

COMMISSION OF THE EUROPEAN COMMUNITIES

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REPORT FROM THE COMMISSION TO THE COUNCIL

on the situation and prospects of the rum market

(Article 2(b) of Protocol 6 to
the fourth ACP-EEC Convention)

CONTENTS

	Page
INTRODUCTION	1
PART ONE: The situation on the Community rum market	2
I. COMMUNITY PRODUCTION	4
A. French production	4
1. Status and economic significance	4
2. Types of rum produced in the FODs	5
3. Tax arrangements applied to these rums in France	5
4. Production trends	6
5. Sales trends	9
B. Spanish production	11
II. IMPORTS FROM ACP STATES	11
1. Status and economic significance	11
2. Types of rum produced in the ACP States	11
3. Import arrangements	12
4. ACP rum import trends	13
III. IMPORTS FROM OTHER COUNTRIES	15
PART TWO: Outlook for the Community market	17
CONCLUSION AND PROPOSAL	19
ANNEXES	

INTRODUCTION

Protocol 6 to the fourth ACP-EEC Convention on rum fixes the quantities of rum originating in the ACP countries which may be imported free of customs duties until 31 December 1995. This report has been drawn up pursuant to Article 2(b) of the Protocol, which states that "for the arrangements applicable from 1996, the Community shall establish, before 1 February 1995, on the basis of a report that the Commission will send to the Council before 1 February 1994, the modalities for the projected abolition of the Community tariff quota, taking into account the situation and prospects on the Community rum market and of the ACP States' exports".

The report examines:

- * the current situation of the Community rum market and recent trends;
- * sources of supplies;
- * the outlook for the Community rum market.

On the basis of this analysis, the report concludes with proposals concerning the "modalities for the projected abolition of the Community tariff quota".

PART ONE

The situation on the Community rum market

In 1993 the Community rum market (not counting OCT) absorbed some 323 000 hectolitres of pure alcohol (HPA) (see annex I).¹ This represents an increase of around 25% on the 1983 figure, although the annual totals fluctuated considerably in the intervening period.

The Community's largest rum markets are France, Germany and the United Kingdom, which together account for nearly 80% of total Community imports.

Although the French market registered a slight dip in 1993, it is by and large the most stable of the Community markets, with annual totals varying between 93 000 HPA and 105 000 HPA. Germany's consumption pattern fluctuates more widely, having gone from 63 000 HPA in 1983 to 103 000 HPA in 1989, to 86 000 HPA in 1991, to 109 000 HPA in 1992, to 77 000 HPA in 1993.

This pattern is inverted in the other Member States' imports, which went from 1 400 HPA in 1989 to 19 000 HPA in 1991, to 13 000 in 1992, to 35 000 HPA in 1993 (Source: Eurostat). The German market has expanded by the greatest margin, and is primarily responsible for the overall increase in Community imports.

The third-largest Community market is the United Kingdom, with annual imports averaging around 74 000 HPA. With the exception of 1990, volumes ranged from 63 000 HPA (1992) to 98 000 HPA (1985), although the general trend between 1983 and 1993 was slightly upward.

In comparison with these major markets, imports by the rest of the Community are of little significance.

¹ Not including Community production in Europe.

That said, the Spanish and Dutch markets appear to be expanding somewhat. Since joining the Community, Spain's rum imports have continued to rise, from 4 900 HPA in 1987 to 35 000 in 1993, while over the same period direct Dutch imports increased from 6 100 HPA to 23 600 HPA.

Annual rum imports by Belgium/Luxembourg, Italy, Ireland and Denmark have remained stable over the last decade at around 2 500 HPA each. The Greek market, after sharp rises in 1991 and 1992, fell back to its customary level of around 1 000 HPA in 1993. Portugal is the Community's smallest rum market, importing less than 1 000 HPA a year.

The Community's rum supplies come from three sources:

- *Community production;
- *imports from ACP States;
- *imports from other exporters.

I. COMMUNITY PRODUCTION

France and Spain produce most of the Community's rum output. Production in other Member States is insignificant, for local consumption only, and will not be taken into account by this report.

The same applies to "Rumverschnitt", a spirit made in Germany from agricultural alcohol with a minimum rum content of 5%. Although "Rumverschnitt" competes with rum on the German market, it does not have the same organic composition as rum and cannot be classed in the same product category:

A. French production

1. Status and economic significance

French production takes place in the Overseas Departments (FODs) Martinique, Guadeloupe and Réunion.

Located in the outer reaches of the Community, the FODs are disadvantaged by the huge distances separating them from Europe and by their island status. Rum production is an important element in the cane/sugar/rum sector which is a key feature of their economies.

This is illustrated by the following figures:

- 40 000 jobs, 22 000 of them direct;
- FRF 1.5 billion annual turnover;
- 50 000 hectares under cultivation and 3 million tonnes of cane harvested;
- an average of 45% of total agricultural exports, ranging from 85% for Réunion to 15% for Martinique.

The relative importance of the individual cane, sugar and rum sectors varies: for Réunion, sugar is the main activity, with a total annual output of nearly 200 000 tonnes of white sugar. Rum, with annual production averaging 65 000 HPA, serves basically to boost the sector's profitability. By contrast, Martinique processes most of its cane into rum, annual sugar production being restricted to 7 000 tonnes and sold only on the local market. Guadeloupe is somewhere between the two, producing 75 000 tonnes of sugar¹ and 70 000 HPA of rum.

¹ Average for the two years preceding cyclone Hugo in 1989.

2. Types of rum produced in the FODs

Many different types of rum are produced in the FODs, each of them having their own specialities dictated by the overall organization of the cane/sugar/rum sector. The three main varieties are:

- agricultural rums obtained solely by fermentation and distillation of locally produced sugar cane juice, with a volatile element content (other than ethyl and methyl alcohols) of at least 225g/HPA. These are the so-called "traditional" rums.
- non-agricultural rums, which are themselves sub-divided into two categories:
 - * the other "traditional" rums, which are obtained by distilling locally produced sugar cane molasses, and have a volatile element content (other than ethyl and methyl alcohols) of at least 225g/HPA;
 - * the "light" rums, which are obtained by distilling sugar cane molasses and have a volatile element content of less than 225g/HPA.

3. Tax arrangements applied to these rums in France

The application of reduced excise duties in France is a defining factor for FOD rum production and marketing.

France's national rum market organization is based on a reduced rate of duty for traditional rums.

The preferential tax system involves a reduced consumption tax for traditional rums, which benefit from a tax advantage of around 42% of the normal excise duty.

The Community authorized France to apply a reduced rate of duty on the consumption of "traditional" FOD rum until 31 December 1992, subject to a sliding annual quota set at 90 000 HPA for 1992.

Council Directive 92/83/EEC of 19 October 1992¹ allowed France to apply a rate cut by a maximum of 50% vis-à-vis the standard national excise duty to rums meeting the following requirements:

- only the types of rum specified in Article 1(4)(a) of Regulation (EEC) No 1576/89 are eligible for the reduced rate of excise duty;²
- the rum must be produced from local sugar cane harvested at the place of production;
- the volatile element content must be greater than 225g/HPA and the alcoholic strength at least 40%.

Taken together, these three conditions correspond to the French definition of the traditional rums which previously benefited from tax advantages, although they do not restrict eligibility to traditional rums from the FODs, as was the case prior to 31 December 1992.

4. Production trends

Over the six years between 1987 and 1992, total rum production in the FODs fell considerably (see annex II). However, the slide did not follow the same pattern in the individual FODs, with their different setups and different types of product.

Réunion

The island's rum is produced from local molasses at three sugar plants/distilleries. Output primarily takes the form of light rum, agricultural rum being produced only in small quantities as the cane crop is mainly used to make sugar.

