5.0	0.0	5.0	
20082079	30,472	0.1%	7	Pineapples, added sugar, no added spirit, packings of =< 1 kg	24.0	19.2	4.8	
18040000	82,093	0.3%	5	Cocoa butter, fat and oil	12.0	7.7	4.3	
72024190	142,059	0.6%	2	Ferro-chromium, containing by weight > 6 % of carbon	8.0	4.0	4.0	
15081090	42,489	0.2%	6	Crude groundnut oil	10.0	6.4	3.6	
08043000	85,813	0.3%	20	Fresh/dried pineapples	9.0	5.8	3.2	
44082091	26,600	0.1%	11	Veneer sheets/sheets for plywood etc. =< 1 mm thick	6.0	3.0	3.0	See note(b)
18010000	843,941	3.3%	21	Cocoa beans, whole/broken, raw/roasted	3.0	0.0	3.0	
08044090	28,377	0.1%	11	Fresh/dried avocados, 1 June to 30 November	8.0	5.1	2.9	
94019090	63,679	0.3%	5	Parts of seats	5.6	2.7	2.9	
84213971	45,981	0.2%	2	Machinery for filtering/purifying gases by a catalytic process	4.4	1.7	2.7	
15111090	42,721	0.2%	9	Crude palm oil	6.0	3.8	2.2	
08081099	151,306	0.6%	4	Fresh apples, 1 April to 31 July	6.0	3.8	2.2	Special safeguard & specific tariff of 6% + max 297 Ecu/T reducing to 4.8% + 238 Ecu/T if unit value less than that stipulated for each sub-period
61101031	41,268	0.2%	8	Men's/boys' jerseys, pullovers etc. of wool, knitted/crocheted	14.0	12.0	2.0	
44089093	33,761	0.1%	10	Veneer sheets/sheets for plywood etc. =< 1 mm thick	6.0	4.0	2.0	
44089099	21,678	0.1%	11	Veneer sheets/sheets for plywood etc. > 1 mm but =< 6mm thick	6.0	4.0	2.0	
61102099	37,343	0.1%	11	Women's/girls' jerseys, pullovers etc. of cotton, knitted/crocheted	14.0	12.0	2.0	
62034231	26,541	0.1%	15	Men's/boys' cotton denim trousers, woven	14.0	12.0	2.0	
61101091	52,901	0.2%	9	Women's/girls' jerseys, pullovers etc. of wool, knitted/crocheted	14.0	12.0	2.0	
87082910	21,532	0.1%	2	Body parts/accessories for misc. vehicles	4.9	3.0	1.9	
72023000	20,979	0.1%	1	Ferro-silicon manganese	5.5	3.7	1.8	
08054000	31,616	0.1%	8	Fresh/dried grapefruit (winter)	3.0	1.5	1.5	1.5% to be applied from 1995
27100079	71,902	0.3%	6	Fuel oils	5.0	3.5	1.5	
28441000	198,542	0.8%	4	Natural uranium and its compounds;	0.0-4.9	0.0	1.5-4.9	
08082033	50,137	0.2%	4	Fresh pears, 1 April to 15 July	5.0	4.0	1.0	Special safeguard & specific tariff of max 297 Ecu/T reducing to max 238 Ecu/T if unit value less than that stipulated for each sub-period
62052000	44,229	0.2%	14	Men's/boys' cotton shirts, woven	13.0	12.0	1.0	
61051000	26,262	0.1%	12	Men's/boys' cotton shirts, knitted/crocheted	13.0	12.0	1.0	
61091000	96,503	0.4%	26	T-shirts, singlets, vests of cotton, knitted/crocheted	13.0	12.0	1.0	
41061200	38,757	0.2%	14	Goat/kidskin leather, pre-tanned	2.9	2.0	0.9	
08051035	66,023	0.3%	7	Sweet oranges, 16 May to 15 October	4.0	3.2	0.8	Special safeguard & specific tariff from 16-31 May of max Ecu 89/T reducing to max 71 Ecu/T if unit value less than 372 Ecu/T
51052900	23,004	0.1%	2	Wool tops and combed wool	2.5	2.0	0.5	
28046900	29,352	0.1%	1	Silicon containing by weight < 99.99% of silicon	6.0	5.5	0.5	
41051210	20,654	0.1%	14	Unsplit sheep/lambskin leather, pre-tanned	2.5	2.0	0.5	

Table 3 (continued)

