

Bachelor Thesis 2015

Agricultural free trade and WTO concessions



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Abstract

The WTO's Agricultural Agreement negotiated in the 1996-94 Uruguay Round provoked several essential steps towards freer trade for agricultural products comprising the elimination of quotas on agricultural imports. The agreement required the conversion of bans and quotas into tariff rate quotas. At present as many as 1'300 tariff quotas increased market access and reduced trade barriers. As Switzerland has WTO membership since 1996, the adherence to its current agreements is compulsory and consequently standard quotas or tariffs were modified to tariff rate quotas. Within the analysis, the dynamics and major developments in trade of seven predetermined agricultural products were examined. Furthermore, the correlation of tariff rate quotas and domestic production in interaction with domestic demand were analysed. Since border protection instruments stimulate domestic production, significant dependencies could be observed. In-quota trade in comparison to out-quota trade revealed the fact that high tariff rates discourage imports of foreign goods. The findings suggest that the implementation of WTO concession after the negotiation of the Uruguay Round has not fundamentally altered trade of the predetermined products. Current instruments of foreign trade protection namely tariff rate quotas are perceived as valuable and indispensable within the industry. Nevertheless, further negotiations not only with the World Trade Organisation but also with other countries in terms of free trade agreements, might jeopardise current trade barriers and force the country to forfeit its border protection for certain products. Without doubt, the reduction of tariff rates associated with the gradual liberalisation of agricultural markets would exert an enormous pressure on domestic production.

Statement of authenticity

We, Daniela Flühler and Anna Katharina Rieder declare that all materials presented in this paper are our own work or fully and specifically acknowledged wherever adapted from other sources.

The authors understand that if at any time it is shown that they have significantly misrepresented material presented here, any degree or credits awarded to them on the basis of that material may be revoked.

We declare that all statements and information contained herein are true, correct and accurate to the best of our knowledge and belief.

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1 Glossary and Abbreviations

AKZA	Tariff rate out of the quota
AKZA Code 1	Reduced tariff rate out of the quota
Agrareinfuhrverordnung	Agricultural import regulation
BSE	Bovine spongiforme enzephalopathie
Bundesamt für Landwirtschaft (BLW)	Federal office for agriculture
ECOSOC	Economic and Social Council
FAO	Food and Agriculture Organisation of the United Nations
GATT	General agreement on trade and tariffs
GDP	Gross Domestic Product
GEB (Generaleinfuhrbewilligung)	General import permit
IMF	International Monetary Fund
ITO	International Trade Organisation
Landwirtschaftsgesetz (LGW)	Agricultural act
Nierstücke	Loin cuts
Fleischverband Proviande	Meat association Proviande
Schlachthälfte Kühe	Half-carcasses cows
Schlachtnebenprodukte	Slaughtered by-products
Schlachtviehverordnung	Ordinance on the meat stock and meat market
Schweizerische Handelsamtsblatt	Swiss Official Gazette (SOGC)
Swisscofel	Trade association fruits and vegetables
TRIPS	Trade related aspects of intellectual property rights
TRQ	Tariff rate quotas / Tariff quotas
Vollversorgung	Full domestic supply
Welthandelsorganisation	World Trade Organisation (WTO)
Zollkontingente	Tariff quota

2 Introduction

The World Trade Organisation's (WTO) current Agriculture Agreement was negotiated in the 1986 – 1994 Uruguay Round and was a significant first step towards fairer competition and a less distorted agricultural sector (WTO website, 2015B). WTO member states agreed to improve market access and to reduce not only barriers to trade but also trade-distorting subsidies. Switzerland has been a member of the World Trade Organisation since 01 July 1995 and has therefore to comply with its standards (ibid.). The Agreement on Agriculture has three pillars, which include the domestic support, market access, and export subsidies (WTO website, 2015D). In order to enhance international trade, every member state is obliged to withdraw border protection for a certain timeframe and to allow a minimum market access of 5%. Further, within the trade of agricultural goods the World Trade Organisation notifies tariff quotas with every country, which consequently influence the domestic production rates as well as the import and export behaviour (ibid.). With the liberalisation of trade and the implementation of tariff quotas, domestic agricultural products have come under pressure, particularly in countries such as Switzerland where production costs are high (Schweizerischer Bauernverband, 2015). Further admissions in the field of market access or the reduction of tariff rates could jeopardise the agricultural sector in Switzerland. Since the adherence to the agricultural sector is anchored in the federal constitution, market liberalisation and their future impacts stimulate political and economic discussions. It is widely agreed that border protection instruments such as tariff quotas, where high tariff rates should discourage imports, are indispensable in order to maintain domestic production of certain products (ibid.). For the purpose of providing an insight into agricultural trade with regards to tariff rate quotas, this paper analyses the dynamics and developments of determined agricultural products and outlines the influence of WTO concessions.

2.1 Objectives of the research

Within the framework of this thesis, the authors focus on the questions to what extent the WTO tariff quotas for agricultural and nutrition products are used, the major developments in terms of trade of agricultural goods with reference to WTO concessions, the interaction of tariff quotas and domestic production and the mechanism of trade inside and beyond WTO tariff quotas.

In order to reduce the sample and to concentrate on agricultural products, which are of major importance to Swiss consumers, the influences of WTO concessions should be analysed in the product categories vegetables, fruits and meat. Further, the authors have pigeonholed four different products within the product category fruit and vegetables: cherry tomatoes, carrots, strawberries

and apricots. In the product category meat, the focus lies on loin cuts, chicken breasts and half-carcasses cows.

The following paper is divided into four parts. The authors will first provide an overview of the relationship between Switzerland and the WTO. The second part addresses the theoretical background in terms of foreign trade within the agricultural sector. The third part contains the analysis of the three different product categories with their corresponding evaluations. Finally, further Doha negotiations as well as challenges and opportunities for the Swiss agricultural sector will be exemplified in the fourth part.

2.2 Methodology

As the authors endeavour to provide a reliable academic paper, the conducted qualitative research and collected secondary data contain trustworthy sources such as books, academic journals and credible websites. In order to gather information about WTO concessions and tariff quotas, the authors consulted both, the WTO and the Federal Office for Agriculture. Afterwards, the predetermined product categories vegetables, fruits and meat were analysed based on secondary data provided by Swiss Impex, the Federal Office for Agriculture, Swisscofel and Proviande. In terms of the analysis part, the bachelor thesis will first and foremost rely on secondary data such as statistics from organisations related to the Federal Office of Agriculture. In a next step, the authors interpreted and evaluated the data pool with reference to the research question. Expert interviews with domestic producers as well as the fruit and vegetable trade association Swisscofel and the meat association Proviande not only supported the evaluation of reported results but also provided the authors with an insight about future benefits and challenges for the Swiss agriculture sector. Hence, the last two parts comprise primary data.

3 World Trade Organisation and Switzerland

In this section the paper will outline the general agreements between Switzerland and the World Trade Organisation. Furthermore, specific information about the WTO will be stated starting with the historical background of Switzerland and their participation in the WTO, the World Trade Organisation and agricultural policies, the explanation of the Uruguay round and its enforced agreements and finally the impacts of the WTO on the Swiss agricultural free trade.

3.1 From GATT (General Agreement on Tariffs and Trade) to WTO

The General Agreements on Tariffs and Trade, known as the GATT, is one third of the Bretton Woods system, which was created after World War II to ensure a stable trade and economic world environment (Senti, 2000:3-63). The International Monetary Fund (IMF) and the World Bank are the other two bodies of the Bretton Woods system. The GATT had a role as an international organisation before the creation of the World Trade Organisation, which was eventually established on January 1 in 1995 by the Final Act of the Uruguay Round negotiations. After World War II, the United Kingdom and the United States submitted proposals to the Economic and Social Council (ECOSOC) of the United Nations regarding the establishment of an international trade body named the International Trade Organisation (ITO) (ibid.).

ECOSOC convened a conference, the United Nations Conference on Trade and Employment in 1946 to consider the UK and US proposals. A Preparatory Committee drafted the ITO Charter and it was approved in 1948 at the conference in Havana, Cuba. According to Senti (2000: 64) the first round of trade negotiations took place while the Preparatory Committee was still working on drafting the Charter because the participants were anxious to begin the process of trade liberalisation at this early stage. Their results were incorporated into the General Agreement, which was signed in 1947 (Anderson and Josling, 2005:440).

Since the original signatory nations expected the Agreement to become part of the more permanent ITO Charter, the text of the GATT contains very little institutional structure. Anderson and Josling (2005:464-477) stated that this lack of detail within the agreement has created increasing difficulties as the GATT membership and roles governing trade between so many of the world's nations have grown. The GATT has functioned as an international organisation for many years even though it has never been formalised as such. The former completed eight rounds of multilateral trade negotiations whereof the Uruguay Round (the 8th round) concluded with the signing of the Final Act on April 15, 1994, in Marrakesh, and produced the World Trade Organisation Agreement.

3.2 Uruguay Round

The seeds of the Uruguay Round were sown in November 1982 at a ministerial meeting of GATT members in Geneva. Although, the ministers intended to launch a major new negotiation, the conference stalled on behalf of agriculture and was widely regarded as failure (WTO website, 2015:A).

Nevertheless, it took four more years of exploring, clarifying issues and painstaking consensus-building, before ministers agreed to launch the new round. They did so in September 1986, in Punta del Este, Uruguay where they eventually accepted a negotiating agenda that covered virtually every outstanding trade policy issue. The talks were going to extend the trading system into several new areas, notably trade in services and intellectual property, and to reform trade in the sensitive sectors of agriculture and textiles. All the original GATT articles had to be reviewed, which resulted in the biggest negotiating mandate on trade ever agreed (WTO website, 2015:B).

Despite the poor political outlook during this period, a considerable amount of technical work continued leading to the first draft of a final legal agreement. It was put on the table in Geneva in December 1991. The text fulfilled every part of the Punta del Este mandate, with one exception — it did not contain the participating countries' lists of commitments for cutting import duties and opening their services markets. Nevertheless the draft became the basis for the final agreement (ibid.).

Over the following two years, the negotiations lurched between impending failures to predictions of imminent success. New points of major conflicts emerged including services, market access, anti-dumping rules and the proposed creation of a new institution. Therefore, the difficulty of reaching agreement on a complete package containing almost the entire range of current trade issues led some to conclude that a negotiation on this scale would never again be possible. Yet, the Uruguay Round agreements contain timetables for new negotiations (Doha Round) on a number of topics (ibid.).

3.3 World Trade Organisation

The World Trade Organisation was born on January 1 in 1995 and was founded by the last and largest GATT round, the Uruguay Round, which lasted from 1986 until 1994. Whereas GATT had mainly dealt with trade in goods, the WTO and its agreements cover trade in services and intellectual property. The WTO started with 76 members and has currently 161 countries worldwide that have a membership. The World Trade Organisation is not only geographically a global organisation but also accounts for 95% of the world trade (Schweizerischer Bauernverband, 2005).

Decisions are made by the entire membership and agreed by consensus. A majority vote is also possible but it has never been used and was extremely rare under the WTO's predecessor GATT. The WTO's agreements have been ratified in all members' parliaments (ibid.).

The WTO's top-level decision-making body is the Ministerial Conference, which meets at least once every two years and is followed by the General Council, which meets several times a year in the Geneva headquarters (WTO, 2015:C).

The World Trade Organisations agreements deal with trade in goods (GATT), trade in services (GATS) and all relevant aspects of intellectual property (TRIPS). It all began with trade in goods. From 1947 to 1994, GATT was not only the forum for negotiating lower custom duty rates and other trade barriers but also became the WTO's umbrella agreement for trade in goods. It additionally deals with specific sectors concerning agriculture and textiles and with issues such as state trading, product standards, subsidies and actions taken against dumping (ibid.).

Banks, insurance firms, telecommunications companies, tour operators, hotel chains and transport companies involved in doing business abroad are able to enjoy the same principles of freer and fairer trade that originally only applied to trade in goods. These principles appear in the General Agreement on Trade in Services (GATS). The WTO's intellectual property agreement comprises rules for trade and investment in ideas and creativity the three pillars of the WTO are shown in the figure below (Schweizerischer Bauernverband, 2005).

Figure 3.1 Trade pillars WTO

GATT	GATS	TRIPS
<ul style="list-style-type: none"> • Goals • Most favoured clause • Principle of national treatment • Transparency • Reciprocity • Reduction of trade barriers • Preferential treatment of developing countries • Environmental protection 		
<ul style="list-style-type: none"> • Agriculture • Health • Trade with textiles • Technological barriers • Investments • Dumping • Customs value • Control of shipment • Rules of origin • Import licence • Subsidies • Protectionism 	<ul style="list-style-type: none"> • Passenger transport • Air traffic • Financial services • Telecommunications 	<ul style="list-style-type: none"> • Intellectual Property • Transitional arrangements

Source: Author based on data from Senti (2000:155)

3.4 Agriculture Agreement

The agriculture agreement was first concluded in the Uruguay Round and imposes distinct disciplines on border measures, domestic support and export subsidies. Its objective is to reduce and eventually eliminate import tariffs and export subsidies while regulating the domestic support (Mavroidis, 2012:758-787). The three main pillars in the agriculture agreement are market access, domestic support and export subsidies.

Market access

The new rule for market access in agricultural products is tariffs only (ibid.). Before the Uruguay Round, some agricultural imports were restricted by quotas and other non-tariff measures. These have been replaced by tariffs that provide more-or-less equivalent levels of protection. Tariff rate quotas, which will be further explained in the theoretical framework, were negotiated with each country for each product. The key aspects of this concept are (i) making agricultural market access conditions more transparent, predictable and competitive, (ii) establishing or strengthening the link

between national and international agricultural markets, and thus (iii) relying more prominently on the market for guiding scarce resources into their most productive uses (ibid.).

Domestic support

The main objective has been to discipline and reduce domestic support while at the same time leaving great scope for governments to design domestic agricultural policies to the specific circumstances in individual countries. The main concept features two categories of domestic support. Either the support with no, or minimal distortive effect on trade which refers to Green Box measures or on the other hand, the trade distorting support that refers to Amber Box measures (Mavroidis, 2002:758-787).

Measures with minimal impact on trade can be used freely and are therefore in a “green box”. They include government services such as research, disease control, infrastructure and food security. Further, they include payments made directly to farmers that do not stimulate production, such as certain forms of direct income support, assistance to support farmers restructure agriculture and direct payments under environmental and regional assistance programmes (ibid.).

Also permitted are certain direct payments to farmers where they are required to limit production, certain government assistance programmes to encourage agricultural and rural development in developing countries, and other support on a small scale when compared with the total value of the product or products supported (ibid.)

Export subsidies

The Agriculture Agreement prohibits export subsidies on agricultural products, unless the subsidies are specified in a member’s lists of commitments. If they are listed, the agreement requires WTO members to cut the amount of money they spend on export subsidies and the quantities of exports that receive subsidies likewise. Taking averages from 1986-90 as the base level, developed countries agreed to cut the value of export subsidies by 36% over the six years starting in 1995. Developed countries also agreed to reduce the quantities of subsidised exports by 21% over the six years. Least-developed countries do not need to make any cuts (Mavroidis, 2002:758-787).

During the six-year implementation period, developing countries are allowed under certain conditions to use subsidies to reduce the costs of marketing and transporting exports (ibid.).

3.5 WTO and agricultural policies in Switzerland

Switzerland joined the World Trade Organisation on 1 July in 1995 and has been a member of GATT since 1 August 1966. The Swiss economy is excellently integrated in the world economy as not only the export quota accounts for almost 52% but also the export trade flows and direct investments are considerably high. Nevertheless, the Swiss proportion of total world trade accounts for less than 1.5%. As a midsized actor in the world trade, Switzerland is not able to succeed with its market power but therefore relies on rules and regulations formed by the World Trade Organisation, which manifests the standards for the cross-boarder trade (Seco website, 2015).

The World Trade Organisation constitutes for the Swiss foreign trade policy and even all free trade agreements are bound to the organisation. As a member of this global body, Switzerland actively participates in open questions and additionally implements and meets existing agreements (ibid.).

Besides other duties of the WTO, the main tasks cover the removal of trade barriers in form of customs and non-tariff quotas. This leads to improved sales opportunities, strengthens the Swiss exports and stabilises the domestic market. The compliance of the World Trade Organisation rules and the sanctioning of offences are ensured through a dispute settlement system, which guarantees stability, legal security and legal equality for everyone. It is in Switzerland's interest to establish a coherent cross-border trade where topics covering the environmental support, labour standards and finally the protection of consumption are discussed. Furthermore, the WTO is a perfect platform for Switzerland in order to support and to debate such topics with other members (Seco website, 2015).

3.6 Impacts of the Uruguay Round on the Swiss agricultural free trade

Swiss agriculture has come a long way from its limited orientation in foreign trade resulting from two world wars with closed borders. Only in 1972 when the first Free Trade Agreement with the European Communities was concluded, the government assured farmers to safeguard their products and prices. Nevertheless, food self-sufficiency was never attained. Besides high tariffs, import quotas and prohibitions, numerous domestic measures such as milk and sugar beet production quotas, a large scope of subsidy tools, and land use limitations secured that the prevailing market prices procured a comparable income for all farmers. Free trade remained limited to non-agricultural products (Schweizerischer Bauernverband website, 2005).

The first step away from the post-war planned agricultural economy took place in 1987. Remarkably, the attempt came not from the government but from the Swiss voters in a referendum toppling

a governmental and parliamentary decision for yet more support to the domestic sugar industry regardless of structural surplus production (ibid.).

Serious reforms only became possible in the wake of the Uruguay Round conclusion and the new WTO rules for market access and subsidies. In 1996, a new constitutional article defining the role of state in support to agriculture obtained a large majority of both, voters and cantons. This Article recognises the multifunctional role of agriculture in three ways: contributing to a secure food supply, conserving natural resources and taking care of the landscape, and encouraging decentralised settlement. On this basis the policy instruments to reach these objectives were completely reformulated. Price and sales guarantees were abolished and price support was reduced. In exchange, direct payments as remuneration for specific services of public and common interest were greatly increased – within the limits of the new WTO rules and disciplines. However, until today more than half of these direct payments remained directly production-related (ibid.).

This short story shows the merits and limits not only of national reform attempts but also of international policy developments in such sensitive areas as agriculture. Switzerland never had a WTO case brought against its agricultural policy. But like other countries it more or less followed the rules for its various reform steps at parliamentary and governmental levels (ibid.).

4 Theoretical framework

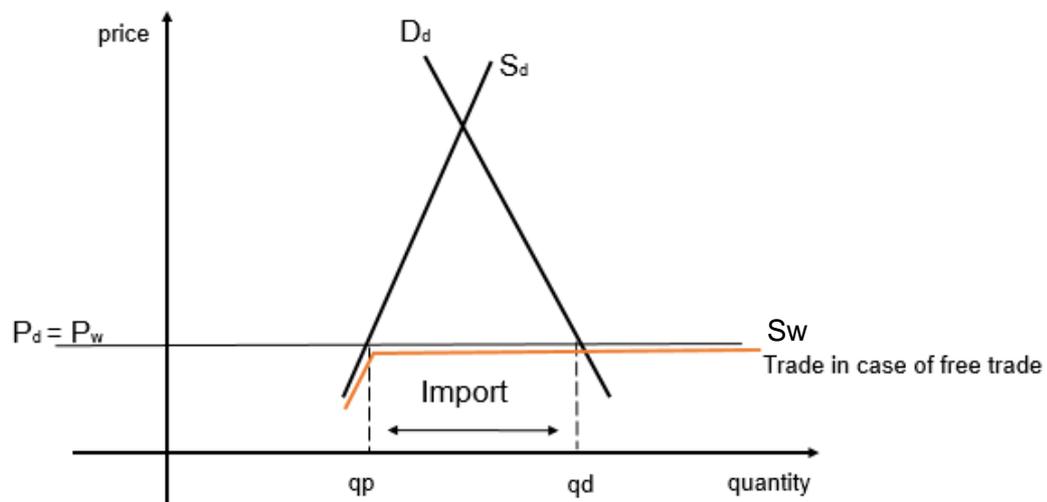
The agricultural sector in Switzerland is anchored in the Federal Constitution, Article 107, and has three objectives namely a secure supply of the population, conservation of natural resources and maintaining the cultural landscape and decentralised settlement of the country (Federal Constitution, 1998). Further, the Agricultural Act regulates foreign trade where border protections in terms of tariffs were firstly mentioned in 1902 (Anwander Phan-Huy and Rieder, 1994:4). Historically, the government has intervened in various ways in order to maintain a strong agricultural sector and protected certain agricultural products (ibid.:211). However, internal and international pressure force Switzerland towards the reduction of product specific subsidies and request more competition and market access (ibid.:171). Nowadays, Swiss agriculture contributes about 1% to GDP. Switzerland is traditionally a net importer of agricultural food products, which are spread over all categories (WTO, 2013:77). Globally, liberalisation of agricultural markets has been on the agenda of national governments and international organisations since almost four decades (Kuyvenhoven, Moll and van Tilburg, 2000:3). Policy makers recognised that government intervention in agricultural markets was not only less effective than expected but also resulted in misallocation of resources or diminished economic growth. Consequently, policies in industrialised countries requested less government interference and shifted from national to supranational regulations (ibid.).

In a policy-free and undisturbed international trade, traders import products from abroad as long as the foreign product costs (world market price) plus transportation costs are below the corresponding costs in the domestic country (Anwander Phan-Huy and Rieder, 1994:217). Thus, a country with low production costs has a strong position in the international market since it is able to produce specifically for the export business and consequently maintains a high employment rate and generates income. On the contrary, importing countries where production costs are high, it is cheaper to import goods instead of producing them. Such an international division of labour results generally in an increase of material prosperity since prices of commodities are low and consumers have to spend a smaller proportion of their income on them (ibid.).

Based on its share in international trade, Switzerland is in the position of a small demander and supplier (Anwander Phan-Huy and Rieder, 1994:217). Thus, whether through its own domestic demand nor supply Switzerland exerts influence on the international price level. The figure below outlines the market situation of a petite country in case unlimited imports prevail. In the trading business, Switzerland is confronted with an elastic foreign supply, which is shown in the figure as horizontal supply line (S_w). With the stipulation of unlimited imports and the neglect of cost of transportation, the world price (P_w) equals the domestic market price (P_d). At the price level P_d ,

the amount q_p is domestically produced whereas the amount q_d represents the domestic demand. Hence, the difference between q_p and q_d would be imported (ibid.).

Figure 4.1 Market situation – free imports



Source: Author based on Anwander Phan-Huy and Rieder (1994:221)

The two important aspects for Switzerland, namely the relatively large spread between domestic and world market price as well as the infinitely elastic foreign supply offer an understanding why foreign trade could jeopardise domestic production (Anwander Phan-Huy and Rieder, 1994: 221). Therefore, in order to protect the agricultural sector, government intervention affects production, demand and trade flows by imposing price incentives or burdens. The framework for such agricultural policies can comprise instruments of foreign trade protection, instruments for influencing the domestic supply, demand and purchasing price for agricultural inputs or direct income transfers (ibid.: 245).

Regarding the barriers to trade and border protection, the authors focus on the instruments of foreign trade protection, which can be summarised as follows.

Tariffs

Tariffs are taxes levied on imported products, which will increase the price of the respective product in the domestic market (Nordhaus and Samuelson, 2010:362). Tariffs are divided into weight duties (imposed on the basis of weight), ad valorem duties (imposed on the basis of price) and

sliding tariffs (the lower the price, the higher the tariff and vice-versa) (Anwander Phan-Huy und Rieder, 1994: 245).

Quotas

Quotas are numerical limits imposed on imported goods and are used to control the volume of trade between countries. They are levied on products in order to reduce or eliminate imports and thereby increase domestic production. Standard quotas are very restrictive (Nordhaus and Samuelson, 2010: 362).

Tariff rate quota

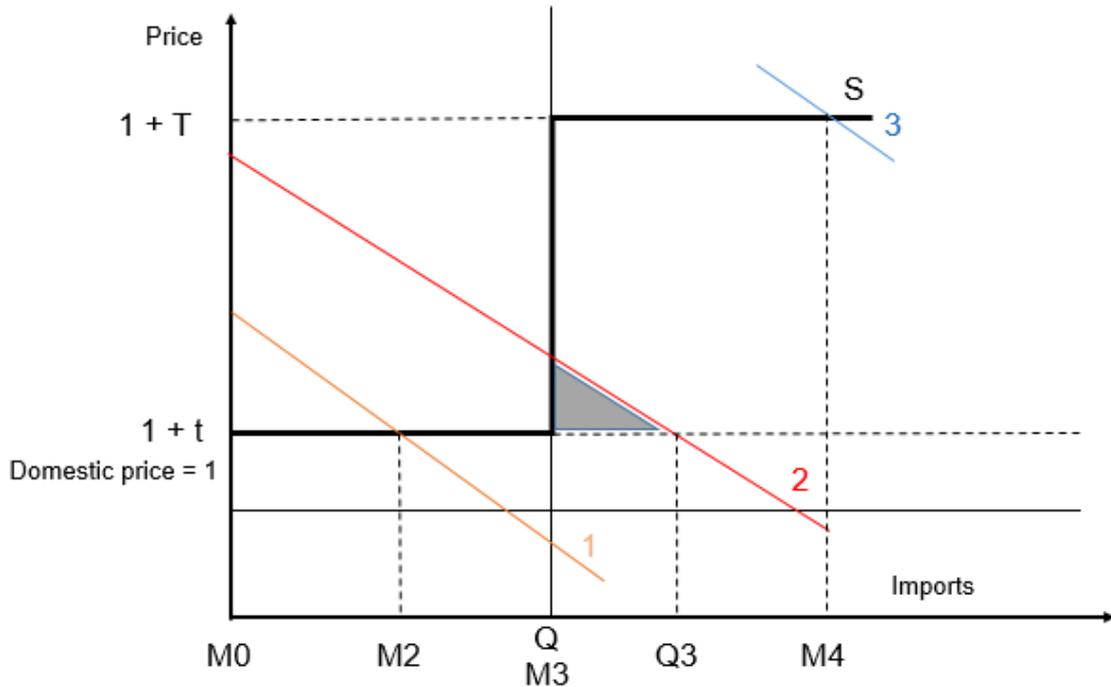
A tariff rate quota is a two-level tariff, charging one tariff, namely the tariff rate under the quota (KZA) on a limited volume of imports and a second, higher tariff, namely the tariff rate out of the quota (AKZA) on all additional imports. The tariff out of the quota is implemented at such a high price that imports would be unprofitable beyond the limited volume and therefore act as a protection of domestic products (Anwander Phan-Huy and Rieder, 1994:258). Since the World Trade Organisation allows only tariff rate quotas when it comes to border protection, the impacts of the former are analysed in more detail.

The figure below shows the mechanism of tariff rate quotas. The two horizontal lines represent the effective supply curve (S). The lower line stands for the imports within the quota at the price $1 + t$ (domestic price + tariff rate under the quota). The other line represents the supply of out of the quota imports at the price $1 + T$ (domestic price + tariff rate out of the quota). The vertical line (Q), which connects the in-quota and out-quota segments, represents the tariff quota volume. Generally, the impacts of tariff quotas on trade are contingent on the excess demand for imports. In the figure, the demand curves (1 to 3) show three possible scenarios of excessive demand (Scully, 2001).

In demand curve number 1 excess demand results in imports of M2 without causing the quota to grasp. As long as imports satisfy domestic excess demand at a volume less than Q, the tariff quota then acts as an ordinary tariff applied at the tariff rate under the quota (ibid.). In the second scenario (demand curve 2) the tariff quota becomes effective. If a tariff quota did not exist and only a tariff was applied at the rate t, the result would be imports of Q3. However, since tariff rate quotas are maximised by volume, represented by line Q, only M3 units of imports occur (Scully, 2001). In the third case, excess demand curve 3 stands for such a high level of demand, which is sufficient to bear imports at the tariff rate out of the quota. The volume of imports is no longer restrained at line Q but on the other hand, the domestic price increases to the price $1 + T$ (Scully, 2001).

The grey-hatched triangle stands for welfare loss of the tariff quota relative to an applied tariff at in-quota rate (ibid.)

Figure 4.2 Mechanism tariff rate quota



Source: Author based on Skully (2001)

As seen in the figure above, a tariff raises the domestic prices of imported products, which will eventually lead to a decline in consumption and imports (Samuelson and Nordhaus, 2010:362). Furthermore, the tariff rate quota rationalises imports since they are restricted to a certain volume. According to Samuelson and Nordhaus (ibid.) tariffs produce economic waste by reducing consumption and increasing prices. On the other hand, they stimulate domestic production and minimise imports, which is of paramount importance particularly in countries where production costs are high (ibid.). According to Anwander Phan-Huy and Rieder (1994:221) the agricultural sector must be defended with instruments of foreign trade protection in order to sustain domestic production (ibid.).

4.1 Governance of tariff quotas in Switzerland

As mentioned above in the WTO agreement it was negotiated that the main instruments for foreign trade protection are tariff quotas. In Switzerland, the principles governing the tariff quotas, their distribution and publication of the allocation are determined in Articles 21 and 22 of the Agricultural Act (1998). The Agricultural Act sets the fundamentals about the import of goods and the allocation of tariff quotas. For example, the act regulates in which cases tariff quotas can be extended or eliminated and how they are divided between importers.

The Federal Council enacted the implementing provisions in Articles 10 to 26 of the Agricultural Import Regulation (2011). The Agricultural Import Regulation not only specifies the process but also defines responsibilities within the allocation of tariff quotas. Appendix 1 displays the duty rates for every imported agricultural good. In Appendix 3 of the regulation all tariff quotas with the respective products are outlined. Furthermore, Article 15 of the Agricultural Import Regulation states that tariff quotas, the types of distribution and the different import quota shares must be made publicly available each year (BWL, 2015c).

Further important legal bases especially for the import of fruits, vegetables and meat are:

- Regulation on the import and export of vegetables, fruits and horticultural products (VEAGOG) (SR 916.121.10) where details about the fruit and vegetable market are regulated. The regulation not only determines the import system of every product category but also defines and explains the protected and free phase of every product. Further, it defines responsibilities in the fruit and vegetable market (1998).
- Regulation on the establishment of periods and deadlines as well as the release of tariff quotas for imports of fresh vegetables, fresh fruits and fresh cut flowers (VEAGOG Freigabeverordnung). This regulation includes detailed information such as the approval of tariff quotas, the distribution of tariff quotas among importers and the responsibilities within those processes for fresh fruits and fresh vegetables. Further, Appendix 1 outlines the protected and free phase of each tariff number and product category (2000).
- Regulation on the import and export of the meat market is defined in the ordinance on the meat stock and meat market. This ordinance includes specifications on the quality of meat, the access of public markets, specific measures for the market support and finally imports regulations for various products (Schweizerische Eidgenossenschaft, 2015).

5 Product analysis fruit and vegetables

In this section, the paper will analyse the product categories fruit and vegetables and the pre-determined products in terms of trade and tariff quotas. Furthermore, the as well as the process of importing fruits and vegetables will be outlined.

In terms of the vegetable market in Switzerland, carrots, tomatoes and iceberg lettuce are the three favoured vegetables of Swiss consumers. Overall, the annual vegetable consumption per capita has increased from 57 kilograms (kg) in 1980 to 86 kg in 2014 and due to the health conscious generation the trend is rising (Gemüse website, 2015). When it comes to fruits, the preferred products are bananas and apples, and the annual consumption per capita amounts up to 75 kg (Swissfruit website, 2015)

For the import of fruit and vegetables a two-phase system applies. The availability of domestic products is taken into account and for each product, a protected and so-called free phased is defined (Chevalley, 2006). The annual year is divided in a phase during which the product is protected (bewirtschaftete Phase), and a phase during which it can be freely imported (nicht bewirtschaftete Phase). Moreover the protected periods for all product categories are notified within World Trade Organisation (BLW website, 2015a). Furthermore, the protected period is divided into a protected phase and an effective protected phase (Ammann and Jörin, 2001). The reason for this division is the domestic production being so low from time to time that protection is not required. Typically this situation occurs in the beginning and at the end of the protected phase. The effective protected period is set out in the regulation on the import and export of vegetables, fruit and horticultural (VEAGOG, 1998) and applies only in Switzerland. During the effective protected phase the government and the associations of fruit and vegetables allocate tariff quotas depending on the domestic production and the expected consumption quantities (Ammann and Jörin, 2001). The allocation of tariff quotas is necessary in case of domestic production being unable to meet domestic demand. No allocation shall be made under full domestic supply (Vollversorgung) by domestic products. During the free phase, the import of fruit and vegetables is unlimited (ibid.). The figure below summarises the differences between the protected and free phase.

Table 5.1 Two-phase import systems

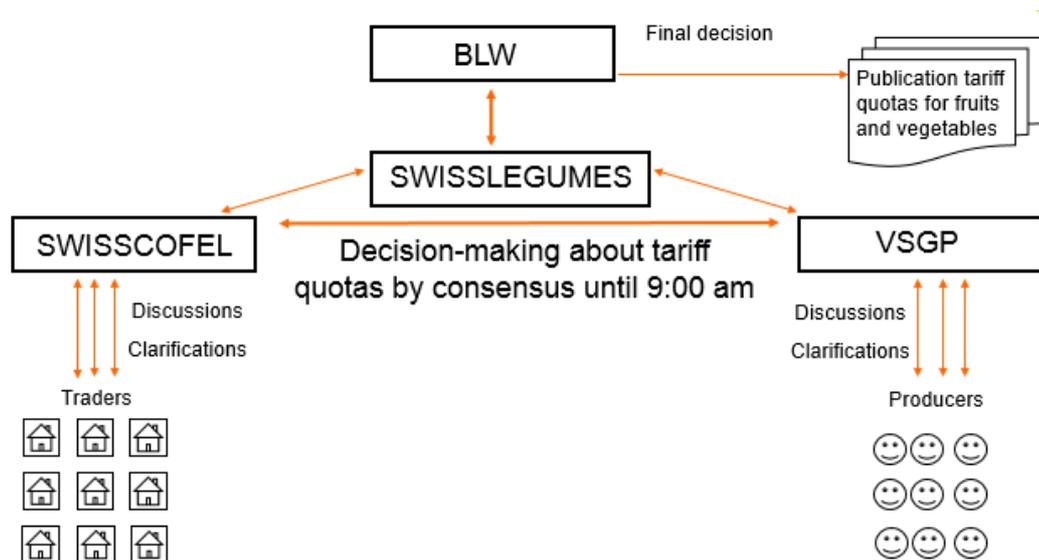
Free phase (nicht bewirtschaftete Phase)	Protected phase (bewirtschaftete Phase)
None domestic production	Domestic production
Import unlimited	Import limited to tariff quota regulations (KZA, AKZA)

Source: Author based on Federal Office for Agriculture (BLW website, 2015a)

The border protection system for fruit and vegetables is based on a quantity control (Zurflüh, 2014). If the domestic supply is insufficient to meet domestic demand, tariff quotas are allocated. Therefore, it is crucial to obtain exact figures about supply and demand during the protected phases for allocating tariff quotas adequately (ibid.). In order to measure supply, producers and trading companies are obliged to report their weekly produced quantities as accurate as possible. On the other hand, the amount of consumption is based on historical data and experience. If the result of these two numbers diverges, the Federal Office for Agriculture allocates a tariff quota in the amount of this differentiation. Before the tariff quota is publicly published, the Federal Office for Agriculture consults the interested parties such as the Association of Swiss fruits, Association of Swiss vegetable producers and Swisscofel (ibid.).

In the figure below the process of the allocation of tariff quotas is outlined. Every Tuesday and Thursday, the Association of Swiss vegetable producers and Swisscofel examine the domestic production level of every product in the protected phase and publish a recommendation with proposed tariff quota allocations to the Federal Office for Agriculture (Zurflüh, 2015a). As the figure below outlines, producers as well as traders are involved in the discussion about the respective amount of quotas. The process is repeated every Tuesday and Thursday when domestic supply and domestic demand determine whether a new tariff quota must be negotiated. It is of paramount interest to protect the domestic producers without having insufficient supply on the market (ibid.). According to Matthias Zurflüh (2015a), the fact that producers, traders and professional associations are included in the decision-making process is advantageous since not only statistical data but also profound professional experience shapes the decision. Furthermore, weekly discounts of retail stores such as Coop and Migros, weather influences such as hail or heat and short-term increases in demand must be taken into account.

Figure 5.1 Tariff quota allocation process



Source: Author based on data from Matthias Zurflüh (2014)

For the fruit, vegetable and meat market, Switzerland has determined a minimum market access in accordance with the WTO. This minimum market access includes different tariff quotas whereof every tariff quota has a minimum notified quantity, which Switzerland must ensure to import every year (Chevalley, 2006). Each tariff quota comprises several products with different tariff numbers, which are defined and listed in the Agricultural Import Regulation (AEV). In the end, the imports of all products within one tariff quota will be accumulated and must exceed the minimum WTO notified amount (ibid).