Annual rum production tends to fluctuate considerably. Local molasses supplies are used in three different ways to boost the sector's profitability: for livestock fodder (around 10%); for local rum production; and for exporting to mainland France for distilling. Local rum output is thus largely determined by the varying demands made on molasses supplies.

¹ Council Directive 92/83/EEC of 19 October 1992 on the harmonization of the structure of excise duties on alcohol and alcoholic beverages, OJ L 316, 31 October 1992.

² Regulation (EEC) No 1576/89 of 29 May 1989 laying down general rules on the definition, description and presentation of spirit drinks, OJ L 160, 12 June 1989.

Martinique

Martinique traditionally produces all three types of rum, with agricultural rum accounting for the lion's share.

Overall rum production fell sharply over the period under consideration, from an average annual output of 96 230 HPA from 1987 to 1990, to 75 800 HPA from 1990 to 1992. This reduction of some 20 000 HPA is primarily due to the virtual abandonment of light rum production.

Agricultural rum production has remained relatively stable at around 60 000 HPA a year, while traditional, non-agricultural rum output has remained steady, though limited, at 10 000 HPA a year.

Light rum production has been more or less discontinued, following Bacardi's withdrawal from Martinique in 1991: up to then the multinational had been distilling around 20 000 HPA a year from Guadeloupe molasses (local supplies being very scarce) for foreign markets, especially Germany.

Guadeloupe

Guadeloupe has the most diversified output of the three FODs, striking the best balance between the three types of rum.

Production remained fairly stable overall in the period under consideration, although there has been a sharp fall since 1990, primarily due to the discontinuation of light rum production (see above under Martinique).

Agricultural rum production increased considerably, from 12 000 HPA in 1987 to 19 800 HPA in 1992, while output of traditional, non-agricultural rum also rose, from 33 500 HPA in 1987 to 39 600 HPA in 1992.

Production of light rum, by contrast, which stood at 21 300 HPA in 1987 and even rose to 23 000 HPA in 1990, had virtually disappeared by 1992, when it amounted to only 600 HPA. This phenomenon was directly linked to the winding down of light rum distilling in Martinique (see above).

Summary

In general, the statistics show that traditional rum production has stabilized or even increased, while light rum output has dropped sharply, partly as a result of the Bacardi's withdrawal.

5. Sales trends

FOD rum sales (not counting local markets) have followed the same trend as production (see annex III), with exports to the Community falling from 142 035 HPA in 1987 to around 92 000 HPA in 1993.¹ However, as with the production figures, the overall picture masks different scenarios in the individual FODs, depending on the export markets and types of rum involved (see annex IV).

Réunion

Direct sales to the Community varied considerably, ranging from 46 800 HPA in 1987 to 20 300 HPA in 1991. The 1993 figure, 19 000 HPA, was the lowest of the last decade.²

In the Community, Réunion rum is marketed almost exclusively in France and Germany. With the exception of 1987, sales volumes in France have remained steady, while direct exports to Germany have fluctuated considerably, falling off sharply from 1991, down to 48 HPA in 1993.²

Martinique

Annual sales to the Community stayed around the 65 000 HPA mark between 1987 and 1991, but dropped over the next two years, down to 36 000 HPA in 1993.

The German market, the only one of any significance other than France, is the main cause of this development. Despite a slight fall over the last two years, Martinique's exports to France have remained relatively stable at around 45 000 HPA a year, but direct sales to Germany have fallen from 21 000 HPA in 1989 to zero in 1993.

According to statistics provided by the Institut d'Emission des Départements d'Outre-Mer in its annual report, this is entirely due to light rum sales, which fell from 28 000 HPA in 1989 to zero in 1992, as a result of Bacardi winding up its production facility in the region.

¹ Conversely, exports from mainland France, particularly to Germany, have risen (see annex V). If these quantities are added to direct FOD exports to the Community market, the adjusted sales figures are 146 000 HPA in 1987 and 114 000 HPA in 1993.

² However, to the extent that French exports to Germany can be attributed to Réunion, the overall quantity of Réunion rum sold on the Community market and in Germany has remained fairly stable.

Guadeloupe

Direct rum exports to the Community rose from 28 000 HPA in 1987 to around 36 500 HPA in 1993.

The increase was mainly accounted for by France, where sales of Guadeloupe rum rose from 24 000 HPA in 1987 to 35 000 HPA in 1993. Guadeloupe has retained its modest market in Germany.

Summary

In the Community, FOD rum is marketed almost exclusively in France and Germany.

The rum sold in France is mainly of the "traditional" variety; it has a relatively stable market share owing to the reduced duties from which it benefits and to the fact that it is in tune with consumers' tastes.

In Germany, the quantity of FOD rum admitted fell by more than 40 000 HPA between 1987 and 1993, 20 000 HPA of which can be accounted for by the closure of the Bacardi distillery. Since then, Martinique rum has disappeared from the German market, a phenomenon which is also partly due to the increase of French exports to Germany.

B. Spanish production

1. Status and economic significance

Other than France, Spain is the only Community rum producer of any size.

Annual output varies considerably, from around 10 000 HPA at the beginning of the 1980s, to 19 000 HPA between 1985 and 1987, and back down to 10 000 HPA in 1992.¹

Since 1987, Spain has been importing increasing quantities of rum, particularly from Latin American and ACP countries. Exports have also risen, reaching nearly 28 000 HPA in 1993, the Dutch market being the main outlet.

¹ Statistics provided by the Federación Española de Fabricantes de Bebidas Espirituosas.

II. IMPORTS FROM ACP STATES

1. Status and economic significance

Rum production is a major economic activity for a number of ACP States, particularly in the Caribbean. In 1991, nearly 190 000 HPA of ACP rum worth around ECU 120 million was exported to the Community, over 95% from just five ACP countries, all in the Caribbean region.² Rum accounts for a major proportion of these countries' total exports to the Community, e.g. 32% in the case of Trinidad and Tobago and 19% for the Bahamas (1991, not including oil products).

2. Types of rum produced in the ACP States

Although traditional rum is distilled by some ACP States, production is almost exclusively focused on light rum.

Some countries also produce an extremely heavy rum which is used to make "Rumverschnitt" in Germany, and which meets the criteria applied in France to traditional rum.

According to sources in the trade, ACP traditional rum sales in the Community probably amount to around 20 000 HPA a year.

3. Import arrangements

As an industrial product, ACP rum imports are in principle exempt from Community customs duties. However, the principle apart, under Article 132 of the fourth Lomé Convention (and similar provisions in earlier versions of the Convention), these imports are regulated by the Protocols on rum annexed to the Conventions until the entry into force of the common organization of the market in spirits.

The Protocol subjects ACP rum exports to the Community to a zero-duty tariff quota opened on an annual basis from 1 July to 30 June, and lays down the criteria for establishing the quota. Once the quota is used up, the MFN duty applies.

For Lomé I and Lomé II, the quota was fixed on the basis of the largest annual quantities imported into the Community from the ACP States over the last three years for which statistics were available, increased by an annual growth rate set at different levels for the UK and the other Member States. The UK growth rate for Lomé I and Lomé II was 40% and 37% for Lomé III, whereas the growth rate for the other Member States was 13% for Lomé I, 18% for Lomé II, and 27% for Lomé III.

² Trinidad and Tobago, Bahamas, Guyana, Jamaica, Barbados.

Lomé III also saw the introduction of a minimum quantity, initially set at 170 000 HPA and subsequently raised to 172 000 HPA following the accession of Spain and Portugal.