CN code	Total SSA exports to EU 1992 (Ecu 000)	% of total SSA exports	No. of exporting SSA states	Brief description	Base rate of duty	Bound rate of duty	% point difference: base rate to bound rate	Remarks
03042097	22,338	0.1%	14	Frozen fillets of saltwater fish	15.0	7.5 or 15	0-7.5	GATT offer tariff item no. 03042099(a)
03026998	43,083	0.2%	22	Fresh/chilled fish	15.0	7.5 or 15	0-7.5	GATT offer tariff item no. 03026995(a)
08030010	160,739	0.6%	14	Fresh bananas, incl. plantains	850 Ecu/T	680 Ecu/T		GATT offer tariff item no. 08030012(a). Special safeguard.
17011190	49,222	0.2%	5	Raw cane sugar	524 Ecu/T	419 Ecu/T		Special safeguard
17011110	319,202	1.3%	7	Raw cane sugar for refining	424 Ecu/T	339 Ecu/T		Special safeguard
24011010	23,003	0.1%	9	Flue-cured Virginia-type tobacco	23% min 28 Ecu max 30 Ecu(e)	18.4% min 22 Ecu max 24 Ecu(e)		GATT offer tariff item no. 24011029(a)
24012010	172,148	0.7%	12	Partly/wholly stemmed/stripped flue-cured Virginia-type tobacco	23% min 28 Ecu max 30 Ecu(e)	18.4% min 22 Ecu max 24 Ecu(e)		GATT offer tariff item no. 24012029(a)
24012020	74,638	0.3%	9	Partly/wholly stemmed/stripped light air-cured Burley-type tobacco	23% min 28 Ecu max 30 Ecu(e)	18.4% min 22 Ecu max 24 Ecu(e)		GATT offer tariff item no. 24012029(a)
02023090	33,652	0.1%	7	Frozen bovine boned meat	20.0% + 4,752 Ecu/T	12.8% + 3,041 Ecu/T		Special safeguard
02013000	72,851	0.3%	5	Fresh/chilled bovine meat, boneless	20.0% + 4,740 Ecu/T	12.8% + 3,034 Ecu/T		Special safeguard
24012080	20,208	0.1%	9	Partly/wholly stemmed/stripped flue-cured tobacco	14% min 28 Ecu max 70 Ecu(e)	11.2% min 22 Ecu max 56 Ecu(e)		GATT offer tariff item no. 24012069(a)
07082010	42,891	0.2%	21	Fresh/chilled beans `vigna spp., phaseolus spp.', 1 October to 30 June	13.0% min 2 Ecu(e)	10.4% min 1.6 Ecu(e)		
17031000	29,741	0.1%	10	Cane molasses resulting from extraction/refining of sugar	0.44 Ecu/100kg	0.35 Ecu/100kg		Special safeguard
27011900	225,077	0.9%	3	Other coal	FRG 6DM/1000kg net Oth:0	0.0		The zero rate will be implemented in full on 1.1.96
27011290	575,844	2.3%	5	Bituminous coal, other	FRG 6DM/1000kg net Oth:0	0.0		The zero rate will be implemented in full on 1.1.96
27011210	26,688	0.1%	2	Coking coal	FRG 6DM/1000kg net Oth:0	0.0		The zero rate will be implemented in full on 1.1.96
27011110	45,480	0.2%	2	Anthracite having a volatile matter limit =< 10%	FRG 6DM/1000kg net Oth:0	0.0		The zero rate will be implemented in full on 1.1.96
27011190	118,727	0.5%	2	Anthracite having a volatile matter limit > 10%	FRG 6DM/1000kg net Oth:0	0.0		The zero rate will be implemented in full on 1.1.96