The relevant tariff quotas and minimum import quantities in terms of fruit and vegetables with regards to the WTO notifications are (Swisslegumes, 2015):

- Tariff quota no. 15; Fresh vegetables, Minimum quantity 166'076 tons (t)
- Tariff quota no. 16; Frozen Vegetables, Minimum quantity 4,500 t
- Tariff quota no. 17; Apples, pears and quinces, fresh, Minimum quantity 15'800 t
- Tariff quota no. 18; Apricots, cherries, plums , fresh, Minimum quantity 16'340 t
- Tariff quota no. 19; Other fresh fruit, Minimum quantity 13'360 t

Generally, individuals who want to import more than 20 kg of fruits or vegetables require a general import permit (GEB) of the section on imports and exports from the Federal Office for Agriculture. Additionally, the import of fruit and vegetables incurs in two different forms, namely previous years

imports (comparative numbers) and domestic power (BLW website, 2015a). Whereas tomatoes, cucumbers, onions, chicory and apples belong to the import system domestic power, all other goods in the category of fruit and vegetables are based on the import system comparative numbers, stated in Article 6 of the regulation on the import and export of vegetables, fruits and horticultural products (1998).

Previous years imports (Comparative numbers)

The import system called comparative numbers considers the previous year imports and, as seen above, is most commonly used in the import scheme for fruit and vegetables (Ammann and Jörin, 2001). In order to calculate the comparative figure, the amounts of all imports, regardless at what tariff rate they were imported, are totalled. In the following year, tariff quota shares will be distributed to general import permit holders on the basis of the comparative number (ibid.). New importers have the opportunity to receive a tariff quota share by importing during the free phase or performing imports at the higher rate of duty (AKZA) during the protected phase. Once they made imports, they are included in the next comparative figure analysis (ibid.).

Domestic power (Inlandleistung)

The allocation of tariff quotas is not only based on the quantity of imports but also on the quantity purchased from domestic producers (Ammann and Jörin, 2001). In order to calculate the number of comparison, all imports, regardless at which tariff rate they were imported, and the acquisition of domestic agricultural products are accumulated. The result is the comparative figure, which is used as basis for the next distribution of tariff quota shares (ibid.). This distribution mode is applied to tomatoes, potatoes and cucumbers because these three cultures are of paramount importance to Switzerland due to their high popularity (Ammann and Jörin, 2001). Due to Matthias Zurflüh (2015a), the calculation of domestic power is very complex since the Federal Office for Agriculture needs evidence that traders bought domestically produced goods in order to take those numbers into consideration for the calculation of the comparative figure.

For the import of fruit and vegetables, there are three different forms of tariff rates, namely the tariff rate under the tariff quota (KZA), the reduced tariff rate out of the quota (AKZA Code 1) and the tariff rate out of the quota (AKZA) as outlined in the section of the WTO and market access (Ammann and Jörin, 2001).

KZA

The tariff rate KZA, being the most commonly used tariff rate for imports, is applied in the three following cases :

- If there is no border control, outside the WTO notified protection periods (Ammann and Jörin, 2001)
- During the protected phase when no tariff quotas are allocated due to a very low and insufficient domestic production. Hence, the Federal Office of Agriculture in consensus with the Association of Swiss vegetable producers and Swisscofel, decides to reduce import barriers in order to ensure food supply (Article 26, Agricultural Import Regulation, 1998)
- During the protected phase when tariff quotas are allocated (Ammann and Jörin, 2001).

AKZA

The tariff rate out of the quota (AKZA) is only valid during the protected phase when imports exceed the allocated tariff quota quantity (Ammann and Jörin, 2001). A useful example to illustrate the AKZA is, when an importer receives in the distribution of tariff quotas a share of 100 t. Nevertheless, the importer decides to import 110 t instead of the allocated 100 t. Consequently, 100 t are charged with the rate under the tariff quota (KZA) and the remaining 10 t with the rate out of the tariff quota (AKZA).

AKZA Code

The reduced off-quota duty rate (AKZA Code 1) is applied during the protected phase when the market enjoys full domestic supply (Vollversorgung). During those periods, the Federal Office for Agriculture allocates no tariff quotas due to the fact that domestic production is in equilibrium domestic demand (Ammann and Jörin, 2001). During full domestic supply, importers are allowed to import an unlimited quantity of goods to the reduced off-quota rate (ibid.). According to Nicolas Spörri (Federal Office for Agriculture, 2015) the reduced off-quota rate is often used when the domestic market requires special types of fruit and vegetables such as organic carrots or yellow tomatoes. Since tariff quotas are only divided into different main product categories such as carrots, apples or tomatoes, they do not distinguish between organic or specialised sub-categories. Hence, the decision whether the domestic market can be fully supplied with Swiss products, is generally taken (on the basis of one tariff number) and does not consider sub-categories. For example, if the Federal Office for Agriculture decides that the domestic demand for tomatoes equals the domestic demand, the possibility arises that the Swiss market lacks organic tomatoes. This shortage must then be imported under the reduced tariff rate (ibid.).

The authors have specified two different products within the product category fruit and two different products within the product category vegetables. After thorough research and the consultation of experts in the respective industry and umbrella organisations, the four products that will be analysed hereafter are cherry tomatoes, carrots, strawberries and apricots. Those products have been

selected because cherry tomatoes stand for a typical indoor-grown vegetable, carrots for a typical warehouse vegetable, strawberries for a typical indoor-grown fruit and apricots for a typical stone fruit. The next section will illustrate the import dynamics, trade within and out of the tariff quota as well as the correlation between domestic production and import for each predetermined product.

5.1 Cherry tomatoes

Cherry tomatoes are a very important vegetable for Switzerland due to the high popularity and their consumption increased steadily over the past decade (Gemüse website, 2015). Unlike seasonal vegetables such as asparagus or iceberg lettuce, cherry tomatoes enjoy a high consumption rate throughout the year. Cherry tomatoes belong to the tariff quota no. 15 (fresh vegetables) and bear the tariff number 0702.0010 (Tares website, 2015). As mentioned above the minimum import of the tariff quota no. 15 is 166'076 t. Cherry tomatoes are typical glasshouse vegetables and they are produced domestically from April until November, whereof the highest yield occurs in July and August. Therefore, the protected phase (blue line) of cherry tomatoes is valid from 01 May to 20 October, the effective protected phase (red line) holds for the period from 11 June until 24 September and the green line is the free phase, which is from 21 October until 30 April (Swisslegumes, 2015). The table below highlights the three different phases:

Figure 5.2 Cherry tomatoes import phases

Cherry-Tomaten Tomates-cerises		1.5.	11.6.	24.9.	20.10.
am Zweig / en grappes Zolltarifnummer 0702.	0010-911 KZA	Kontingent 0011-911 KZA	Ausserhalb Kontingent 0019-911 AKZA	Bei Vollversorgung 0019-911 AKZA-Code1	
Zoll (pro 100 kg brutto)	Fr. 5.00	Fr. 5.00	Fr. 731.00	Fr. 600.00	
andere / autres Zolltarifnummer 0702.	0010-999 KZA	Kontingent 0011-999 KZA	Ausserhalb Kontingent 0019-999 AKZA	Bei Vollversorgung 0019-999-Code1 AKZA-Code1	
Zoll (pro 100 kg brutto)	Fr. 5.00	Fr. 5.00	Fr. 731.00	Fr. 600.00	

Source: Swisslegumes (2015)

As mentioned before, tariff rates vary in accordance with the protected and free phase. The table below illustrates that the tariff rate during the protected phase, when tariff quotas are allocated, is 5.00 Swiss francs per 100 kg gross. The tariff rate out of the quota adds up to 731.00 Swiss francs per 100 kg gross and the reduced tariff rate out of the quota (when having full domestic supply) is 600.00 Swiss francs per 100 kg gross. The difference between the tariff rate out of the quota and the tariff rate under the quota can be explained by the protection of the domestic production as importers prefer to purchase more expensive goods from domestic producers instead of importing cheaper products where high tariff rates are added. During the free phase the tariff rate equals the tariff rate under the tariff quota.

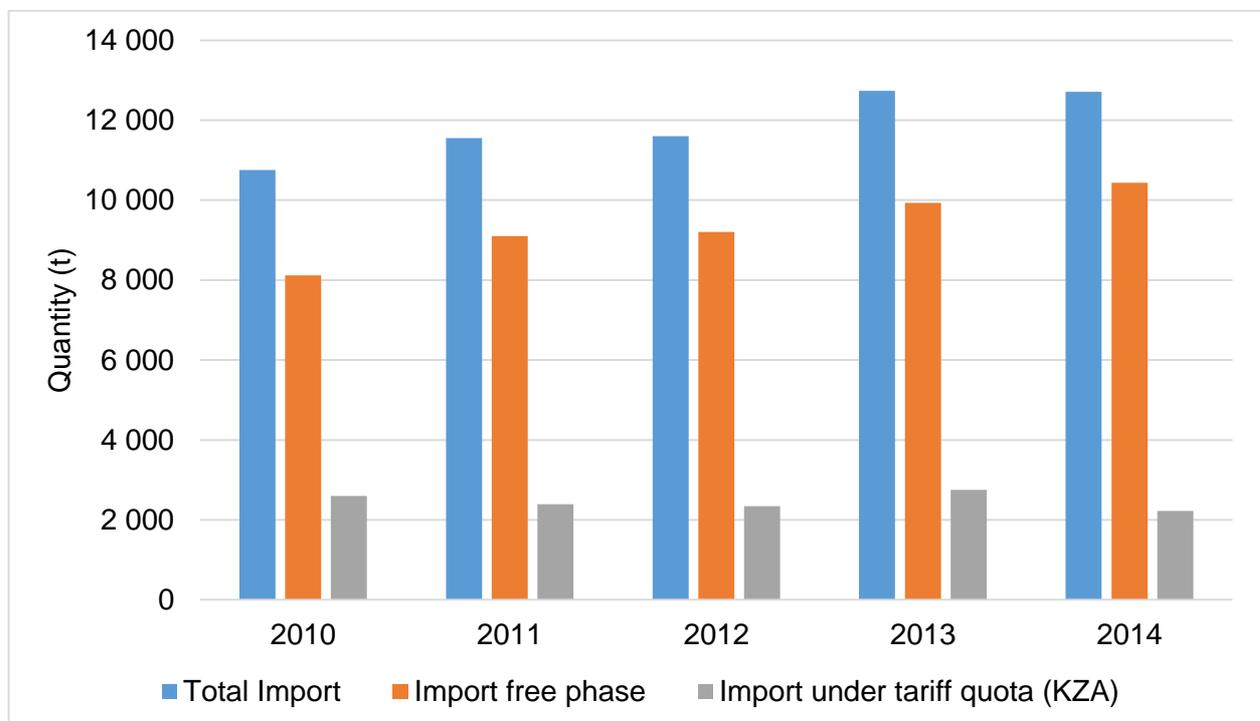
Table 5.2 Cherry tomatoes duty rates

Phase	Import option	Duty rates in CHF per 100 kg gross
21 Oct – 01 May	free	5.--
30 Apr – 20 Oct (protected phase)	Import under the quota (KZA)	5.--
	Import out of the quota (AKZA-1)	600.--
	Import out of the quota (AKZA)	731.--

Source: Author based on data from Tares (website, 2015)

The figure below illustrates the changes in imports within the last five years. It is obvious from the data that imports (blue bar) of cherry tomatoes increased steadily from 10'757 t in 2010 to 12'715 t in 2012. The bar chart also highlights that most imports occurred during the free phase (orange bar). A significant smaller number of cherry tomatoes entered the Swiss market during the protected phase (grey bar) once tariff quotas were allocated. On average, imports during the free phase accounted for 80% whereas imports during the protected phase accounted for 20% of total imports. This result suggests that the minimum amount, which must be imported in accordance with the WTO concessions, incurs during the free phase.

Figure 5.3 Cherry tomatoes imports under different phases 2010 - 2014



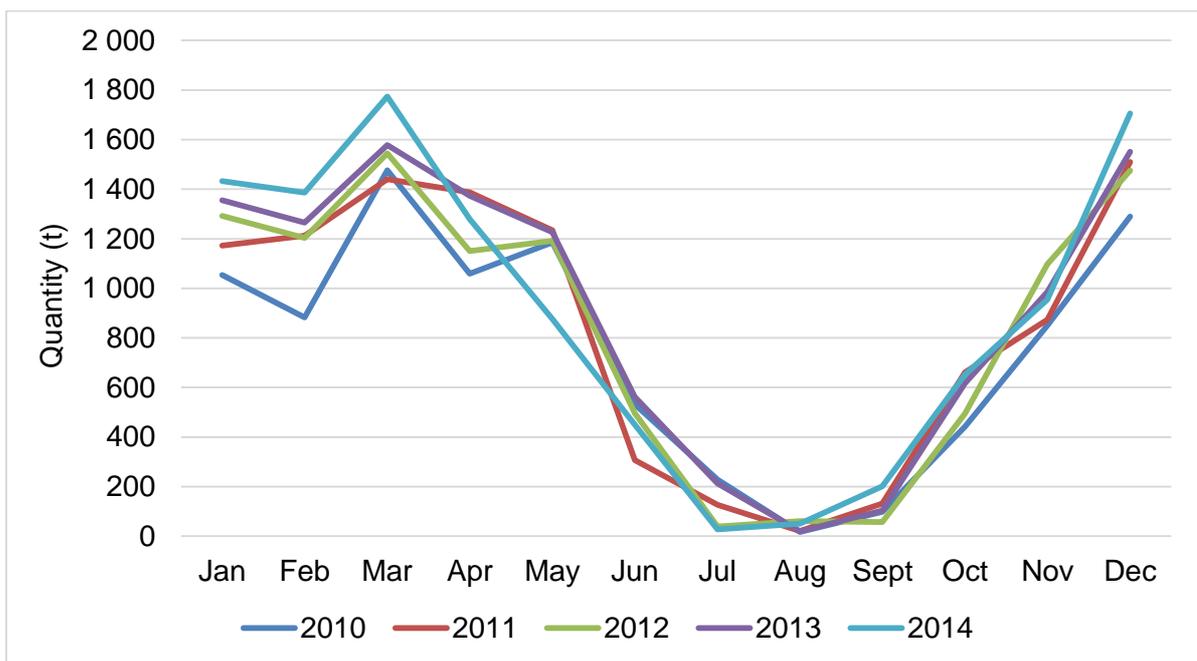
Source: Author based on data from BLW (2015b)

On the contrary, the export of cherry tomatoes has low significance in the trade balance. On an overall import amount of 59'367 t from 2010 to 2014, only 146 t of cherry tomatoes were exported.

In other words, for every 1'000 kg of import only 2.46 kg of cherry tomatoes are exported. According to Matthias Zurflüh (2015b), the export figures can be neglected as export of cherry tomatoes is seldom and sporadic. The main reason for the export of cherry tomatoes is short-term surpluses in domestic production, which cannot be distributed among domestic traders. Nevertheless, since cherry tomatoes are fresh vegetables, export must be organised rapidly and with the high price of Swiss products, purchasers are rarely found (ibid.).

The next figure presents an overview of total annual imports of cherry tomatoes from 2010 to 2014. The import lines of all years have the same tendency. From the figure it can be seen that every year imports commence on a higher basis and reach their peak in March. Whereas in March 2010, imports peaked with a total of 1'476 t, in March 2014 this figure added up to 1'773 t. Further, the chart shows a decrease of imports in February, which results from the lower amount of calendar days in February. The descending line from May until September can be explained by the protected phase, where imports are limited to tariff quotas.

Figure 5.4 Cherry tomatoes total import 2010 - 2014

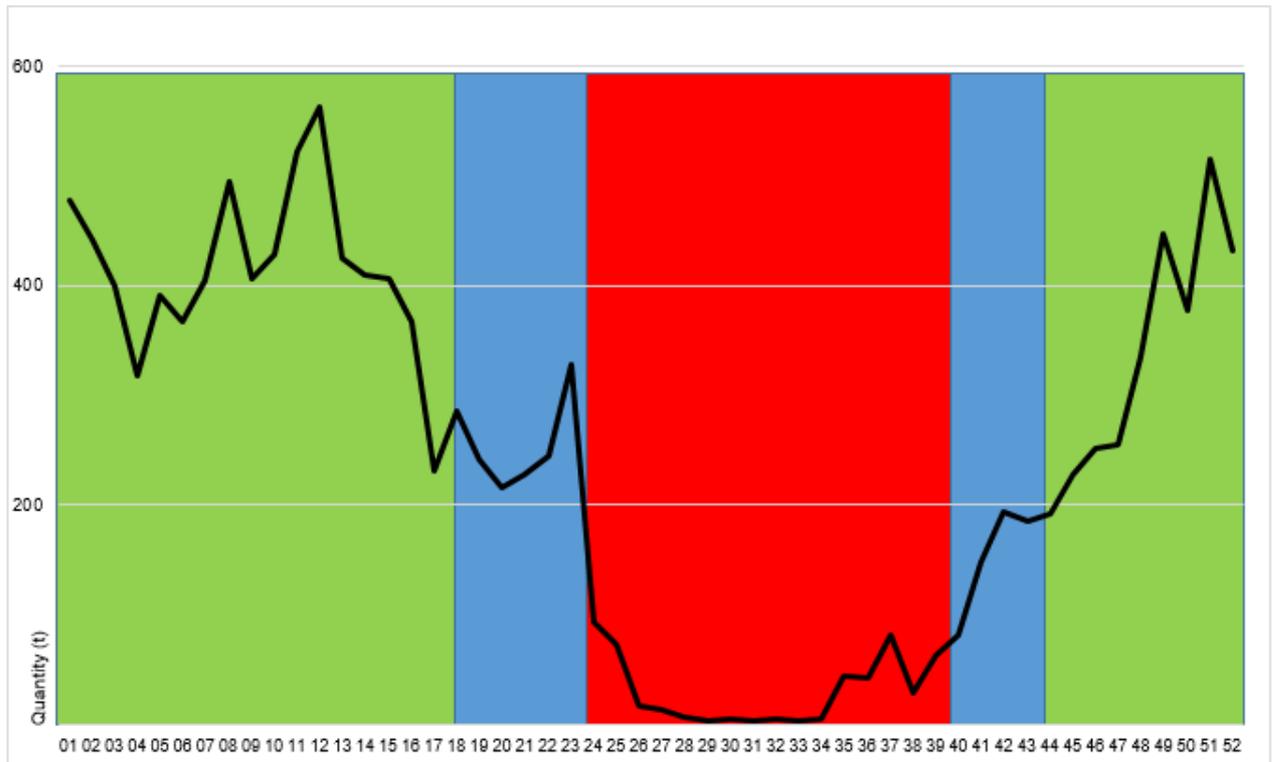


Source: Author based on data from Agristat (2015)

Figure 5.5 is a more detailed illustration of figure 5.4 and only captures the import of cherry tomatoes in 2014. It shows the correlation between the import and the different import phases. The green hatched area indicates the free phase, the blue hatched area the protected phase and the red hatched area the effective protected phase. The graph indicates that with the protected phases, market access decreases and lower quantities of cherry tomatoes enter the Swiss market. Traders are only allowed to import cherry tomatoes if the Federal Office for Agriculture allocates

tariff quotas. This situation is demonstrated in the chart in the calendar weeks 24 to 29 and 34 to 40 where the import line moves upwards.

Figure 5.5 Cherry tomatoes total import 2014



Source: Author based on data from BLW (2015b)

In the figure below the allocated tariff quotas for cherry tomatoes in the year 2014 are outlined. It is seen that on the 11 June, the Federal Office for Agriculture allocated a tariff quota of 50'000 kg. As mentioned in the introduction, this tariff quota is then distributed to different importers according to their share in domestic power. The tariff quotas are limited to a certain date, which means that the allocation of 50'000 kg was only valid until the 17 June 2014. Only one day later the Federal Office of Agriculture released a second tariff quota of 50'000 kg. Such a short interval indicates that the first tariff quota issued on the 11 June could either not cover the domestic demand or domestic supply was lower than reported. Between the 24 June and the 02 July or from the 09 July to the 29 August respectively, the table shows no allocation of tariff quotas, which indicates that domestic supply was in equilibrium with domestic demand.

Table 5.3 Cherry tomatoes allocation of tariff quota

Period	Allocation of tariff quota (kg gross)
11.06.2014 - 17.06.2014	50'000
12.06.2014 - 17.06.2014	50'000
18.06.2014 - 24.06.2014	80'000
02.07.2014 - 08.07.2014	20'000
02.07.2014 - 08.07.2014	60'000
29.08.2014 - 02.09.2014	20'000
03.09.2014 - 09.09.2014	30'000
05.09.2014 - 09.09.2014	30'000
10.09.2014 - 16.09.2014	40'000
12.09.2014 - 16.09.2014	60'000
17.09.2014 - 24.09.2014	30'000

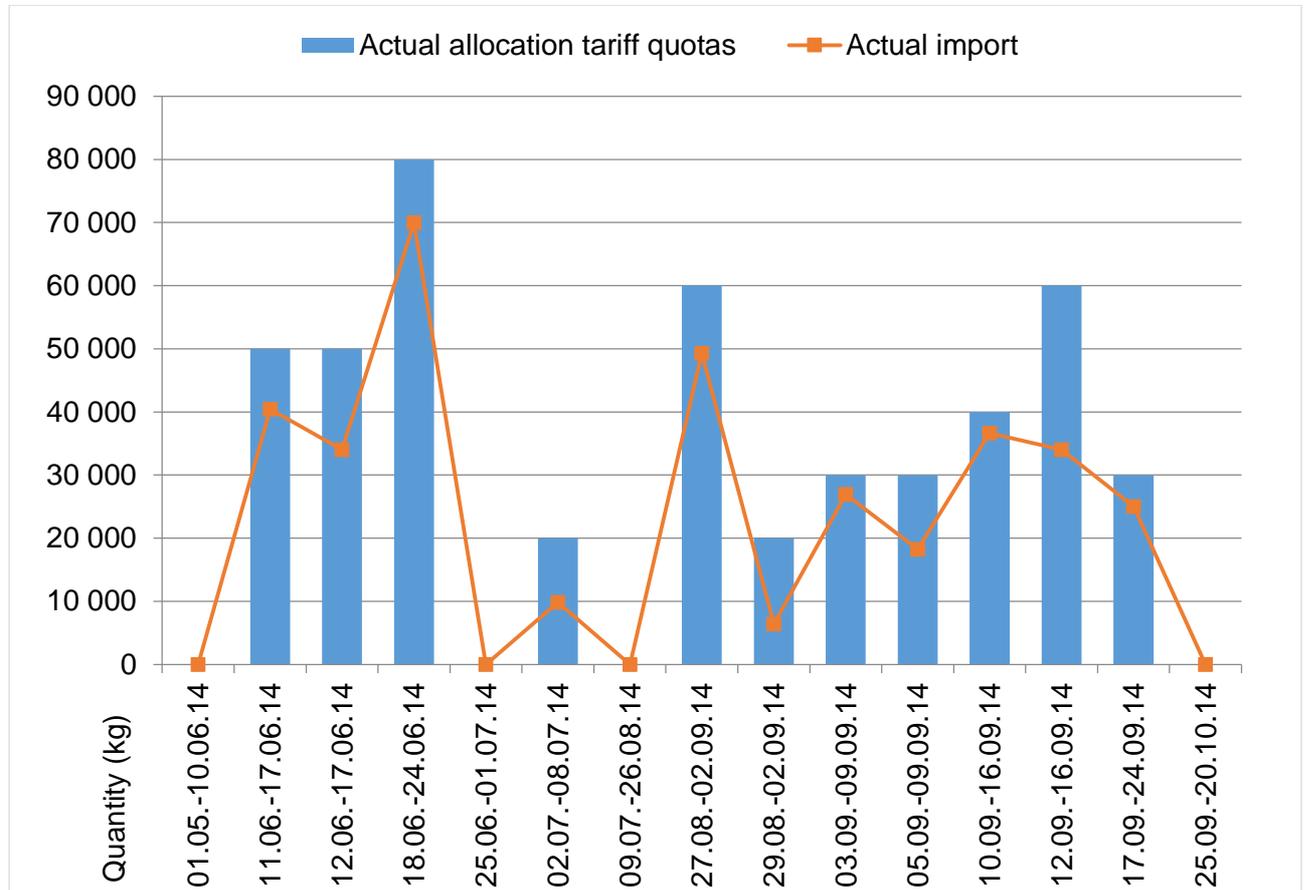
Source: Author based on data from Federal Office for Agriculture (BWL, 2015c)

In the following figure, the utilisation of tariff quotas mentioned before, are displayed in a bar chart. The orange dots indicate the actual import while the blue bars show the tariff quotas. According to Matthias Zurflüh (2015a), tariff quotas are never used at full capacity due to the difference between gross and net weighting, the fact that some importers withdraw from business or the fact that importers concentrate on importing during the free phase and allow their tariff quota share to expire. Already the usage of 80% of a tariff quota suggests a high utilisation rate and demands for a new tariff quota for the following interval (ibid.). In 2014, the utilisation rate of tariff quotas was on average 79%, which indicates an efficient distribution of tariff quotas. As the figure displays, only tariff quotas from the 29 August to 02 September with 32% and 12 September to 16 September with 57%, respectively, performed below the expectations of the Federal Office for Agriculture. Over the last five years, the utilisation rate of tariff quotas for cherry tomatoes were 85%.

As mentioned above, during the protected phase, Switzerland distinguishes between an effective protected phase and the protected phase, which is notified within the WTO. By the time the terms about the effective protected phase were negotiated the future of domestic production within the vegetable market was underestimated and it was predicted that the availability of Swiss products would be shorter than the notified protected period (Zurflüh, 2015b). Hence, the Federal Office for Agriculture decided to minimise the protected phase from 01. May to the 20 October to the effective protected phase from 11 June to the 24 September. According to Matthias Zurflüh (2015b), the domestic production of many products exceeded the expectations and if negotiated today the protected period would equal the effective protected period since cherry tomatoes are being cultivated throughout the whole year. Nevertheless, in order to alter the law, consensus in parliament is required, which is problematic and tiresome (ibid.). Thus, most domestic producers accepted such a differentiation. The bars in the beginning and at the end of the next figure display zero since they

lie outside the effective protected phase and traders were able to import cherry tomatoes in an unlimited quantity.

Figure 5.6 Cherry tomatoes utilisation of tariff quotas 2014



Source: Author based on data from BLW (2015b)

Overall, there has been no significant difference in the allocation of tariff quotas over the last five years. Due to the constant demand and the partially insufficient domestic production, the Federal Office for Agriculture has allocated tariff quotas regularly. According to Matthias Zurflüh (2015b), the allocation of tariff quotas in the cherry tomato market depends firmly on climatic conditions, which consequently influence domestic production. If lighting conditions during winter and spring were good, domestic production will boost and meet the domestic demand requirements. This phenomenon can be observed in the utilisation of tariff quotas 2012, where during the protected phase only five tariff quotas were allocated.

In the appendix all figures of the utilisation of tariff quota as well as the associated utilisation rates from 2010 to 2014 of cherry tomatoes will be displayed.

The following table compares the imports within the tariff quota on the left hand side, the import with the reduced tariff rate in the middle and the import out of the tariff quota on the right hand

side. Compared to an import of 2'225,25 t in 2014 under the tariff quota, only 17,26 t were imported out of the quota. Consequently, there is nearly no trade out of the quota. According to Matthias Zurflüh (2015a), the reasons for the trade outside the tariff quota are calculation mistakes of importers or the fact that new traders who want to enter the import business carry out imports in order to receive a tariff quota share in the next years import share distribution.

When enjoying full domestic supply, the reduced tariff rate out of the quota (AKZA Code 1) is imposed on imports. For example, in 2014 cherry tomatoes were fully domestically supplied between 25 June until 01 July, as illustrated in the table above. During those days 36.8 t were imported with the reduced tariff rate. As mentioned in the introduction, such imports generally refer to organic or specialised products, which the domestic market is unable to offer.

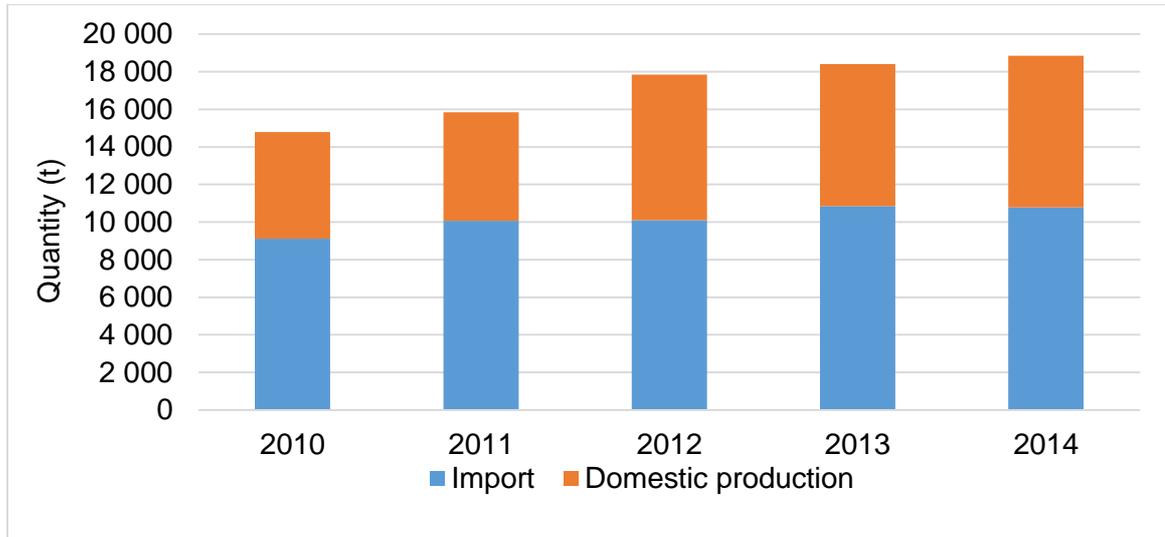
Table 5.4 Comparison of cherry tomatoes under and out of tariff quotas

	Import under tariff quota (KZA)	Import out of tariff quota (AKZA-1)	Import out of tariff quota (AKZA)
2010	2598,91	34,82	6,50
2011	2391,18	52,50	10,77
2012	2341,72	45,86	10,26
2013	2748,02	43,25	15,65
2014	2225,25	36,80	17,26

Source: Author based on data from BLW (2015b)

From the data in figure 5.7 it is apparent that not only the import increased constantly but also the domestic production have risen over the last five years. In 2010, domestic production was on a level of 5685 t compared to 8072 t in 2014. According to Matthias Zurflüh (2015b), trends for the future for cherry tomatoes are florid since they have experienced a product change and become a lifestyle article. Eating cherry tomatoes is trendy and convenient. Unsurprisingly, many producers and farmers decided to jump at the chance and build glasshouses in order to produce cherry tomatoes. However, he sees a risk in excess production mainly during the summer months when domestic production peaks and at the same time summer holidays hit the industry.

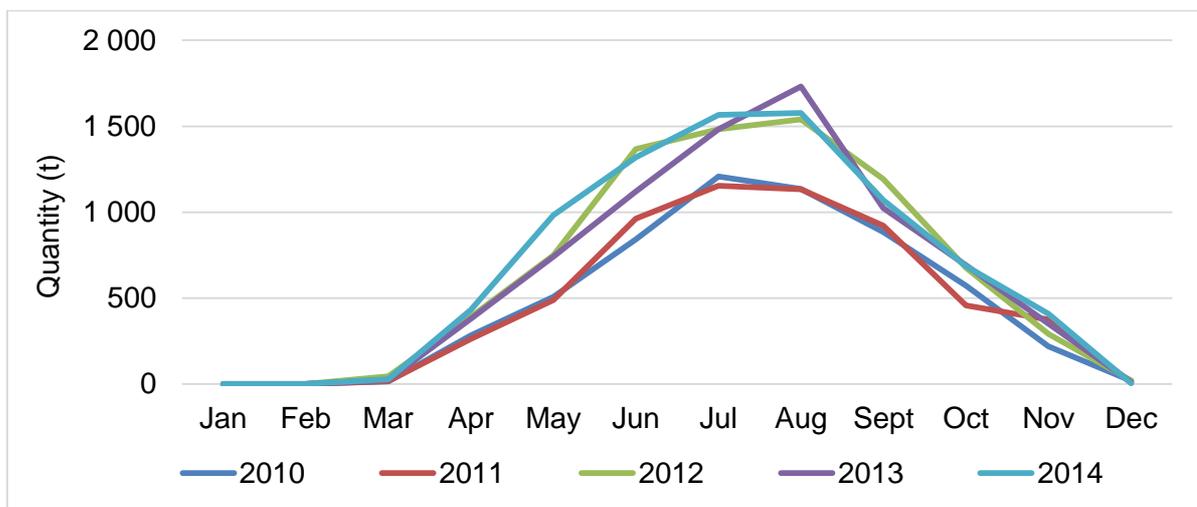
Figure 5.7 Cherry tomatoes import and domestic production



Source: Author based on data from Agristat (2015)

From the graph below, we can see the detailed domestic production trends of cherry tomatoes over the last five years. Due to externalities such as climate and planting conditions, most cherry tomatoes are produced between June and September, which corresponds to the border protection. Further, the graph illustrates a lower production (1'120 t) of cherry tomatoes in June 2014 compared to 2012 (1'366 t) and 2014 (1'318 t), respectively. This statement suggests that tariff quotas in June 2014 must have been higher in order to cover the domestic demand. Interestingly, as seen in figure 5.6 the Federal Office of Agriculture allocated in June 2014 a maximum of 180 t in tariff quotas whereas in 2013 a maximum of 290 t were released, which eventually aligns with the former suggestion.

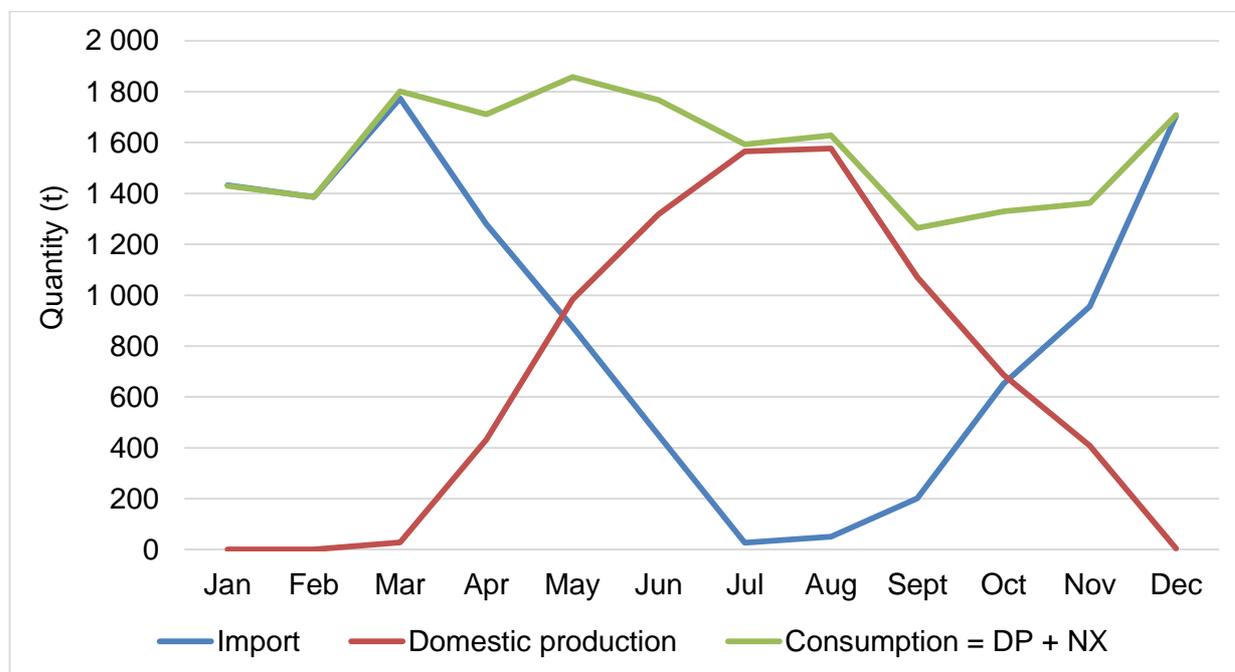
Figure 5.8 Cherry tomatoes domestic production 2010 - 2014



Source: Author based on data from Agristat (2015)

The figure below presents the import (blue line), domestic production (red line) and domestic demand (green line) of cherry tomatoes in 2014. From the data, it is apparent that the consumption level is constant and underpins the argument that cherry tomatoes are consumed on the same level throughout the year. On the other hand, the graph displays the reciprocal interplay between imports and domestic production. As soon as the domestic production ascends, the border protection grasps and imports descend. In July and August almost no cherry tomatoes were imported due to the fact that traders were required to wait for allocated tariff quotas unless they were willing to import cherry tomatoes out of the tariff quota to exorbitant tariff rates. The most striking result to emerging from the data is that even though the effective protected phase ends on the 24. September and imports are unlimitedly possible, the import rate remains on a moderate level. This result indicates that traders still purchase domestically produced cherry tomatoes in order to cover the domestic demand. Matthias Zurflüh (2015b) agrees partially with this statement. On one hand, importers within the retail sector favour domestic products since quality and image are of paramount importance. On the other hand, importers within the gastronomy, accounting for 45%, are indifferent to domestic or foreign products. Within this sector, prices are everything that counts. Hence, protection is crucial and the protected period should not be shortened. The issue between imports for retail business and gastronomy will be further elaborated in section 3.