For Lomé IV, the Protocol on rum was substantially modified. In accordance with Article 2 of the Protocol, the quota is set as follows:

- until 31 December 1992, on the basis of the largest annual quantities imported from the ACP States into the Community in the last three years for which statistics are available increased by the same annual growth rates as were applied under Lomé III, with a minimum quantity of 172 000 HPA;
- until 31 December 1993, on the basis of the same reference period, but with no additional annual growth rate, and again a minimum quantity of 172 000 HPA;
- for 1994 and 1995, the volume of the total quota "shall in each case be equal to that of the previous year increased by 20 000 HPA".

The Protocol also specifies that for the arrangements applicable from 1996, the Community "shall establish, before 1 February 1995, on the basis of a report that the Commission will send to the Council before 1 February 1994, the modalities for the projected abolition of the Community tariff quotas, taking into account the situation and prospects on the Community rum market and the ACP States' exports".

For the implementation of the Protocols on rum, every year, on the basis of a Commission proposal, the Council adopts a Regulation establishing the amount of the quota and the relevant administrative procedures. Until 1987-88, contrary to the position adopted by the Commission in its proposals, the Council opted to share the quota out among the Member States, while a special provision, also introduced by the Council, required the United Kingdom to take the requisite steps to ensure that its ACP rum imports were used for domestic consumption only.

Since 1988-89, this requirement has been dropped and a Community-wide tariff quota gradually adopted. National shares were finally discontinued with effect from 1 January 1993.

4. ACP rum import trends

Since the introduction of the Protocol on rum in 1975, ACP rum exports to the Community have increased substantially, from around 100 000 HPA in the mid-1970s to 210 000 HPA in 1993 (see annex VI). However, the increase has not been evenly paced. Between 1975 and 1987, annual exports fluctuated between 100 000 HPA and 140 000 HPA, without establishing any clear trend either upwards or downwards. It was only from 1989 that sales in Europe began to increase regularly, from 105 000 HPA in 1988-89 to 202 000 HPA in 1991-92.

The major upturn since 1989 is reflected in the tariff quota, which, in line with the relevant provisions of the Lomé Convention, shadows the increase in imports at some remove. While the quota was fixed at the minimum guaranteed quantity until 1989-90, it began to rise from the following year, reaching 224 827 HPA in 1993-94.

The quota's rate of use was 61% in 1988-89 and 100% in every subsequent year (see annex VII).

Generally speaking, all the countries concerned have contributed to the increase in total ACP rum exports to the Community, in proportion to their initial market shares (see annex VIII).

Trinidad and Tobago, the largest ACP exporter of rum to the Community, increased its overall sales to the EC from 26 000 HPA in 1988 to 75 000 HPA in 1993. The German and Spanish markets have been chiefly responsible for this development: while sales on Trinidad and Tobago's traditional market, the United Kingdom, have fluctuated wildly over the last five years, from 25 000 HPA in 1988 to 47 000 HPA in 1990 to 11 700 HPA in 1993, exports to Germany and Spain have risen from 3 HPA and zero respectively in 1988 to 34 000 HPA and 25 000 HPA in 1993.

Jamaica, the second-largest ACP exporter, has seen its total sales to the Community progress from 30 600 HPA in 1988 to 38 000 HPA in 1993. Germany absorbed nearly all of this increase, its imports of Jamaican rum going from 22 800 HPA in 1988 to 32 000 HPA in 1993.

Guyana, the third-largest ACP exporter, increased its sales to the Community from 35 000 HPA in 1988 to 61 000 HPA in 1991, only to see the total fall back to 41 000 HPA in 1993. This was as a result of developments on the German market, traditionally the second-largest outlet for Guyana's rum after the UK, which, having absorbed 12 500 HPA in 1988, after an increase in 1991, managed only 2 000 HPA in 1993.

The total volume of rum exports from the Bahamas rose from 19 500 HPA in 1988 to 37 000 HPA in 1993, in response to a strong increase in demand in the UK and also in the Netherlands, where imports climbed from 928 HPA in 1988 to 6 360 HPA in 1993.

Barbados increased its rum exports to the Community from 2 300 HPA in 1988 to 17 800 HPA in 1993, primarily on account of the spectacular growth of demand in the UK, whose imports rose from 2 000 HPA in 1988 to 13 800 HPA in 1993.

Summary

The statistics indicate that, apart from an upturn in the UK market in 1993, most of the growth in ACP rum exports to the Community is accounted for by Germany, whose imports from all the ACP suppliers rose by some 60 000 HPA between 1983 and 1995, around two thirds of the total increase. This is partly explained by the fact that the German rum market as a whole expanded by around 30 000 HPA over the same period.

Another reason is the relocation of the Bacardi distillery from Martinique to Trinidad, which consequently has been the main beneficiary of increased German demand for ACP rum.

The ACP suppliers also saw significant increases in their exports to Spain, Greece (until 1992) and the Netherlands, which together account for around a third of the overall increase in ACP rum sales to the Community. While the conquest of the Spanish market can be explained in terms of the family ties between the biggest Spanish distillery and the main ACP supplier, the breakthrough on the Greek and Dutch markets must be directly put down to the introduction of a Community-wide tariff quota for ACP rum.

III. IMPORTS FROM OTHER COUNTRIES

Rum imports from other countries have increased since 1982, although there has been a slight fall in sales since the boom years of 1990 and 1991 (see annex IX). The main suppliers involved are Mexico, Cuba, Venezuela, Brazil and Russia. The Community applies a customs duty of ECU 1/%vol/HPA + ECU 5/HPA for rum packaged in containers of less than two litres, and ECU 1/%vol/HPA for bulk rum.

The GATT agreement provides for a reduction of 36% in the Community tariff on rum over a period of 6 years, with the result that in 2000, the duty will be ECU 0.6/%vol/HPA + ECU 3.2/HAP on bottled rum and ECU 0.6/%vol/HPA on bulk rum.

This reduction will make rum from these other exporters more competitive vis-à-vis Community-produced and ACP rum.

PART TWO

Outlook for the Community market

Although Community rum consumption has fluctuated considerably over the last ten years, the general trend has been upward, which would suggest that there is scope for the market to continue to expand in future. However, analysis of the statistics and trends for other spirits would also indicate that Community demand for rum is unlikely to grow significantly in the near future.

The liberalization process agreed in the Uruguay Round negotiations will also inevitably lead to fiercer competition on the Community market, with an even greater challenge coming from rums from non-preferential third countries, which are already very competitive under the current protective arrangements, as their increased market share over the last ten years shows (6.1% in 1993, 2.8% in 1983, with a high point of 10% in 1991).

Given the production methods used in the countries concerned, this increased competition will primarily affect light rum, which accounts for the lion's share of the ACP States' output.

Consequently, the dropping of the ACP tariff quota in 1996, as envisaged in the fourth Lomé Convention, appears to be all the more warranted for this type of rum.

The newly liberalized Community rum market will also oblige Community producers to adapt.

First, liberalization will increase pressure on Community light rum production in Réunion; in the absence of any special tax advantages, this product will have to compete openly on the Community market if it is to find outlets.

Second, increased competition in the light rum sector could also extend to traditional rum, the FODs' key product, given the potential for other rum suppliers to convert their distilling operations to traditional rum production, and the possible impact of switches in consumption patterns.

The future of Community-produced traditional rums will depend partly on the retention of an efficient tax advantage on the French market, and partly on the ability of Community producers to maximize the selling points of this quality product and to seek new outlets for it on the Community market.

The Community should support its producers' efforts to adapt, and the Commission is therefore presenting, in tandem with this paper, a report on the status of Community producers with proposals for measures to help them. Since the restructuring process will not bear fruit immediately, as regards the modalities for the abolition of the ACP tariff quota scheduled for 1996, the access of ACP traditional rum to the Community market should be liberalized more gradually.