16041410	145,157	0.6%	8	Prepared/preserved tuna/skipjack	24.0	24.0	0.0	
03034212	31,980	0.1%	6	Frozen yellowfin tunas for industrial manufacture of products of 16.04	20.0	20.0	0.0	GATT offer tariff item no. 03034219(a)
03037810	44,216	0.2%	5	Frozen hake `merluccius spp.'	15.0	15.0	0.0	See note(c)
03075910	35,751	0.1%	13	Frozen octopus `octopus spp.'	8.0	8.0	0.0	
76011000	266,331	1.1%	7	Unwrought aluminium, not alloyed	6.0	6.0	0.0	
27090090	5,514,563	21.9%	7	Petroleum oils/oils obtained from bituminous minerals, crude	0.0	0.0	--	GATT offer tariff item no. 27090000(a)
71081200	4,220,177	16.7%	27	Gold, non-monetary, in other unwrought forms	0.0	0.0	--	
71023100	1,313,924	5.2%	23	Diamonds, unworked or simply sawn, cleaved or bruted	0.0	0.0	--	
88023010	465,330	1.8%	13	Civil aircraft of > 2,000 but =< 15,000 kg unladen weight	0.0	0.0	--	
71101100	266,543	1.1%	1	Platinum, unwrought or in powder form	0.0	0.0	--	
26011100	251,233	1.0%	4	Iron ores and concentrates, including roasted iron pyrites: non-agglomerated	0.0	0.0	--	
71021000	236,444	0.9%	12	Unsorted diamonds	0.0	0.0	--	
52010090	233,996	0.9%	26	Cotton, not carded or combed, other	0.0	0.0	--	
74031100	219,266	0.9%	6	Cathodes and sections of cathodes of refined copper	0.0	0.0	--	
26060000	212,520	0.8%	5	Aluminium ores and concentrates	0.0	0.0	--	
44039990	204,133	0.8%	19	Wood in the rough	0.0	0.0	--	
74031900	203,712	0.8%	6	Refined copper, unwrought	0.0	0.0	--	
44072290	185,511	0.7%	19	Okoume, obeche, sapelli etc., sawn/chipped lengthwise etc.	0.0	0.0	--	
09024000	175,400	0.7%	20	Black fermented/partly fermented tea in immediate packings of > 3kg	0.0	0.0	--	
71103100	169,960	0.7%	2	Rhodium, unwrought or in powder form	0.0	0.0	--	
26020000	157,490	0.6%	5	Manganese ores and concentrates, including manganiferous iron	0.0	0.0	--	
44033490	111,277	0.4%	13	Sapelli/acajou d'Afrique/iroko wood in the rough	0.0	0.0	--	
71023900	110,266	0.4%	15	Non-industrial diamonds, sorted, not mounted/set	0.0	0.0	--	
74020000	101,770	0.4%	3	Unrefined copper; copper anodes for electrolytic refining	0.0	0.0	--	
44079999	96,568	0.4%	28	Wood sawn or chipped lengthwise etc.	0.0	0.0	--	
51011100	80,474	0.3%	5	Shorn wool, greasy, not carded/combed	0.0	0.0	--	
44033410	78,129	0.3%	8	Okoume wood in the rough	0.0	0.0	--	
75021000	72,618	0.3%	4	Unwrought nickel, not alloyed	0.0	0.0	--	
25161100	71,478	0.3%	15	Granite, crude or roughly trimmed	0.0	0.0	--	
25101000	63,331	0.3%	4	Natural calcium/aluminium calcium phosphates & phosphatic chalk, unground	0.0	0.0	--	
88024010	61,820	0.2%	2	Civil aircraft of > 15,000 kg unladen weight	0.0	0.0	--	