Figure 5.9 Cherry tomatoes total consumption, import and domestic production 2014



Source: Author based on data from Agristat (2015)

To summarise, WTO tariff quotas have not altered trade to the extent that cherry tomatoes still can be imported in time of scarcity and protected where domestic protection prevails. As outlined in the

analysis, domestic production increased within the last five years as the lucrative market attracted market participants. According to Matthias Zurflüh (2015b), domestic competition will intensify and end in surplus production as it could have been observed during summer 2015. Since exports are often a zero-sum game and storage not yet technically possible, excessive production might impinge negatively on the cherry tomatoes market.

5.2 Carrots

Carrots are a typical warehouse vegetable and their features stand for many other products such as apples or cabbage. Carrots have the tariff number 0706.1020 (Tares website, 2015) and they belong to the tariff quota no. 15 (fresh vegetables) where a minimum import of 166'076 t. is required. Carrots are domestically produced throughout the year with the highest harvest in January, February, March and April. In virtue of the high annual domestic production rate of carrots, the protected period for is prolonged. The graph below shows that the protected phase (blue line) is valid from the 25 May to the 10 May, the effective protected phase (red line) holds for the period from the 01 June to the 10 May. The green line, which accounts for the free phase, is only applicable from the 11 May to the 24 May. Nevertheless, due the WTO agreements, Switzerland is forced to generate a minimum market access within all product categories and withdraw trade barriers for a minimum of two weeks. The table below highlights the three different phases:

Figure 5.10 Carrots import phases

Karotten				10.5	1.6				
Carottes				10.5	25.5				
Baby-/Pariser Baby/Parisiennes									
Zolltarifnummer 0706.		1020-011	Kontingent	Ausserhalb Kontingent	Bei Vollversorgung				
		KZA	1021-011	1029-011	1029-011-Code1				
Zoll (pro 100 kg brutto)		Fr. 4.00	Fr. 4.00	Fr. 155.00	Fr. 120.00				
Karotten / carottes									
Zolltarifnummer 0706.		1020-099	Kontingent	Ausserhalb Kontingent	Bei Vollversorgung				
		KZA	1021-099	1029-099	1029-099-Code1				
Zoll (pro 100 kg brutto)		Fr. 4.00	Fr. 4.00	Fr. 155.00	Fr. 120.00				

Source: *Swisslegumes (2015)*

As mentioned above, tariff rates vary in accordance with the protected and free phase. In the table below it is shown that the tariff rate during the protected phase is 4.00 Swiss francs per 100 kg gross. The tariff rate out of the quota adds up to 155.00 Swiss francs per 100 kg gross and the reduced tariff rate out of the quota (when having full domestic supply) is 120.00 Swiss francs per 100 kg gross. The difference between the tariff rate out of the quota and the tariff rate under the quota is much smaller in comparison to other products. The former can be explained by the high availability of domestic products throughout the year, where the temptation to import carrots is small. During the free phase, the tariff rate equals the tariff rate under the tariff quota.

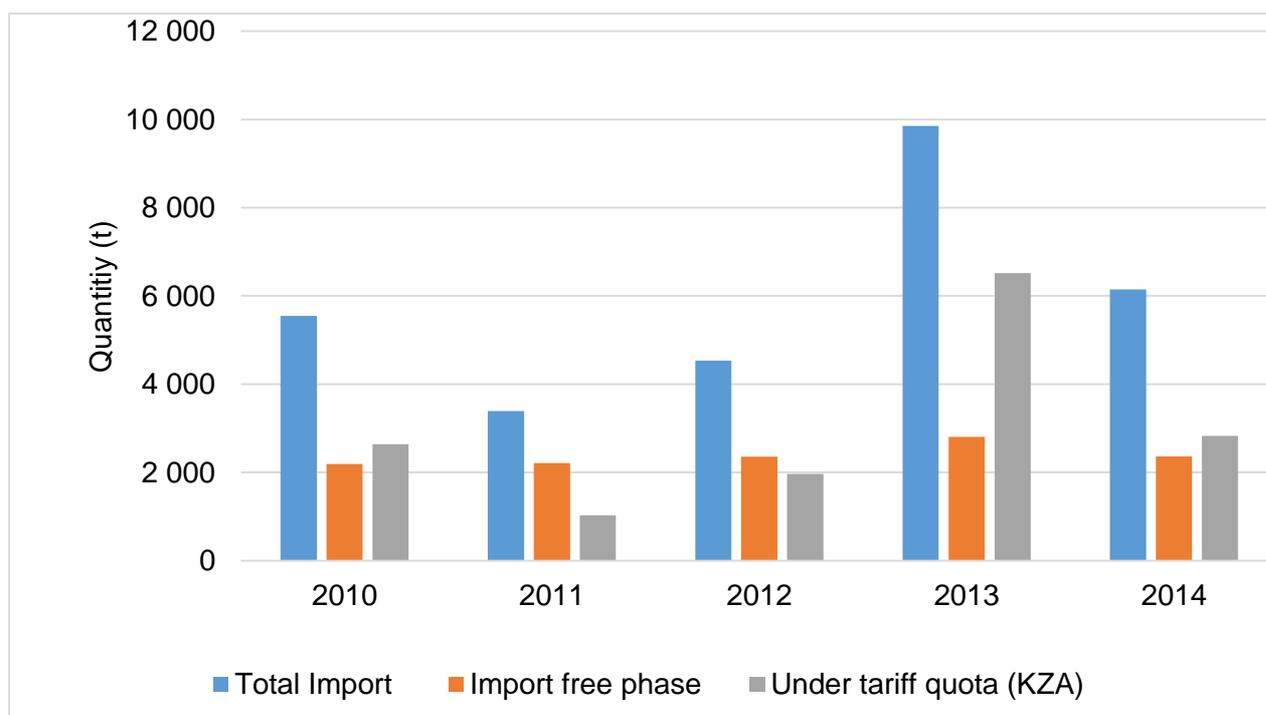
Table 5.5 Carrots duty rates

Phase	Import option	Duty rates in CHF per 100 kg gross
11 May – 24 May	free	4.--
25 May – 10 May (protected phase)	Import under the quota (KZA)	4.--
	Import out of the quota (AKZA-1)	120.--
	Import out of the quota (AKZA)	155.--

Source: Author based on data from Tares (website, 2015)

The figure below presents the changes in imports within the last five years. The data suggests that the total import of carrots is irregularly distributed with a peak in 2013 of 9'854 t and an all time low of 3'389 t in 2011. According to Matthias Zurflüh (2015b), the increase in imports from 4'538 t in 2012 to 9'854 t in 2013 is not exceptional in relation to the total market volume of carrots. He thinks that the reason behind the ascending import figure might be poor storage or low quality of domestic carrots and therefore more goods need to be imported. Unlike cherry tomatoes, where imports incur during the free phase, the highest import of carrots occurred under the tariff quota. On average, Switzerland imports a quantity of 2'386 t during the free phase (orange bar) in comparison to a quantity of 2'994 t under the tariff quota (grey bar). Overall, the bar chart imposes that carrots cannot be seen as a leading import vegetable and are mostly produced domestically.

Figure 5.11 Carrots imports under different phases 2010 - 2014



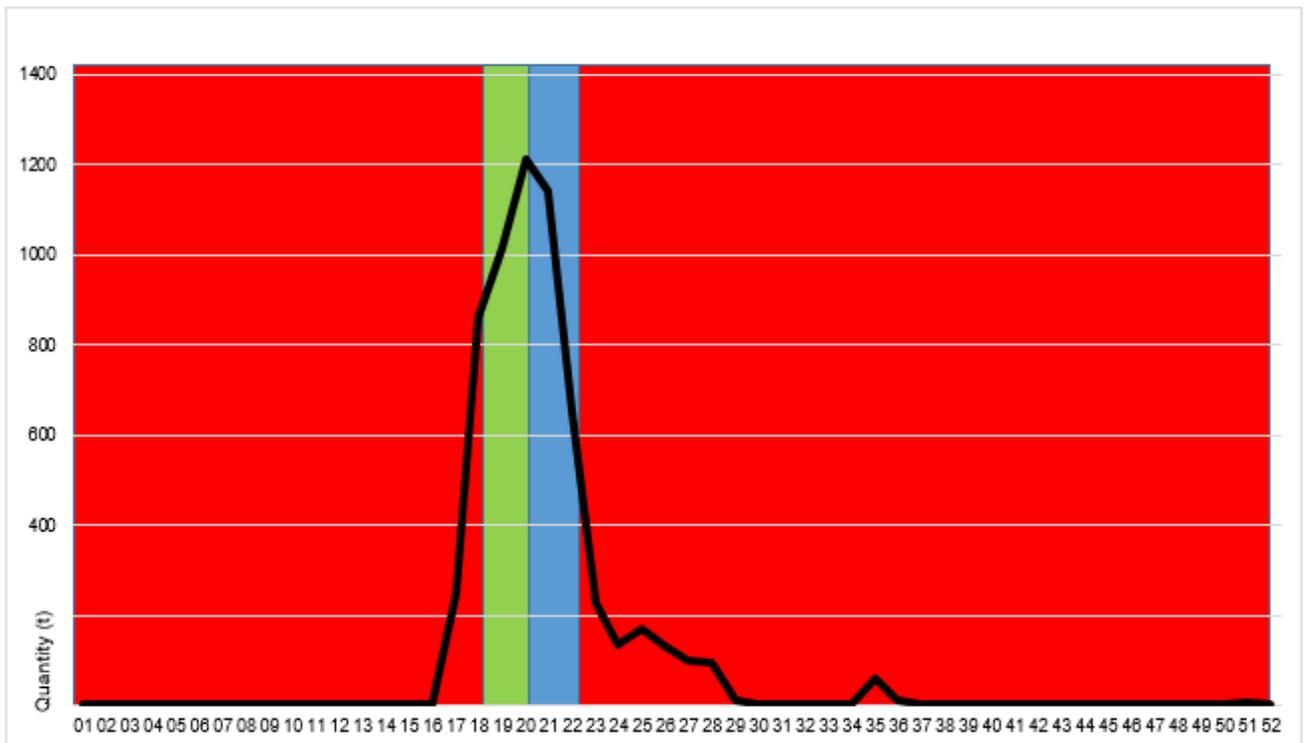
Source: Author based on data from BLW (2015b)

Similar to cherry tomatoes, the export of carrots has low significance in the trade balance. On an overall import amount of 29'479 t within the last five years, only 93 t of carrots were exported, which is equivalent to 0,33%. Like cherry tomatoes, the reason for exporting of carrots is excess production. Furthermore, when Russia suffered from the embargo in 2014, carrot producers hoped for an attractive niche market and started to export carrots to Russia (Zurflüh, 2015b). Nevertheless, only very small quantities could be exported and both transportation as well as the high price level of Switzerland are obstacles to trade

Figure 5.12 captures the changes of imports in 2014. It outlines the relation between imports and the various import phases. Unlike cherry tomatoes, carrots are domestically produced throughout the year. Hence, the protected phase (red area) remains for eleven months and the border protection is withdrawn only during four weeks in May (green and blue area).

According to Matthias Zurflüh (2015b), the carrot market is only exposed to free trade due to WTO agreements; otherwise carrots would be protected throughout the whole year. Nevertheless, he supports the free phase of two weeks since the market experiences a clean up where warehouses are cleared and older goods are sold. As soon as the cycle of the protected phase starts again, the availability of fresh and high quality products increases and is favourable to domestic consumers (ibid.).

Figure 5.12 Carrots total imports 2014

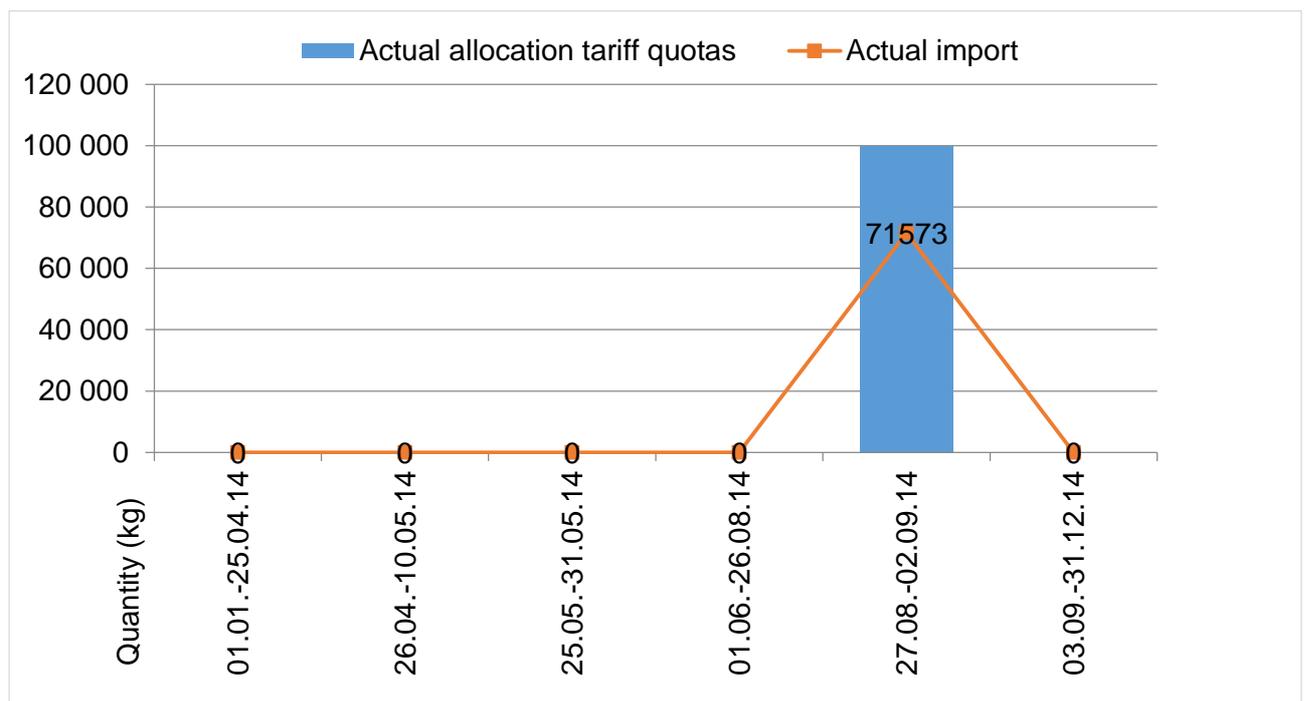


Source: Author based on data from BLW (2015b)

In terms of releasing tariff quotas, the carrot market is unique as during the last four years only one tariff quota has been allocated by the Federal Office for Agriculture. The amount of the allocated tariff quota in August 2014 was 100'000 kg whereof 71'573 kg were actually imported. This indicates an utilisation rate of 71%. According to Matthias Zurflüh (2015b), the bad weather conditions during last summer induced a shortage in carrots and thus a tariff quota was required.

Nevertheless, within the carrot market the Federal Office for Agriculture also allocates individual tariff quotas for traders (Spörri, 2015). For example, when traders negotiate an agreement with local producers to deliver a predetermined amount of carrots and the producer is ultimately unable to fulfil the contract due to external or internal circumstances, the trader can apply for an individual tariff quota with the Federal Office for Agriculture in order to reduce his loss (ibid.). Individual tariff quotas having been allocated within the last five years add up to 350'000 kg. Those individual tariff quotas also explain partially the deviation from the import line to the protected phase in figure 5.12 Even though no official tariff quotas were allocated in the protected phase, imports occurred.

Figure 5.13 Carrots utilisation of tariff quotas 2014



Source: Author based on data from BLW (2015b)

The following table compares the imports within the tariff quota, the imports with the reduced tariff rate and the imports out of the tariff quota. As the figure illustrates trade, which incurs out of the tariff quota is redundant. Within the last five years, only 4.20 t were imported out of the tariff quota compared to 14'974 t under the tariff quota. This result can be explained by the fact that in the carrot market only few tariff quotas are allocated, where there is the possibility to import out of the

quota in the first place. When Switzerland enjoys full domestic supply, the AKZA Code 1 is imposed on imports. According to Nicolas Spörri (2015), the imports that occurred on the basis of the reduced tariff rate are due to shortages of specialised products. Usually in spring, the demand for organic carrots intensifies but domestic production has not yet reached harvest. Hence, such products must be imported from abroad in order to satisfy customer expectations.

Table 5.6 Comparison of carrots under and out of tariff quotas

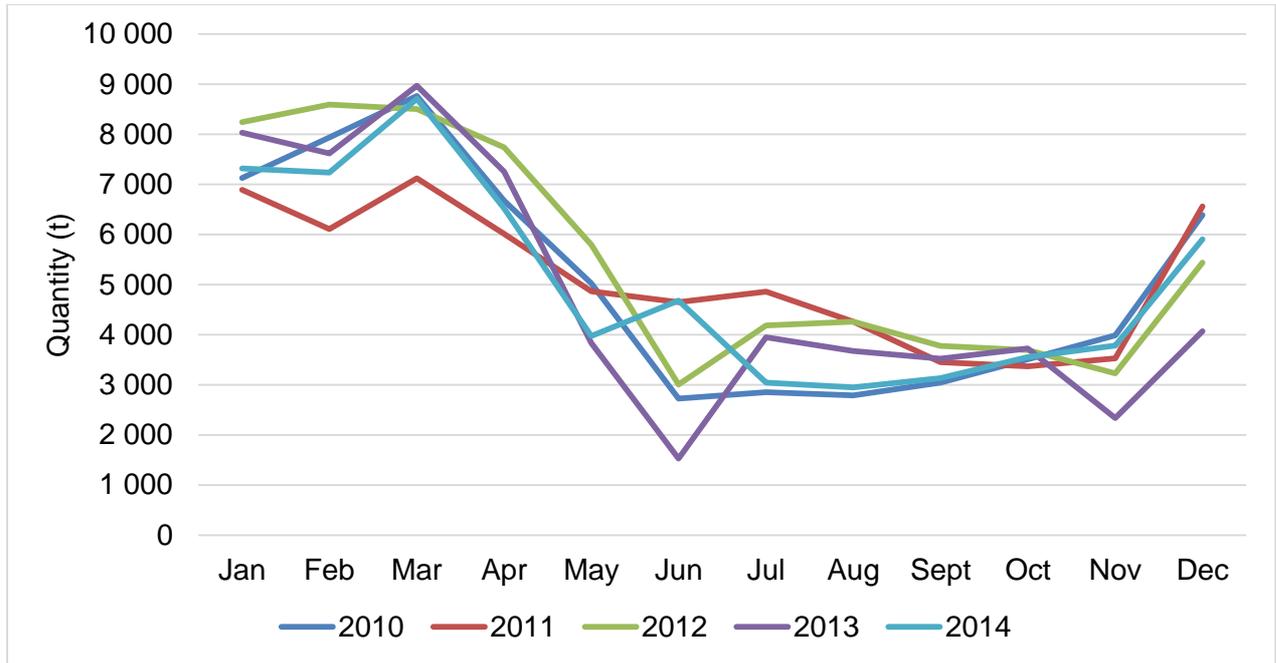
	Import under tariff quota (KZA)	Import out of tariff quota (AKZA-1)	Import out of tariff quota (AKZA)
2010	2'639,45	716,34	1,40
2011	1'026,66	147,30	0,56
2012	1'963,23	219,00	0,34
2013	6'517,53	534,74	0,12
2014	2'827,65	949,49	1,74

Source: Author based on data from BLW (2015b)

Within the carrots market, the domestic production is predominant. On average, domestic production accounts for 92% and leaves the import way behind with 8%. Domestic production had a low of 58'506 t in 2013 and a peak with 66'465 t in 2012. According to Matthias Zurflüh (2015b), the predicted trend for carrots is relatively stable. Unlike cherry tomatoes, carrots failed to become a lifestyle product and pertain to the more traditional vegetables.

The graph below the detailed domestic production of carrots over the last five years is outlined. It is apparent that Switzerland harvests the majority of carrots from January to March. The lowest carrot production occurred in June 2013 with 1'524 t. As mentioned above and seen in the figure below Switzerland produces carrots throughout the whole year. Nevertheless, from March until May or June, a steady descending production line can be observed. According to Matthias Zurflüh (2015b), the new production of carrots, which is not only very complex and challenging but also highly cost intensive, starts in April. Hence, producers advocate lower quantity but high quality production outcomes than making high investments and run the risk of flawed products.

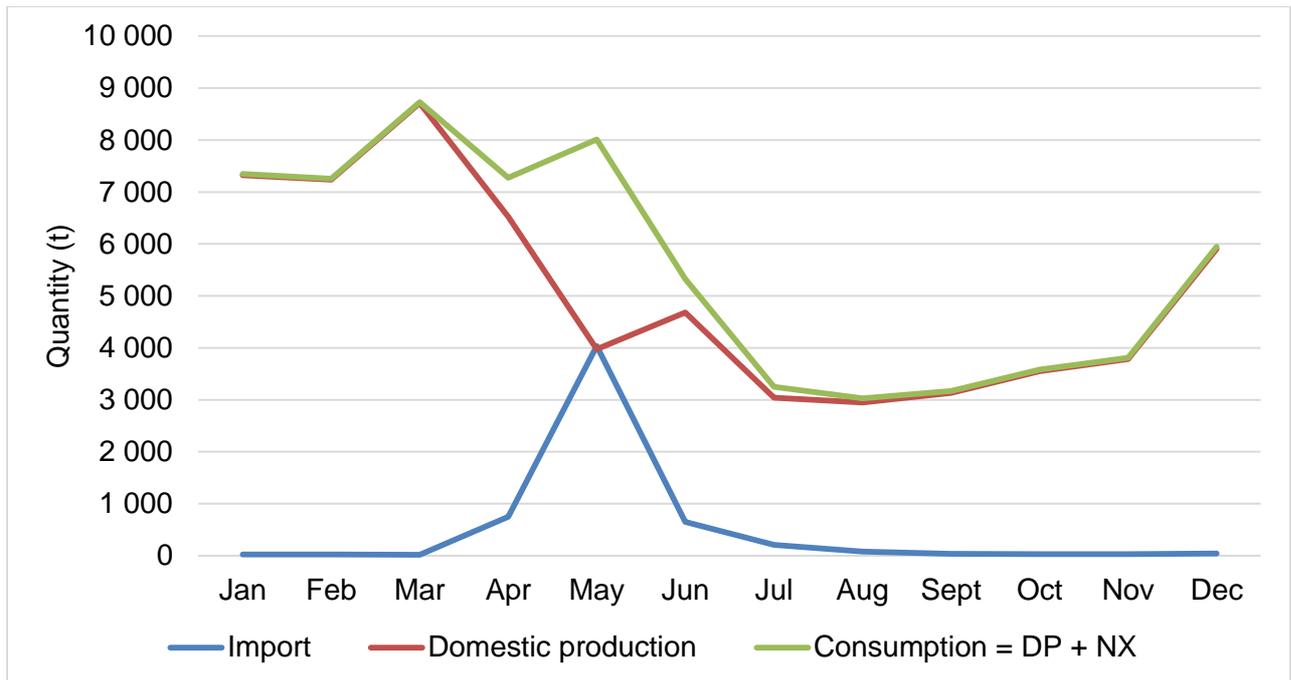
Figure 5.14 Carrots domestic production 2010 - 2014



Source: Author based on data from Agristat (2015)

The figure below presents the import, domestic production and domestic demand of carrots in 2014. It can be seen that consumption decreases in July, August and September which is an additional reason why domestic production decreases likewise. The descending demand line can be explained by seasonality of other products that offer a substitute or variation on the menu. According to Matthias Zurflüh (2015b) also the pricing is decisive. Whereas the prices for lettuce deviate noticeably from summer to winter, carrots remain on the same price level throughout the year. Unsurprisingly, consumers favour the purchase of lettuce in summer when prices are low and substitute other goods such as carrots. Further, the graph illustrates the correlation between domestic production and import. As domestic production is reduced in May and consumption remains high, the market opens up for imports, which eventually underpins the peak of imports in May, where imports are allowed to an unlimited amount. Overall, both lines decrease as the demand for carrots is descending.

Figure 5.15 Carrots total consumption, import and domestic production 2014



Source: Author based on data from Agristat (2015)

To summarise, with a weekly consumption of 2'000 t in winter months, the market of carrots is enormous and will remain on the same level as in prior years (Zurflüh, 2015b). The unique feature about the carrots market in comparison to the other products is the fact that self-supply could be achieved throughout the year. However, the WTO agreement stipulates a minimum market access of two weeks, which is the reason why imports occur during that time. The reduction of domestic production during the free phase entails not only disadvantages. Stored products are sold before import goods enter the market so that after the free phase, the market can commence with fresh and high quality products in the protected phase. Overall, the introduction of tariff quotas has not altered the trade of carrots since tariff quotas are issued only on special occasions, which we could observe in the analysis.

5.3 Strawberries

Strawberries are a typical glasshouse fruit and are, unlike cherry tomatoes and carrots, strongly influenced by seasonality. They belong to the tariff quota no. 19 (other fresh fruit) and bear the tariff number 0810.1010 (Tares website, 2015). As mentioned above the minimum import of the tariff quota no. 19 is 13'360 t. Due to the seasonal circumstances, strawberries are only domestically produced during spring and summer months, namely from May until August with the production peak in June. As a consequence of such a short domestic production period, the protected phase (blue line) is only valid from the 15 May to the 31 August. In the product categories of fruit,

the effective protected phase and the protected phase always converge. Unlike the negotiations in the vegetable market, fruit market negotiations proceeded differently and involved parties reached the agreement that both periods should align (Zurflüh, 2015b). The green line, which indicates the free phase, is from 01 September to 14 May where domestic supply is generally too low to meet the domestic demand. Hence, importers are allowed to import an unlimited amount of strawberries (BLW, 2014b). The table below highlights the three different phases:

Figure 5.16 Strawberries import phases

Erdbeeren				15.5			31.8
Fraises				15.5			31.8
Zolltarifnummer 0810.	1010-014	Kontingent	AusserKontingen	Bei Vollversorgung			
No tarifaire de douane	KZA	1011-014	1019-014	1019-014-Code1			
Zoll (pro 100 kg brutto)	Fr. 3.00	Fr. 3.00	Fr. 510.00	Fr. 450.00			

Source: *Swisslegumes (2015)*

As mentioned above, tariff rates vary in accordance with the protected and free phase. In the table below it can be seen that the tariff rate during the protected phase, when tariff quotas are allocated, is 3.00 Swiss francs per 100 kg gross. The tariff rate out of the quota adds up to 510.00 Swiss francs per 100 kg gross and the reduced tariff rate out of the quota (when having full domestic supply) is 450.00 Swiss francs per 100 kg gross. The differences between tariff rates under and out of the tariff quota is again significant and shall protect the domestic production. During the free phase, the tariff rate equals the tariff rate under the tariff quota.

Table 5.7 Strawberries duty rates

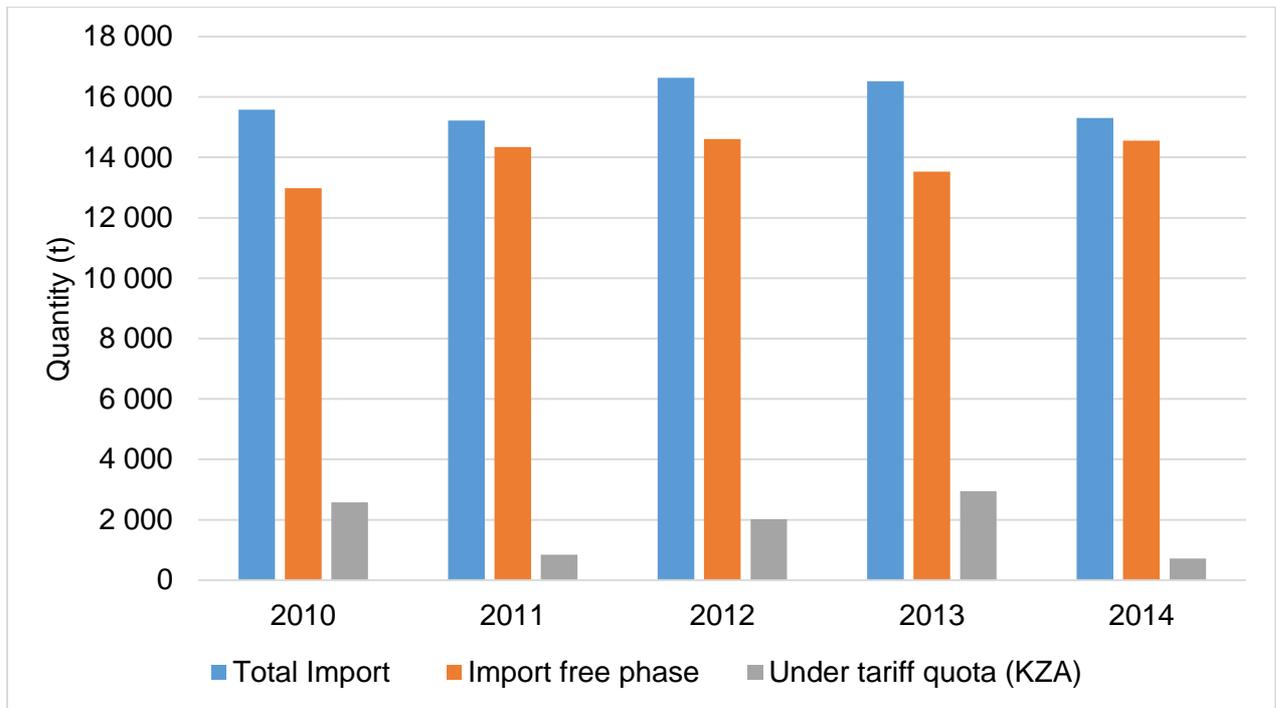
Phase	Import option	Duty rates in CHF per 100 kg gross
1. Sept. – 14. Mai	free	3.--
15. Mai – 31. Aug. (protected phase)	Import under the quota (KZA)	3.--
	Import out of the quota (AKZA-1)	450.--
	Import out of the quota (AKZA)	510.--

Source: *Author based on data from Tares (website, 2015)*

The figure below illustrates the changes in imports of strawberries from 2010 to 2014. It can be observed that imports of strawberries accelerated steadily until 2013 with a slight decrease in 2014, which can be explained by the increase in domestic production during summer. On average, 79'261 t of strawberries were imported within the last five years whereof 70'008 t during the free phase and 9'104 t during the protected phase. Hence, it can be said that most imports incur during the free phase (orange bar) when imports are unlimited and the domestic production is unshielded. A significant smaller amount of strawberries enters the Swiss market during the protected phase

when tariff quotas are allocated. In 2011 and 2014 likewise, only 841 t and 718 t respectively entered the Swiss market under the tariff quota, which implies that only few tariff quotas were allocated in those years. This graph advocates the fact that the minimum amount, which must be imported in accordance with the WTO concessions of tariff quota no 19, incurs during the free phase.

Figure 5.17 Strawberries imports under different phases 2010 - 2014

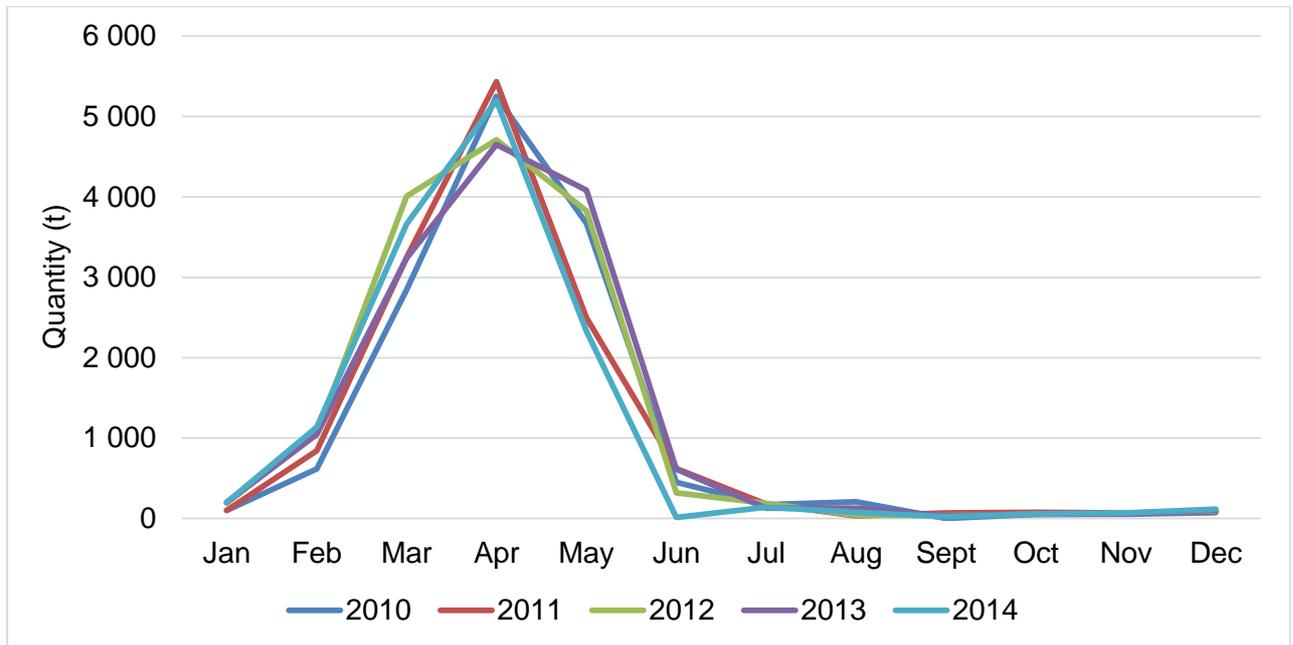


Source: Author based on data from BLW (2015b)

The exports of strawberries are remarkably low. On an overall import amount of 79'261 t from 2010 until 2014, only 116 t of strawberries were exported, which is 0.17%. According to Matthias Zurflüh (2015b), export data in the strawberry business can be neglected as export occurs only under extraordinary circumstances.

The next figure presents an overview of total imports of strawberries within the last five years. The annual import lines converge and are almost identical. It can be seen that the import of strawberries peaks in April and reached with 5'431 t the record high in 2011. The descending line from May to June is explicable by the protected phase, which commences on the 15. May. An interesting fact apparent from the data is that even though imports of strawberries are exposed to free trade from September until December, no goods enter the Swiss market. This manifests that strawberries belong to the type of seasonal products and are mainly consumed in spring and early summer.

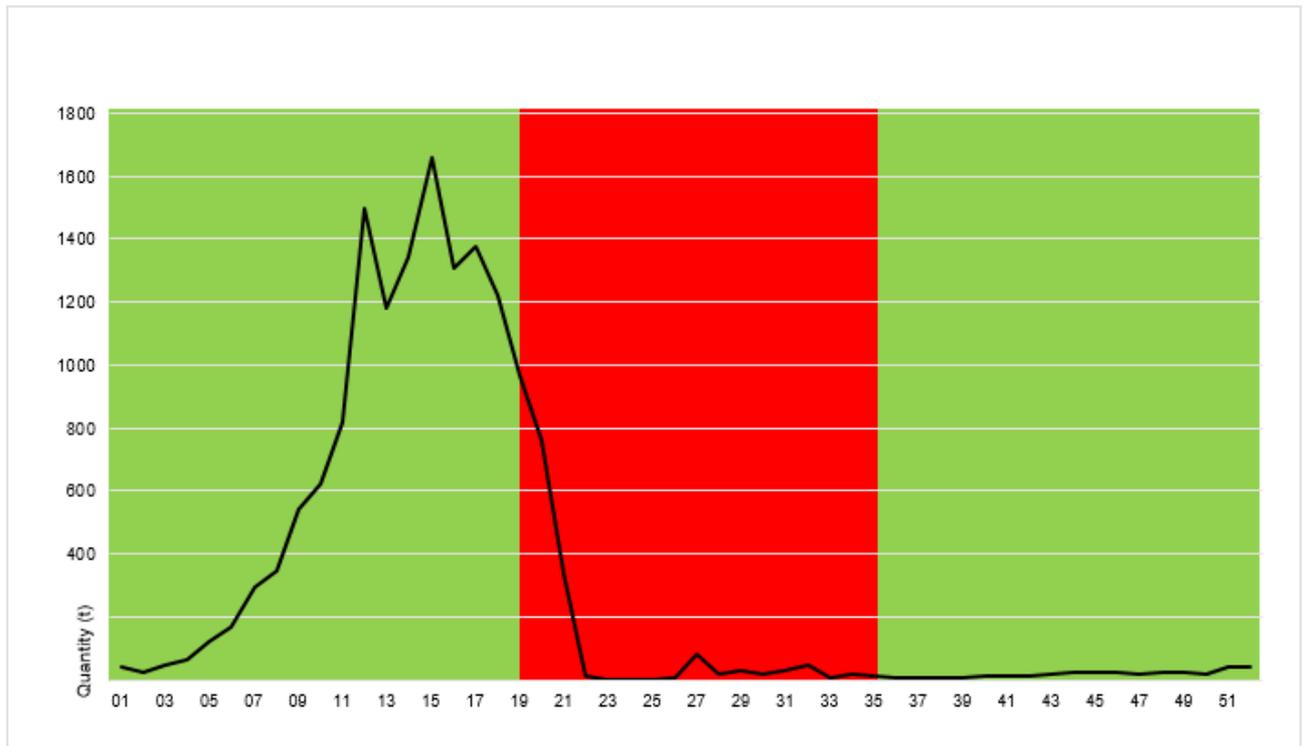
Figure 5.18 Strawberries total imports 2010 - 2014



Source: Author based on data from Agristat and Swissfruit (2015)

Figure 5.19 is a close-up of figure 5.18 and only captures the import of strawberries in 2014. It shows the correlation between the import and the different import phases. The green hatched area indicates the free phase and the red hatched area the effective protected phase. As already mentioned, the fruit market only co-operates with the protected and free phase. Thus, the blue hatched area is omitted. The graph indicates clearly that during the protected phases, where imports are restricted, the import line drops tremendously until it almost reaches the zero mark. Further, the distribution of imports suggests that the product is strongly exposed to seasonality and first and foremost imported in April and May where consumer demand is high while strawberries are not yet being domestically produced. Hence, Switzerland is obliged to import in order to meet customer demand. The small deviation from the zero mark in the red hatched phase can be explained by the allocation of tariff quotas where trade is allowed.