CONCLUSION AND PROPOSAL

Article 2(b) of Protocol 6 to the Lomé Convention, on rum, specifies that, for the arrangements applicable from 1 January 1996, the Community "shall establish ... the modalities for the projected abolition of the Community tariff quota, taking into account the situation and prospects on the Community rum market and of the ACP States' exports.

This undoubtedly means that the Community is under an obligation to abolish the tariff quota definitively before the present Lomé Convention expires. However, the provision also allows the Community to establish "the modalities for the projected abolition" for a transitional period, "taking into account the situation and prospects on the Community rum market and of the ACP States' exports", it being understood that the quota must be definitively abolished by the end of the present Convention at the latest.

Given the above, and in view of the current situation and prospects of the Community rum market, the Commission is of the opinion that the tariff quota for light rum should be abolished from 31 December 1995.

However, considering the importance of traditional rum production to the economies of the Community regions concerned, the Commission feels it is essential to maintain a tariff quota for ACP traditional rum for a transitional period that will allow Community producers to adapt to the new market environment.

Obviously, due allowance should be made for the ACP States' current exports of this product in setting the quota, which should be gradually relaxed before finally being abolished by the end of the present Convention.

Consequently the Commission proposes that the Community:

- abolish the tariff quota on ACP light rum imports¹ from 1 January 1995;
- maintain the tariff quota on ACP traditional rum imports at 20 000 HPA a year, to be increased by 2 000 HPA each year before finally being abolished on 1 January 2000.

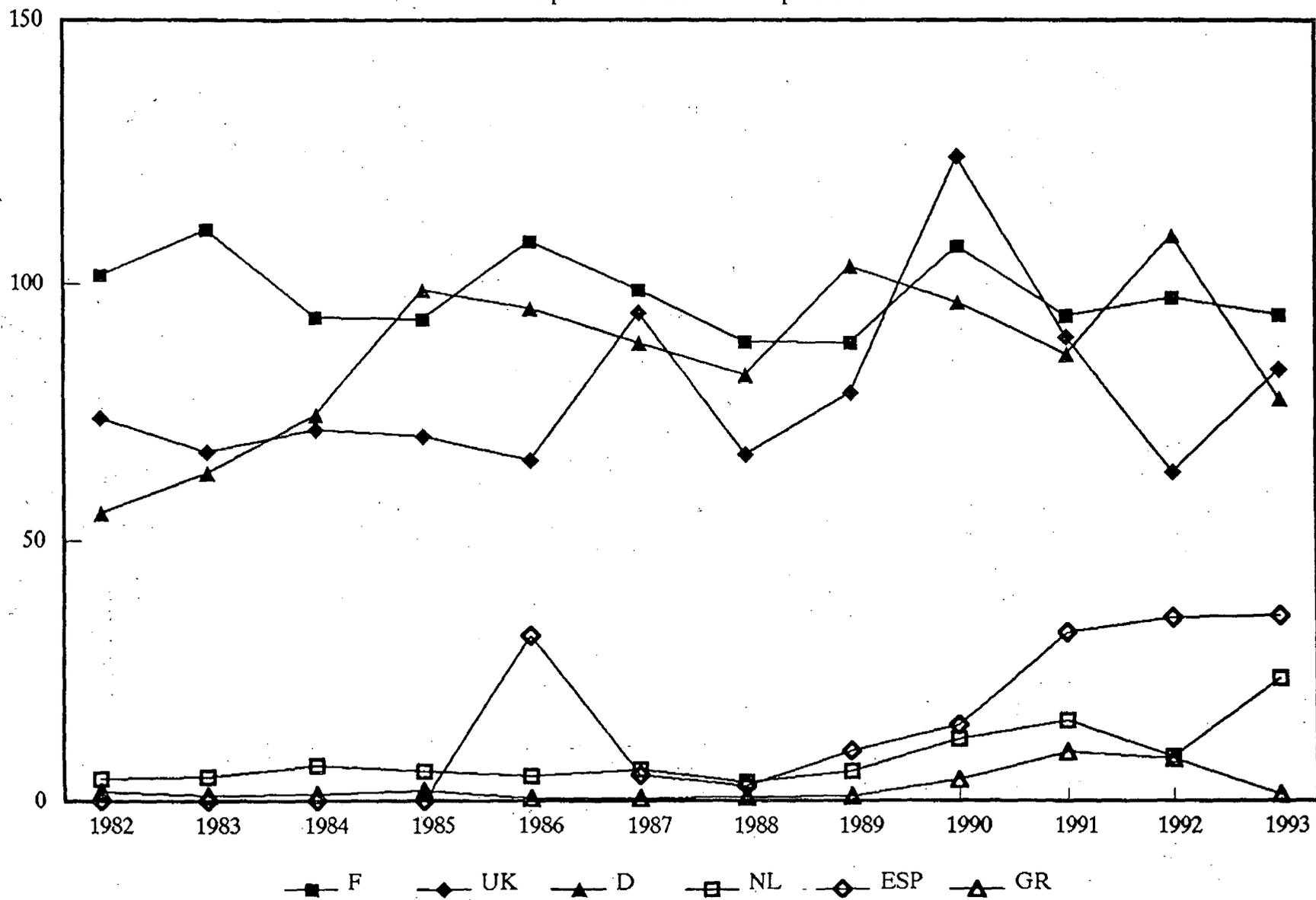
¹ Light rum is obtained by distilling sugar cane molasses. The volatile element content is under 225g/HPA.

CEE importations de RHUM 1982-1993 (en milliers de HAP)