Table 3 (continued)

CN code	Total SSA exports to EU 1992 (Ecu 000)	% of total SSA exports	No. of exporting SSA states	Brief description	Base rate of duty	Bound rate of duty	% point difference: base rate to bound rate	Remarks
81051010	61,039	0.2%	5	Cobalt mattes and other intermediate products of cobalt	0.0	0.0	--	
44033590	52,764	0.2%	13	Tiama/mansonia/ilomba/dibetou/azobe wood in the rough	0.0	0.0	--	
40012200	51,877	0.2%	10	Technically specified natural rubber (TSNR)	0.0	0.0	--	
89012010	51,824	0.2%	1	Sea-going tankers	0.0	0.0	--	
41042210	51,264	0.2%	15	Bovine leather, not further prepared than chrome-tanned, wet-blue	0.0	0.0	--	
26169000	51,206	0.2%	5	Precious metal ores and concentrates	0.0	0.0	--	
89019010	48,402	0.2%	1	Sea-going vessels for transport of persons/goods	0.0	0.0	--	
40012990	40,316	0.2%	12	Natural rubber in primary forms/plates/sheets.strip	0.0	0.0	--	
26190093	39,996	0.2%	1	Slag suitable for the extraction of titanium oxide	0.0	0.0	--	
13012000	38,165	0.2%	13	Natural gum arabic	0.0	0.0	--	
26140090	32,553	0.1%	2	Titanium ores and concentrates	0.0	0.0	--	
71022100	31,015	0.1%	7	Industrial diamonds, unworked or simply sawn etc., sorted	0.0	0.0	--	
23069091	30,637	0.1%	1	Oilcake resulting from extraction of germ of maize	0.0	0.0	--	
41022100	30,525	0.1%	6	Raw skins of sheep/lambs, pickled	0.0	0.0	--	
44033450	28,524	0.1%	11	Sipo wood in the rough	0.0	0.0	--	
44033430	27,301	0.1%	7	Obeche wood in the rough	0.0	0.0	--	
40012100	26,005	0.1%	5	Smoked sheets of natural rubber	0.0	0.0	--	
26100000	24,633	0.1%	1	Chromium ores and concentrates	0.0	0.0	--	
26209099	21,388	0.1%	6	Ash and residues	0.0	0.0	--	
47032900	20,086	0.1%	3	Semi-bleached/bleached non-coniferous chemical wood pulp	0.0	0.0	--	
Exports of Ecu 1-20 million:								
03061100	1,283	0.0%	16	Frozen rock lobster and other sea crawfish	25.0/25.0 (U)	12.5	12.5	
03062100	6,371	0.0%	11	Rock lobster and other sea crawfish	25.0	12.5	12.5	
06031029	7,721	0.0%	10	Fresh cut flowers/buds, 1 June-31 Oct.	24.0	12.0	12.0	GATT offer tariff item no. 06031020(a)
09041190	1,956	0.0%	11	Dried pepper	10.0	0.0	10.0	
06039000	1,758	0.0%	12	Dried etc. flowers	20.0	10.0	10.0	
16025090	11,626	0.0%	5	Prepared/preserved bovine meat/offal, cooked	26.0	16.6	9.4	
06031065	1,534	0.0%	10	Chrysanthemums, 1 Nov.-31 May	17.0	8.5	8.5	GATT offer tariff item no. 06031060(a)
06031051	15,799	0.1%	8	Roses, 1 November to 31 May	17.0	8.5	8.5	GATT offer tariff item no. 06031060(a)
06031053	14,266	0.1%	7	Carnations, 1 November to 31 May	17.0	8.5	8.5	GATT offer tariff item no. 06031060(a)
03033300	3,788	0.0%	10	Frozen sole `solea spp.'	15.0	7.5	7.5	
03037998	18,020	0.1%	23	Frozen saltwater fish	15.0	7.5	7.5	GATT offer tariff item no. 03037999(a)
06029999	1,349	0.0%	12	Indoor plants & cacti	13.0	6.5	6.5	GATT offer tariff item no. 06029985(a)
44182090	11,178	0.0%	10	Doors/frames/thresholds of wood	6.0	0.0	6.0	GATT offer tariff item no. 44182000(a)
44201019	1,934	0.0%	29	Statuettes/other ornaments of wood	6.0	0.0	6.0	GATT offer tariff item no. 44201000(a)
08045000	16,816	0.1%	25	Fresh/dried guavas, mangoes, mangosteens	6.0	0.0	6.0	
94036090	6,774	0.0%	22	Wooden furniture	5.6	0.0	5.6	
94016900	1,761	0.0%	15	Seats with wooden frames, non-upholstered	5.6	0.0	5.6	
94035000	11,943	0.0%	10	Wooden bedroom furniture	5.6	0.0	5.6	
94036010	9,101	0.0%	21	Wooden dining/living room furniture	5.6	0.0	5.6	
09050000	18,893	0.1%	3	Vanilla	11.5	6.0	5.5	
28092000	15,575	0.1%	1	Phosphoric acid and polyphosphoric acids	11.0	5.5	5.5	
72104910	11,252	0.0%	4	Flat-rolled products of iron/non-alloy steel	5.3	0.0	5.3	See note(d)
72171290	12,834	0.1%	3	Wire of iron/non-alloy steel	5.3	0.0	5.3	See note(d)
90189090	1,107	0.0%	16	Surgical/dental etc. instruments	5.3	0.0	5.3	
84314980	1,305	0.0%	20	Parts of machinery (various)	5.2	0.0	5.2	GATT offer tariff item no. 84314990(a)
84719910	1,178	0.0%	29	Peripheral units	4.9	0.0	4.9	
44219099	2,911	0.0%	17	Articles of wood n.e.s. in Ch. 44	4.9	0.0	4.9	

Table 3 (continued)