Figure 5.19 Strawberries total imports 2014



Source: Author based on data from BLW (2015b)

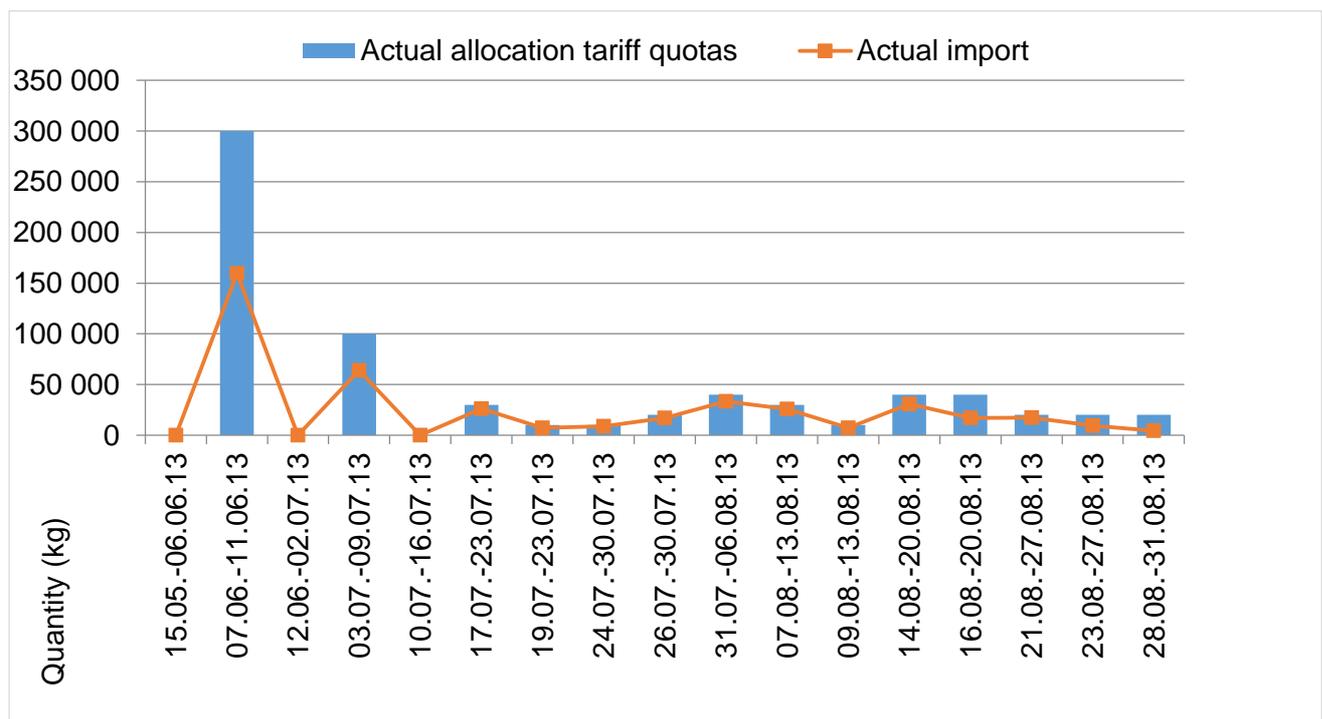
During the protected phase, tariff quotas are allocated in case the domestic production does not correspond with the demand.

The following figure highlights the allocated tariff quotas and their utilisation rate in 2013. The authors selected the year 2013 as it illustrates a typical allocation of tariff quotas for strawberries. The orange dots indicate the actual import whereas the blue bars show the tariff quotas. For instance, it can be observed that on the 06 June the Federal Office for Agriculture allocated a tariff quota of 300'000 kg. As mentioned in the introduction, this tariff quota is then distributed to different importers according to a comparative figure. The tariff quotas are limited to a certain date, which means that the allocation of 300'000 kg was only valid until the 11 June 2013. As the figure displays, the first tariff quota was only used to 53% (orange dot) compared to 74% during the whole period. The low utilisation rate indicates that domestic supply was higher than expected and consequently imports unsuitable. Unsurprisingly, the next period from 12 June until the 02 July, the table shows no tariff quota meaning that domestic supply was in equilibrium with domestic demand. This implies that the harvest peak of strawberries was in June. Overall, the graph shows that during July and August generally only small amounts of tariff quotas were allocated. Reasons are on one hand the high domestic production and on the other hand, sometimes a small tariff quota is allocated in or-

der to prevent imports to the reduced tariff rate, which beat down the price and compete against the domestic price.

As already mentioned, the production of strawberries is very seasonal and sensitive in terms of planting. Therefore, the allocation of tariff quotas during the last five years has varied widely. Nevertheless, it can be said that in the beginning of the productive phase, the harvest of strawberries is only accelerating and does not yet fulfil the domestic demand requirements. Hence, the beginning of the protected period is characterised by high tariff quotas whereas during summer only small tariff quotas are allocated. The figure below outlines, such a situation clearly. The period from the 15 May to the 06 June was zero, which can be explained by the fact that the Federal Office for Agriculture decided to liberalise the market and allow imports in an unlimited way since domestic supply was insufficient. The first zero bar must not be mixed-up with the zero bar in 12 June to 02 July, this bar equals zero because domestic supply could meet domestic demand, consequently no tariff quota was allocated.

Figure 5.20 Strawberries utilisation of tariff quotas 2013

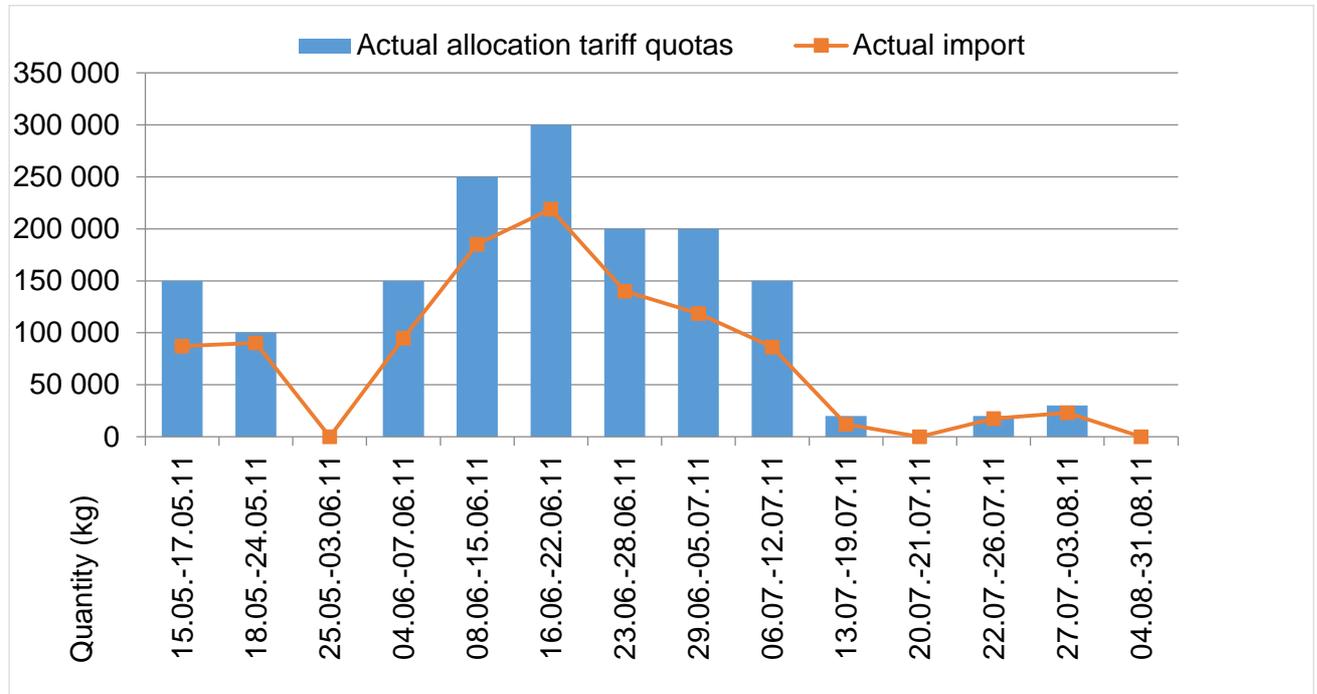


Source: Author based on data from BLW (2015b)

The figure below presents the allocation of tariff quotas for strawberries in 2011. The picture looks quite controversial compared to the figure above. Whereas in 2011 during June and July tariff quotas of 1'290'000 kg were allocated in comparison to 510 t in 2013, in May there were only two tariff quotas of 250'000 kg compared to a complete liberalisation of the market in 2013. This implies that domestic production developed differently in 2011. In contrast to 2014, the Federal Office of Agri-

culture decided against free import possibilities in the beginning of the protected phase as the domestic market already provided strawberries. This difference shows again that strawberry harvest is very much exposed to externalities.

Figure 5.21 Strawberries utilisation of tariff quotas 2011



Source: Author based on data from BLW (2015b)

In the appendix all figures of the utilisation of tariff quota as well as the associated utilisation rates from 2010 to 2014 of strawberries will be displayed.

The following table compares the imports within the tariff quota on the left hand side, the import with the reduced tariff rate in the middle and the import out of the tariff quota on the right hand side. Compared to an import of 718,68 t in 2014 under the tariff quota, there were only 19,19 t imported out of the quota. Thus, trade outside the tariff quota is petite and accounted for 0.83% distributed over the last four years. According to Matthias Zurflüh (2015b), the strawberry market features tiny individual tariff quota shares, which can lead to a tariff quota allocation of 10 kg for one importer. Since those allocations include tare, the calculation gets complicated and it might result in the import exceeding the 10 kg. This surplus must then be declared by the higher tariff rate (AKZA). According to Matthias Zurflüh (2015b), this situation is the most common reason why AKZA imports appear in the statistic.

When domestic demand is fully supplied by domestic products, the AKZA Code 1 is imposed on imports. Within the last five years, a total of 73.42 t of strawberries entered the market to the reduced tariff quota compared to 79'261 t of total import. One possible reason is the fact that in com-

parison to the other products such as tomatoes the availability of specialised products is limited. Further, full domestic supply occurs only on an occasional basis, which then again decides upon the possibility of imports with the reduced tariff rate.

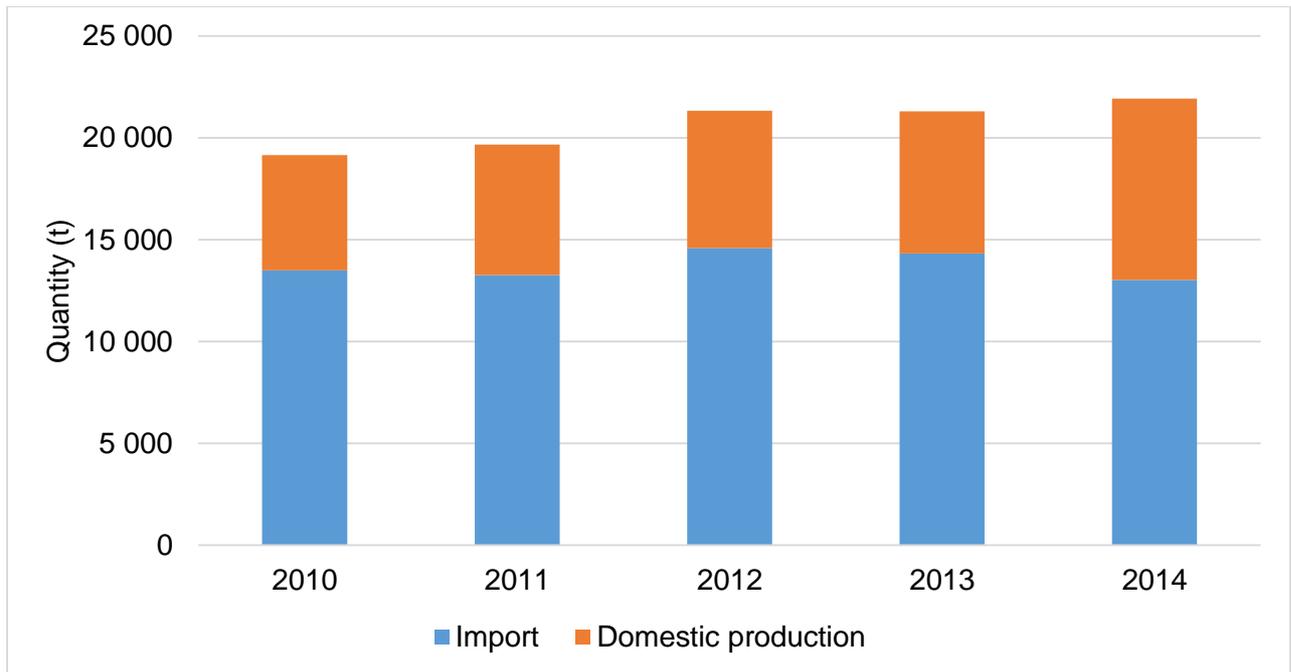
Table 5.8 Comparison of strawberries under and out of tariff quotas

	Import under tariff quota (KZA)	Import out of tariff quota (AKZA-1)	Import out of tariff quota (AKZA)
2010	2'580,54	9,86	15,46
2011	841,78	19,88	13,69
2012	2'019,25	6,65	6,20
2013	2'944,50	24,43	20,65
2014	718,68	12,60	19,19

Source: Author based on data from BLW (2015b)

Figure 5.22 reveals the domestic production and import rates of strawberries over the last five years. It can be seen from the data that domestic production increased steadily in the first four years and jumped to an all-time high in 2014. The increase from 2013 with a domestic production of 6'966 t to 8'906 t in 2014 was disproportionate. According to Matthias Zurflüh (2015b), the reasons can be found on one hand in the constant development of the domestic strawberry production and on the other hand in the explosive growth in the number of strawberries producers. Matthias Zurflüh (ibid.) is ambiguous about the future trend for strawberries, on one side strawberries enjoy a healthy image and have growth potential but on the contrary, strawberries are relatively expensive compared to fruits with identical seasonality such as nectarines or melons. For instance, at discount nectarines can be offered for 1.00 Swiss francs per kg whereas domestically produced strawberries still cost 9.00 Swiss francs per kg. Hence, it is a fine line between customers' willingness to pay the extra charge for domestic strawberries or their decision to substitute strawberries with nectarines and other fruits. Further, the figure illustrates that imports account for a greater share than own production (ibid.). Surprisingly, as seen in the figures 5.20 and 5.21 the former only occurs in spring when Swiss strawberries are not yet due. On average, domestic production accounts for 34%, import for 66% respectively.

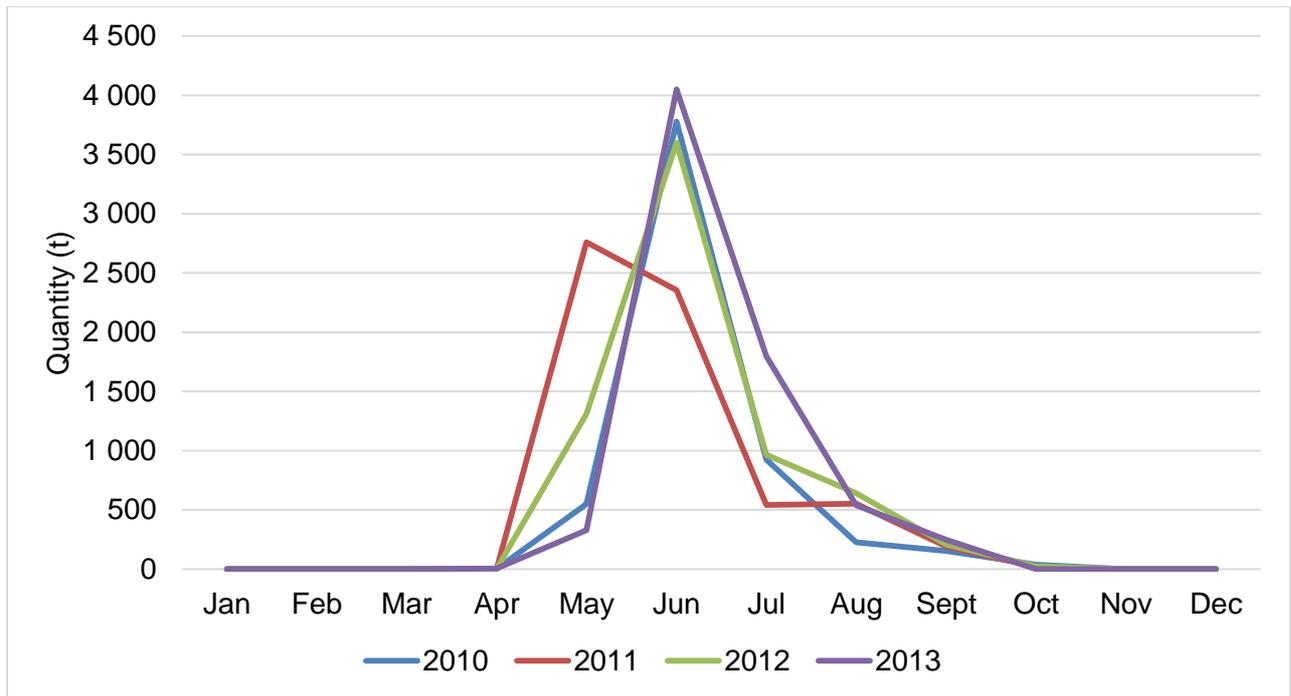
Figure 5.22 Strawberries total imports and domestic consumption 2010 - 2014



Source: Author based on data from Agristat (2015)

In the graph below, we can observe the detailed domestic production trends of strawberries from 2010 to 2013. Unfortunately, the association of fruits could not provide the monthly data for the strawberry production of 2014 but only the total figure of 8'906 t. As explained before, the production of strawberries has increased tremendously during the last years. Nevertheless, strawberries are cultures, which are not only delicate and sensitive but also depend on good weather conditions during early spring. Due to the climatic conditions in Switzerland, strawberries can only be grown from the middle of May until end of August, which corresponds to the protected phases. The domestic production lines of 2010, 2012 and 2013 are almost identical, which implies similar weather conditions during spring. The assumption that due to the allocation of tariff quotas, domestic production in 2013 must have peaked in June can be proven with the following figure. As the chart outlines, in 2011 the domestic harvest was earlier which corresponds to the allocation of tariff quotas seen in figure 5.21 where almost all tariff quotas were allocated during June or July. The discrepancies in production rates mostly refer to dissimilar weather conditions. For instance in May 2011, 2758 t were domestically produced compared to 1'308 t in 2012 or 328 t in 2013.

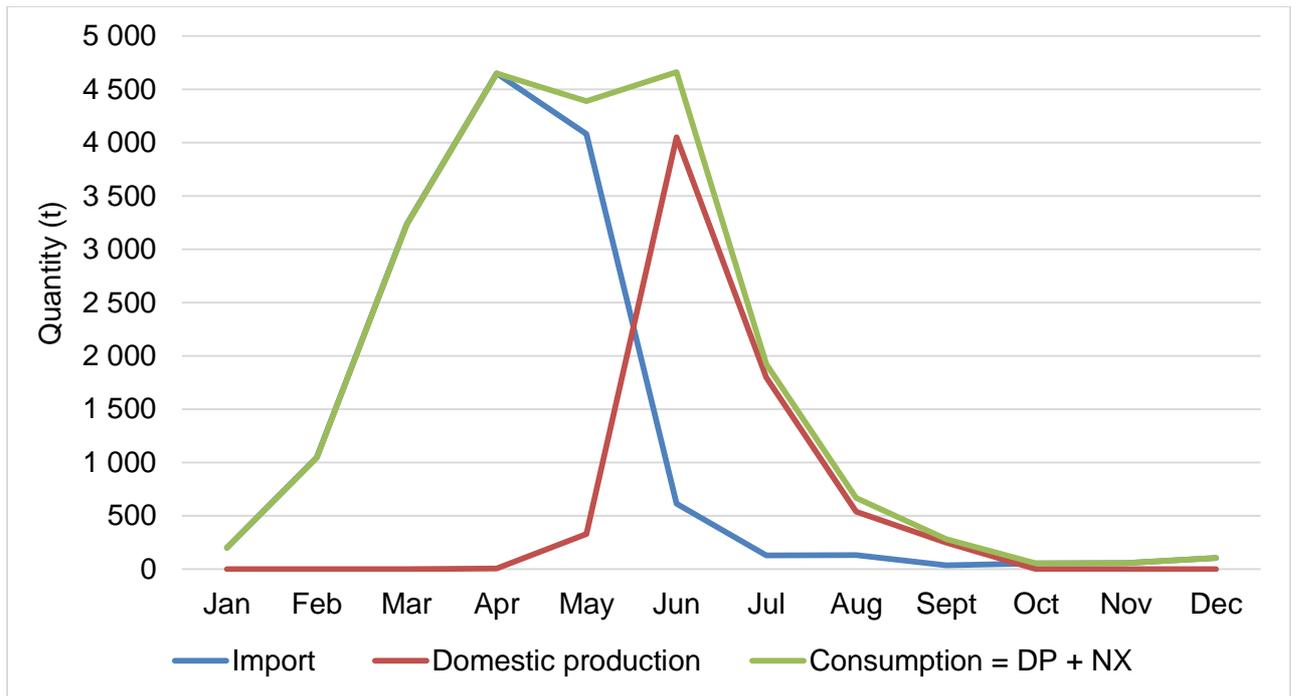
Figure 5.23 Strawberries domestic production 2010 - 2013



Source: Author based on data from Agristat and Swissfruit (2015)

The figure below illustrates the import, domestic production and domestic demand of strawberries in 2013. It can be seen from the data that the consumption level is bell-shaped, which can be explained by the seasonality of the product. Between July and August, the consumption line drops as other summer fruits enter the market and the harvest draws to an end. Unsurprisingly, also the protected phase terminates end of August when not only domestic production but also domestic demand ceases. The blue and the red line represent import and domestic production respectively. As already explained in charts before, during spring the Swiss market is supplied with imports and supported by domestic demand (if possible) and during summer vice-versa during summer. It is clearly apparent from the table below that in the middle of May, when the protected phase begins, domestic production is only beginning and therefore often tariff quotas must be allocated in order to match domestic demand (green line). As soon as domestic production accelerates less tariff quotas are released, as domestic supply equals domestic demand.

Figure 5.24 Strawberries total consumption, imports and domestic production 2013



Source: Author based on data from Agristat and Swissfruit (2015)

To recapitulate, the trade of strawberries has not changed due to the implementation of WTO concessions (Zurflüh, 2015b). As mentioned before, the predicted trend is divided since strawberries are very popular, which leads to an increase in consumption on one hand and on the contrary, the high price of Swiss strawberries may result in a substitution effect. Nevertheless, especially in the berry market, consumers are very sensitive to domestic products and perceive their quality as superior compared to foreign berries. Unsurprisingly, traders prioritise Swiss products even if the protected phase would be shortened. The analysis revealed that production experienced a boom over the last years. Reasons for this development are the excellent climatic conditions for strawberry production, the enhancement of production among existing producers and the overall increase of strawberry producers due to structural changes within the agricultural sector.

5.4 Apricots

Apricots are a typical stone fruit and like strawberries, they are exposed to seasonality and their harvest strongly depends on weather conditions. Apricots have the tariff number 0809.1011 (Tares website, 2015) and they belong to the tariff quota no. 18 (Apricots, cherries, plums, fresh) where a minimum import of 16'340 t is required. The short domestic production period lasts from June to September and is mainly centralised in the canton of Wallis. Apricots reach their highest peak of harvest in July. Hence, the domestic production must only be protected for a short phase, which is

defined in the protected phase (blue line) valid from the 01 July to the 31 August. The green line is the free phase and goes from the 01 September to the 30 June (Swisslegumes, 2015).

Figure 5.25 Apricots import phases

Aprikosen Abricots						1.7.	31.8			
						1.7.	31.8			
Zolltarifnummer in offener Packung 1) 0809. No tarifaire à découvert 1) Zoll (pro 100 kg brutto)	1011 KZA Fr. 3.00					Kontingent Ausser 1018 KZA Fr. 3.00	Kontingent 1019 AKZA Fr. 204.00	Bei Vollversorgung 1019-Code1 AKZA-Code1 Fr. 200.00		
Aprikosen Abricots						1.7.	31.8			
						1.7.	31.8			
Zolltarifnummer in anderer Packung 0809. No tarifaire autrement emballées Zoll (pro 100 kg brutto)	1091 KZA Fr. 5.00					Kontingent Ausser 1098 KZA Fr. 5.00	Kontingent 1099 AKZA Fr. 204.00	Bei Vollversorgung 1099-Code1 AKZA-Code1 Fr. 200.00		

Source: Swisslegumes (2015)

In the table below the different tariff rates are displayed. The tariff rate during the protected phase, when tariff quotas are allocated, is 3.00 Swiss francs per 100 kg gross while the tariff rate out of the quota adds up to 204.00 Swiss francs per 100 kg gross. The reduced tariff rate out of the quota (when having full domestic supply) is 200.00 Swiss francs per 100 kg gross. Like strawberries, the spread between the tariff rate under and out of the quota is significant, which should eventually protect the domestic production. During the free phase, the tariff rate equals the tariff rate under the tariff quota.

Table 5.9 Apricots duty rates

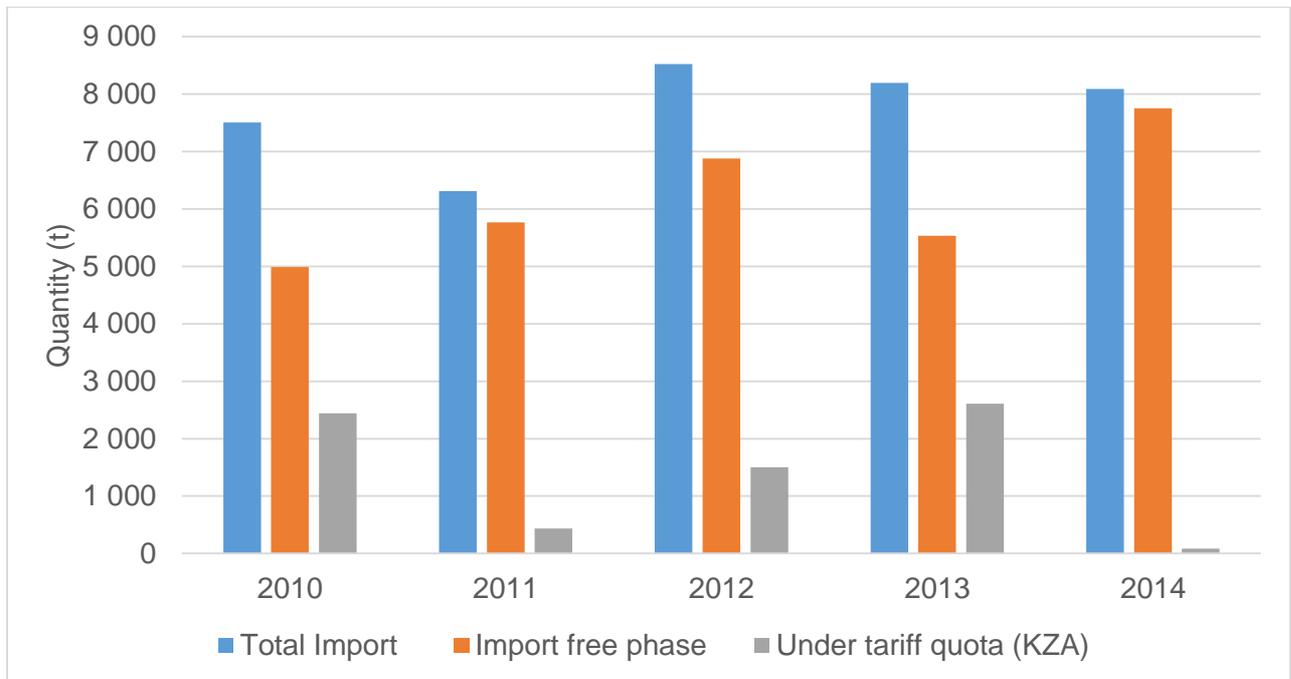
Phase	Import option	Duty rates in CHF per 100 kg gross
01 Sept – 30 Jun	free	3.--
01 Jul – 31. Aug (protected phase)	Import under the quota (KZA)	3.--
	Import out of the quota (AKZA-1)	200.--
	Import out of the quota (AKZA)	204.--

Source: Author based on data from Tares (2015)

The figure below illustrates the changes in imports of apricots within the last five years. Imports of apricots peaked with 8'522 t in 2012 and reached their lowest mark in 2011 with 6'312 t. As can be seen from the table below imports mainly occurred during the import free phase (80%). Hence, a significant smaller number were imported during the protected phase, when border protection grasped. Especially, in 2011 and 2014 only 436 t and 86 t respectively entered the Swiss market within the tariff quota. Such low numbers propose that domestic production was very high and almost equalled domestic demand so that few tariff quotas were necessary. The increase in imports

during the free phase in 2014 can be explained by the extraordinary high demand before the protected phase started, where imports added up to 5'000 t compared to 4'000 t in 2013. This graph advocates the fact that the minimum amount, which must be imported in accordance with the WTO concessions of tariff quota no 19 incur during the free phase.

Figure 5.26 Apricots total imports under different phases 2010 - 2014

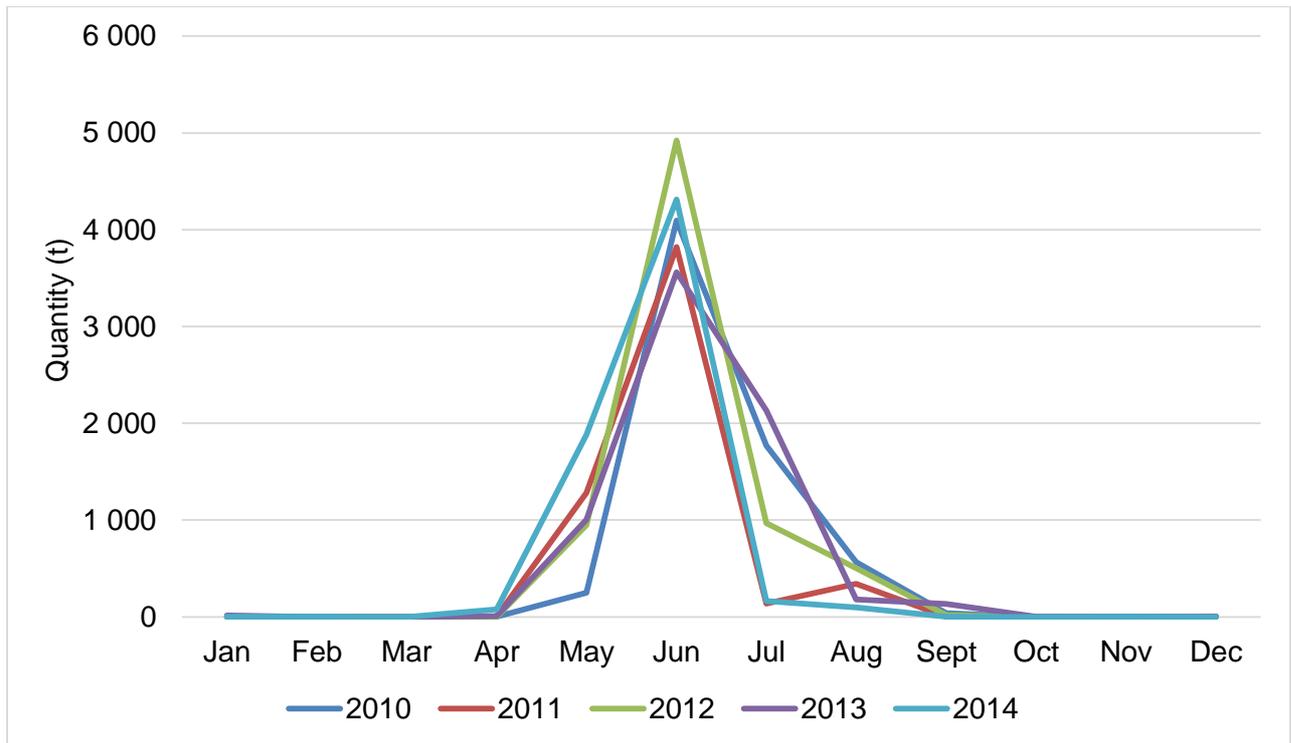


Source: Author based on data from BLW (2015b)

Similar to strawberries the export of apricots is a drop in the ocean. Overall imports amount for 36'628 t from 2010 until 2014 and only 365 t of apricots were exported, which accounts for 0.99%. According to Matthias Zurflüh (2015b) export data in the apricot business can be neglected as export occur only under extraordinary circumstances.

The next figure illustrates an overview of total imports of apricots within the last five years. From the graph below we can observe that the import of apricots peaks in June and reached with 5'922 t the highest mark in 2012. The import trend lines are identical to strawberries with the only difference that the curve of apricots is set backwards as their seasonality diverges. The descending line from July to August can be explained by the protected phase, which starts on the 01 July. Further, the data reveals that the import lines deviate more extremely during the descending phase than in the ascending phase. The reason can be found by the fact that the annual harvest varies greatly and therefore imports react accordingly. Similar to strawberries, the protected period of apricots ends in August since both, domestic demand and domestic production cease.

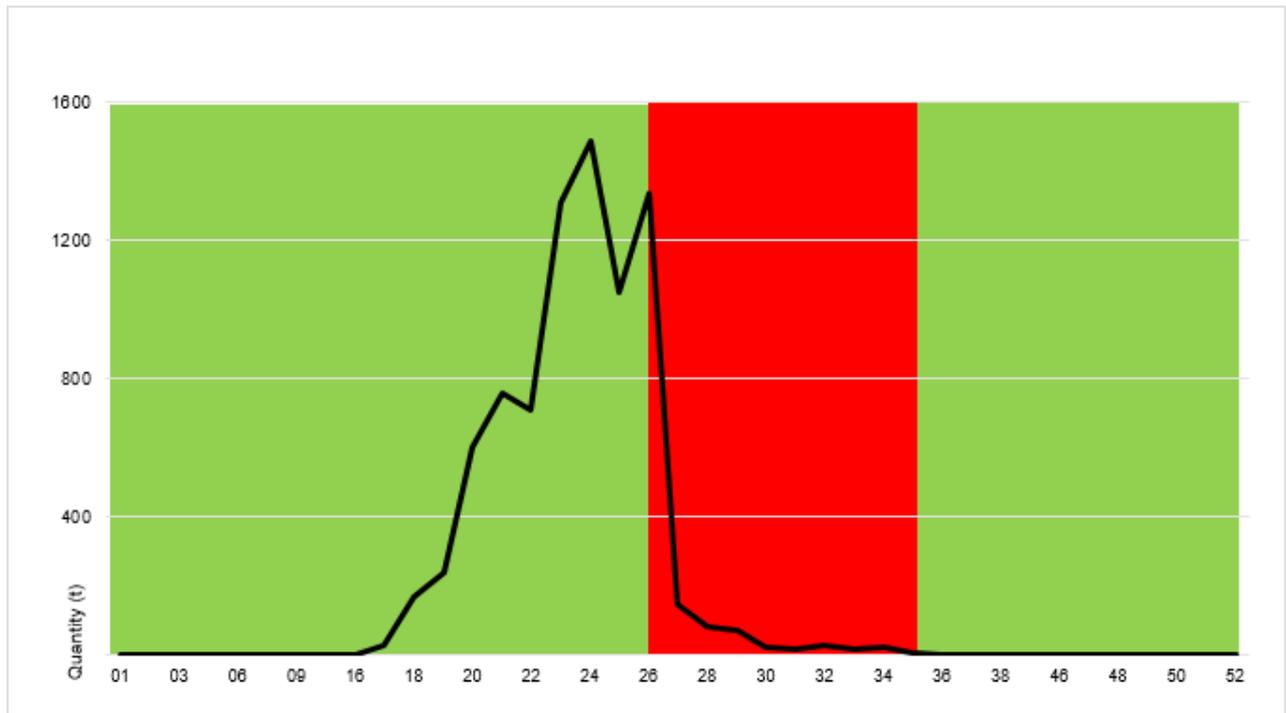
Figure 5.27 Apricots total imports 2010 - 2014



Source: Author based on data from Agristat and Swissfruit (2015)

Figure 5.28 presents a close-up of figure 5.27 and only captures the imports of apricots in 2014. The data highlights the correlation between the import and the various import phases. The green hatched area indicates the free phase while the red hatched area the protected phase. Further, the distribution of imports suggest that the product is exposed to seasonality and import figures increase from May to June when demand accelerates while domestic production is still unavailable. The graph indicates clearly that during the protected phases, where imports are restricted, the import line drops tremendously until it almost reaches the zero mark. From August to April the import is inexistent since there is no corresponding demand.