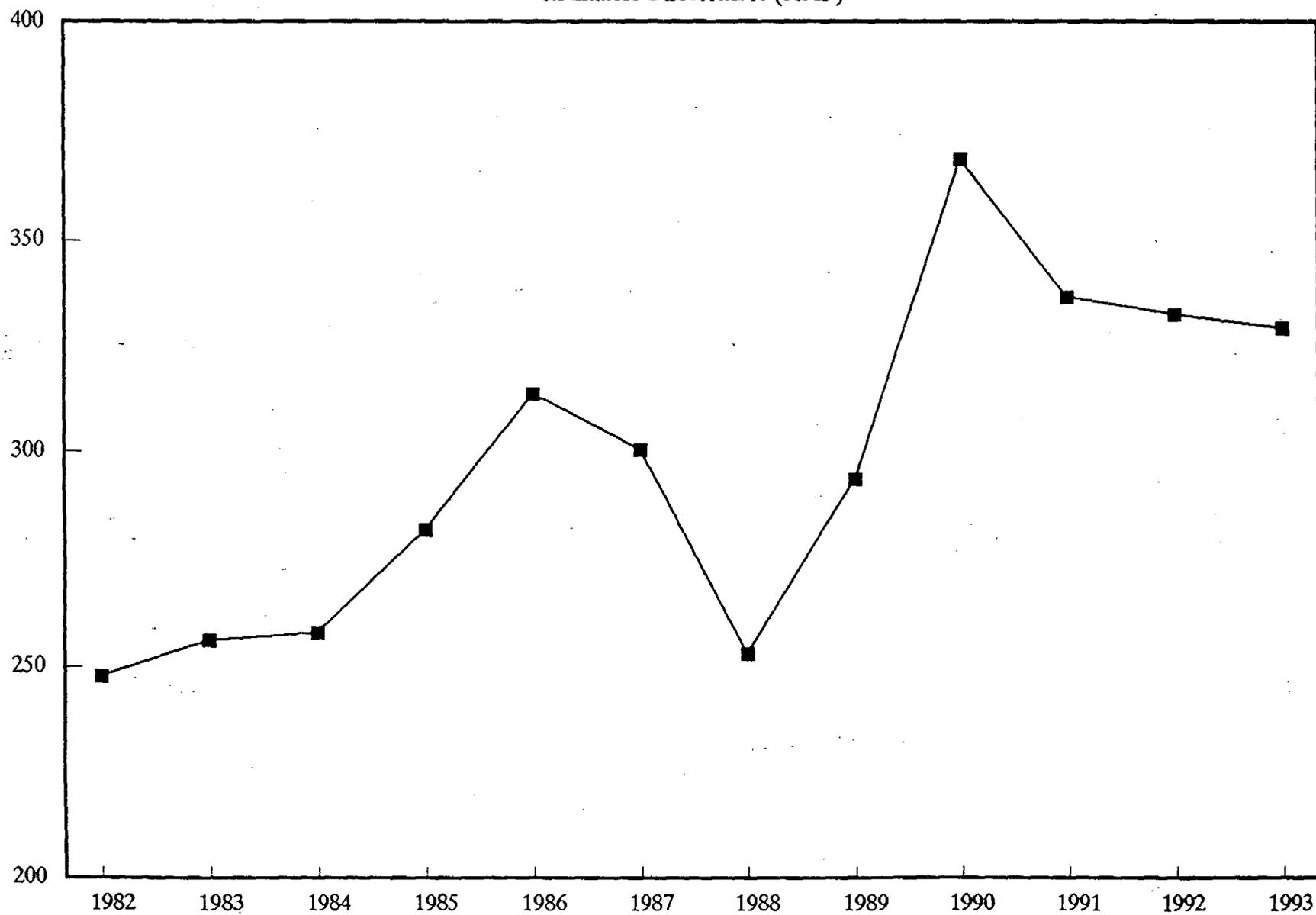
Pays importateurs	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
France	101.5	110.5	93.1	92.8	108.2	98.5	88.4	88.1	107.1	93.2	96.8	93.5
Belg./Lux.	3.6	2.3	2.0	2.3	1.8	1.5	2.6	2.3	3.0	1.8	2.4	1.9
Pays-Bas	4.3	4.7	6.8	5.7	4.8	6.1	3.6	5.7	12.0	15.5	8.5	23.6
R.F.Allem.	55.2	62.8	74.1	98.5	94.9	88.2	81.9	103.1	96.0	85.8	109.2	77.2
Italie	3.2	3.3	4.1	4.9	1.3	1.7	1.1	1.3	2.0	3.0	2.8	3.1
Royaume-Uni	73.6	67.0	71.3	70.1	65.4	94.1	66.4	78.4	124.5	89.2	63.0	82.9
Irlande	2.6	2.2	2.6	2.5	2.4	2.3	2.4	1.4	3.0	2.3	2.2	1.2
Danemark	2.2	2.2	2.7	2.9	2.2	2.1	2.5	2.2	2.2	2.7	3.4	2.7
Grèce	1.7	1.0	1.1	1.9	0.5	0.6	0.6	0.9	4.2	9.4	8.2	1.2
Portugal	0.0	0.0	0.0	0.0	0.2	0.2	0.6	0.5	0.4	0.9	0.3	0.6
Espagne	0.0	0.0	0.0	0.0	31.8	4.9	2.8	9.7	14.7	32.5	35.3	35.7
EUR12	247.9	256.0	257.8	281.6	313.5	300.2	252.9	293.5	368.9	336.3	332.1	323.6

Source: EUROSTAT

IMPORTATIONS DE RHUM DANS LA CEE (1982-1993) – en milliers de HAP
Principaux Etats membres importateurs



IMPORTATIONS GLOBALES DE RHUM DANS LA CEE (1982-1993)
en milliers d'hectolitres (HAP)



Production de rhum (en hectolitre d'alcool pur HAP)

Année	Types	Martinique	Guadeloupe	Réunion	Total
1987	tous rhums	99.700	66.800	81.700	248.200
	<i>dont rhum léger</i>	<i>23.500</i>	<i>21.300</i>	<i>30.500*</i>	<i>75.300</i>
	dont rhum agricole	63.300	12.000	300	75.600
1988	tous rhums	85.500	74.600	60.400	220.500
	<i>dont rhum léger</i>	<i>19.100</i>	<i>21.000</i>	<i>29.000*</i>	<i>69.100</i>
	dont rhum agricole	52.300	13.500	-	65.800
1989	tous rhums	103.500	79.600	73.600	256.700
	<i>dont rhum léger</i>	<i>29.800</i>	<i>19.300</i>	<i>38.100*</i>	<i>87.200</i>
	dont rhum agricole	63.000	14.500	700	78.200
1990	tous rhums	84.800	72.200	58.700	215.700
	<i>dont rhum léger</i>	<i>20.300</i>	<i>23.000</i>	<i>21.600*</i>	<i>64.900</i>
	dont rhum agricole	53.300	17.000	300	70.600
1991	tous rhums	66.600	61.700	71.700	200.000
	<i>dont rhum léger</i>	<i>4.400</i>	<i>6.500</i>	<i>31.300*</i>	<i>42.200</i>
	dont rhum agricole	51.800	19.200	1.200	72.200
1992	tous rhums	76.000	60.000	52.500	188.500
	<i>dont rhum léger</i>	<i>800</i>	<i>600</i>	<i>16.400</i>	<i>17.800</i>
	dont rhum agricole	60.000	19.800	-	79.800

(*) la production de rhum léger de la Réunion est certainement plus importante car il faut lui additionner une partie des rhums dits "industriels" (non agricoles de caractère traditionnel ou légers) produits dans cette région

Source: Institut d'Emission des Départements d'Outre-Mer

Importations de RHUM/ARRAK en provenance des DOM

unités: HAP

1/ VENTILATION PAR PAYS DOM

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
REUNION	37785	44902	43399	58219	56830	46877	31216	38377	32990	20371	29572	19039
GUADELOUPE	30246	33281	27636	28293	30032	28154	28533	27550	39961	33964	38817	36596
MARTINIQUE	53759	66580	61523	57396	74345	67000	62145	65776	67448	59273	39441	35993
GUYANE FR.	1046	1030	1235	948	0	4	7	274	539	783	793	0
DOM	122836	145793	133793	144856	161207	142035	121901	131977	140938	114391	108623	91628

2/ VENTILATION PAR ETAT MEMBRE

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
FRANCE	98202	109144	92152	90114	105789	96562	86953	86210	102237	92476	96334	89502
BELG.-LUXBG.	115	7	4	2	3	4	6	22	15	14	17	2
PAYS-BAS	0	35	0	33	0	6	0	0	0	17	0	0
RF ALLEMAGNE	24496	36587	41633	54635	55089	45439	34931	45709	38665	21872	12233	1945
ITALIE	22	20	4	72	318	24	11	36	17	12	23	180
ROYAUME-UNI	0	0	0	0	0	0	0	0	0	0	0	9
IRLANDE	1	0	0	0	0	0	0	0	0	0	0	0
DANEMARK	0	0	0	0	0	0	0	0	0	0	0	0
GRECE	0	0	0	0	0	0	0	0	0	0	0	0
PORTUGAL	0	0	0	0	0	0	0	0	0	0	0	0
ESPAGNE	0	0	0	0	8	0	0	0	4	0	16	195
EUR12	122836	145793	133793	144856	161207	142035	121901	131977	140938	114391	108623	91833

Source: EUROSTAT

ANNEXE IV

Importations de RHUM/ARRAK en provenance des DOM vers la C.E. en général, la FRANCE ET LA R.F.A., en HAP