<i>CN code</i>	<i>Total SSA exports to EU 1992 (Ecu 000)</i>	<i>% of total SSA exports</i>	<i>No. of exporting SSA states</i>	<i>Brief description</i>	<i>Base rate of duty</i>	<i>Bound rate of duty</i>	<i>% point difference: base rate to bound rate</i>	<i>Remarks</i>
84719290	1,278	0.0%	34	Input/output units	4.9	0.0	4.9	
20087071	10,747	0.0%	2	Peaches with a sugar content exceeding 15% by weight	24.0	19.2	4.8	
20082099	12,371	0.0%	4	Pineapples, packings of >= 4.5 kg, no added sugar or spirit	23.0	18.4	4.6	
81110011	12,842	0.1%	2	Unwrought manganese; powders of manganese	4.5	0.0	4.5	
31021010	14,546	0.1%	1	Urea containing more than 45 % by weight of nitrogen on the	11.0	6.5	4.5	
90328990	1,106	0.0%	17	Instruments for regulating/controlling	7.2	2.8	4.4	
44092091	11,701	0.0%	13	Non-coniferous blocks/strips/friezes	4.0	0.0	4.0	
06021090	4,726	0.0%	13	Unrooted cuttings/slips (excl. vines)	8.0	4.0	4.0	
08044010	13,875	0.1%	11	Fresh/dried avocados, 1 December to 31 May	8.0	4.0	4.0	4% to be applied from 1995
85291090	1,990	0.0%	14	Aerial reflectors and parts of aerials	7.2	3.6	3.6	
07096099	3,459	0.0%	16	Fruits of genus capsicum/pimenta	10.0	6.4	3.6	
15131199	13,519	0.1%	2	Crude coconut oil in immediate packings of > 1kg	10.0	6.4	3.6	
15132191	14,314	0.1%	4	Crude palm kernel oil in immediate packings of > 1kg	10.0	6.4	3.6	GATT offer tariff item no. 15132195(a)
90158011	2,802	0.0%	18	Meteorological/hydrological/geophysical electronic instruments	7.2	3.7	3.5	
87089998	7,795	0.0%	25	Parts/accessories for vehicles, various	6.9	3.5	3.4	GATT offer tariff item no. 87089999(a)
07099090	11,792	0.0%	27	Fresh/chilled vegetables n.e.s.	16.0	12.8	3.2	
44121100	10,604	0.0%	4	Plywood	10.0	7.0	3.0	See note(b)
44082099	12,145	0.0%	8	Veneer sheets etc.	6.0	3.0	3.0	See note(b)
84314300	1,671	0.0%	16	Parts for boring/sinking machinery	2.9	0.0	2.9	
90159000	4,128	0.0%	16	Parts/accessories of instruments/apparatus	5.6	2.7	2.9	
90158099	1,330	0.0%	15	Non-electronic instruments/appliances	5.6	2.7	2.9	
85389090	2,137	0.0%	14	Parts of apparatus (various)	4.6	1.7	2.9	
73269098	1,285	0.0%	14	Articles of iron or steel	5.3	2.7	2.6	GATT offer tariff item no. 73269099(a)
46021091	1,585	0.0%	16	Basket/wicker work	6.2	3.7	2.5	
87082990	17,558	0.1%	3	Body parts/accessories for vehicles	6.9	4.5	2.4	
84719190	1,274	0.0%	24	Digital processing units	4.9	2.5	2.4	
84139190	1,298	0.0%	17	Parts of pumps (not civil aircraft)	4.0	1.7	2.3	
84099100	1,493	0.0%	12	Parts for spark ignition i.c. piston engines	4.9	2.7	2.2	
84149090	4,046	0.0%	24	Parts of air/vacuum pumps, etc.	4.4	2.2	2.2	
84099900	9,523	0.0%	34	Parts for engines (various)	4.9	2.7	2.2	
27122000	11,732	0.0%	1	Paraffin wax containing by weight less than 0.75 % of oil	4.4	2.2	2.2	
08071090	5,261	0.0%	17	Fresh melons (excl. watermelons)	11.0	8.8	2.2	GATT offer tariff item no. 08071050(a)
08109080	3,058	0.0%	22	Fresh fruit	11.0	8.8	2.2	GATT offer tariff item no. 08109092(a)
52094200	13,446	0.1%	5	Denim	10.0	8.0	2.0	
61102091	14,733	0.1%	10	Men's/boys' cotton jerseys etc., knitted or crocheted	14.0	12.0	2.0	
61046210	3,401	0.0%	12	Women's/girls' cotton trousers, knitted or crocheted	14.0	12.0	2.0	
52091100	6,639	0.0%	11	Unbleached plain cotton weave	10.0	8.0	2.0	
52081295	10,988	0.0%	12	Unbleached plain cotton weave	10.0	8.0	2.0	
52051200	15,362	0.1%	12	Single cotton yarn of uncombed fibres	6.0	4.0	2.0	
08082031	17,819	0.1%	2	Fresh pears, 1 January to 31 March	10.0	8.0	2.0	Special safeguard & specific tariff of max 297 Ecu/T reducing to max 238 Ecu/T if unit value less than 569 Ecu/T
52081299	7,516	0.0%	12	Unbleached plain cotton weave	10.0	8.0	2.0	
62046231	8,353	0.0%	12	Women's/girls' cotton denim trousers, woven	14.0	12.0	2.0	
62045200	1,731	0.0%	12	Women's/girls' cotton skirts, woven	14.0	12.0	2.0	
62044200	2,511	0.0%	11	Women's/girls' cotton dresses, woven	14.0	12.0	2.0	
62034235	19,280	0.1%	15	Men's/boys' cotton trousers, woven	14.0	12.0	2.0	
61103099	12,727	0.1%	8	Women's/girls' jerseys etc., manmade fibres, knitted or crocheted	14.0	12.0	2.0	
61142000	2,995	0.0%	12	Garments of cotton, knitted or crocheted	14.0	12.0	2.0	