Figure 5.28 Apricots total imports 2014



Source: Author based on data from BLW (2015b)

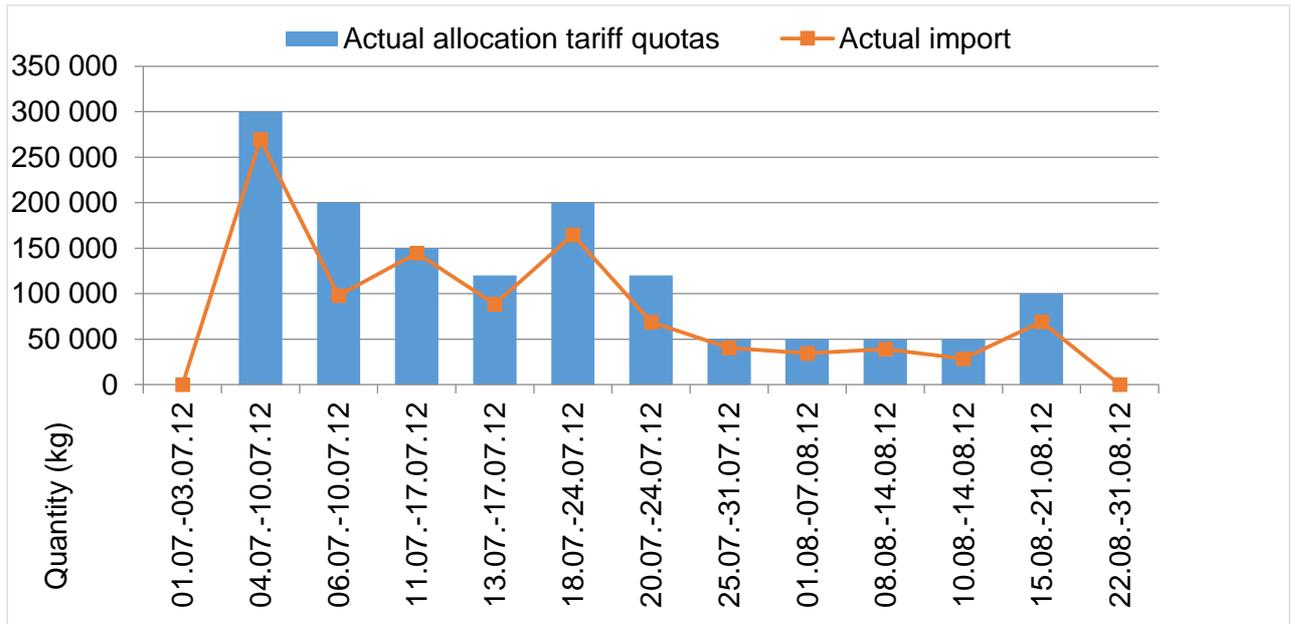
During the protected phase, tariff quotas are allocated in case the domestic production does not correspond with the demand.

In the following figures the allocation and utilisation of tariff quotas are illustrated in a bar chart. The orange dots indicate the actual import while the blue bars show the tariff quotas. Since the allocation of tariff quotas diverge significantly from each other, the authors decided to elaborate the allocation of tariff quotas of the years 2011, 2012 and 2014. The table shows that during the protected phase, tariff quotas were allocated during the whole period meaning domestic supply was never in equilibrium with domestic demand. Compared to strawberries, the released tariff quota amounts were significantly higher. In 2012, the utilisation rate of the tariff quota was on average 77%, which indicates an efficient distribution. As the figure displays, the first tariff quota was almost used at full capacity, which explains why a second tariff quota was released on the following day. The very first and very last bar in the graph amount to zero because the availability of domestic products was not guaranteed so that the Federal Office for Agriculture decided to withdraw border protection and expose apricots to free trade.

As already said, the domestic production and consequently the allocation of tariff quotas varied widely over the last five years. For instance, the year 2012 featured a high and regular allocation of tariff quotas, which influenced the total result of imports under the tariff quota seen in figure 5.26. On the other hand, in 2014, the import under the tariff quota amounted only 86 t, which suggests a

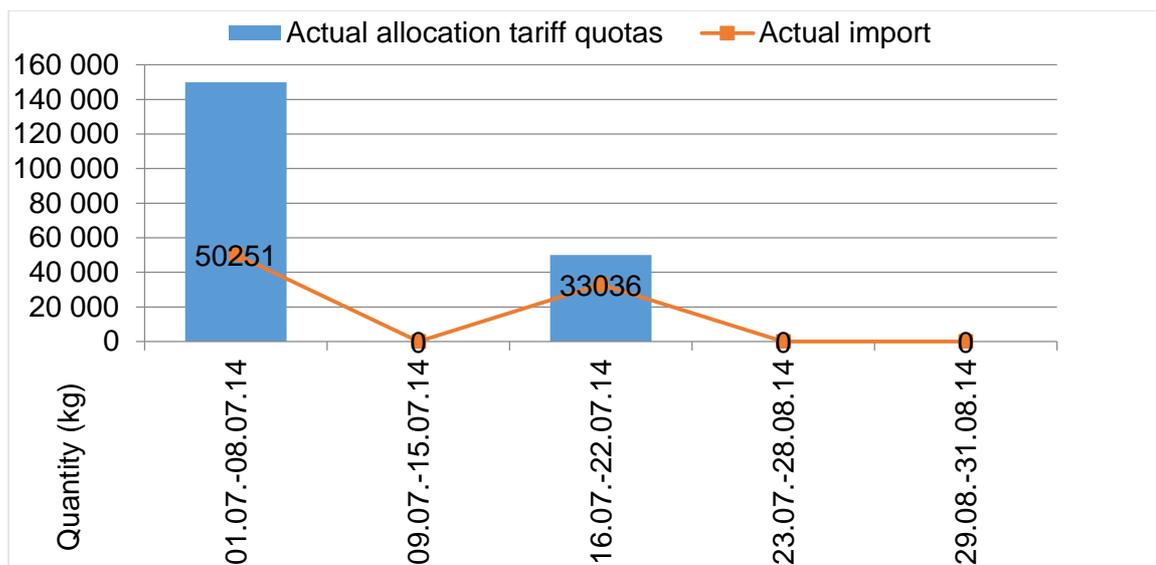
low allocation of tariff quota. It can be seen from the figure below that the former assumption is correct. During the protected period only two tariff quotas were released and for the remaining time the market could benefit from full domestic supply. Furthermore, the figure illustrates that the tariff quota from the 01 July until the 08 July was only used to 33%, which indicates that imports were not necessary since domestic products were available.

Figure 5.29 Apricots utilisation of tariff quotas 2012



Source: Author based on data from BLW (2015b)

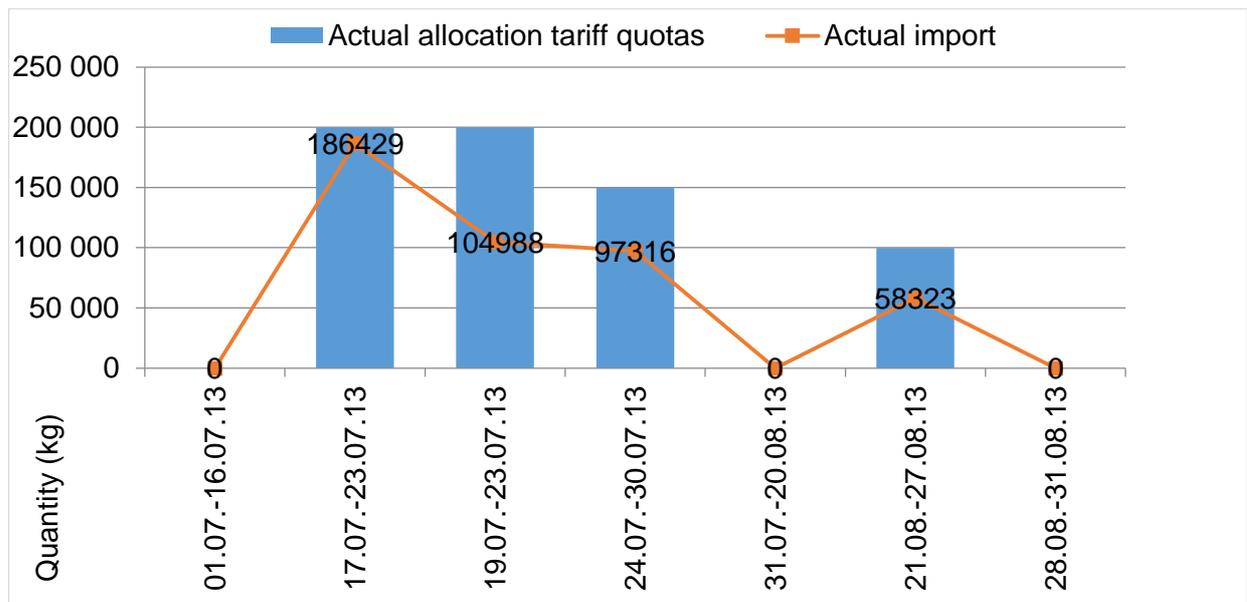
Figure 5.30 Apricots utilisation of tariff quotas 2014



Source: Author based on data from BLW (2015b)

A further example of the variation of domestic production is the year 2013. In this year, most tariff quotas were released in the beginning of the protected phase and from 01 July to 16 July, the Federal Office for Agriculture decided to open the market completely in order to allow unlimited imports. This implies that the yield of apricots was delayed compared to other years. This assumption can also be observed in the domestic production line in figure 5.33, which is clearly skewed to the left. The further allocation of tariff quotas in other years can be found in the appendix.

Figure 5.31 Apricots utilisation of tariff quotas 2013



Source: Author based on data from BLW (2015b)

The following table compares the imports within the tariff quota on the left hand side, the import with the reduced tariff rate in the middle and the import out of the tariff quota on the right hand side. Overall, imports where AKZA is applied only accounted for 4%. From the data it is observable that in 2014, the trade outside the tariff quota exceeded the trade within the tariff quota. Similar to the strawberry market, small numbers of allocated tariff quota shares are responsible for this imbalance. Further, in 2012 the table presents an import of 142 t out of the tariff quota, which can be explained by the fact that in 2012 domestic production was insufficient, which then again requests a more frequent allocation of tariff quotas (Zurflüh, 2015b). Consequently, the allocation of tariff quotas offers the possibility to import out of the tariff quota in the first place. Overall, the figures are too small to be meaningful.

When having full domestic supply, the reduced tariff rate is applied on imports. In the last five years 333 t entered the Swiss market within the reduced tariff rate. Similar to strawberries, apricots have less production variations as for example tomatoes or peaches, which ultimately reduces the urge of importing specialised products. Furthermore, as this tariff rate is only applicable during full

domestic supply it enjoys a limited time frame as tariff quotas are released on a regular basis within the apricot market. The number zero, which appears in the table below, can be correlated to figure 5.29, which illustrates that in 2012 there was no full domestic supply throughout the protected period.

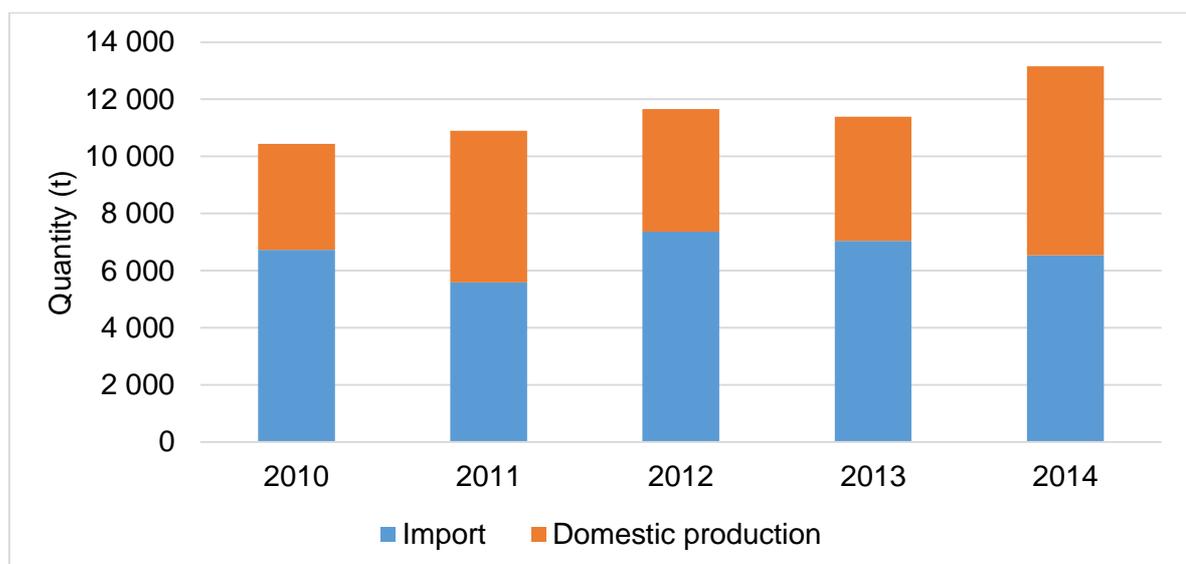
Table 5.10 Comparison of strawberries under and out of tariff quotas

	Import under tariff quota (KZA)	Import out of tariff quota (AKZA-1)	Import out of tariff quota (AKZA)
2010	2'440,94	49,13	28,14
2011	436,16	80,98	27,56
2012	1'501,06	0	142,86
2013	2'606,61	42,99	13,46
2014	86,25	160,74	92,80

Source: Author based on data from BLW (2015b)

Figure 5.32 compares domestic production and the import of apricots over the last five years. It can be observed from the data that annual domestic production varied widely and reached its highest marks in 2011 with 5'305 t and 2014 with 6'621 t respectively. This statement corresponds to figure 5.26 which illustrated that only few imports occurred during the protected phase and suggested a high domestic production in those years. On average, domestic production accounted for 42% during the last five years, which can be interpreted as surprising result since only the canton of Valais produces Swiss apricots. From the data it is clearly observable that as soon as domestic production accelerates, import decreases and vice-versa. This implies a very steady demand in apricots, which is then divided between either imports or domestic demand.

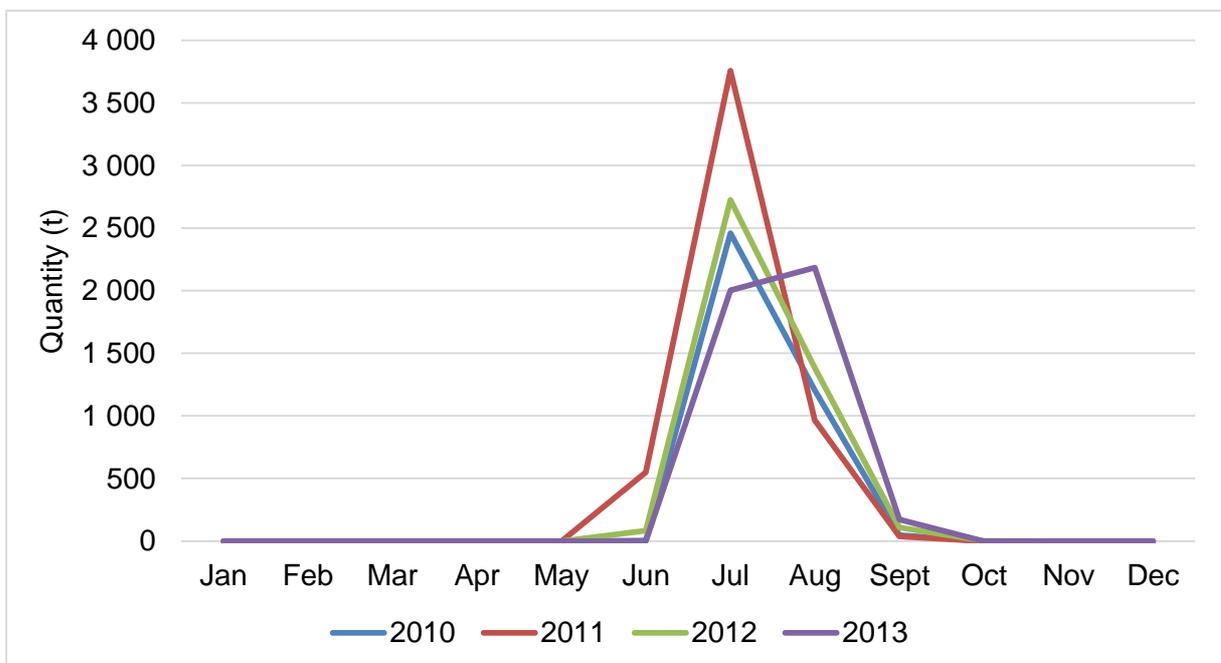
Figure 5.32 Apricots total imports and domestic production 2010 - 2014



Source: Author based on data from Agristat (2015)

From the graph below, we can observe the detailed domestic production developments of apricots from 2010 to 2013. Unfortunately, the association of fruits could not provide the monthly data for the apricots production of 2014 but only the total figure of 6'621 t. Total yield of domestic production of apricots depends heavily on weather conditions and the climate in spring when apricots blossom. Furthermore, apricots bear a concentration risk since they are only cultivated in the canton of Wallis. As a consequence, the annual harvest of apricots is more labile compared to strawberries. The variation of total domestic production can also be observed in the graph. As already mentioned before, the domestic production 2011 outperformed other years, which consequently resulted in a low allocation of tariff quotas. Only in August, when domestic production collapsed, indicated by the steep descending line, the Federal Office for Agriculture was forced to release a higher amount of tariff quotas. On the contrary, in 2013, the production line was skewed to the left meaning that tariff quotas were first and foremost allocated in the beginning of the protected phase before the market was self-sufficient. Based on the assumption the fewer released tariff quotas, the better the domestic production, the harvest of apricots in 2014 must have been exceptional and equally distributed throughout the summer. According to Matthias Zurflüh (2015b), over the last twelve years apricot producers invested heavily in research in the fields of cultivation and quality increase of apricots. This resulted in high quality products, which are appreciated by Swiss consumers. Hence, he perceives the trend for Swiss apricots as favourable.

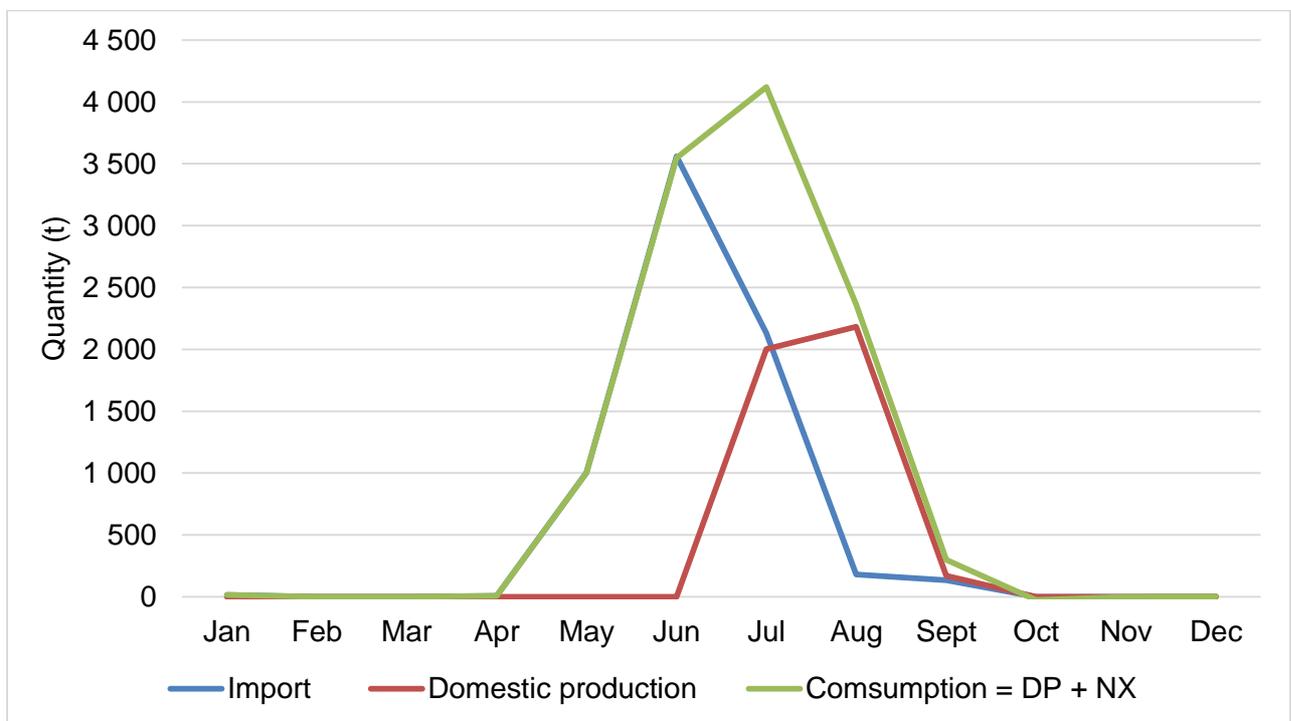
Figure 5.33 Apricots domestic production 2010 - 2013



Source: Author based on data from Agristat and Swissfruit (2015)

The figure below presents the import, domestic production and domestic demand of apricots in 2013. As seen from the data, the consumption level is bell-shaped meaning that apricots are a seasonal product and mainly consumed during summer. Between August and September the consumption line drops. The blue and the red line represent import and domestic production, respectively. The graph illustrates the reciprocal interplay between the domestic demand and the import rate. As soon as domestic demand is unable to fulfil the demand line, imports in terms of tariff quotas are necessary in order to obtain the market equilibrium. As mentioned before, in 2013 the domestic production line was slightly skewed to the left whereas in other years one could expect a more equal distribution.

Figure 5.34 Apricots total consumption, imports and domestic production 2013



Source: Author based on data from Agristat and Swissfruit (2015)

To conclude the change in trade of apricots was not based on WTO concessions but rather due to the modification of the product (Zurflüh, 2015b). As mentioned before, Swiss apricot producers realised the need to distinguish themselves from foreign products in order to compete against high quality apricots from France. Consequently, high investments in marketing, branding and product development were undertaken. The analysis illustrated that communication and marketing campaigns were successfully implemented as domestic production today accounts for 42% of total consumption. According to Matthias Zurflüh (2015b), even though Swiss apricots belong to the higher price range in the fruit segment, producers managed to boost their image and find purchasers who are willing to pay the additional costs for Swiss products. Nevertheless, Switzerland will

always be dependent on imports since the production of apricots is concentrated to the canton of Wallis and therefore very limited.

5.5 Evaluation fruit and vegetable market

Overall, the trade of fruit and vegetables has not changed significantly since the implementation of tariff quotas after the Uruguay Round. In principle, the scheme of protecting domestic production was only slightly modified as border protection already existed before the WTO agreements (Zurflüh, 2015b). Whereas the former system comprised a total restriction of imports, the current system introduced high tariff rates in order to discourage imports. Within the industry, the implemented border protection is seen as vital instrument in order to safeguard the domestic production. According to Fabian Etter (Vegetable Producer, 2015) it enables producers to dispose domestic products at a cost-covering price since during the protected phase domestic production is prioritised. Georg Bregy (Swissfruits, 2015) states that during the free phase competition and price pressure with foreign products is clearly noticeable when simultaneously domestic goods are available. Especially, since the euro exchange rate dropped to an all time low, the existing border protection is jeopardised. He emphasises that the possibility exists to omit the current border protection when during full domestic supply importers import foreign goods to the reduced tariff rate (AKZA Code 1) and sell them at a lower price compared to domestically produced goods. However, Matthias Zurflüh (2015b) indicates that the possibility of such a scenario is limited to situations where the price differentiation between domestic and foreign products is immense since reduced tariff rates are remarkably higher than tariff rates under the quota. As the analysis outlined, imports to the reduced tariff rate out of the quota were insignificant and thus, the former example could not be observed in our product categories. Fabian Etter (2015) mentioned one negative effect of the border protection. In case the availability of domestic products is scarce and the Federal Office for Agriculture refuses the allocation of tariff quotas, traders are under pressure to fulfil the needs of customers namely offering adequate quality products at a reasonable price (Etter, 2015).

Both, producers and traders advocate their voice in the decision-making process of the allocation of tariff quotas, when trade associations consult their opinions about domestic production and domestic demand. Almost always the industry reaches an agreement, which shows that cooperation works well (Bregy, 2015). However, Fabian Etter (2015) sees optimisation possibilities in the transitional periods in spring and autumn. Firstly, the reporting system of domestic demand and domestic production should be enhanced as it bears flaws. On one hand, purchasers who would advocate the allocation of a tariff quota might indicate much higher demand figures than they actually are. On contrary, producers who disfavour the allocation of tariff quotas report higher production

figures in order to maintain full domestic supply. Consequently, the price level of domestic products remain high as products become scarce. As a second improvement, Fabian Etter (ibid.) mentioned the sale of imported products after the end of the protected phase. Even though it is prohibited, some market participants import large quantities during the controlled phase, which are consequently sold after the protected period ended. This mechanism boosts prices of Swiss products and endangers their sales.

Ambiguities arise when it comes to the alternation of protected periods or the elimination of protective tariff rates. While pure importers would appreciate a liberalisation of the market as their paramount interest lies in the supply and well functioning of the market, large-scale producers would favour a prolongation of the protected phases (Zurflüh, 2015b). Furthermore, opinions vary widely among fruit and vegetable producers. Whereas fruit producers are generally more market oriented and agree with imports in order to supply the market, vegetable producers are more conservative and would favour closed borders, as they fear the competition with foreign products. In general, fruit producers, especially strawberry producers benefit from the favourable image of Swiss products, which are preferred on the market (ibid.).

In case tariff rates would be eliminated and the market would be liberalised, Mr Bregy (2015) perceives the domestic production endangered. He outlines that for instance products like fruit vinegar and jam, where domestic production is unprotected, market share dropped within the last 15 years from 80% to 18%. Fabian Etter (2015) underlines the former statement in saying that liberalised markets would have devastating consequences for worshipping the Swiss production. The high costs, particularly high salaries, as well as strict regulations eliminate the possibility to reduce production costs. Consequently, the Swiss production would degenerate into a niche market for customers who are willing to pay the higher price (ibid.).

6 Product analysis meat

In this section the paper will analyse the product category meat and the predetermined products. Furthermore, the regulations of the meat stock and meat market and the process of importing meat will be outlined. An in depth analysis of the market situation of the past five years for the three defined products will follow as well.

Swiss meat market and import regulations

About one fifth of all consumed meat in Switzerland is imported. These imports are mostly executed within the scope of the WTO and its notified tariff quotas. In Switzerland the average per capita consumption of meat is 51,70 kg. The most popular meat is pork and amounts for almost half of the total meat consumption, whereas chicken ranks second and is followed by beef. The latter two products always compete against each other.

The Swiss import regulations are based on the agricultural agreement of the World Trade Organisation, which came into force in 1995. According to this agreement, Switzerland needs to grant access to the domestic market, this being achieved through the establishment of specific tariff quotas (Proviande website, 2015).

The import of meat is divided into two tariff quotas of which quota no. 05 concerns “red meat” (beef, horse, sheep and goat) and quota no. 06 involves all “white meat” (pork and chicken).

Table 6.1 Tariff quotas for meat

Tariff quota no. 05		Tariff quota no. 06	
22'500 t		54'500 t	
05.1 Air-dried meat	187 t	06.1 Cured ham	583 t
05.2 Canned beef	770 t	06.2 Canned ham	71 t
05.7 Remainder	20'703 t	06.3 Sausages	3'148 t
05.71 Remainder of beef	2'000 t	06.04 Remainder	50'698 t
05.72 Remainder of sheep	4'500 t	06.41 Remainder of pork	8'498 t
05.73 Remainder of horse	4'000 t	06.42 Remainder of chicken	42'200 t

Source: Author based on BLW website (2015)

The notified quantities at the World Trade Organisation are 22'500 t for quota no. 05 and 54'500 t for quota no. 06, of which each of these quotas is subdivided into further categories. Periodic releases are issued by the federal office for agriculture (BLW) after the consultation of the respective associations and industries. Another key aspect is that the Swiss parliament wants to ensure the production of high quality meat within the country and therefore strongly supports the previous im-

port barriers and tariff quotas. All regulations concerning the meat market are determined in the Swiss ordinance on the meat stock and meat market (Verordnung über den Schlachtvieh- und Fleischmarkt) (Schweizerische Eidgenossenschaft, 2015). This ordinance includes legal regulations concerning the quality of meat, the access of public markets, specific measures for the market support and finally imports regulations for various products.

In order to import a quantity of 20 kg of meat an importer is required to have a general import permit (Generaleinfuhrbewilligung). In addition, if the importer is able to import under a tariff quota he will benefit from a lower tariff (KZA) otherwise the higher quota rate (AKZA) is implied which has been explained in the section of theoretical framework. Once the quantity is imported the tariff quotas are distributed in different ways, either with an auction (Versteigerung) or based on the domestic power (Inlandleistung) of the last years imported quantity or over the total quantity of slaughtered animals from the past years (Häfner and Jörin, 2012).

Auction

Auctions are published on the websites of the Swiss Official Gazette of Commerce (SOGC) and the one of the Federal Office for Agriculture (BLW). All the participants can place a maximum of five bids before the deadline expires. The tariff quotas are distributed based on the highest bid in descending order of priority (BLW website, 2015).

Domestic power

Another system for distributing tariff quotas is according to the domestic power. This means that the Federal Council for Agriculture (BLW) allocates tariff quotas on the total of all the auctioned animals. Furthermore, the quotas are proportionally distributed according to the numbers of the last year's quantity of auctioned animals (Schweizerische Eidgenossenschaft, 2015).

Slaughtered animals

Finally, the third distribution method is allocated according to the total number of slaughtered animals. This basically means that the distribution is made proportionally according to the numbers of the last year's slaughtered animals (Schweizerische Eidgenossenschaft, 2015).

The authors have specified three different products within the meat category. After thorough research and the consultation of experts, in the respective industry the three products being analysed hereafter are loin cuts (Nierstücke), chicken breasts (Hühnerbrüste) and half-carcasses of cows (Schlachthälften Kühe). Every product is subdivided into distinct tariff numbers, which are registered at the Swiss customs in order to differentiate the products from each other. The different tariff numbers are shown below and they are based on data from the website Tares website (2015):

- Loin cuts with bone: 0201.2091 (KZA), 0201.2099 (AKZA)
- Loin cuts boneless: 0201.3091 (KZA), 0201.3099 (AKZA)
- Chicken breasts: 0207.1311 (KZA), 0207.1319 (AKZA)
- Half-carcasses cows: 0201.1091 (KZA), 0201.1099 (AKZA)

These products have been selected because loin cuts represent high quality products, chicken breasts are imported in very large quantities and half-carcasses of cows is meat, which is processed into further products. This specific process is called inward or outward processing arrangements. Whereas inward processing means that foreign goods are processed in Switzerland and then exported again, the outward processing stands for the handling of domestic products in a foreign country, which are then imported again. This whole process is performed out of the tariff quota and is therefore free of duty.

6.1 Loin cuts

This section concerns the in depth analysis of loin cuts, chicken breasts and half-carcasses of cows. Then the authors will outline different aspects of the import and export, duty rates and the approved quantities with a final summary of the meat market in the end of this section.

Loin cuts represent high quality product in Switzerland and have therefore been chosen for further analysis. The products can be divided into loin cuts with bone and the parts that are boneless. Every loin cut consists of three parts the tender loin (Filet), rump steak (Hüfte) and roast beef (Rostbraten). This product belongs to the tariff quota 05.71 and the notified quantity at the World Trade Organisation is 2'000 t per year. Tariff quotas are distributed in three different ways as mentioned in the section above. As for loin cuts, 50% of the total imports are distributed over an auction, 40% are allocated to the total quantity of slaughtered animals from the previous year, whereas the remaining 10% are distributed according to the domestic power. This method has changed in 2014. Before that the allocation was 90% over an auction and 10% over the domestic power (Schneider M. 2015).

In the table below the different duty rates for loin cuts with bones are illustrated. It clearly shows that products imported under the quota are charged at a lower rate of 159.00 Swiss francs in comparison to the much higher rate of 1'368.00 Swiss francs when importing out of the quota.

Table 6.2 Loin cuts with bones duty rates

Import option	Duty rates in CHF per 100 kg gross
Import under the quota (KZA)	159.--
Import out of the quota (AKZA)	1'368.--

Source: Author based on data from Tares website (2015)

The second table indicates the duty rates and import options for loin cuts boneless. There is the same rate of 159.00 Swiss francs when importing under the quota. However the import out of quota duty is much higher at a rate of 2'212.00 Swiss francs. The reason for this higher rate could be that loin cuts boneless are more preferred than the ones with bones and the process of deboning in Switzerland results in much higher labour expenditures. This basically indicates that loin cuts imported out of quota generally charge a much higher price and it is therefore better for them to be imported within the quota.

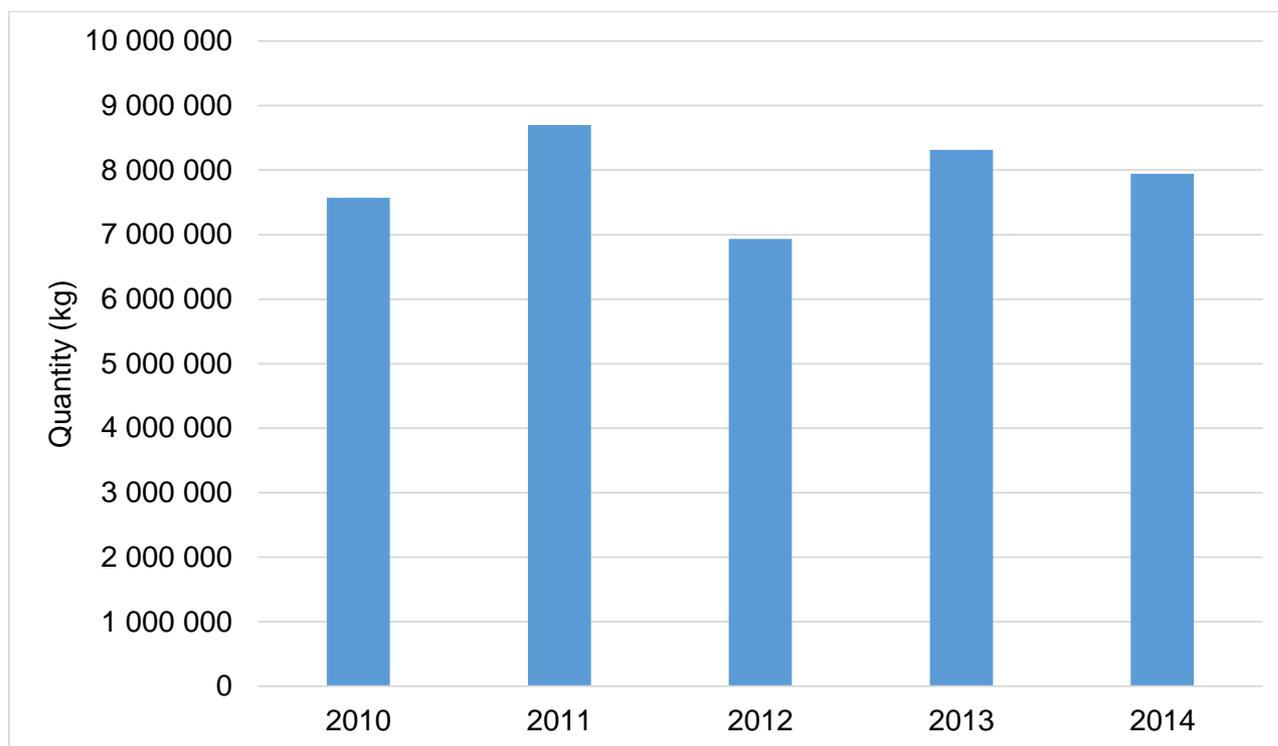
Table 6.3 Loin cuts boneless duty rates

Import option	Duty rates in CHF per 100 kg gross
Import under the quota (KZA)	159.--
Import out of the quota (AKZA)	2'212.--

Source: Author based on data from Tares website (2015)

In the next section the focus lies on the analysis of the total import of loin cuts over the past five years, the different rates of tariff quotas and the approvals of tariff quotas. The following figure shows the total import of loin cuts with bone and boneless from the year 2010 to 2014. The import of loin cuts has been stable since 2010, with the highest import in 2011 where approximately 8,6 million kg were introduced to the Swiss market. This clearly indicates that Swiss consumers are willing to import large quantities of high quality meat.