Pays déclarants	Partenaire: REUNION											
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	37785	44902	43399	58219	56830	46877	31216	38377	32990	20371	29572	19039
FRANCE	30457	27630	27544	23645	25699	26120	15661	15782	18661	16544	21794	18991
RF ALLEMAGNE	7328	17272	15855	34574	31131	20757	15555	22595	14329	3827	7778	48

Pays déclarants	Partenaire: GUADELOUPE											
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	30246	33281	27636	28293	30032	28154	28533	27550	39961	33964	38817	36596
FRANCE	28156	32012	20189	25305	23406	24406	26189	26062	35889	33947	35236	34536
RF ALLEMAGNE	2090	1247	7447	2934	6606	3726	2344	1452	4072	0	3581	1897

Pays déclarants	Partenaire: MARTINIQUE											
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	53759	66580	61523	57396	74345	67000	62145	65776	67448	59273	39441	35993
FRANCE	38543	48485	43184	40216	56684	46032	45096	44366	47680	41981	39298	35975
RF ALLEMAGNE	15078	18068	18331	17127	17352	20956	17032	21388	19732	17266	87	0

Pays déclarants	Partenaire: GUYANE FR.											
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	1046	1030	1235	948	0	4	7	274	539	783	793	0
FRANCE	1046	1017	1235	948	0	4	7	0	7	4	6	0
RF ALLEMAGNE	0	0	0	0	0	0	0	274	532	779	787	0

Source: EUROSTAT

ANNEXE V

Importations par la RFA de RHUM/ARRAK en provenance de la FRANCE

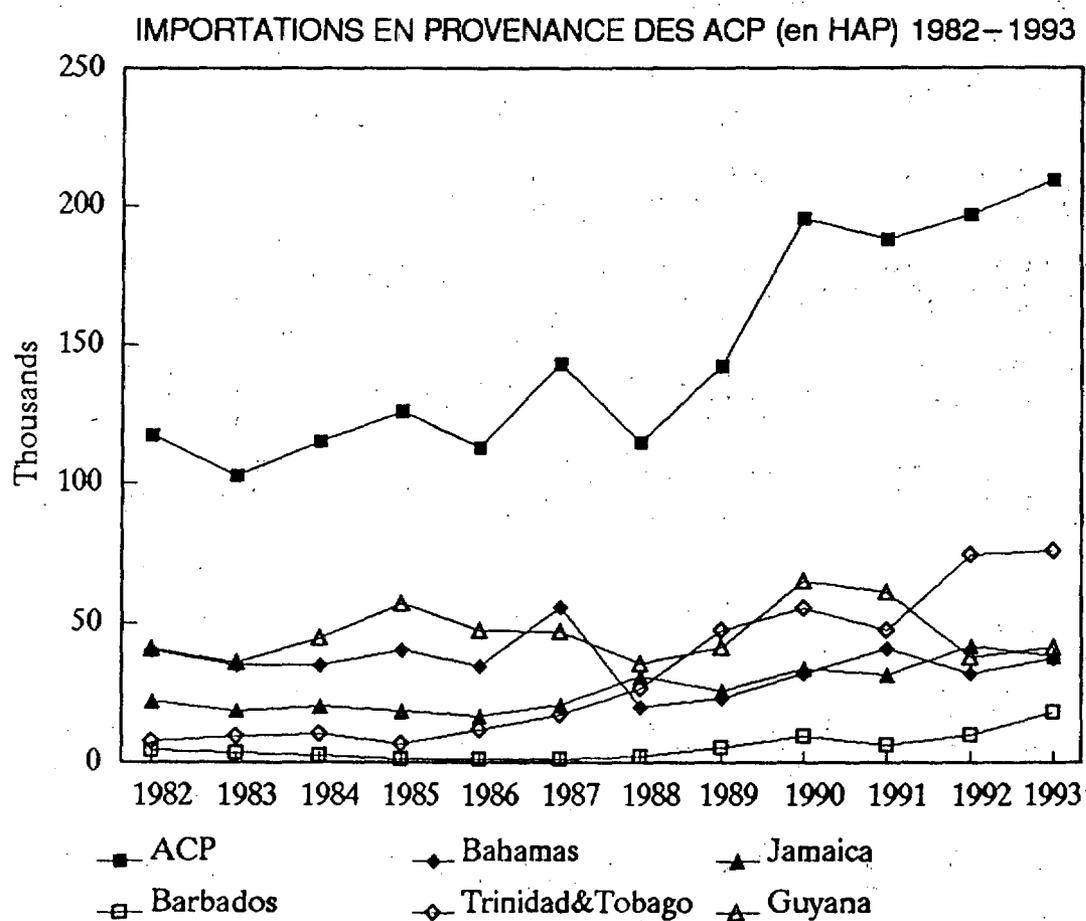
1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
6354	11899	20661	13458	13537	4534	664	143	1002	16012	7577	22314

Source: EUROSTAT

IMPORTATIONS DANS LA C.E. DE RHUM & ARRACK EN PROVENANCE DES ACP (en HAP)

Partenaire:	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
ACP	117683	102905	115234	126156	113193	143009	114897	142212	195649	188139	196961	209468
BAHAMAS	40392	34958	34880	40318	34325	55850	19476	22799	31463	40712	31556	36862
JAMAÏQUE	21642	18458	20122	18085	16526	20364	30618	25345	33314	31234	41688	37817
BARBADOS	4289	3276	2481	1250	1232	1209	2300	5342	9296	6322	9551	17808
TRINIDAD & TOB	7618	9093	10331	6604	11473	16897	26102	47485	55266	47240	74887	75969
GUYANA	40585	35757	44852	57152	47334	47036	35228	40985	65413	61317	37394	41012