Table 3 (continued)

<i>CN code</i>	<i>Total SSA exports to EU 1992 (Ecu 000)</i>	<i>% of total SSA exports</i>	<i>No. of exporting SSA states</i>	<i>Brief description</i>	<i>Base rate of duty</i>	<i>Bound rate of duty</i>	<i>% point difference: base rate to bound rate</i>	<i>Remarks</i>
62031100	11,829	0.0%	3	Men's/boys' suits of wool/fine animal hair, woven	14.0	12.0	2.0	
39269099	1,451	0.0%	11	Articles of plastics	8.4	6.5	1.9	
85030099	4,043	0.0%	25	Parts of machines (various)	4.4	2.7	1.7	GATT offer tariff item no. 85030090(a)
85179089	3,763	0.0%	29	Parts of apparatus for carrier-current line systems	4.6	3.0	1.6	GATT offer tariff item no. 85179010(a)
08094019	13,641	0.1%	3	Fresh plums, 1 October to 30 June	8.0	6.4	1.6	Special safeguard & specific tariff from 11-30 June of 129 Ecu/T reducing to 103 Ecu/T if unit value less than 722 Ecu/T
41079090	14,384	0.1%	4	Leather of animals n.e.s. in Ch. 41	3.5	2.0	1.5	
84119990	6,889	0.0%	13	Parts of gas turbines (not turbo jets/props, civil aircraft)	5.5	4.1	1.4	
72021180	19,646	0.1%	2	Ferro-manganese, > 2% carbon	4.0	2.7	1.3	GATT offer tariff item no. 72021190(a)
84119190	3,687	0.0%	12	Parts of turbo-jets/turbo-props (not civil aircraft)	3.8	2.7	1.1	
91139010	11,020	0.0%	7	Watch straps, leather/composition leather	7.0	6.0	1.0	
72024910	11,059	0.0%	2	Ferro-chromium, =< 0.05% carbon	8.0	7.0	1.0	
71131900	7,002	0.0%	16	Articles/parts of jewellery, precious metal (not silver)	3.5	2.5	1.0	
62053000	8,620	0.0%	12	Men's/boys' shirts, manmade fibres, woven	13.0	12.0	1.0	
85174000	2,928	0.0%	18	Apparatus for carrier-current line systems	4.6	3.6	1.0	
08062092	11,527	0.0%	1	Sultanas, in immediate containers of net capacity > 2kg	3.0	2.4	0.6	GATT offer tariff item no. 08062058(a) (dried grapes)
20089271	12,580	0.0%	5	Mixtures of fruits, added sugar but no spirit, packings of net content <= 1kg	17.0	8.5-13.6	3.4-8.5	GATT offer tariff item no. 20089272/3(a) (8.5=tropical, 13.6=other)
85438080	5,242	0.0%	12	Electrical machines/apparatus with individual functions	7.0	0.0 or 3.7	3.3 or 7.0	GATT offer tariff item no. 85438090(a)
90318039	1,559	0.0%	20	Instruments for measuring/checking, n.e.s. in Ch. 90	7.2	0.0 or 4.0	3.2 or 7.2	0% to be implemented immediately; 4% is for 'other' only
84798980	4,088	0.0%	14	Machines having individual functions, n.e.s. in Ch. 84	4.4	0.0 or 1.7	2.7 or 4.4	GATT offer tariff item no. 84798990(a). 0% to be implemented over 8 years; 1.7% for 'other' only