Figure 6.1 Loin cuts total imports 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

In the following table the authors have made a comparison between the import of loin cuts with bone under the quota (KZA) and the ones imported out of the quota (AKZA). The quantities imported under the quota are much larger than the goods introduced out of the quota. Most of the numbers remained steady with the exception of the two figures resulting in much higher numbers in the year 2011 and 2012. An indicator for the higher numbers for imports of loin cuts under the quota (KZA) is that the duty rates are much lower and consumers are not willing to pay the higher prices of 1'368.00 Swiss francs shown in table 6.2 above.

Table 6.4 Comparison of loin cuts with bone under and out of tariff quotas

	Import Loin cuts with bone KZA (kg)	Import Loin cuts with bone AKZA (kg)
2010	175'794	15'049
2011	930'209	21'571
2012	1'723'127	21'571
2013	121'047	18'786
2014	107'210	57'801

Source: Author based on data from Swiss Impex (2015)

The next graph gives an overview of all the imports of loin cuts boneless over the past five years under the quota (KZA) and the quantities imported out of the quota (AKZA). There is a significant difference between the graph below and the table above, giving a clear indication that Swiss con-

sumers prefer to import high quality beef and the parts that are boneless. In addition to give a brief overview, in the year 2011 there were approximately 4,70 million kg of loin cuts boneless imported under the quota (KZA) whereas in the same year 4,50 million kg have been introduced out of the quota (AKZA). Considering the duty rates for out of the quota tariffs, which lie at a rate of 2'212.00 Swiss francs, Swiss people spent almost 99,40 million Swiss francs on tariffs in the year of 2011. Consequently the reason for this phenomenon could be that the average spending of Swiss people on consumer goods is much higher than in other comparable countries.

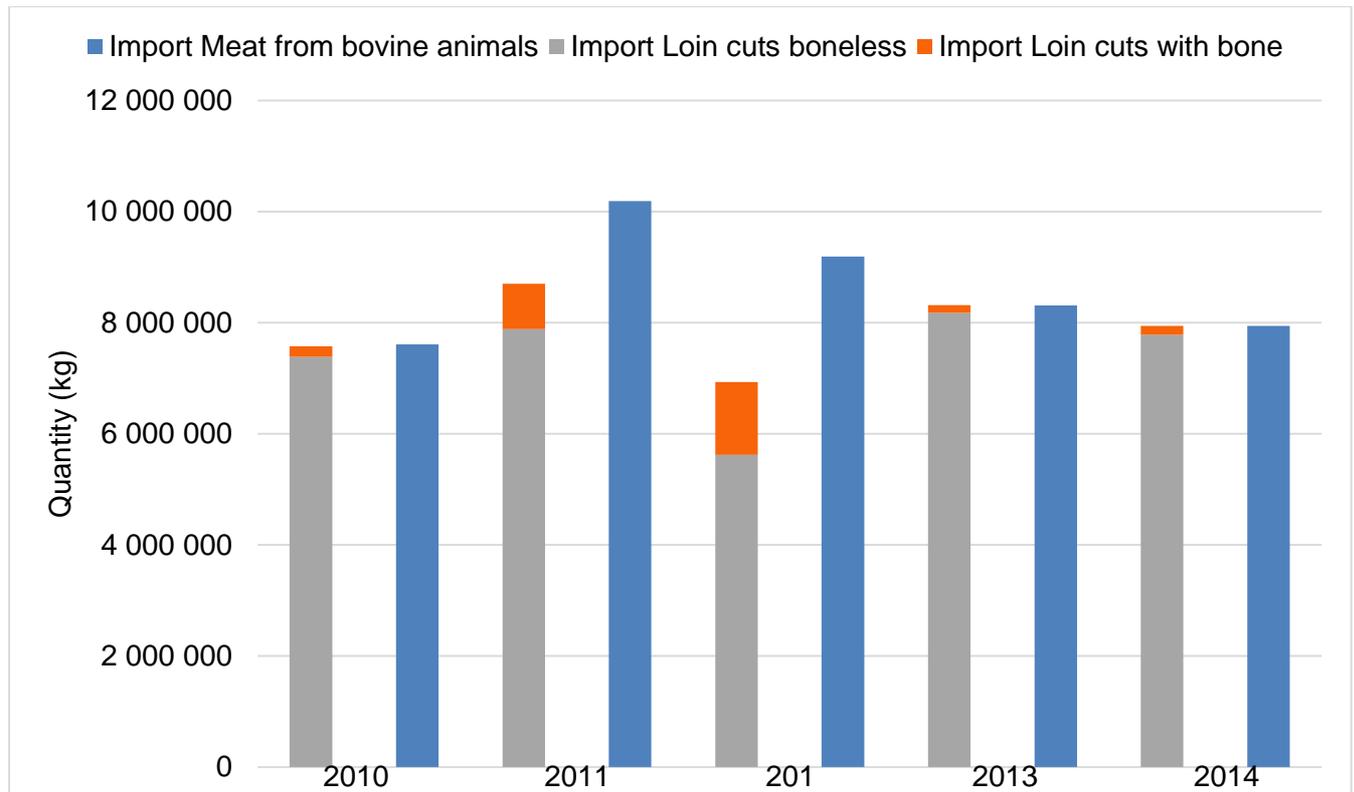
Figure 6.2 Loin cuts total imports under and out of the tariff quota 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

In the graph below the total import of meat from bovine animals is compared to the import of loin cuts with bones and the boneless pieces. This figure is another indication that Swiss people tend to prefer high quality pieces when it comes to the consumption of beef. Comparing the total amount of 8,30 million kg of meat from bovine animal to the total quantity of 7,90 million kg of loin cuts with bone and boneless pieces, show that 95% of the total imports of meat from bovine animals are loin cuts. There have been higher imports in the years 2011 and 2012. According to Peter Schneider from the meat association Proviande during these two years significant amounts of pistols, which are the hindquarter of the boneless flank from bovine animals, have been imported. This is another strong indicator that almost only high quality beef products are introduced to the Swiss consumer market.

Figure 6.3 Comparison of total import loin cuts to import meat from bovine animals



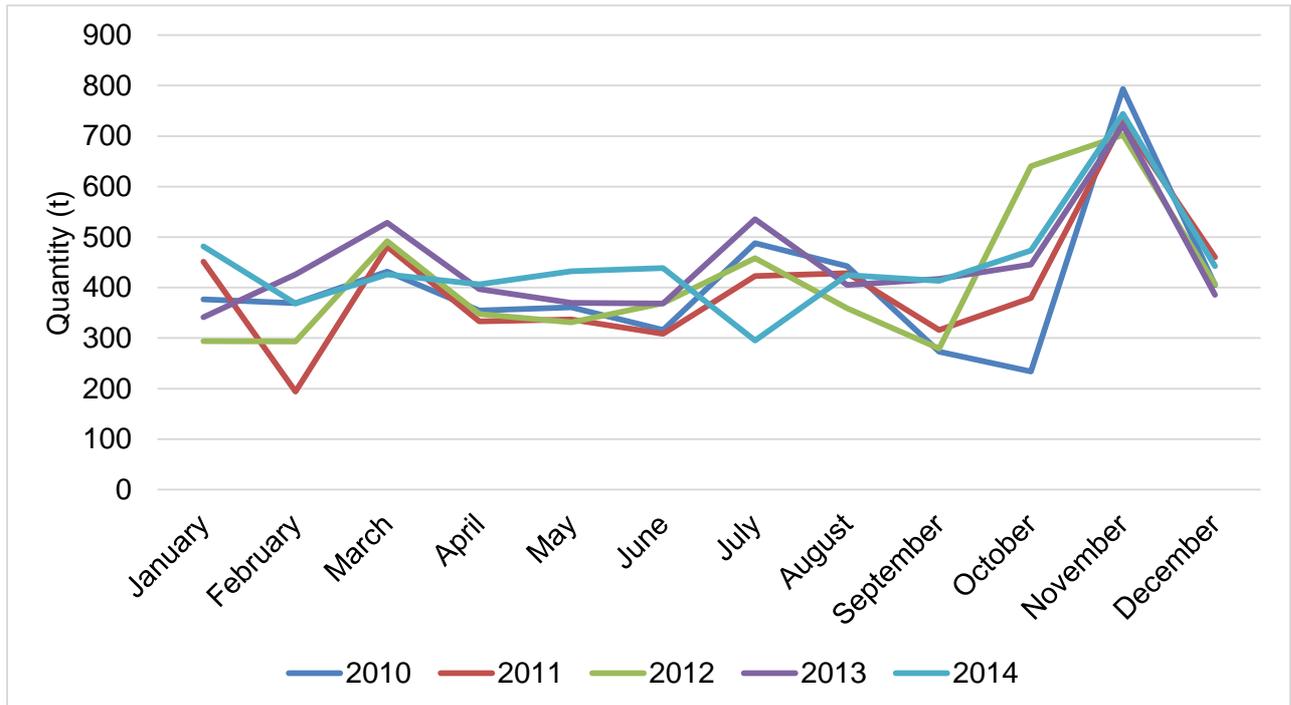
Source: Author based on data from Swiss Impex (2015)

There is another interesting fact comparing the total import with the total export of loin cuts. Over the past five years 43,20 million kg of loin cuts have been imported whereas a tiny proportion of only 33'617 kg have been exported from Switzerland to another foreign country. This shows that out of 100 kg of imported loin cuts only about 80 grams are exported, the reasons for this are almost only slaughtered by-products (Schlachtnebenprodukte) being exported. These are basically the parts that are not consumed in Switzerland. Another tiny percentage of the export is the processing of meat and then the export of the finished product to another country. Nevertheless, the share of processed meat in trade can look differently for other products.

In the following graph the approvals of tariff quotas over the past five years from 2010 until 2014 are indicated. The association for meat called Proviande meets on a regularly basis every four weeks to analyse the Swiss meat market. Based on the current market situation, the different quantities that will be approved for the upcoming periods are then decided and this proposal is forwarded to the Federal Office for Agriculture where it is again approved and published. These quantities must lie within the notified quantities of the World Trade Organisation. According to Mike Schneider (2015) Switzerland is famous for its consumption of high quality meat during the Christmas holiday season and it therefore imports large quantities of loin cuts. The graph shows that there is a sharp increase of the imported quantity beginning in November with its peak in the end

of December and followed by a steady decline beginning in January. The lowest month for the consumption of beef is October because then the haunting season in Switzerland starts and a lot of venison is eaten. Another interesting fact for the slight rise of the imported quantities over the months from June to August could be that in the summer season a lot of beef is used for barbecues (ibid.).

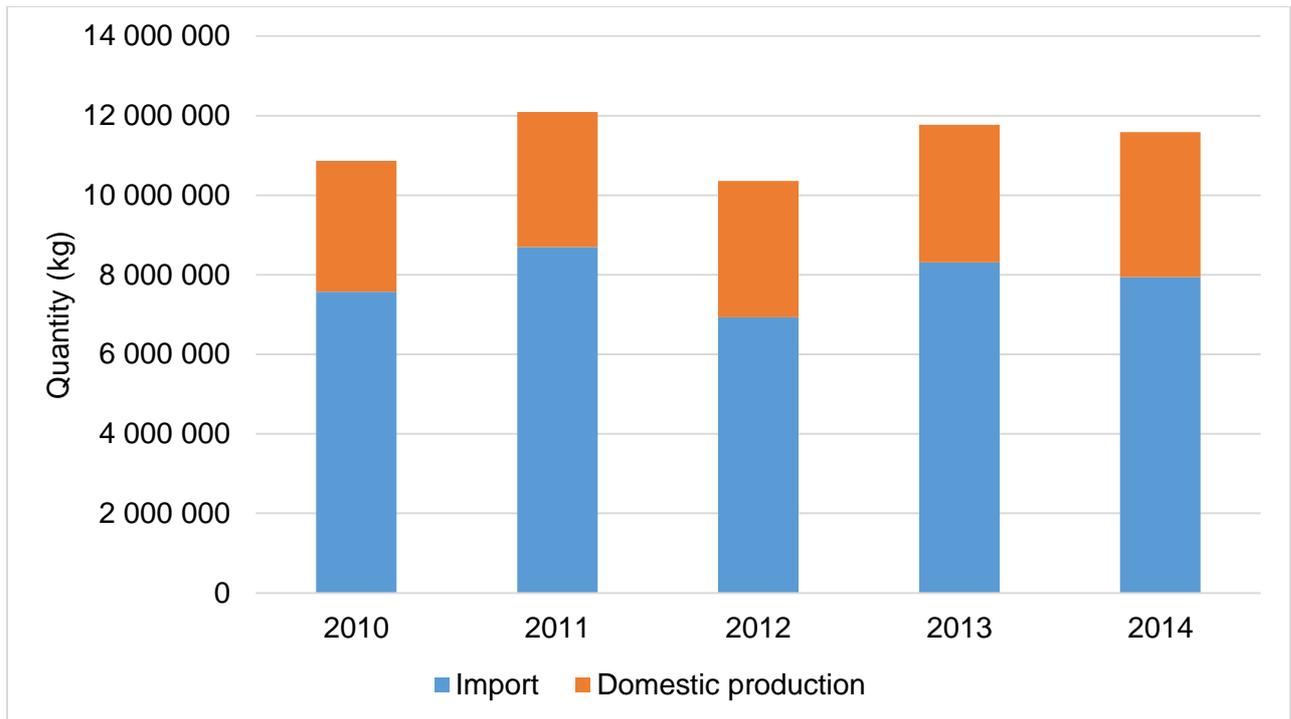
Figure 6.4 Loin cuts approval of tariff quotas 2010 - 2014



Source: Author based on data from Proviande (2015)

In order to give an overview of the total consumption of loin cuts in Switzerland the following graph has been established based on data from Proviande (2015). It compares the total import of loin cuts with the total domestic production of loin cuts in Switzerland, the graph indicates that higher quantities are imported than domestically produced. A reason for that could be that Switzerland has not enough agricultural farmland in order to hold cows. Moreover, the produced quantities of beef in Switzerland are not able to cover the domestic consumption. Adding up the imported quantities with the domestically produced quantities one reaches the total consumption of loin cuts in Switzerland. As Switzerland is seen to have a luxurious consumption they tend to prefer high quality meat. Consequently the total consumption of loin cuts on average lies between 10 to 14 million kg over the past five years. Comparing this to the much higher consumption amounts for chicken, which will be outlined in the following section, it also reflects the above-mentioned statement that beef ranks third after chicken in the total consumption.

Figure 6.5 Loin cuts total domestic production and imports 2010 - 2014



Source: Author based on data from Proviande (2015)

6.2 Chicken breast

Chicken breasts are widely consumed in Switzerland this resulting in large imported quantities. According to data from Aviforum (2013), 24% of the entire chicken accounts for chicken breasts and they are the products, which are consumed predominantly compared to other parts of the chicken. Chicken breasts belong to the tariff quota no. 06.42 and the notified quantity at the World Trade Organisation is 42'200 t per year. When it comes to the distribution of tariff quotas for chickens, 100% of the total quantities are allocated over an auction.

The table below gives an overview of the different duty rates charged when importing chicken breasts under the quota (KZA) or out of the quota (AKZA). There is a significant difference in the amount being charged for imports out of the quota (AKZA), as the rate is almost 50 times higher than the other one.

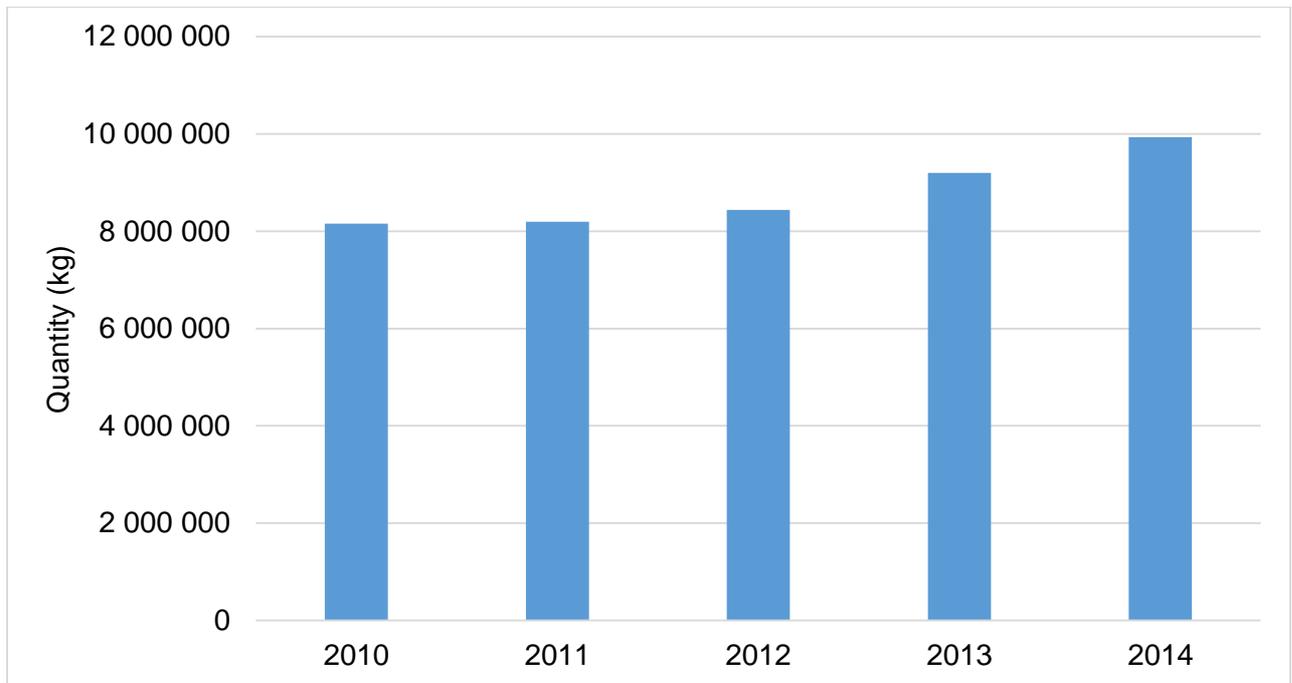
Table 6.5 Chicken breasts duty rate

Import option	Duty rates in CHF per 100 kg gross
Import under the quota (KZA)	30.--
Import out of the quota (AKZA)	1'581.--

Source: Author based on data from Tares website (2015)

In this section the focus lies on the analysis of imports and tariff quotas of chicken breasts. The figure below indicates the total imports of chicken breasts over the past five years and there has been a steady growth from the year 2010 onwards. In 2014 approximately 10 million kg of chicken breasts were introduced to the Swiss consumer market.

Figure 6.6 Chicken breasts total imports 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

When it comes to analysing the comparison between the quantities imported under the quota (KZA) and the ones imported out of the quota (AKZA), it clearly indicates that enormous amounts are imported under the quota because of the much cheaper duty rate of 30.00 Swiss francs. There was a radical decrease in the year 2013 for the quantities imported out of the quota, the reason for that being the chicken scandals and the bird flu outbreak in Great Britain and the Netherlands whereupon Switzerland then banned the import of chickens from these two countries. This resulted in much lower imports of 486 kg in 2013. Furthermore the lower amounts imported out of the quota are mostly special products which are not consumed predominately.

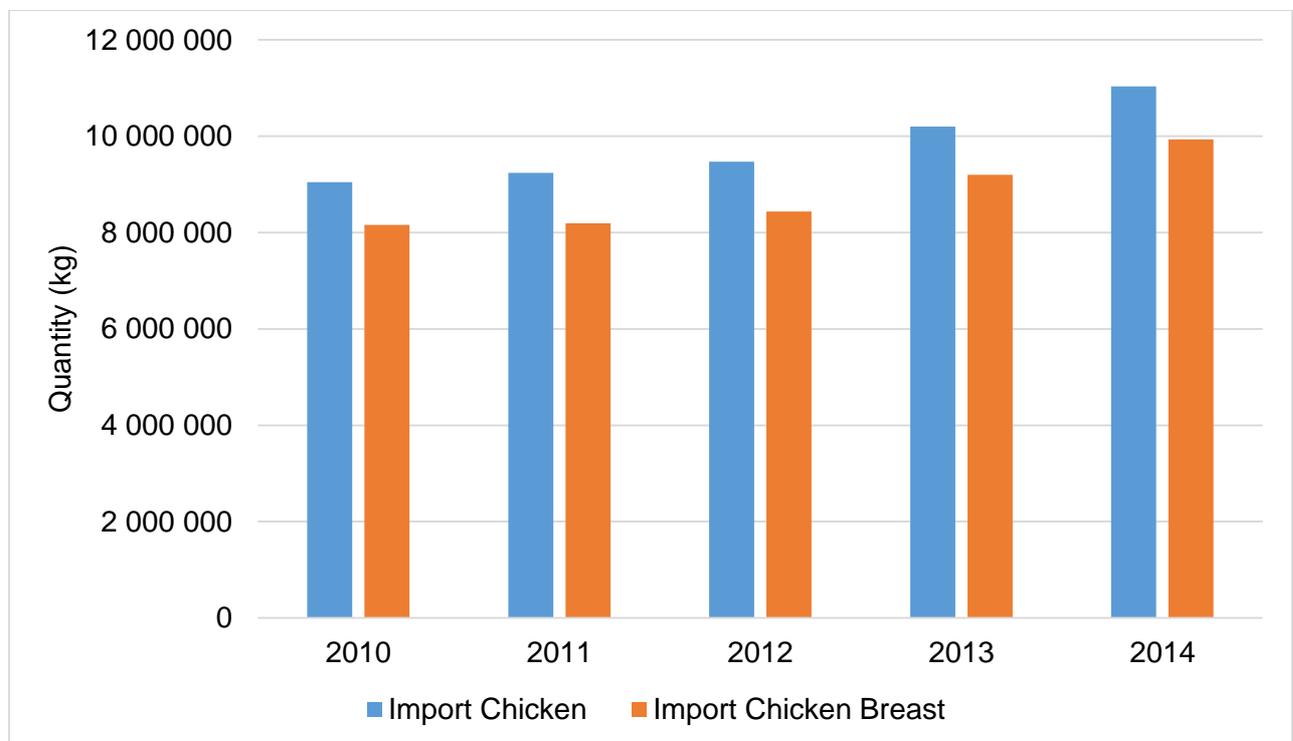
Table 6.6 Comparison of chicken breasts under and out of tariff quotas

	Import Chicken breast KZA (kg)	Import Chicken breast AKZA (kg)
2010	8'140'912	15'579
2011	8'100'846	93'097
2012	8'384'883	54'341
2013	9'197'580	486
2014	9'898'160	37'803

Source: Author based on data from Swiss Impex (2015)

In the following graph the total import of chicken is compared to the total import of chicken breasts. It is revealed that, the overall import of chicken breasts accounts for almost 90% of the total import of chicken. This mainly indicates that most Swiss people prefer chicken breasts when it comes to the consumption of meat from chicken. On the contrary to the import of chicken breasts which amounts approximately 43,90 million kg over the past five years only 7,30 millions kg were exported. This means that for every 100 kg of chicken breasts that are imported 16,60 kg is exported. One explanation is that mostly all slaughtered by-products are exported, as these goods are not consumed in Switzerland. There is a growing foreign market for chicken feet abroad and thus they amount for almost all of the exported goods (Schneider P. 2015).

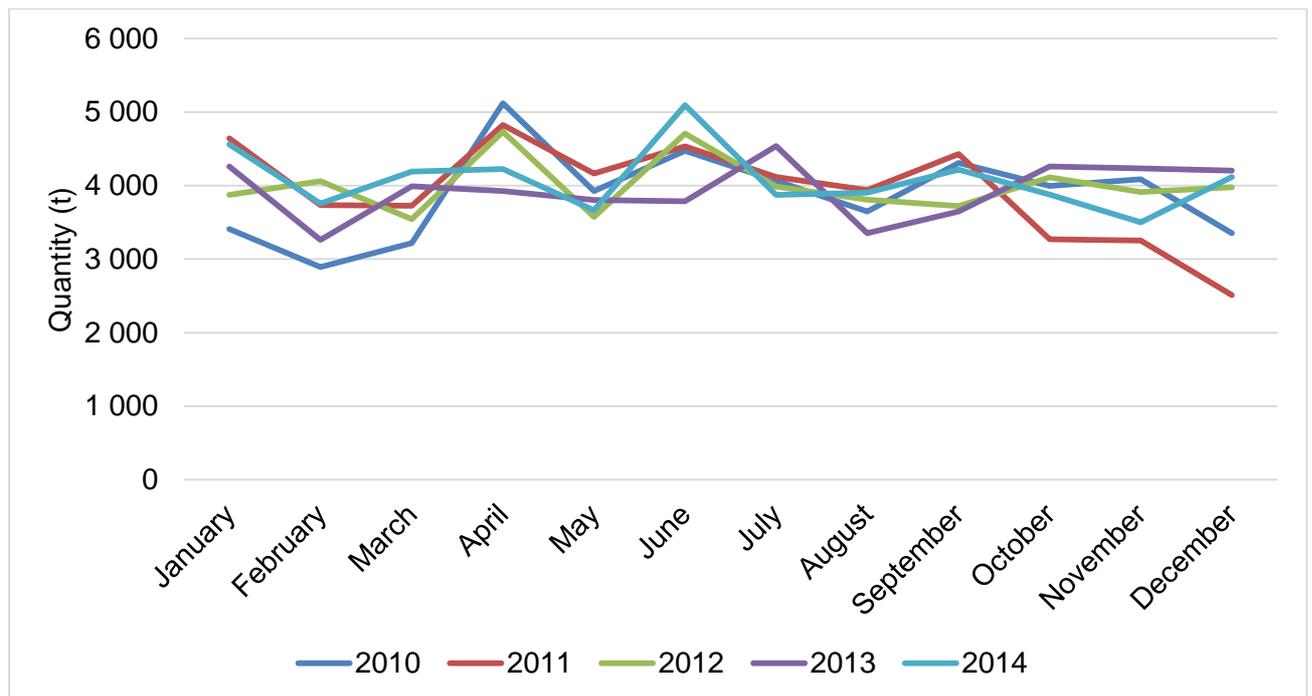
Figure 6.7 Comparison imports chicken breasts to imports chicken 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

According to data gathered from Proviande the following graph has been generated showing the approved tariff quotas over the past five years. The quantities, which are published by the Federal Office for Agriculture are also comparing the graph for chicken breasts with the one for loin cuts from above. It clearly indicates that there is almost no fluctuation throughout the year. The consumption of chicken breasts does not vary between the different holiday seasons and remains therefore constant over the whole 12 months.

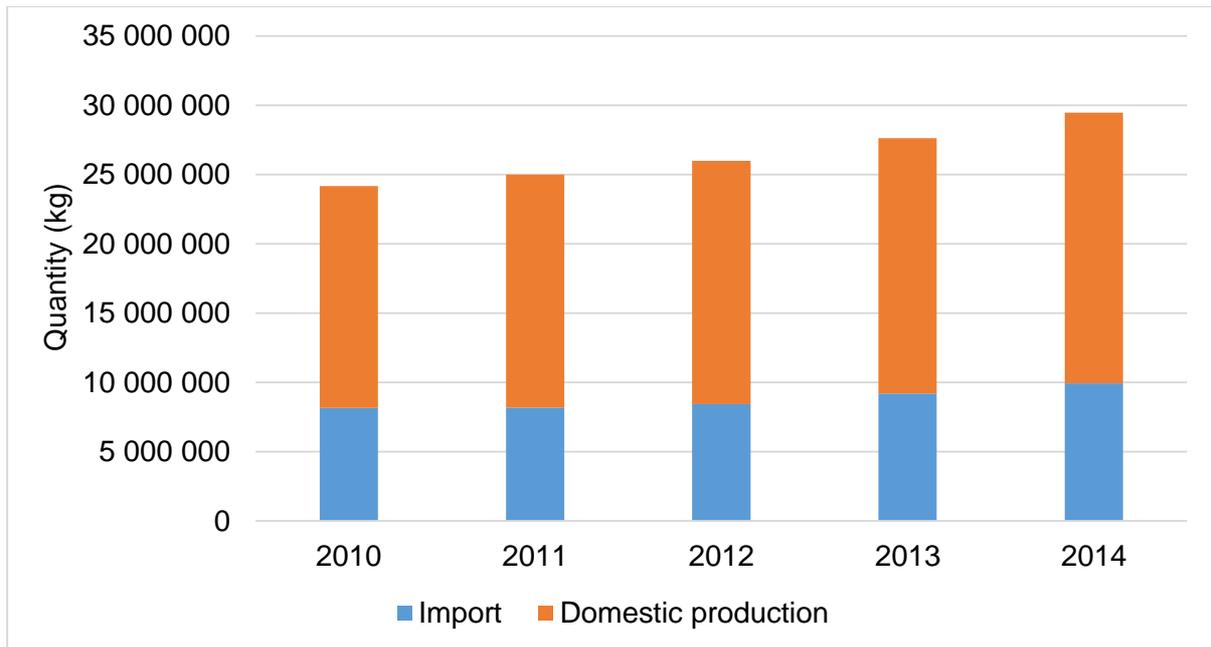
Figure 6.8 Chicken breast approval of tariff quotas 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

There has been a steady increase of the total consumption of chicken breasts in Switzerland over the past five years. However, the consumption for chicken legs is decreasing rapidly since there is a huge health trend going on in Switzerland and as these parts are perceived to be products with a lot of fat nobody wants to consume them anymore. The graph below discloses an overview of the import of chicken breasts compared to the domestic production. One key aspect is that almost twice as much is domestically produced compared to the import. This is a clear indicator that Swiss people prefer to know where chickens are held and how they have been treated. There were many cases in European countries where the animals were mistreated and various cases of chickens containing traces of antibiotics. The willingness to pay for domestically grown products, for instance the ones classified as organic products offered by various wholesalers and farmers, is much higher

Figure 6.9 Chicken breasts total domestic production and total imports 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

6.3 Half-carcasses cows

Half-carcasses of cows are typical goods, which are further processed into other products such as sausages, minced meat for ready-to-eat meals or cold cuts. They belong to the tariff quota no. 05.7 and the notified quantity at the World Trade Organisation is 20'703 t per year. When it comes to the distribution of tariff quotas, they are allocated in the same way as loin cuts, which means that 50% are distributed over an auction, 40% depend on the quantity of slaughtered animals and the remaining 10% are assigned according to the domestic power.

The figure below contains the different duty rates for half-carcasses of cows. Even here it is clearly visible that when importing under the quota (KZA), the rate is much lower than importing out of the quota (AKZA).

Table 6.7 Half-carcasses cow duty rates

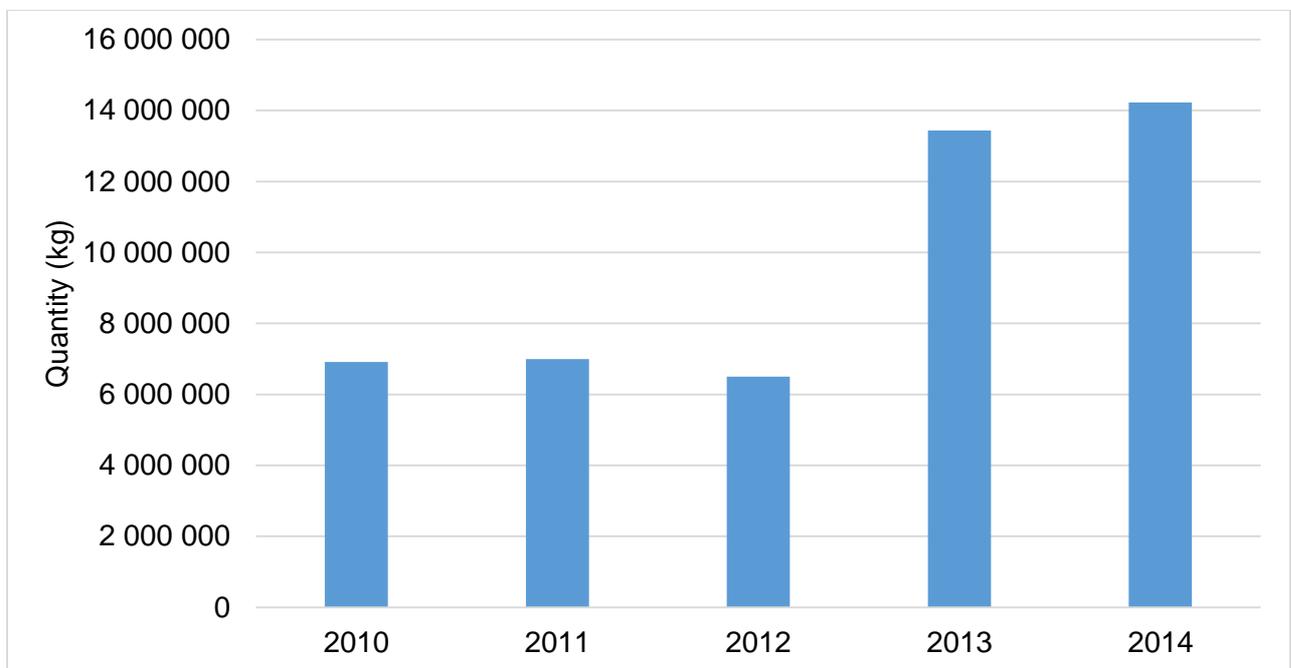
Import option	Duty rates in CHF per 100 kg gross
Import under the quota (KZA)	69.--
Import out of the quota (AKZA)	758.--

Source: Author based on data from Tares website (2015)

This section shows the total import of half-carcasses of cows for the past five years starting from 2010. In the beginning of 2010 only 6,90 million kg were imported whereas at the end of 2014 a

total quantity of 14,20 millions kg were introduced to the Swiss market. A reason for this radical increase of the total import is the huge scandal of bovine spongiforme enzephalopathie (BSE) happening in the years before 2010. BSE is a disease, which occurs predominantly by bovine animals. Switzerland was therefore forced to ban the import of half-carcasses of cows, but the consumption still increased rapidly so border protection was withdrawn. They started to import these products in the beginning of 2010 but only in smaller quantities, but they soon realised that these quantities would not be sufficient for the Swiss market. Consequently the Swiss government started to convince consumers that the BSE scandal was finished and when the confidence of the Swiss consumers was strengthened in the year 2013, they doubled the imports for half-carcasses of cows (Schneider P. 2015).

Figure 6.10 Half-carcasses cows total imports 2010 - 2014



Source: Author based on data from Swiss Impex (2015)

The following table gives an overview over the different quantities imported under and out of the quota. There is always a much higher import under the quota (KZA) since the duty rate is much lower. It would not be reasonable to import such large quantities out of the quota (AKZA) as the duty rate amounts to 758.00 Swiss francs for 100 kg. This would eventually result in much higher costs for Swiss consumers.

Table 6.8 Comparison of half-carasses cows under and out of tariff quotas

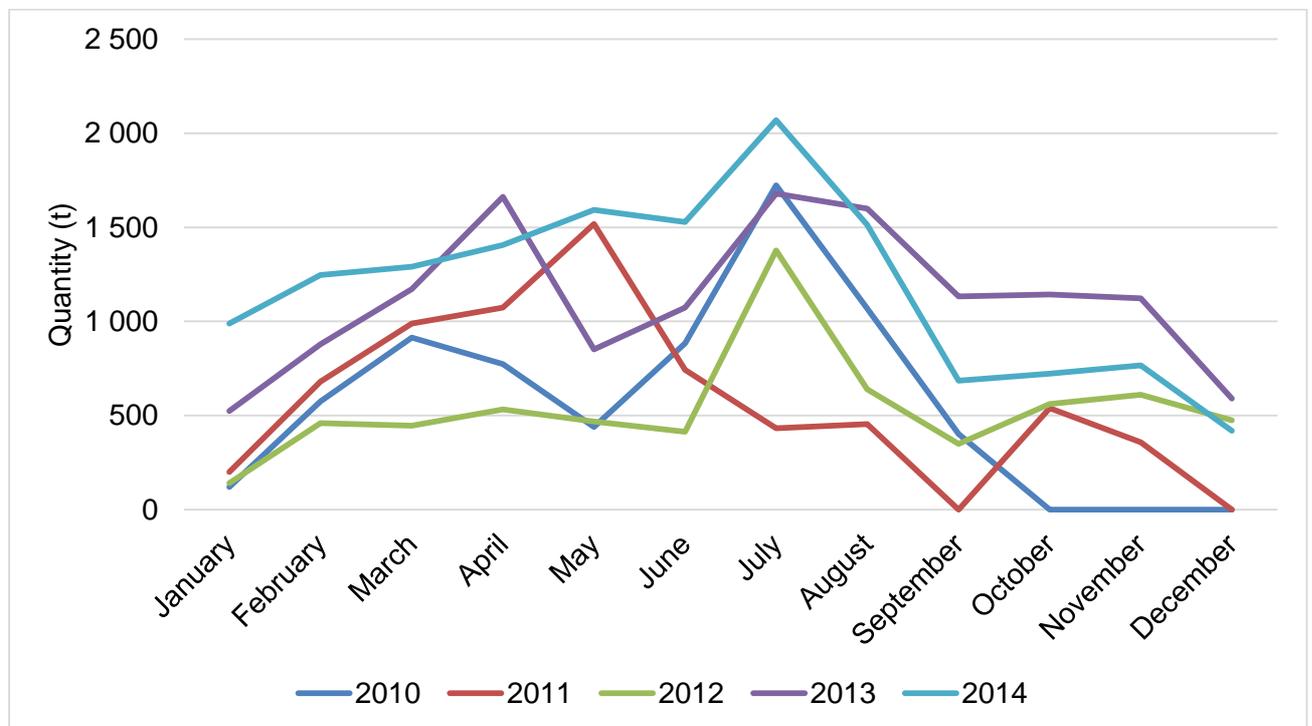
	Import Half-carasses cows KZA (kg)	Import Half-carasses cows AKZA (kg)
2010	6'910'557	1'262
2011	6'991'550	26
2012	6'499'626	85
2013	13'436'728	127
2014	14'228'559	233

Source: Author based on data from Swiss Impex (2015)

As this product is imported and further processed almost nothing is exported. In the past five years only a tiny amount of 30 kg have been exported.