Source: EUROSTAT



IMPORTATIONS DE RHUM VERS LES ETATS MEMBRES, selon pays d'origine, 1982-1993

EUROSTAT Commerce Extérieur de la CEE

Flux: Import Régime statistique: 4 Unités: hectolitres d'alcool pur

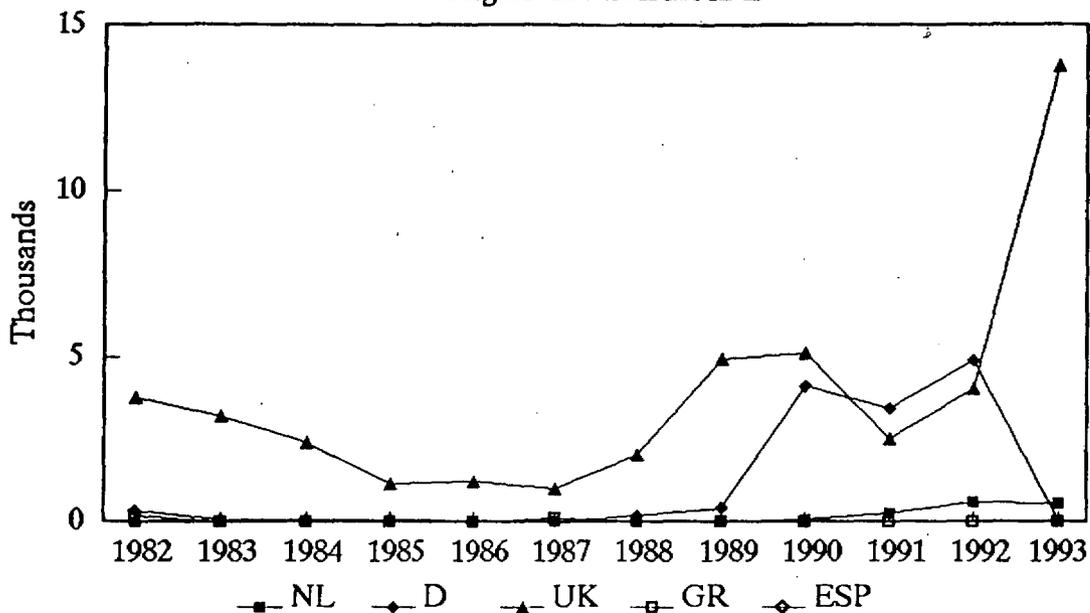
Produit: RHUM&ARACK		Partenaire: BAHAMAS										
Pays déclarants		Periode										
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	40392	34958	34880	40318	34325	55850	19476	22799	31463	40712	31556	36863
FRANCE	0	0	0	0	0	0	0	0	0	0	0	4
PAYS-BAS	2903	3376	2955	3481	2947	3138	928	1952	3426	4905	1065	6363
RF ALLEMAGNE	5522	4265	3616	4672	5013	1419	2626	2910	4131	3469	4560	4510
ROYAUME-UNI	26289	23117	24022	27676	22015	47521	11632	13791	15000	19981	13647	21651
GRECE	0	0	0	0	0	0	0	595	3748	8075	6852	846
ESPAGNE	0	0	0	0	90	0	0	0	35	0	4	75
Produit: RHUM&ARACK		Partenaire: JAMAIQUE										
Pays déclarants		Periode										
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	21642	18458	20122	18085	16526	20364	30618	25345	33314	31234	41688	37817
FRANCE	0	96	30	19	0	0	0	0	8	1	4	2
PAYS-BAS	726	699	629	970	1036	1422	1363	1557	1222	1199	1387	1262
RF ALLEMAGNE	10180	7569	7377	9366	9298	12956	22840	18552	26674	24231	34580	31914
ROYAUME-UNI	8751	8357	9887	5237	3538	3369	3600	2844	2449	2650	2734	2994
GRECE	155	42	14	164	201	169	272	95	281	685	1100	290
ESPAGNE	0	0	0	0	503	157	18	205	115	41	125	84
Produit: RHUM&ARACK		Partenaire: LA BARBADE										
Pays déclarants		Periode										
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	4289	3276	2481	1250	1232	1209	2300	5342	9296	6322	9551	17808
FRANCE	0	0	0	0	0	0	0	0	1	9	8	3405
PAYS-BAS	2	15	0	0	16	14	0	8	82	267	582	530
RF ALLEMAGNE	338	47	52	70	13	43	191	381	4107	3440	4881	25
ROYAUME-UNI	3751	3209	2401	1144	1203	989	2040	4908	5106	2514	4023	13781
GRECE	162	0	0	0	0	113	19	0	0	0	0	0
ESPAGNE	0	0	0	0	0	0	0	0	0	1	23	38
Produit: RHUM&ARACK		Partenaire: TRINIDAD, TOBAGO										
Pays déclarants		Periode										
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	7618	9093	10331	6604	11473	16879	26102	47485	55266	47240	74887	75969
FRANCE	0	0	0	0	0	0	0	0	0	0	0	8
PAYS-BAS	14	41	36	47	4	15	0	0	0	14	1	4332
RF ALLEMAGNE	556	0	3	2	1	9	3	8092	0	7748	34314	33557
ROYAUME-UNI	6728	8866	9908	6192	11049	16528	25626	32344	47418	21857	14252	11697
GRECE	0	8	0	0	0	0	0	0	0	29	0	60
ESPAGNE	0	0	0	0	0	0	0	6864	7825	16994	24949	24978

ANNEXE VII (suite)

Produit: RHUM&ARACK Pays déclarants	Partenaire: GUYANA Période											
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR	40585	35757	44852	57152	47334	47036	35228	40985	65413	61317	37394	41012
FRANCE	963	0	3	0	0	0	0	0	0	0	0	0
PAYS-BAS	92	140	2322	170	97	233	121	736	2675	1786	2980	9400
RF ALLEMAGNE	12341	12654	18178	27917	19997	21385	12434	16852	11438	20384	12591	2087
ROYAUME-UNI	27126	22927	24303	29035	27239	25404	22661	23389	51285	39137	21823	29368
GRECE	0	0	0	23	0	0	0	0	0	0	0	8
ESPAGNE	0	0	0	0	0	0	0	0	0	0	0	0