85299098	4,911	0.0%	35	Parts of apparatus (various)	7.2	3.0-5.0	2.2-4.2	GATT offer tariff item no. 85299099(a)
84733010	1,201	0.0%	22	Parts/accessories for machines (various)	4.0	0.0 or 2.0	2.0 or 4.0	GATT offer tariff item no. 84733000(a). 0% for other, 2% for electronic assemblies to be implemented over 8 years
84733090	6,178	0.0%	34	Parts/accessories for machines (various)	4.0	0.0 or 2.0	2.0 or 4.0	GATT offer tariff item no. 84733000(a). 0% for other, 2% for electronic assemblies to be implemented over 8 years
90318099	1,243	0.0%	19	Instruments for measuring/checking, n.e.s. in Ch. 90	5.8	0.0 or 4.0	1.8 or 5.8	0% to be implemented immediately; 4% is for 'other' only
28442011	11,648	0.0%	1	Uranium enriched in U 235 and its compounds	0.0(U)-4.9	0.0	0.0-4.9	
03074919	19,074	0.1%	16	Frozen cuttlefish	8.0	6.0-8.0	0.0-2.0	
24012050	11,524	0.0%	4	Partly/wholly stemmed/stripped light air-cured tobacco	14 min 28 max 70 Ecu(e)	11.2 min 22 max 56 Ecu(e)		GATT offer tariff item no. 24012069(a)
24013000	10,165	0.0%	10	Tobacco refuse	14 min 28 max 70 Ecu(e)	11.2 min 22 max 56 Ecu(e)		
07141099	5,350	0.0%	11	Fresh/dried manioc	148 Ecu/T	95 Ecu/T		Special safeguard
17019910	13,761	0.1%	6	White sugar containing in dry state >= 99.5% sucrose	(AGR)			No information in EU documents received
85252090	1,576	0.0%	27	Radio telegraphic/telephonic transmission apparatus	6.5	6.5	0.0	
87032319	1,130	0.0%	11	Cars etc., 1500-3000 cc, new	10.0	10.0	0.0	GATT offer tariff item no. 87032310(a)
03074911	4,461	0.0%	12	Frozen cuttlefish 'sepiola'	8.0	8.0	0.0	
03074931	14,590	0.1%	8	Frozen squid 'lolligo vulgaris'	6.0	6.0	0.0	
03042019	14,933	0.1%	6	Frozen fillets of freshwater fish	9.0	9.0	0.0	
03033990	1,779	0.0%	10	Frozen flat fish	15.0	15.0	0.0	
03061310	5,051	0.0%	13	Frozen shrimps and prawns of 'pandalidae' family	12.0	12.0	0.0	
03037981	12,027	0.0%	3	Frozen monkfish	15.0	15.0	0.0	See note(c)
87032390	3,680	0.0%	37	Cars etc., 1500-3000 cc, used	10.0	10.0	0.0	
87032490	1,527	0.0%	14	Cars etc., > 3000 cc, used	10.0	10.0	0.0	
41011090	2,285	0.0%	17	Dried whole raw hides/skins, bovine	0.0	0.0	--	
90142019	8,839	0.0%	22	Aeronautical/navigation instruments	0.0	0.0	--	
41012100	3,657	0.0%	10	Whole raw hides/skins, bovine. fresh/wet-salted	0.0	0.0	--	
41013010	9,474	0.0%	25	Dried/dry-salted hides/skins, bovine	0.0	0.0	--	
41021010	2,483	0.0%	12	Raw skins of lambs	0.0	0.0	--	