When analysing the graph below where all the approved tariff quotas are listed from the past five years, there is a clear indication that half-carasses of cows are being consumed almost throughout the whole year. There is a slight increase over the summer months from June to August where processed meat is used to make sausages, which are mostly consumed at barbecues in the summer period. According to Peter Schneider (2015), another reason for the increase over the summer months is the fact that significant numbers of Swiss cows spend their summer up in the alps, which means that larger quantities have to be imported during these periods.

Figure 6.11 Half-carasses cows approval of tariff quotas 2010 - 2014



Source: Author based on data from Proviande (2015)

6.4 Evaluation meat market

This section will give a short conclusion of the Swiss meat market and its main challenges and opportunities for the future associated with the tariff quotas and the WTO. Finally the three products will be summarised and concluding thoughts are outlined.

Overall, the development of the Swiss meat market has been stable over the past five years and since the introduction of tariff quotas. According to Peter Schneider (2015) and Martin Rufer (2015), from the Swiss farmers federation, tariff quotas are an important tool for the Swiss market. Through the usage of tariff quotas imports are unlimited and quantities can be introduced under much cheaper conditions. This supports the maintenance of a stable price level in Switzerland. The market development is quite positive on a long-term basis, but the short-term volatility is increasing. Price fluctuations in international markets influence the domestic market, particularly those markets where border protection is insufficient, this occurring for milk and sugar. Furthermore the price erosion has been tightened even more through the stronger Swiss franc.

According to Peter Schneider (2015), the Swiss meat market is always undersupplied because of higher increase in prices for the animal husbandry and the steady decrease of the animal population. Furthermore, the overall demand for high quality meat is growing more than the domestic production, which results in higher imports over the past years. Another interesting fact is that the collective wealth of Swiss people is very high and typically people only want to eat luxury products such as loin cuts or chicken breasts. This leads to the fact that only small parts of an animal are consumed and consequently a lot of meat is not consumed. Additionally imported meat contributes to the value chain and creates new jobs. This situation applies for half-carcasses cows where entire parts are imported and then processed in Switzerland. Almost 1'000 work places can be generated and this is important because the Swiss population is growing steadily.

Switzerland is able to convince consumers with its high quality and credibility and this has been even more strengthened through the various meat scandals in foreign countries. Future predictions say that the overall meat consumption will stagnate and that the Swiss government needs to sensitise consumers with good marketing and communication campaigns in order to eat more Swiss meat. The Swiss meat market will not be able to compete with other countries on the basis of price and quantities since the availability of resources is limited. Nevertheless, Switzerland will defeat itself with innovation and high quality.

As for the three products chosen for the analysis, the development has been quite stable for all of them, except the fact that half-carcasses of cows were only reintroduced to the Swiss market in the year 2010. Concerning the price development of all products there is no risk of a declining price,

except that auctions lead to higher prices for loin cuts and half-carcasses of cows. The protection of all three products is granted through the current tariff quotas applied by the World Trade Organisation. According to Peter Schneider (2015) the only risk, which exists at the moment is the fact that domestic production for pork accounts for 97% and simultaneously there is a radical decrease in the overall consumption of pork. As a result, prices increase and at the same time less pork meat is consumed. The Swiss meat association is currently trying to outline the benefits of pork meat to the Swiss consumers with different campaigns and over various communication channels.

7 The Doha Round

The talks are named after the city where they were launched even though they mainly took place in Geneva. They are also called the Doha Development Agenda, partly to emphasise that development is a main objective (World Trade Organisation, 2015A). The commitments previously negotiated in the Uruguay Round were included to continue the reforms in further talks. These talks were divided into sub-subjects. The first one was concerning the agreement on trade related aspects of intellectual property rights (TRIPS) where members negotiated the creation of a multilateral register for geographical indications on wines. Of broader interest were negotiations in agriculture and services. However, these talks resumed in the year 2000 (Schluep Campo and Jörin, 2015).

Key negotiations of the Doha Round concern the subjects of agriculture, non-agricultural market access, services, trade facilitation, the environment, geographical indications, intellectual property issues and finally dispute settlement. This paper will mainly focus on the negotiation rounds for agriculture.

According to Schluep Campo and Jörin (2015), negotiations on agriculture began in early 2000, when in November 2001 about 121 governments had submitted a large number of negotiating proposals concerning agriculture. These negotiations are still continuing and no common grounds have been established so far. The new declaration of the Doha Round builds on the work already undertaken and tries to redefine certain deadlines. It also reconfirms the long-term objective already agreed in the present WTO-Agreement: to establish a fair and market-oriented trading system through a programme of fundamental reform. The purpose is to correct and prevent restrictions and distortions in agricultural markets and member governments commit themselves to comprehensive negotiations aimed at:

- Market access: substantial reductions
- Export subsidies: reductions of, with a view of phasing out, all forms of these
- Domestic support: substantial reductions for support that distort trade

Currently the negotiations are not proceeding, as too many discrepancies between the major players in the market exist. Considering the fact that if the Doha Round is finalised and negotiations on the market access succeed, it would have a negative impact on the agricultural market in Switzerland. As producers in the vegetable market stated in previous sections of the paper, liberalisation would be devastating and the Swiss market might be flooded with cheaper goods from foreign countries (ibid.).

8 Concluding thoughts and future perspectives

As the evaluation and the objectives of the Doha Round outlined, the Swiss agricultural market is facing an unknown and challenging future. Current negotiations with the World Trade Organisation and countries interested in free trade agreements with Switzerland, may force the country to forfeit its border protection for certain products in the agricultural sector. As the evaluation has shown border protection is perceived as a valuable measure to safeguard domestic production. Producers and traders within the analysed industries fear the reduction of tariff rates, which would consequently provoke an enormous pressure on domestic prices. Based on the conducted research the authors perceive the following opportunities and threats for the Swiss agricultural market. These assumptions are limited to the predetermined products.

8.1 Opportunities

- The analysis has indicated that there is a tendency towards the consumption of Swiss products. Regionality is of paramount importance especially in the strawberry and chicken market. Through communication and marketing campaigns, such opportunities could be further enhanced. As the example of Swiss apricots showed, branding can improve sales and raise awareness for domestic products.
- Based on lifestyle and socio-cultural trends the fruit and vegetables market experiences a huge growth potential. As Switzerland is able to produce fresh and healthy fruit and vegetables domestically, for instance carrots, apples, salads and cucumbers, the growth potential is perceived as an opportunity. For instance, cherry tomatoes enjoy an annually increased consumption rate due to the fact of being convenient and trendy. According to the Food and Agriculture Organisation of the United Nations (FAO website, 2015) it is important to prepare fresh and healthy meals and to reduce the average meat consumption.
- Continuous product development lead to an overall higher quality in the long run and enhance innovative products. According to Matthias Zurflüh (2015) Switzerland engages primarily in the research development within the fruit market, whereas the Netherlands are leading in the vegetable market. Switzerland could become a role model of unique cultivation methods and the development within the product range. Those aspects could distinguish Swiss products from foreign products and boost their popularity.

8.2 Threats

- Elimination of tariff rates will eventually lead to higher imports of foreign goods, which will increase pressure on domestic prices and could reduce market share for domestic producers. Consequently they would no longer be able to produce cost efficiently in order to compete with foreign markets. This threat has been outlined by various experts, interviewed in an earlier stage. Our analysis proposed that Swiss consumers are sensitised towards Swiss products and perceive their value as superior. However, the authors assume that if the price gap widens extensively consumers would ultimately chose price over quality.

Possible solution: In order to reduce costs, the authors assume that single producers could merge into associations where expertise is centralised and resources are shared, which would increase efficiency and counteract the immense pressure on prices. Furthermore, the authors see improvements in the declaration of fruit and vegetables within the gastronomy. Whereas in grocery stores fruit and vegetables are already declared, there is no such declaration legally required in the gastronomy. The authors assume if declaration was generally embedded in law consumers would be more sensitised to choose meals, which are prepared with domestic products. Additionally, Switzerland could raise awareness about the average spending on nutrition, which currently only accounts for 8% in comparison to the higher amounts of 13% in France or 16% in Portugal (Regenass, 2013). This awareness could change the overall spending behaviour and would positively affect sales of domestic products.

- Within the production of strawberries and cherry tomatoes, a trend towards overproduction can be observed. Since consumption has increased many producers see the growing opportunities in these two markets. Particularly in the market for cherry tomatoes domestic competition is very high and impacts domestic prices. If there is a persistent overproduction, efficient market allocation would fail, as the demand function is inelastic.

Possible solution: The above mentioned issue could eventually be solved through extensive research which enhances the storage possibilities of surplus production. In addition, excess products could be made available for niche markets in foreign countries. Nevertheless, in order to start an export business, communication and marketing would be indispensable.

Based on the opportunities and threats the authors conclude that Switzerland is not able to compete against foreign markets in terms of price and quantities but rather on quality, innovation and marketing campaigns. The findings and the evaluation of the conducted interviews have empha-

sised that the major threat does not originate from current negotiations with the World Trade Organisation but rather with upcoming free trade agreements. Ultimately, the question about how and to what extent domestic production should be protected in the future, is political. In terms of border protection the particular question of tariff rate quotas will matter enormously; will there be any such quotas in the future? And how big will they be? Expert opinions regarding those questions diverge tremendously and the accurate answer can only be found in the near future.

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10 Apendices

10.1 Transcripts of expertinterviews

Georg Bregy, Swissfruit, 29. July 2015, e-mail, (Bregy, 2015)

1. Bemerkt man als Obstproduzent einen Einfluss der WTO Zollkontingente? Wenn ja, in welchem Sinne?
2. Sind sie zufrieden mit den Zollkontingenten? Sehen Sie Verbesserungsmöglichkeiten?
3. Bemerkten Sie den Schutz der Schweizer Landwirtschaft? Bewirtschaftete/nicht bewirtschaftete Phasen?
4. Wie hat sich die Produktion in den letzten Jahren verändert? Schwierigkeiten? Schwemmung Markt mit Billigprodukten
5. Aus der Sicht der Obst/Gemüseproduzenten, welche Massnahmen sollte die Schweiz ergreifen, dass die inländische Produktion besser geschützt ist?
6. Was würde bei einer zusätzlichen Öffnung vom Markt mit der Schweizer Produktion von Obst und Gemüse passieren?

Antwort: Die heutige Grenzbewirtschaftung nach WTO-Regeln ist für die inländische Produktion lebenswichtig. Bei einem Wegfall würden massive Marktanteile verloren gehen. Das zeigt die Erfahrung mit den bisher liberalisierten Produkten wie etwa den Obstbränden: Innerhalb 15 Jahren ging deren Marktanteil (Spirituosenmarkt) von 80% auf 18% zurück. Bei Produkten wie Obstessig oder Konfitüre ging es in dieselbe Richtung. Die heutigen Regelungen sind in der Branche gut akzeptiert, und die Abläufe sind etabliert. Sowohl Produzenten wie auch Verarbeiter und Händler können damit leben. Fast immer kann sich die Branche auf einheitliche Anträge an die Behörde einigen, das zeigt, dass die Zusammenarbeit gut funktioniert und dass Kompromissbereitschaft vorhanden ist. Wir möchten, dass sich die Regeln und Vorgaben für die Grenzbewirtschaftung nicht noch weiter verkomplizieren. Die Märkte brauchen ein pragmatisches und manchmal kurzfristiges Vorgehen.

Der Wettbewerb mit den ausländischen Produkten ist in allen Bereichen deutlich spürbar, in den freien Phasen bei gleichzeitiger Verfügbarkeit von Inlandware entsprechend mehr (Beispiele: Erdbeeren, Tafelkernobst). Gerade mit dem tiefen Eurokurs verliert der bestehende Grenzschutz manchmal seine Wirkung, so dass Produkte auch zum hohen Zollansatz importiert und immer noch günstiger als vergleichbare Schweizer Produkte angeboten werden. Umso wichtiger ist für die inländische Branche, sich kontinuierlich zu verbessern, effizienter zu werden, Kosten zu senken, und dabei weiterhin auf eine hohe Qualität und auf ein angepasstes Herkunftsmarketing zu setzen. Auch mit dem Cassis de Dijon-Prinzip kamen neue Billigprodukte ins Land, die zum Teil die Konsumenten täuschen. Die ganze Branche hat in den letzten Jahren viel investiert, beispielsweise in Witterungsschutz, neue Sorten, Lager- und Sortieranlagen. Hauptsächlichster Nachteil zum Ausland sind die hohen Kosten, insbesondere die Löhne. Da die Produkte oft wenig Möglichkeiten zur Differenzierung bieten, ist aus unserer Sicht ein angemessener Grenzschutz gerechtfertigt, um diese Nachteile etwas auszugleichen. Der Frage ist aber schlussendlich eine politische, in welchem Umfang man eine einheimische Produktion erhalten will

Fabian Etter, Gemüse Egger, 29. July 2015, e-mail (Etter, 2015)

1. Bemerkt man als Obstproduzent einen Einfluss der WTO Zollkontingente? Wenn ja, in welchem Sinne?

Antwort: Als Produzent und Händler spüren wir sowohl die positiven wie auch die negativen Auswirkungen der Zollkontingente. Der Grenzschutz ermöglicht uns als Produzent unsere Produkte zu einem kostendeckenden Preis abzusetzen. Als Händler bevorzugen wir die Inländischen Produkte, auch wenn diese manchmal teurer sind als die Importprodukte. Die negativen Auswirkungen des Grenzschutzes merken wir, wenn die Verfügbarkeit von inländischen Produkten knapp ist, aber trotzdem kein Importkontingent gesprochen wird. Dann haben wir jeweils Probleme unseren Kunden qualitativ einwandfreie Ware zu einem vernünftigen Preis anbieten zu können.

2. Sind sie zufrieden mit den Zollkontingenten? Sehen Sie Verbesserungsmöglichkeiten?

Antwort: Die Kontingentierung ist ein wichtiges Instrument zum Schutz unserer Schweizer Landwirtschaft und sie funktioniert im Grossen und Ganzen gut. Bei Früchten und Gemüse werden jeweils wöchentlich (wenn nötig auch halbwochentlich) von Produzenten und Abnehmern Informationen bezüglich Angebot und Nachfrage abgeholt. Damit wird das Marktvolumen und die zur verfügbare Menge berechnet. Verbesserungsmöglichkeiten sehe ich in der Mengemeldung. Bei den Abnehmern kann ich es zu wenig abschätzen, wie genau diese Ihren Bedarf melden, jedoch gehe ich davon aus, dass auch diese, wenn sie auf eine Kontingentsgewährung aus sind, den Bedarf eher höher ansetzen. Bei den Produzenten muss ich leider immer wieder mal feststellen, dass es solche gibt, die nicht sauber ihr Angebot melden. Sie versuchen damit eine Kontingentsprechung zu verhindern, um den Preis bei ihren CH-Produkten hoch zu halten. Schlussendlich schaden diese der ganzen Branche und dem Image des ganzen Kontingentsystems. Es sollte eine Möglichkeit geben solche Falschmeldungen zu identifizieren und zu büssen. Eine zweite Verbesserungsmöglichkeit sehen wir beim Abverkauf von Importprodukten nach Ende der Bewirtschafteten Phase. Es gibt Marktteilnehmer, welche in der Bewirtschafteten Phase grosse Mengen importieren und diese dann noch lange über das Ende der Bewirtschafteten Phase hinaus verkaufen und so den Preis der CH-Produkte drücken. Hier sollte rigoros kontrolliert und gebüsst werden.

3. Bemerkten Sie den Schutz der Schweizer Landwirtschaft? Bewirtschaftete/nicht bewirtschaftete Phasen?

Antwort: Wie in den vorherigen Antworten schon erwähnt, nehmen wir den Grenzschutz als sehr wertvolles und wichtiges Instrument wahr. In den Bewirtschafteten Phasen, besonders in den Übergangszeiten im Herbst und Frühling sehen wir ein Verbesserungspotenzial im Meldewesen.

4. Wie hat sich die Produktion in den letzten Jahren verändert? Schwierigkeiten? Schwemmung Markt mit Billigprodukten

Antwort: Am meisten spüren wir den Preiskampf. Wir sind einem ständigen Preisdruck ausgesetzt welcher in den letzten Jahren massiv zugenommen hat. Dies vor allem auf dem freien Markt. Was ich noch betonen kann ist, dass Discounter einen erstaunlich fairen Preis bezahlen und auch möglichst auf CH-Produkte setzen.

5. Aus der Sicht der Obst/Gemüseproduzenten, welche Massnahmen sollte die Schweiz ergreifen, dass die inländische Produktion besser geschützt ist?

Antwort: Im Wesentlichen greift der Grenzschutz gut. Kleine Optimierungsmöglichkeiten gibt es, wie in Punkt 2 erwähnt. Ich spreche hier nur von Rohware. Produzenten von verarbeiteten Produkten haben sicherlich andere Meinungen.

6. Was würde bei einer zusätzlichen Öffnung vom Markt mit der Schweizer Produktion von Obst und Gemüse passieren?

Antwort: Dies hätte verheerende Folgen für die Schweizer Produktion. Mit den Produktionskosten in der Schweiz (Personal und Hilfsgüter) und den viel strengeren Bewirtschaftungsvorschriften als im Ausland ist es nicht möglich günstiger zu produzieren. Die Schweizer Produktion würde zu einem Nischenmarkt verkommen für Kunden, welche bereit sind den höheren Preis zu bezahlen

Schneider Peter, Proviande, 30 July 2015, Bern

Nierstücke 0201.2091/99 und 0201.3091/99

1.) Bei der Kontingentsverteilung wurde im Jahr 2014 die gesamte Verteilungsmethode geändert. Vorher wurden 90% Versteigert und 10% anhand der Inlandleistung verteilt nun werden 50% Versteigert und 40% gehen an die Schlachtenden Betriebe und schliesslich werden die restlichen 10% anhand der Inlandleistung verteilt. Warum wurde diese Methode gewechselt? Was sind die Vor- und Nachteile der alten beziehungsweise der neuen Methodik? Welchen Einfluss haben sie auf Preis und Importmengen?

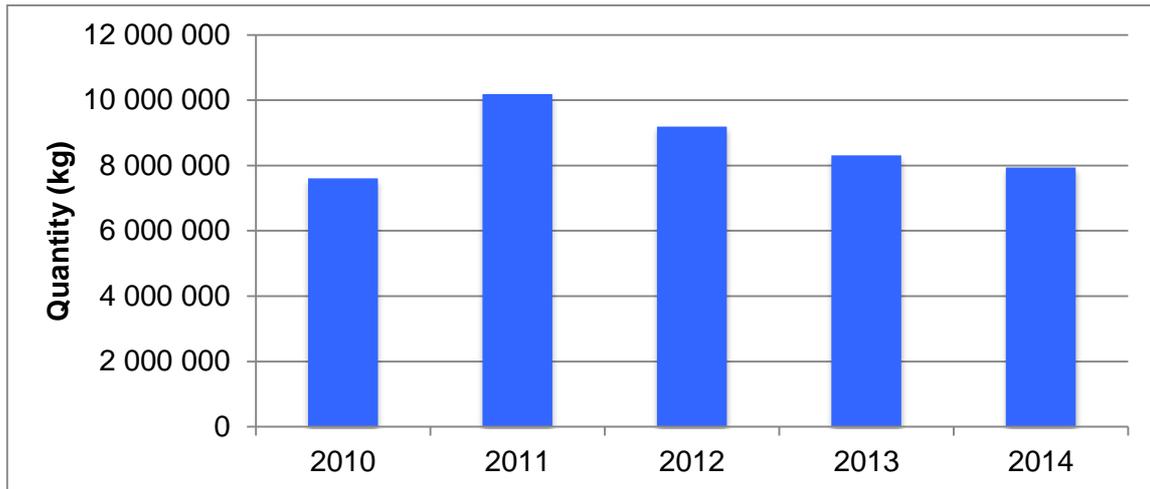
Antwort: Damit die Inlandleistung besser gewährleistet ist. Bundesrat war dagegen, Methode wurde aber trotzdem geändert.

2.) Hat sich seit der Einführung von Zollkontingenten gemäss WTO, der Handel stark verändert? (Allgemein auf den gesamten Handel mit Fleisch bezogen)

Antwort: Der Handel hat sich nicht gross verändert. Die Zollkontingente haben sich nicht gross verändert und schützen den Schweizer Fleischmarkt.

3.) Bei den Nierstücken wurde im Jahr 2011 10,18 Millionen kg importiert hingegen im Vorjahr nur 7,61 Millionen kg. Wie ist diese Differenz erklärbar?

Antwort: Diese Abweichung liegt noch im Rahmen, da in den Jahren 2011 und 2013 Pistolas importiert wurden, welche in den Vorjahren nie importiert wurden.



- 4.) Bei der nächsten Grafik sieht man bei den Nierstücken mit Knochen, dass im Jahr 2012 die importierte Menge zum KZA Ansatz drastisch angestiegen ist. Wie ist dies erklärbar?

Antwort: Diese Grafik beinhaltet falsche Zahlen

- 5.) Bei den Nierstücken wurden über die letzten fünf Jahre ca. 43,2 Millionen kg importiert wobei sich der gesamte Export nur auf 33'617 kg beläuft. Weshalb gibt es überhaupt einen Export wenn solch grosse Mengen importiert werden müssen um den Eigenbedarf zu decken?

Antwort: Trockenfleisch macht den grössten Anteil beim Export aus und die grössten Abnehmer sind Deutschland und Frankreich. Zudem sind vieles Schlachtnebenprodukte welche in der Schweiz keine Verwendung finden und dann exportiert werden.

- 6.) Uns ist aufgefallen das trotz des hohen Importvolumens bei den Nierstücken, die Inlandproduktion konstant geblieben ist. Weshalb wird bei so hohem Eigenbedarf die inländische Produktion nicht angekurbelt? Ist das eine Preisfrage oder ist dies auf die begrenzte Anzahl von Rindern zurückzuführen?

Antwort: Eine gewisse Unterversorgung besteht im ganzen Tierfeld. Tierhaltungpreise steigen stetig an und es besteht momentan ein Rückgang des Rindviehbestands. Zudem steigt die Nachfrage mehr als die Inlandproduktion.

- 7.) Hat sich der Preis bei den Nierstücken in den letzten fünf Jahren stark verändert? Haben Versteigerungen einen grossen Preiseinfluss und wie sieht es mit dem Preiszerfall aus wenn ausländische Nierstücke, welche viel günstiger sind, importiert werden?

Antwort: Versteigerung lässt die Preise ansteigen. Jedoch ist die allgemeine Preisentwicklung normal geblieben. Ein Preiszerfall besteht bei den Nierstücken nicht, da durch den Import auch noch extrem hohe Zuschläge auf den Preis kommen. Importe werden am teuren Markt welcher in der Schweiz herrscht angepasst.

- 8.) Aus der Sicht eines Schweizer Viehproduzenten wie denken Sie steht dieser zu den Einfuhren welche unter der WTO gehandhabt werden? Ist dieser mit den Zollkontingenten allgemein Einverstanden?

Antwort: Es hat zu wenig Rindviehproduzenten in der Schweiz, Preis muss stimmen damit es sich lohnt Rinder zu produzieren.

- 9.) Gibt es Produkte welche ohne Zollkontingente nicht importiert werden würden? (nur im Bereich des Fleisches)

Antwort: Nein das gibt es Grundsätzlich nicht. Es würden weiterhin alle Produkte importiert werden aber die gesamten Importe würden kleiner ausfallen.

Hühnerbrüste 0207.1311/19

- 10.) Bei dieser Grafik sieht man, dass die importierte Menge zum AKZA Ansatz im Jahr 2013 drastisch auf 486 kg zurück geht. Was könnte hierfür der Grund sein? Was ist überhaupt der Grund, dass zum AKZA importiert wird?

Antwort: Dies ist auf die Sperrung zweier Importländer (Niederlande, Grossbritannien) zurückzuführen. Zudem sind es nur spezielle Produkte welche zum AKZA Code reinkommen. Die Gastronomie ist der grösste Abnehmer von importierten Hühnchen.

- 11.) Auf 43,9 Millionen kg welche über fünf Jahre importiert werden, wurden nur 7,3 Millionen kg exportiert. Weshalb wird überhaupt eine Menge exportiert?

Antwort: Es werden grössere Mengen von Schlachtnebenprodukten exportiert wie zu Beispiel Hühnerfüsse welche einen grossen Trend haben im Moment. Zudem ist der Schweizer Wohlstand sicherlich auch ein Grund weshalb viele Schlachtnebenprodukte exportiert werden und nicht zum Eigenverzehr dienen.

- 12.) Was sind wichtige Qualitätsaspekte beim Hühnerfleisch? Schaut der Schweizer Konsument zuerst auf den Preis oder auf die Qualität beim Verzehr von Hühnerfleisch?

Antwort: Die wichtigsten Qualitätsaspekte sind die Tierhaltung, Herkunft, Qualität Fleisch

- 13.) Die notifizierte Menge beim Hühnerfleisch ist 42'200 t bei der WTO. Ist es schwer diese Kontingentsmenge zu erreichen da die Jährlichen zahlen nur wenig die Mindestmenge überschreiten? Wäre es der Schweiz bei kleineren Mindestmengen beim Import die Inlandproduktion zu steigern?

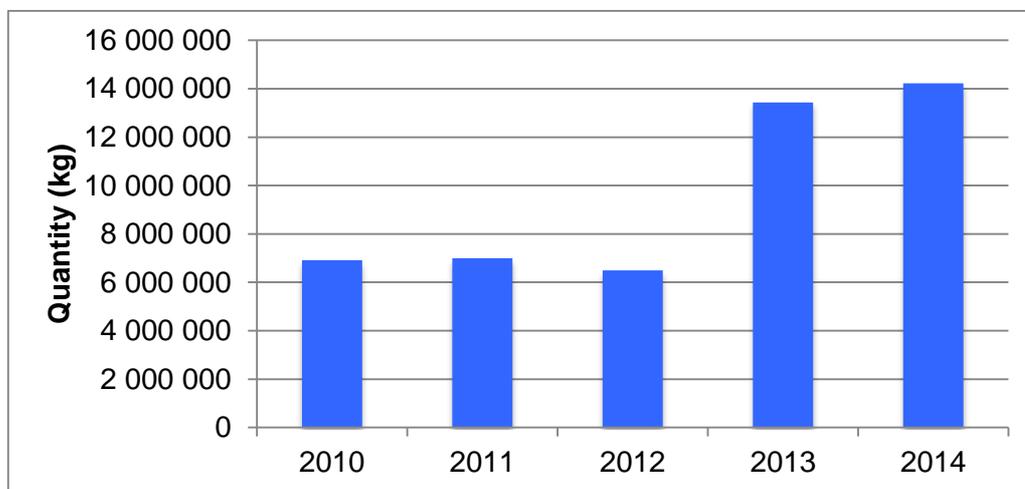
Antwort: Nein diese Gefahr besteht nicht da nur die Obergrenze von dem Kontingent (54500 t) erreicht werden muss und diese jährlich weit überschritten wird.

- 14.) Besteht auch beim Hühnerfleisch die Gefahr von einem Preiszerfall da Schweizer Fleisch grundsätzlich teurer ist? Wie wird dagegen Vorgegangen?

Antwort: Nein auch hier besteht keine Gefahr des Preiszerfalls, würden jedoch die Zollkontingente gesenkt werden dann hätte dies automatisch einen Einfluss auf die inländischen Preise.

Schlachthälften Kühe 0201.1091/99

- 15.) Bei dieser Grafik sieht man das sich in den Jahren 2013 und 2014 der Import fast verdoppelt hat, was könnte hierfür der Grund gewesen sein?



Antwort: Wurde erst am 2010 wieder importiert wegen den BSE Skandalen. Am Anfang hatte man noch kein Vertrauen deshalb kleinere Mengen aber ab 2013 wurden dann die Importe verdoppelt.

- 16.) Für welche Produkte werden eigentlich Schlachthälften von Kühen weiter verarbeitet?

Antwort: Wurstproduktion, Charcuterie, Fertiggerichte (Hackfleisch in Lasagne)

- 17.) Im Sommer werden viel höhere Kontingentsanteile vergeben als im Winter, hat es hierfür einen speziellen Grund?

Antwort: Hat etwas mit dem verzerr der Wurstwaren in der Schweiz zu tun. Zudem sind viele Kühe im Sommer in den Bergen.

Zukunft

- 18.) Wie könnte der Schweizer Agrarmarkt in der Zukunft aussehen wenn eine Form der Doha Runde bewilligt wird? Was sind die Chancen und Gefahren?

Antwort: Angebot von aussen würde sehr zunehmen, Preisdifferenzen würden weit auseinander gehen. Chancen sind die Schweizer Qualität und Gefahren der Preisdruck

- 19.) Was würde passieren wenn die Zölle beim AKZA noch weiter gesenkt werden?

Antwort: Der Schweizer Markt würde mit Ausländischer Ware geschwemmt werden und es würde ein extremer Preisdruck entstehen. Zudem hätte es fatale Folgen für vereinzelte Produkte wie zum Beispiel das Schweinefleisch oder die Milch.

- 20.) Was wären die grössten Herausforderungen in der Schweiz für die Zukunft?

Antwort: Der Konsum stagniert. Produktion kann nicht noch viel mehr ausgebaut werden. Jedoch könnte mehr in der Schweiz verarbeitet werden.

- 21.) Wie könnte sich der Schweizer Agrarmarkt von anderen abheben? Innovation, Kommunikation ect.

Antwort: Über Menge und Preis ist eine Abhebung von anderen Märkten sicherlich nicht möglich, aber über innovative Ideen und hervorragende Qualität könnte sich der Schweizer Markt von anderen abheben. Zudem ist es wichtig ein gutes Kommunikation und Marketingkonzept entwickelt wird, welches die Vermarktung der Produkte vorantreibt. Ein gutes Beispiel hier für ist Österreich weil die haben dies bereits exzellent umgesetzt.

Rindviehproduzenten, E-Mail, 30. July 2015

- 22.) Bemerkt man als Produzent einen Einfluss der WTO Zollkontingenten?

Antwort: Ja, die Zollkontingente (ZK) sind wichtig. Durch die ZK werden zwar die Importe nicht limitiert. Die Mengen, die zu sehr günstigen Konditionen eingeführt werden, sind aber begrenzt. Das hilft ein einigermaßen akzeptables Preisniveau in der Schweiz aufrechtzuerhalten.

- 23.) Wie hat sich die Produktion in den letzten Jahren verändert? Schwierigkeiten? Wird der Markt mit billigen Produkten geschwemmt?

Antwort: Die Märkte entwickeln sich langfristig international zwar positiv, die kurzfristige Volatilität nimmt aber zu. Die Preisschwankungen auf den internationalen Märkten übertragen sich auch auf die Schweiz, insbesondere bei Märkten, wo der Grenzschutz nicht ausreichend ist,

so bei der Milch oder beim Zucker. In diesen Märkten haben wir daher momentan ein extrem tiefes Preisniveau. Der Preisdruck wurde verschärft durch die Frankenaufwertung.

24.) Was sehen sie gäbe es für Verbesserungsmöglichkeiten im Zusammenhang mit der WTO und den Zollkontingenten?

Antwort: Die WTO muss einsehen, dass sich die internationalen Agrarmärkte stark verändert haben, dass in den einzelnen Staaten der Aspekt der Ernährungssouveränität eine grosse Bedeutung hat und dass die von der WTO angestrebten Liberalisierungsschritte im bei den Lebensmitteln nicht zielführend sind. Das heisst, dass an den Zollkontingenten und an der Ausserkontingentzollansätzen nicht substantiell geschraubt werden sollte.

25.) Wie denken Sie sieht die Zukunft der Schweizer Rindviehproduzenten aus?

Antwort: Die Schweizer Rindviehproduktion hat gute Perspektiven, die Konsumenten haben ein hohes Vertrauen in Schweizer Rindfleisch. Dieses Vertrauen ist angesichts der Fleischskandale im Ausland noch gestiegen.

26.) Wie sieht der Schutz der Schweiz aus für Rindviehproduzenten? Welche Massnahmen sollte die Schweiz ergreifen das Inländische Produktion besser geschützt ist?

Antwort: Der Schutz für Rindfleisch ist gut und muss beibehalten werden. Problematisch ist die Marktordnung bei der Milch. Hier funktioniert der Grenzschutz nicht, daher haben wir ruinöse Milchpreise von unter 50 Rp. kg Milch.

Spörri Nicolas, 26. June 2015, Thelephoneinterview (Spörri, 2015)

Grüne/Blaue/Rote Phasen, Grüne und blaue sind bei WTO notifiziert und können nicht geändert werden, bei der roten Phase ist die Schweiz autonom, sie könnten national abgekürzt werden, sind jedoch seit 1995 fix.

Beispiel Cherry Tomaten: (2014)

Freigabe von Zollkontingentsteilmenge; das heisst es wird vom ganzen Gemüse Zollkontingent Nr. 15 wird ein Teil für Cherry-Tomaten verwendet und freigegeben. Die notifizierte Menge vom Zollkontingent Nr.15 darf nicht unterschritten werden. Die Teilmengen gelten nur für einzelne Produkte. 2x in der Woche werden die Zollkontingentsteilmengen vergeben; dies passiert normalerweise am Dienstag und Donnerstag.

b) Art der Verteilung	Periode	Zugeteilte Menge kg brutto
Vergleichszahl	11.06.2014 - 17.06.2014	49'990
Vergleichszahl	12.06.2014 - 17.06.2014	49'990
Vergleichszahl	18.06.2014 - 24.06.2014	79'984
Vergleichszahl	02.07.2014 - 08.07.2014	19'996
Vergleichszahl	27.08.2014 - 02.09.2014	59'988
Vergleichszahl	29.08.2014 - 02.09.2014	19'996
Vergleichszahl	03.09.2014 - 09.09.2014	29'994
Vergleichszahl	05.09.2014 - 09.09.2014	29'994
Vergleichszahl	10.09.2014 - 16.09.2014	39'992
Vergleichszahl	12.09.2014 - 16.09.2014	59'988
Vergleichszahl	17.09.2014 - 24.09.2014	29'994
Total		469'906

Effektive Zahlen, 11.06-17.06, nur 40t Importiert / 12.06-17.06 nur 34t importiert etc. Genaue Liste kann bei Herrn Spörri verlangt werden via Mail

Die Zuteilung für die verschiedenen Importeure basiert auf dem Import im Vorjahr für die einzelnen Produkte. Falls ein Importeur eine Zuteilung von 10t vom Teilkontingent vom 11.06 bis 17.06 erhält, möchte aber 12t importieren, kann er dies mit 10t zum KZA und 2t zum AKZA tun.

Insgesamt wurden für das Jahr 2014 470t Teilkontingente freigesprochen, jedoch wurden nur 350t effektiv importiert. Der Grund ist, dass manche Kontingente nicht gebraucht wurden. Manchmal erhält ein Importeur im Inland genügend Ware oder hat den Import ganz eingestellt. Oder möchte nur während der freien Zeit importieren. Dies kann sich jedoch auf die Vergleichszahlen auswirken, ein Importeur, welcher sein Kontingent nicht ausschöpft erhält eine kleinere Zuteilung im nächsten Jahr.

Bei der Vollversorgung (Tage wenn keine Teilkontingente freigegeben werden) – Vollversorgung ist grundsätzlich. Sagt aber nicht, dass es immer genügend Spezialitäten-Cherry-Tomaten hat oder genügend Bio-Tomaten, deshalb zu reduziertem Satz importieren, Cherry-Tomaten im Jahr 2014 37t. Unbeschränkte Menge.

Bei der geschützten Phase vom 11.06 – 24.09 hat es genügend Produktion im Inland (normalerweise)

Rüebli

Lose Karotten konzentrieren.

Individuelle Kontingente für Verarbeitungsindustrie / pro Firma spezielle, wenn z. B. Anbauvertrag mit Bauer und dann keine Ernte und 100t fehlen kann ein individuelles Kontingent veranlasst werden (komplexes Verfahren)

01.06-10.05 bewirtschaftet, normalerweise ganzes Jahr eigen Produktion. Normalerweise werden Kontingente nur bei saisonalen Engpässen vergeben. Einzelbeurteilung.

Rüebli gelten als Lagergemüse und stehen auch für Kohl, Äpfel (15 Produkte)

AKZA 1 / 949t – vor allem Biorüebli, da diese Anfangs Jahr noch nicht reif sind in der Schweiz und erst drei Wochen später in den Läden parat sind. Zusätzliche Importe sind günstiger. Verkaufspreis schnell nicht so in die Höhe, da AKZA 1 relativ tief ist.