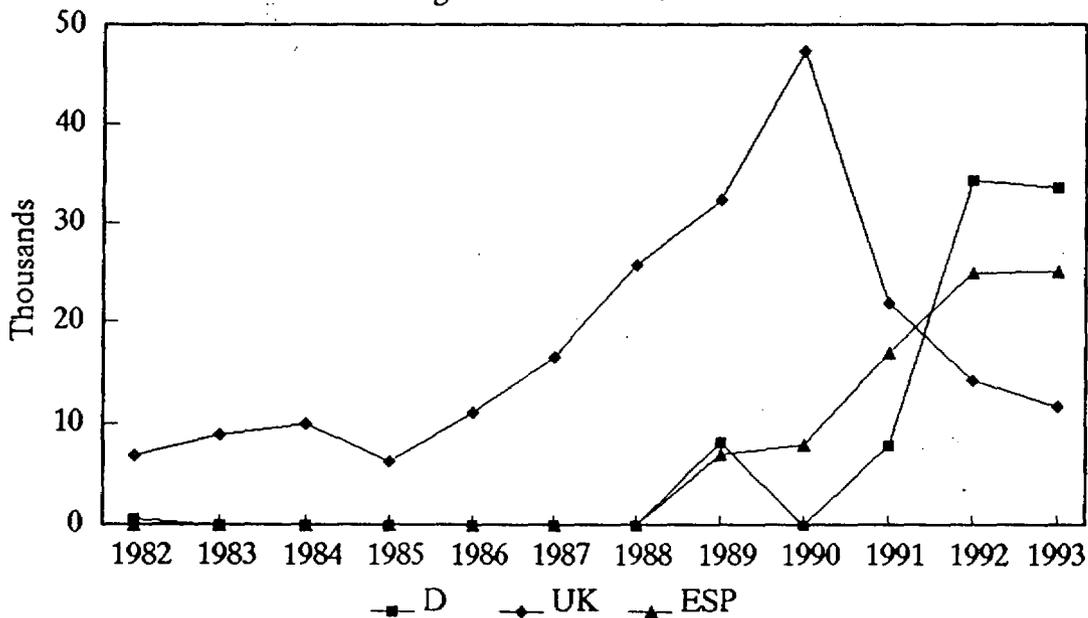
Source: EUROSTAT

IMPORTATIONS DE RHUM vers les ETATS MEMBRES 1982-1993
 Origine: LA BARBADE



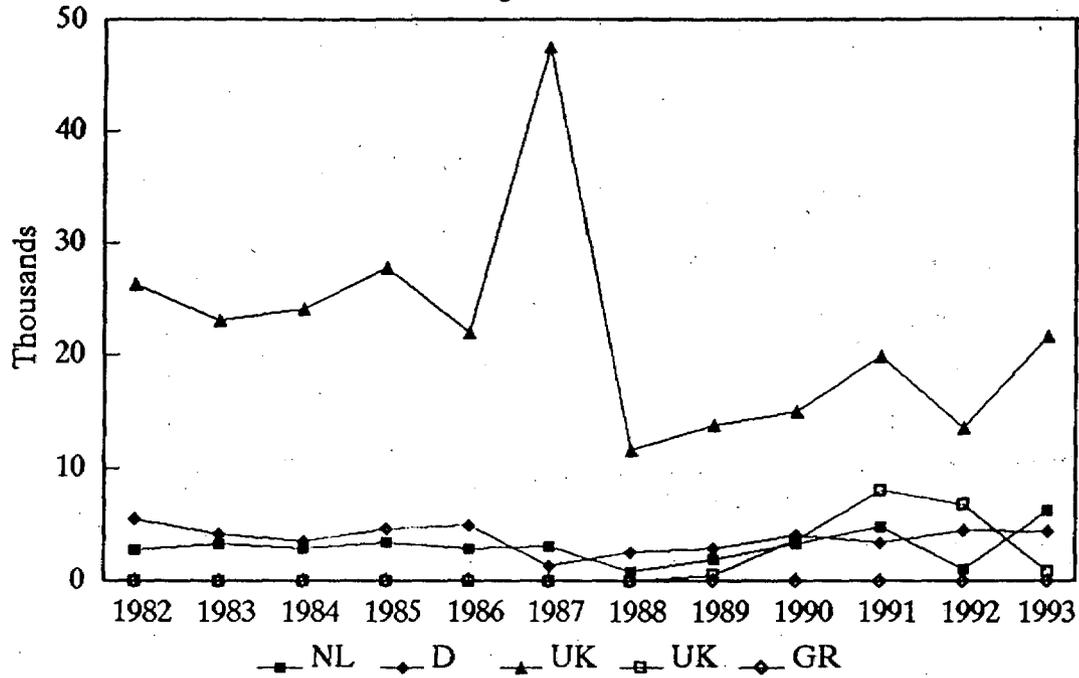
Source: EUROSTAT
 En hectolitres d'alcool pur

IMPORTATIONS DE RHUM vers les ETATS MEMBRES 1982-1993
 Origine: TRINIDAD/TOBAGO

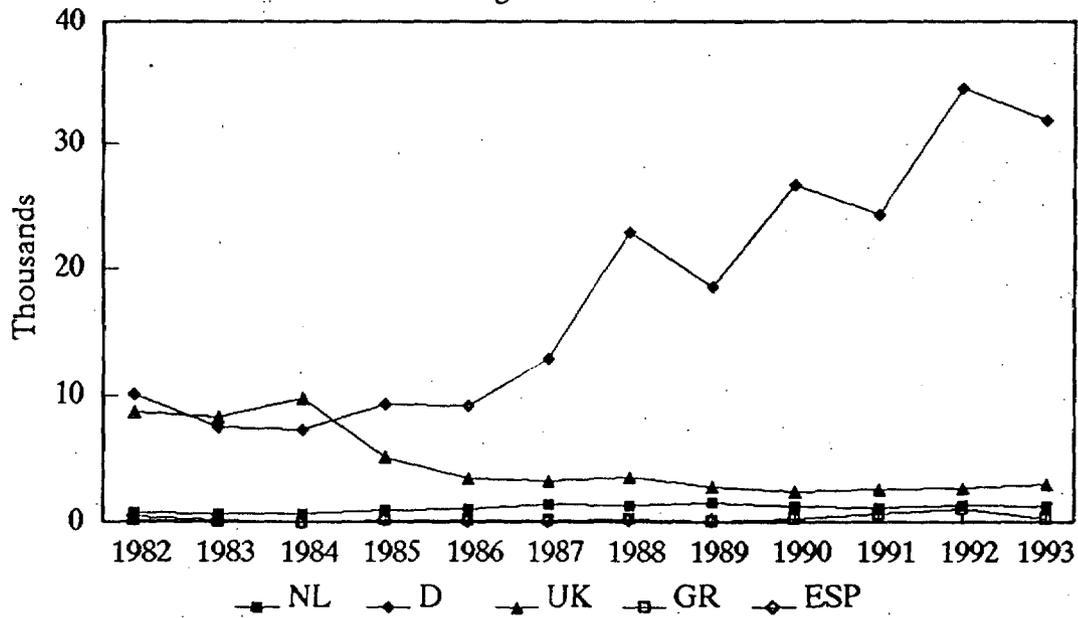


Source: EUROSTAT
 En hectolitres d'alcool pur

IMPORTATIONS DE RHUM vers les ETATS MEMBRES 1982-1993
Origine: BAHAMAS

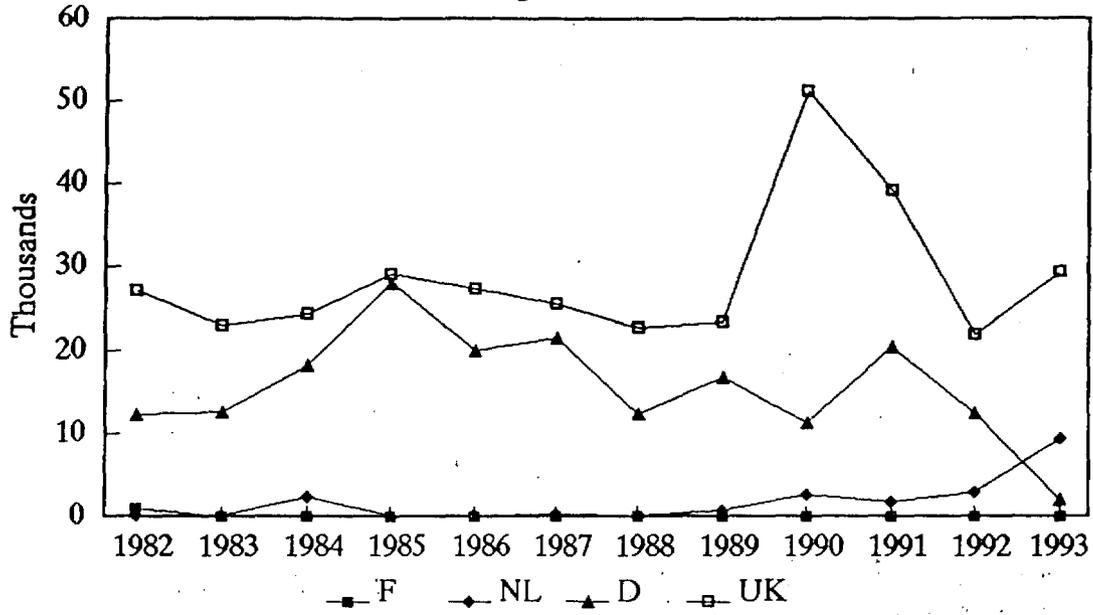


IMPORTATIONS DE RHUM vers les ETATS MEMBRES 1982-1993
Origine: JAMAIQUE



Source: EUROSTAT
En hectolitres d'alcool pur

IMPORTATIONS DE RHUM vers les ETATS MEMBRES 1982-1993
 Origine: GUYANA



Source: EUROSTAT
 En hectolitres d'alcool pur

ANNEXE IX

Importations de RHUM/ARRAK dans la C.E. en provenance de PAYS TIERS (autres que ACP ou DOM), en HAP

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
EUR12	7359	7337	8798	10550	39059	15108	16079	19273	32326	33722	26561	20459
F	115	8	54	13	122	356	247	1875	4797	667	459	599
B/LUX	151	235	216	439	102	90	454	173	924	259	309	301
NL	487	296	831	966	693	1253	1197	1403	4557	7276	2373	1714
RFA	1263	1707	1587	1830	5443	6917	8842	10565	10994	4606	5965	3149
I	2782	2947	3405	4207	508	892	651	853	892	1943	1780	2329
UK	592	504	758	727	324	214	848	858	2502	2074	5084	2007
IRL	349	294	235	4	19	1	16	33	0	4	50	7
DK	241	403	578	646	116	160	114	222	461	251	161	112
GR	1379	943	1134	1718	334	278	341	198	129	545	280	16
P	0	0	0	0	205	159	557	437	384	659	163	126
ESP	0	0	0	0	31193	4788	2812	2656	6686	15438	9937	10099

Source: EUROSTAT