Table 3 (continued)

<i>CN code</i>	<i>Total SSA exports to EU 1992 (Ecu 000)</i>	<i>% of total SSA exports</i>	<i>No. of SSA states exporting</i>	<i>Brief description</i>	<i>Base rate of duty</i>	<i>Bound rate of duty</i>	<i>% point difference: base rate to bound rate</i>	<i>Remarks</i>
23061000	11,719	0.0%	11	Oilcake resulting from extraction of cotton seeds	0.0	0.0	--	
26151000	17,243	0.1%	2	Zirconium ores and concentrates	0.0	0.0	--	
25240030	14,168	0.1%	5	Asbestos fibres/flakes/powder	0.0	0.0	--	
25301000	11,275	0.0%	9	Vermiculite, perlite and chlorites, unexpanded	0.0	0.0	--	
26070000	16,388	0.1%	1	Lead ores and concentrates	0.0	0.0	--	
26209060	14,541	0.1%	1	Ash/residues containing mainly titanium	0.0	0.0	--	
90149010	1,374	0.0%	15	Parts/accessories of instruments (various) for civil aircraft	0.0	0.0	--	
25085000	13,122	0.1%	3	Andalusite, kyanite and sillimanite	0.0	0.0	--	
23066000	17,063	0.1%	8	Oilcake resulting from extraction of palm nuts or kernels	0.0	0.0	--	
74040091	3,453	0.0%	20	Waste/scrap of brass	0.0	0.0	--	
74040010	7,546	0.0%	22	Waste/scrap of refined copper	0.0	0.0	--	
51021050	11,517	0.0%	3	Hair of camel/yak/angora or other goats etc.	0.0	0.0	--	
74040099	9,333	0.0%	24	Waste/scrap of copper alloys (excl. brass)	0.0	0.0	--	
71031000	12,912	0.1%	23	Unworked/roughly shaped precious/semi-precious stones	0.0	0.0	--	
74031200	19,756	0.1%	3	Wire bars of refined copper	0.0	0.0	--	
71189000	12,978	0.1%	3	Coin of legal tender	0.0	0.0	--	
71102100	19,887	0.1%	1	Palladium, unwrought or in powder form	0.0	0.0	--	
71129000	14,211	0.1%	6	Waste/scrap of precious metal	0.0	0.0	--	
51012100	11,020	0.0%	3	Shorn wool, degreased	0.0	0.0	--	
41032000	1,712	0.0%	18	Raw hides/skins of reptiles	0.0	0.0	--	
41041030	6,344	0.0%	10	Other skin leather not further prepared than chrome-tanned	0.0	0.0	--	
41021090	10,321	0.0%	21	Raw skins of sheep	0.0	0.0	--	
41031010	8,591	0.0%	22	Hides/skins of goats/kids	0.0	0.0	--	
88033010	3,115	0.0%	24	Parts of aeroplanes/helicopters, civil	0.0	0.0	--	
44072190	7,114	0.0%	16	Meranti etc. sawn/chipped lengthwise	0.0	0.0	--	
49019900	1,863	0.0%	30	Printed books/brochures/leaflets	0.0	0.0	--	
44020000	11,500	0.0%	14	Wood charcoal (including shell or nut charcoal)	0.0	0.0	--	
44071099	3,808	0.0%	15	Coniferous wood sawn/chipped lengthwise	0.0	0.0	--	
23050000	18,993	0.1%	2	Oilcake resulting from extraction of groundnut oil	0.0	0.0	--	
12072090	13,778	0.1%	8	Cotton seeds (excl. for sowing)	0.0	0.0	--	
12119090	11,323	0.0%	26	Plants/parts of plants for perfumery/insecticides/fungicides etc.	0.0	0.0	--	
13019000	4,814	0.0%	11	Natural gums, resins, balsams etc.	0.0	0.0	--	
01060099	6,390	0.0%	30	Live animals (excl. horses, bovine, swine, sheep, goats, poultry, fish etc.)	0.0	0.0	--	
12071090	3,071	0.0%	10	Palm nuts and kernels	0.0	0.0	--	
03011010	1,963	0.0%	17	Live ornamental freshwater fish	0.0	0.0	--	
05079000	1,469	0.0%	18	Tortoiseshell, whalebone, horn etc.	0.0	0.0	--	
97050000	2,400	0.0%	28	Collectors pieces, botanical/mineralogical etc.	0.0	0.0	--	
97011000	2,603	0.0%	17	Paintings etc. done entirely by hand	0.0	0.0	--	
97030000	1,117	0.0%	24	Original sculptures/statuary, any material	0.0	0.0	--	
	23,027,942	91%	Avg. 12					

Notes:

- (a) The tariff item numbers used in the GATT offer do not always coincide with the Combined Nomenclature (CN) codes used in the trade statistics from which this table is derived. In such cases, a judgement has been made on which of the GATT offer tariff item numbers approximates most closely to SSA exports, and the number identified is indicated in this column.
- (b) The implementation of the concessions will be delayed until such time as no export bans or export taxes are imposed by Malaysia and Indonesia on wood products of this Chapter.
- (c) Autonomous reductions might be offered, dependent upon granting of fishing rights to the Community in the framework of fisheries agreements to be agreed upon between contracting parties.
- (d) Reduction will be phased in over ten years.
- (e) Per 100 kg net.

Sources: Eurostat, 1993; and EU documents on post-GATT changes.

References

- Eurostat (1993); *EEC external trade - 1988-1992 (Combined Nomenclature)*, Supplement 1/1993. Luxembourg: Statistical Office of the European Communities (CD-ROM).
- McQueen, M. and Stevens, C. (1989); 'Trade Preferences and Lomé IV: Non-traditional ACP Exports to the EC', *Development Policy Review*, Vol. 7. London: Sage.
- Stevens, C. (1991); 'The Caribbean and Europe 1992: Endgame?', *Development Policy Review*, Vol. 9. London: Sage.
- Stevens, C. (1994); 'Agricultural Development in the Near East and North Africa Region: the Implications of Changing European Policy'. Report commissioned by the Food and Agriculture Organization of the United Nations, Rome; August.
- WDM (1994); 'Submission to the European Commission on Phasing Out the Multi-Fibre Arrangement'. World Development Movement, London, and Germanwatch; September.