Zurflüh Matthias, 07. July 2015, Telephoneinterview (Zurflüh, 2015a)

AKZA: es wird sehr wenig zu diesem Tarif importiert, passiert eher wenn etwas verkalkuliert wurde oder wenn ein neuer Händler importieren möchte und von diesen Zollkontingenten nutzen machen möchte. Bevor zum AKZA importiert wird, versuchen Händler von anderen Händlern deren prozentualen Anteil von Kontingenten zu erhalten. Kontingente können nur einmal abgetreten werden. Die Quoten werden einmal jährlich vergeben. AKZA ist sehr teuer und wird nur sehr selten benutzt. Verrechnung von Händlern. Bevor hoher Zoll bezahlt wird, versuchen Händler andere Sachen.

Uruguay: Blaue (bewirtschaftete) Phase ist bei der WTO notifiziert

Kontingente werden anhand der Importleistung oder der Inandleistung vergeben. Importleistung ist Systemhemmend und betrifft fast ausschliesslich alle Früchte und Gemüse. Kontingentsmenge wird anhand der Importierten Menge des Vorjahrs bestimmt. Zuerst importiert man zu sehr hohen Ansätzen deshalb ist es Wettbewerbsverzerrend.

Beat Bösiger Niederbipp, Tomaten

Inandleistung betrifft das Fleisch sowie die Cherry Tomaten, zuerst muss der produzierende Handel gedeckt werden, danach wird anhand der übernommenen Menge der Kontingentsanteil bestimmt. Um diesen Anteil zu erhalten muss die übernommene Menge ausgewiesen werden welches über Lieferscheine und diverse Papiere erfolgt. Dieser Weg ist sehr bürokratisch. BLW bevorzugt Versteigerungen da diese höhere Einnahmen gewähren.

Kontingentsvergabe: 2 x wöchentlich jeweils am Dienstag und Donnerstag. Verschieden Branchen fällen zusammen die Entscheide. Produktion und Handelsbetriebe werden angefragt. Swissscofel und VSGP müssen einen Konsens finden und geben dann die Kontingentsmengen an Verband von Swissolegumes weiter. Der endgültige Entscheid wird dann vom BLW getroffen. Nachdem Papier mit Vorschlägen von Swissscoffell bereitgestellt wurde, können sich Händler und Produzenten melden und ihre Meinung preisgeben. WTO sieht es nicht gerne, wenn am Donnerstag höhere Zollkontingente als am Dienstag vergeben werden. Dienstag ist ebenfalls für Lieferanten aus dem Ausland einfacher zu organisieren, da diese noch Zeit für die Lieferung haben. Meistens ist es am Donnerstag für Lieferanten aus Spanien schon zu spät. Donnerstag gibt es nur Aufstockung wenn es nicht reicht mit dem freigegebenen Kontingenten vom Dienstag.

Wenn ein Freihandelsabkommen mit der EU zustande käme dann würde dem BLW Geld in der höhe von fast 70% fehlen. Obwohl es eine Verbesserung des BIPs geben könnten wäre es trotzdem nicht rentabel.

Marktversorgung muss gewährleistet werden. Indikatoren für den Ausblick für die Vergabe von Zollkontingenten sind zum Beispiel die Aktionen von Grossisten (Coop, Migros, Aldi, Denner), Wetter, Ferienzeit, Cherry-Tomaten Aktion (4.2 Multiplikator was umgesetzt wird, wenn Aktion und folgende Wochen meistens Nachfragerückgang). Mindestmarktzutritt von 5% - aus diesem Grund sind Karotten 2 Wochen geöffnet. Ohne WTO, Karotten hätten keine nicht bewirtschaftete Phase.

Bruttokontingent – Gebinde/Verpackung sind beim Zollsystem inklusive, Bruttokontingentansätze – deshalb nie vollkommen ausgeschöpft. Waren werden mit dem Gebinde verzollt.

Warum werden Zollkontingente nie völlig ausgeschöpft? Importleistung – Importeure erhalten Zuteilung obwohl kein Import mehr stattfindet (meistens wird Anteil (GEB) behalten für zukünftige Importe) / Bruttozollkontingente

Effektive Ausschöpfung von Kontingente bei rund 80% = zu wenige Teilzollkontingente gewährt. Händler müssen telefonieren, damit sie von anderen Händler noch Kontingente erhalten. Einzelne Importeure sind völlig ausgeschöpft und können nur noch zum AKZA importieren. Importeure kein Gebrauch oder Verpackung und Gebinde gehören zu Teilkontingentszollmenge.

Ziel ist, dass treffende Zollkontingente gewährt werden und nicht möglichst hohe Kontingente.

Produzente sehen immer die Kontingentvergabe als Schuld, wenn nicht alles verkauft werden kann. Schlechtes Wetter, Aktionen, sonstige Marktnachfragen sehen die Meisten als kleinen Einfluss auf Produktion/Verkauf.

Importeure wollen möglichst hohe Kontingente damit eine hohe Möglichkeit zum Import besteht.

Früchte: weniger Anbieter, deshalb konzentrierter und pragmatischer, Händler und Produzente, Kommissionsproduzente, Obstverband

Erdbeeren: Händler noch Ware hat / loyales Kontingent / keine Einfuhr beim AKZA Code 1 möglich, immer noch kleines Kontingent geben, damit zusätzlich nur zu höheren Zöllen eingeführt werden kann. Konsumentenwünsche berücksichtigen – es wird automatisch mehr verkauft, wenn 500g anstatt 250g Schalen angeboten werden.

Kirschen: Richtpreise mit Produzenten festlegen, Landwirtschaftsgesetz integriert, hohe Bedeutung für Produktion

Himbeeren: Keine Kultur und Ernte, da Temperaturen zu heiss, zu wenig Kontingente freigegeben.

Preiszerfall: marokkanische Tomaten, spanische Tomaten (AKZA Code 1) können bei Vollversorgung zum tieferen AKZA Code 1 eingeführt werden und sind trotzdem noch günstiger als einheimische Tomaten (kleines Kontingent vergeben, damit AKZA Code 1 ausgeschaltet wird)

Export – Mostobst, Tomaten, Kirschen, Apfel, falls Übermengen produziert werden können diese zu kleinen Mengen exportiert werden. Letztes Jahr mit EU Lieferungsstopp an Russland – Schweiz wurde wettbewerbsfähig und konnte an Russland Gemüse liefern. Ansonsten sind Schweizer Preise meistens zu hoch und können nicht exportiert werden. Auch wenn genug Ware vorhanden ist – keine Brand um höheren Preis zu rechtfertigen. Keine Marketing und Kommunikationsstrategie.

Meisten Importe aus dem EU Raum: mehr logistischer Natur als Zollkultur

Es gibt bei den Zollkontingenten keine 100% Ausnützung. Chicore, Auberginen haben Saisonkontingenten aber unsere Produkte haben keine Mindestkontingente und es werden nur Teilzollkontingentsmengen bei Bedarf vergeben. Keine Grundkontingente.

Grundsätzlich werden die notifizierten Mengen bei der WTO während der nicht bewirtschafteten Phase erreicht, während der bewirtschafteten Phase über alle Produkte werden rund 18560t importiert.

Zurflüh, Matthias, 30. July 2015, Bern (Zurflüh, 2015b)

Allgemein

- 27.) Hat sich seit der Einführung von Zollkontingenten gemäss WTO, der Handel stark verändert?
(Allgemein auf den gesamten Handel mit Obst/Gemüse bezogen)

Antwort: Insgesamt hat sich der Handel nach Einführung von Zollkontingenten nicht stark verändert. Grundsätzlich hat sich die Systematik nicht gross verändert, da schon vor der Uruguay Runde, die Schweizer Landwirtschaft durch ein drei Phasen System geschützt wurde. Der einzige Unterschied war, dass beim drei Phasen System der Aussenhandel ganz geschlossen werden konnte. Heute, anhand von verschiedenen Zöllen (KZA/AKZA), wird der Aussenhandel nicht ganz geschlossen aber die hohen Zölle während der bewirtschafteten Phase machen Importe unattraktiv. Wird die Schweizer Inlandproduktion grundsätzlich genug geschützt?

Antwort: Dies kommt auf die Perspektive an. Handelsseitig steht die Versorgung vom Markt im Vordergrund und nicht der Schutz der Inländischen Produktion. Zudem gibt es Kategorien wie zum Beispiel Bananen oder Kiwis wo die inländische Produktion schlicht inexistent ist. Reine Importeure würden eine Öffnung vom Markt begrüßen, Grossproduzenten hingegen sind der Meinung, dass die geschützten Phasen zu kurz angesetzt sind. Migros und andere Detailhändler sind im Zwiespalt, da sie einerseits inländische Produkte bevorzugen und andererseits kommunizieren, dass nur inländische Ware bevorzugt wird, wenn der Import möglichst einfach funktioniert.

- 28.) Aus der Sicht eines Schweizer Gemüse/Obstproduzenten wie denkst du, steht dieser zu den Einfuhrregulationen wie sie unter der WTO gehandhabt werden? Ist dieser mit den Zollkontingenten allgemein Einverstanden?

Antwort: Sehr unterschiedliche Ansichten bei Gemüse und Obstproduzenten. Die einen sind eher Marktorientiert und einverstanden mit einer kleinen Marktöffnung und der Verteilung von Zollkontingenten. Hauptsache der Markt wird versorgt (Beerenproduzenten da Schweizer Ware sowieso bevorzugt wird). Andererseits Kohlproduzenten, welche eine totale Grenzschiessung bevorzugen würden damit der Markt nur von Schweizer Kohlgemüse versorgt werden kann. Sehr unterschiedliche Wahrnehmungen. Allgemein sind alle einverstanden, da der grosse Vorteil ist, dass innerhalb der Branche die Importregelung getätigt werden kann. Somit fließen auch Wettereinflüsse auf die Produktion oder Aktionen bei den Gross-Detaillisten in die Entscheidung ein. Falls das Bundesamt für die Importregelung zuständig wäre, würde die Entscheidung nur auf statistischen Zahlen basieren.

- 29.) Bei welchen Produkten im Obst-und Gemüsemarkt haben die Zollkontingente am meisten Einfluss auf den Handel?

Antwort: Dies kommt auf die individuelle Kontingentsanteilmenge je Produkt an. Bei Karotten und Äpfeln spielt der Import überhaupt keine Rolle da der Markt das ganze Jahr im Inlandprodukten versorgt werden kann.

- 30.) Gibt es Produkte welche ohne Zollkontingente nicht importiert werden würden? (nur im Bereich Obst/Gemüse)

Antwort: Hängt von den Ausserkontingentszollansätzen ab. Zum Beispiel beim Nüsslersalat ist der Tarif bei CHF 1700.00 per 100kg brutto was für den Importeur schlichtweg unbezahlbar ist.

- 31.) Weshalb wurde beim Obst und Gemüse einen AKZA Code 1 Zoll eingeführt, wenn es bei allen anderen Produkten nur die normalen Sätze zum KZA und AKZA gibt? Gefährdet der AKZA Code 1 die Inlandproduktion?

Antwort: Preisdifferenz zwischen Inland und Ausland mit dem AKZA Code 1 vergleichen und manchmal macht es für den Importeur Sinn zum reduzierten Tarif zu importieren anstatt inländische Produkte zu kaufen. Nur möglich wenn Inland und Auslandpreis so stark differenzieren, dass der Import zum reduzierten Tarif günstiger kommt. Grundsätzlich sollte der AKZA Code 1 als Schutz dienen und Importeure abschrecken. Zusätzlich gibt es auch Produzenten, welche über die hohen Zölle Bescheid wissen und ihren Preis nach oben anpassen, weil der Händler die Ware benötigt und zum hohen Zollansatz nicht importieren will. Ausnahmefälle wenn zu Code 1 importiert wird für Spezialprodukte. Grund hierfür ist, dass es zu wenige Zolltarifnummern gibt. Knollensellerie könnte in fünf verschiedene Zolltarifnummern (je nach Gewichtsklasse) unterteilt werden, damit jeweils die Zollkontingente an die richtige Produktkategorie verteilt werden kann. Hauptgrund für Code 1 Einfuhren ist, dass für eine Zolltarifnummer kein Zollkontingent freigegeben wird obwohl eine Unterkategorie fehlt. Für Karotten wird kein Zollkontingent freigegeben obwohl zu wenige Bio-Karotten auf dem Markt sind.

Cherry Tomaten 0702.0010/0011/0019

- 32.) Weshalb ist bei den Cherry Tomaten die effektiv bewirtschaftete und bewirtschaftete Phase unterschiedlich?

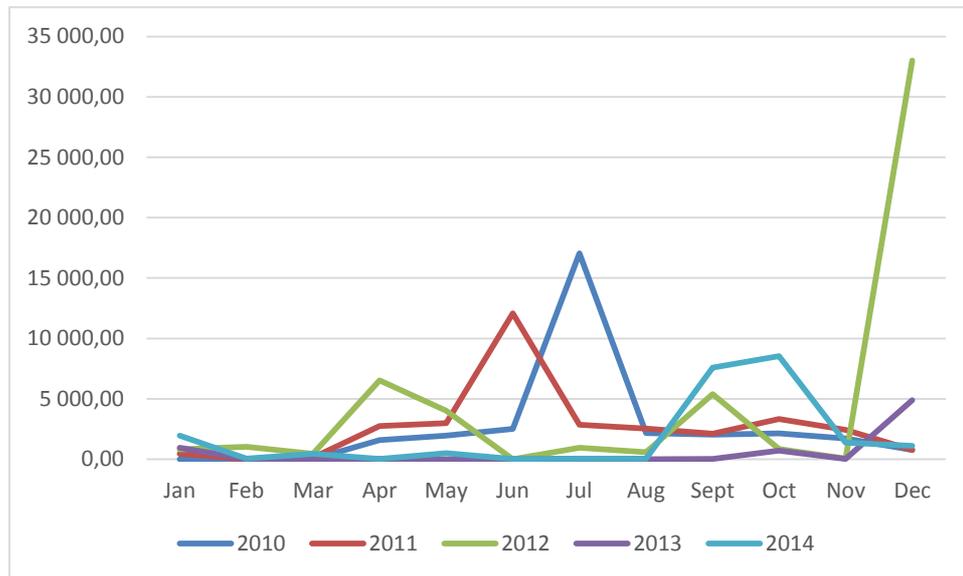
Antwort: In der Uruguay Runde was man sich noch nicht bewusst, dass sich Cherry Tomaten so stark entwickeln werden. Würde man heute verhandeln, hätten Cherry Tomaten einen stärkeren Grenzschutz und die effektiv bewirtschaftete und bewirtschaftete Phase würden übereinstimmen. Fast ganz jährliche Produktion von Cherry Tomaten. Für die Anpassung der Phasen müsste innerhalb der Branche einen Konsens erreicht werden, welcher weiter an das Parlament weitergereicht werden müsste.

- 33.) In der freien Phase werden sehr viele Cherry Tomaten importiert, kann es auch passieren, dass zu viele Cherry Tomaten importiert werden? Überschwemmung vom Markt?

Antwort: Der Import hat stark zugelegt, da der Konsum stetig zunimmt. Der Konsum nimmt stetig zu aufgrund des Bevölkerungswachstums und der pro Kopf Konsum aufgrund der Veränderung der Produkts. Cherry Tomaten wurden zum Lifestyle und Convenience Produkt. Der Markt kann grundsätzlich nicht durch Import Überschwemmt werden, da kein Importeur auf Ware sitzen will, welche er nicht verkaufen kann.

- 34.) Dies sind Exportdaten von Cherry Tomaten von Swiss Impex. Warum werden Cherry Tomaten exportiert obwohl der Eigenbedarf meistens nicht durch Inlandproduktion gedeckt werden kann? Gibt es einen speziellen Grund für den Anstieg im Jahr 2010 im Dezember?

Antwort: Die Statistik ist völlig verfälscht, da es im Cherry Tomaten Bereich keinen Export gibt. Kann bei Überschüssen in der Produktion vorkommen aber normalerweise sind die Transportkosten höher als der Verkaufspreis und somit nicht lohnenswert.

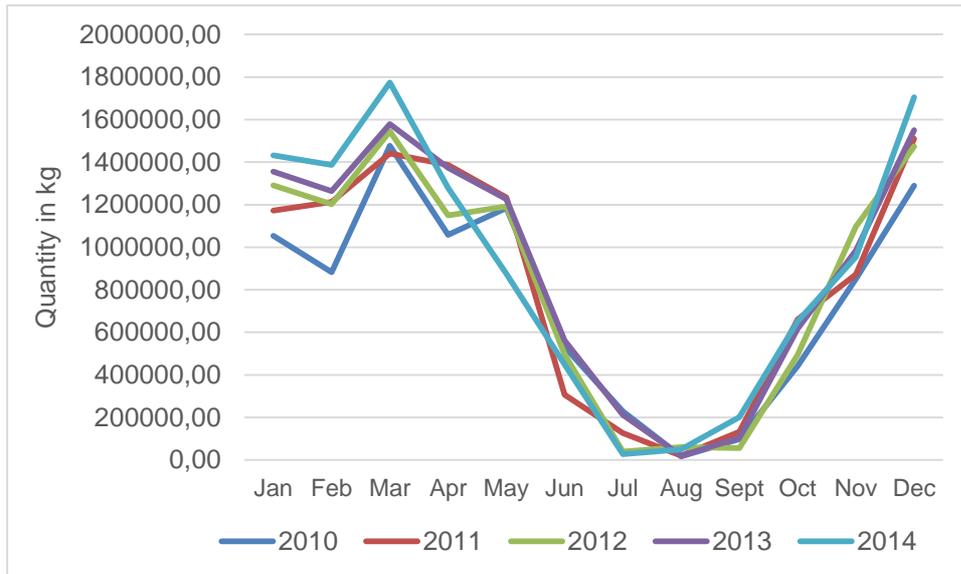


- 35.) Während der blauen Phase (bewirtschaftete Phase) werden immer noch sehr wenige Cherry Tomaten importiert, obwohl keine Zollkontingente freigegeben werden und unlimited importiert werden kann. Ist dies darauf zurückzuführen, dass im September beziehungsweise im April bereits ein hoher Anteil an Inlandproduktion besteht? Könnte die bewirtschaftete Periode auch verkürzt werden, wenn bei Inlandproduktion Cherry Tomaten vom Inland bevorzugt werden?

Antwort: Während der Importphase, bevorzugen gewisse Importeure billigere Ware. Dies vor allem in der Gastronomie wo alles über den Preis passiert. Als Lösungsansatz könnte das Lebensmittelgesetz geändert werden, dass ebenfalls Früchte und Gemüse deklariert werden muss (Gastronomie). Andere Sensibilität und Konsumente achten sich auf die Produkteherkunft. Etwa 50% vom Import geht in den Detailhandel und 45% in die Gastronomie. Hingegen beim Detailhändler gibt es eine Lebensmitteldeklarationsgesetz, welche die Deklaration von Lebensmitteln voraussetzt. Für den Detailhandel, Phasen könnten gekürzt werden da Inlandproduktion bevorzugt wird auch aufgrund von Image (wenn Pricing halbwegs in Ordnung). Gastronomie keine Chance da dies auf billige Importware aus ist.

- 36.) Warum gibt es bei den Cherrytomaten einen rückläufigen Import im Februar?

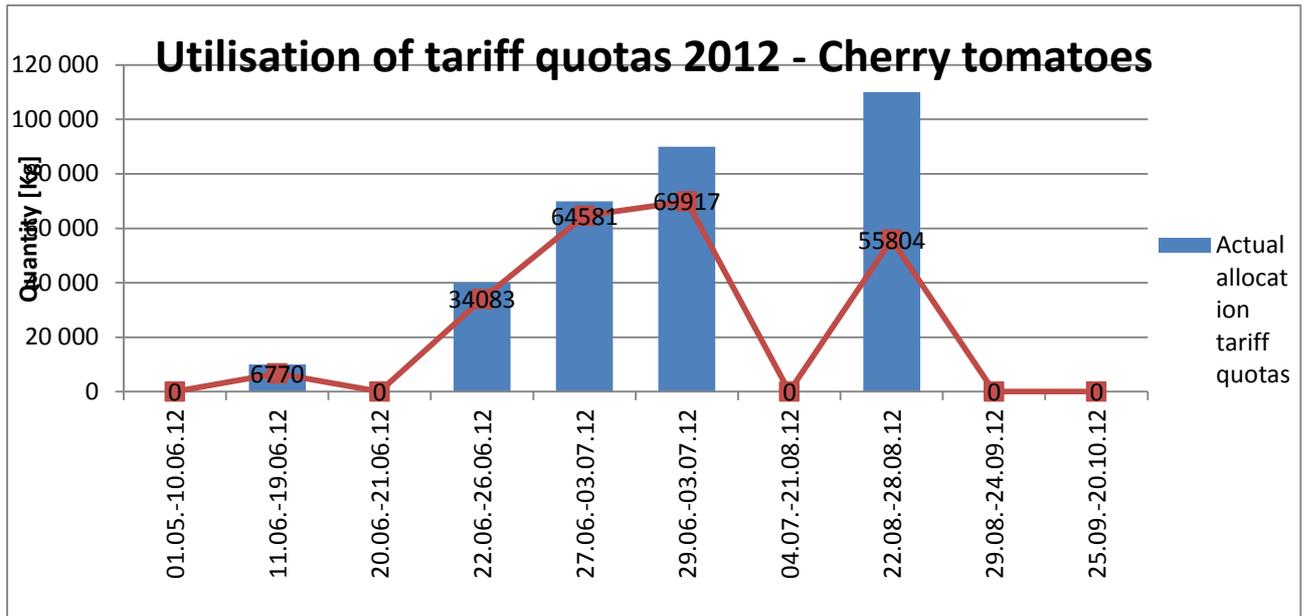
Antwort: Februar hat nur 28 Tage.



37.) Im Jahr 2012 wurden für die Cherry Tomaten nur fünf Zollkontingente freigegeben. Gibt es einen speziellen Grund hierfür? In anderen Jahren war die Freigabe von Zollkontingenten meist höher.

Antwort: Sonniger Winter und Frühling mit perfekten Lichtverhältnissen was zu einer sehr hohen Produktion im Jahr 2012 führte. Demzufolge mussten nur wenige Kontingente freigegeben werden.

Allgemein ist die Inländische Produktion stetig angestiegen und im 2015 war eine Produktionsrate von über 100% was dazuführte, dass Tomaten nicht verkauft werden konnten, vor allem während der Ferienzeit im Hochsommer wo die Nachfrage eher abnimmt. In den letzten fünf Jahren war die Produktion stetig steigend wird jedoch jetzt aufgrund des Raumplanungsgesetzes gedrosselt. Was auch einen starken Einfluss mehr Produktion hatte, war die Kampagne aus der Region. Produzenten an den richtigen Standorten haben sich entschieden, Cherry Tomaten zu produzieren weil sie wussten, dass Abnehmer gefunden werden konnten und den richtigen Standort deklarieren konnten, obwohl keine Kompetenzen zur Anpflanzung von Cherry Tomaten vorhanden waren. Förderung von Inlandproduktionen, welche bei freiem Markt nicht vorkämen.



38.) Haben die WTO Zollkontingente den Handel von Cherry Tomaten verändert? Wie sieht der Trend für die Zukunft aus?

Antwort: WTO Zollkontingente haben den Handel von Cherry Tomaten insofern nicht verändert, da das Produkt weiterhin importiert werden kann und der Grenzschutz mit den hohen Zöllen greift. Für den Produktionstrend: Obwohl Produzenten festgestellt haben, dass die absetzbare Produktion ein Maximum erreicht hat wird die Anbaufläche weiter zunehmen. Grosser Konkurrenzkampf im Inland. In Genf sind nochmals zusätzliche Hektaren zum Anbau von Cherry Tomaten geplant was in Preiskampf und Überproduktion enden könnte. 1% Überangebot gibt 10% Preisreduktion was eine Gefahr für den inländischen Cherry Tomaten Markt werden könnte.

Karotten 0706.1020/1021/1029

39.) Bei den Karotten gibt es nur eine sehr kurze nicht bewirtschaftete Phase, da die Inlandproduktion stets hoch ist. Schadet es dem Handel, dass der Markt bei Karotten geöffnet werden muss? Ist Import von Karotten überhaupt nötig?

Antwort: Grosser Vorteil, dass es zu einer Markterfrischung führt. Aufräumaktion. Falls keine Marktöffnung stattfinden würde, würden Produzenten die Produktion ankurbeln um die fehlenden zwei Wochen mit inländischer Produkte abzudecken. Folglich, bei der jeweils neuen Ernte wären immer noch alte Produkte an Lager. Wenn nun der Markt geöffnet wird, werden die alten Produkte verkauft und nach zwei Wochen ist die neue Ernte auf dem Markt. Ist begrüssenswert. Produzenten sehen dies anders.

40.) Haben die WTO Zollkontingente den Handel von Karotten verändert? Wie sieht der Trend für die Zukunft aus?

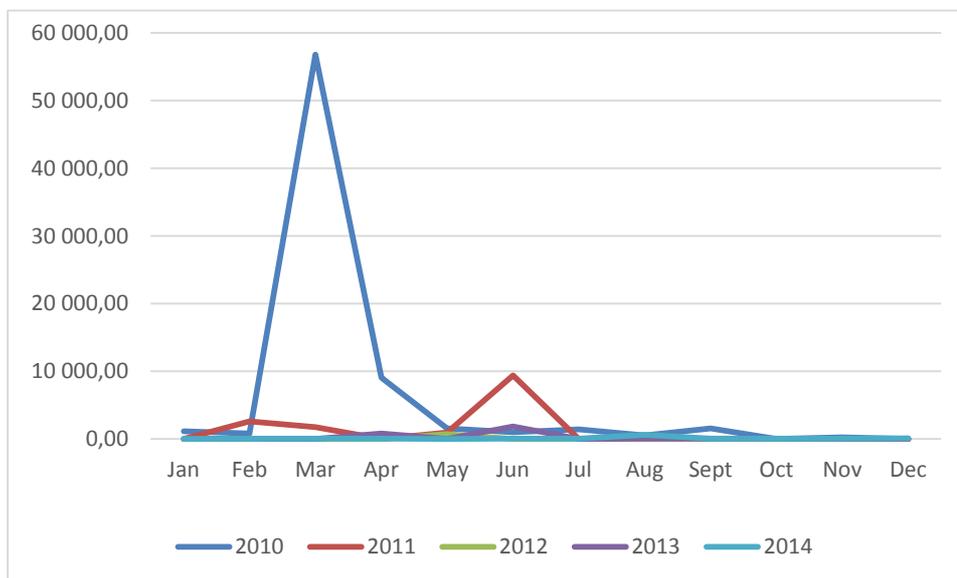
Antwort: Zollkontingente haben den Markt nicht verändert, da solche nur bei speziellen Anlässen herausgegeben werden. Trend für Karotten ist stetig, keine grosse Wachstumsrate da das Produkt eher traditionell als Lifestyle ist.

- 41.) Wie haben gesehen, dass in den letzten fünf Jahren genau ein Zollkontingent im Jahr 2014 herausgegeben wurde. Was war der Grund hierfür? Kann es sein, dass das Wetter einen Einfluss hatte?

Antwort: Aufgrund des Wetters blieben Karotten zu klein, um diese als Industrieware zu verkaufen. Folglich musste ein Zollkontingent für grössere Karotten herausgegeben werden.

- 42.) In der Grafik ist ersichtlich, dass im Jahr 2013 der gesamte Import stark angestiegen (von 5000t auf fast 10'000t) ist. Gibt es einen besonderen Grund hierfür?

Antwort: Wöchentlich (im Winter) werden 2000 tonnen Karotten konsumiert, folglich ist der Markt gigantisch. Der Import von Karotten ist sehr unterschiedlich und fluktuiert stark. Im Sommer geht der Konsum zurück, da Karotten nicht „in“ sind und im Sommer grundsätzlich nicht Saison haben. Zudem gibt es Substitutionsgüter wie Kopfsalat, welche im Sommer sehr viel billiger sind als im Winter und deshalb viele Kunden auf Kopfsalat umsteigen. Zudem ist die Palette im Sommer vielfältiger was dazu führt das Konsumenten mehr verschieden Gemüse kaufen als sich wie im Winter eher auf Karotten zu konzentrieren. Falls weniger Lager, kann es sein, dass die Grenze manchmal eine Woche früher geöffnet wird und somit kann auch der Anstieg im 2013 erklärt werden.

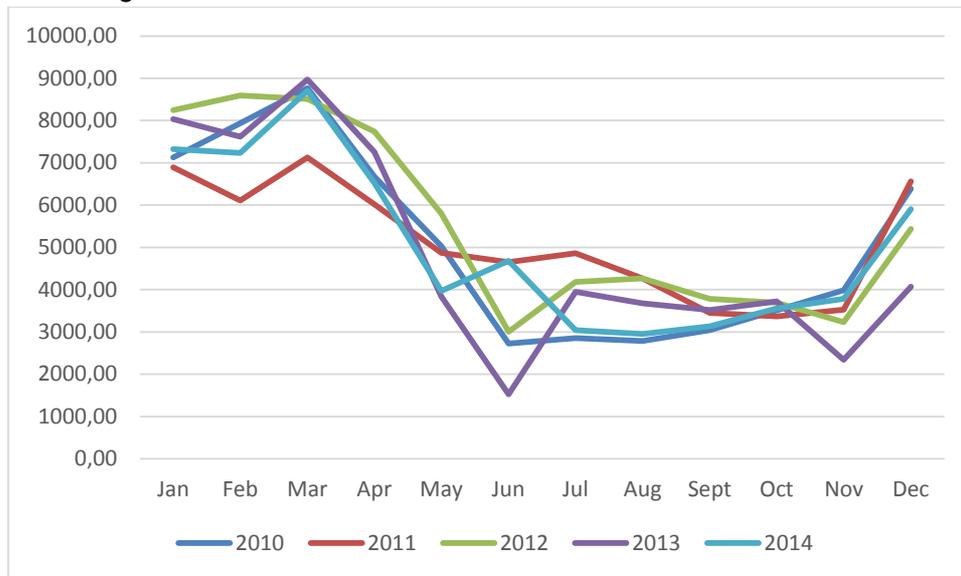


- 43.) Im Jahr 2010 wurden im Frühjahr sehr viele Karotten exportiert (60t). Was war der Grund hierfür?

Antwort: Nur kleinstmengen. Projekt Export nach Russland, da diese von EU Handelshemmnisse für Importe hatten.

- 44.) Die Inlandproduktion von Karotten geht stets von April bis Juni zurück. Ist dies weil der Konsum oder die Nachfrage rückläufig ist?

Antwort: Produktion von frischen Karotten beginnt. Diese werden unter Folien angebaut was sehr anspruchsvoll und kostenintensiv ist. Daher wird bei der Periode, wo neue Karotten gesät werden grundsätzlich weniger produziert. Zudem ist der Konsum in den Sommermonaten rückläufig.



Erdbeeren 0810.1010/1011/1019

- 45.) Aus welchem Grund sind bei Früchten die effektiv bewirtschafteten mit den bewirtschafteten Phasen identisch und beim Gemüse nicht?

Antwort: Dies waren andere Verhandlungen. „Früchtler“ sind eher die Markttypen und bereit eine kürzere bewirtschaftete Phase in Kauf zu nehmen. Im Gegensatz zu Gemüseproduzenten, welche eher konservativ sind, sind Fruchtproduzenten einverstanden die Grenze auch einmal vor Ende der bewirtschafteten Phase zu öffnen wenn nicht mehr genügend Inlandproduktion vorhanden ist. „Früchtler“ sind mehr auf Augenhöhe mit dem Handel und dem Konsum.

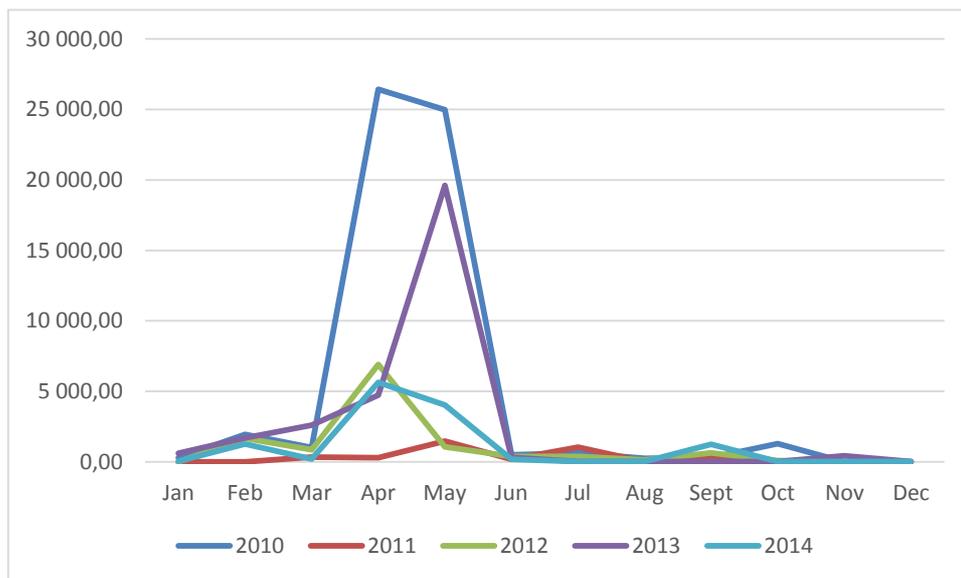
- 46.) Haben die WTO Zollkontingente den Handel von Erdbeeren verändert? Wie sieht der Trend für die Zukunft aus?

Antwort: Grundsätzlich hat sich der Handel nicht verändert. Der Trend für die Zukunft sieht verhalten aus. Auf der einen Seite legt der jährliche Konsum zu da es ein sehr beliebtes Produkt ist (Gutes Image und Bevölkerungswachstum). Auf der anderen Seite sind die Kosten. Erdbeeren sind im Verhältnis zu anderen Produkten (Pfirsich, Nektarine oder Melone) sehr teuer. So zum Beispiel bei Aktionen; dort kann ein Kilo Nektarinen für CHF 1.00 angeboten werden, wo die Erdbeeren nicht unter CHF 9.00 angeboten werden können. Gute ersichtlich bei Phasenwechsel, wo inländische Produkte in einer 250g Schale für CHF 5.95 angeboten

wurden und gleichentags Importwarte in einer 500g Schale ebenfalls für CHF 5.95. Deshalb ist es ein schmaler Grat wie lange Konsumenten bereit sind für das Schweizer Produkt den Aufpreis zu bezahlen oder sich zu Entscheiden auf Erdbeeren komplett zu verzichten und sich von Nektarinen oder Pfirsichen zu ernähren.

- 47.) Die folgenden Exportdaten haben wir von Swiss Impex. Wie kann bei Erdbeeren ein Export stattfinden (vor allem im Jahr 2010) wenn es meistens nicht genug Inlandproduktion für den Verbrauch hat?

Antwort: Zahlen sind nicht interpretierbar. Export nur möglich bei Überschüssen.



- 48.) Bei den Erdbeeren werden meistens nur relativ kleine Mengen Zollkontingente (in der Mitte der bewirtschafteten Phase) freigegeben, ist dies weil die Inlandproduktion den Bedarf meistens deckt? Oder ist dies, damit der Konsumentenpreis geschützt werden kann und keine Mengen zum AKZA Code 1 eingeführt werden können?

Antwort: Es werden nur kleine Zollkontingente herausgegeben, weil die Schweiz grundsätzlich ein sehr guter Erdbeerenproduktionsstandort ist. Die klimatischen Bedingungen in der Schweiz sind sehr gut. Zudem gibt es sehr gute Produzenten, welche in den letzten Jahren enorm zugelegt haben. Beim Strukturwandel innerhalb der Landwirtschaft kamen viele neue Produzenten hinzu – viele Landwirtschaftliche Betriebsberater haben Landwirten empfohlen sich von der klassischen Landwirtschaft zu verabschieden und mit der Produktion von Erdbeeren zu beginnen. Ähnliche Wertschöpfung wie beim Viehbetrieb. Zwei Hauptgründe: Ausdehnung vom Angebot durch mehr Produzenten und erfahrene Produzenten, welche die Produktion weiterentwickelt haben und nun eine höhere Produktionsrate haben.

- 49.) Zu Beginn der bewirtschafteten Phase werden jeweils relativ hohe Mengen von Zollkontingenten herausgegeben. Würde es Sinn machen, hier die bewirtschaftete Phase nach hinten zu verschieben und den Import auf unlimitiert zu ändern?

Antwort: Sensibilität von Produzent ist viel höher bei Beeren als bei anderen Produkten Von daher macht es keinen Sinn die bewirtschaftete Phase zu verschieben. Handel will bei Beeren

grundsätzlich Schweizer Produkte. Qualität ist sehr hoch und daher ist man gar nicht interessiert an ausländischen Beeren. Auch wenn Phasen verkürzt würden, sobald Schweizer Ware auf dem Markt ist, wird diese bevorzugt.

- 50.) In der folgenden Grafik ist ersichtlich, welche Mengen zum KZA und AKZA importiert wurden. Es ist zu sehen, dass es im Jahr 2012 einen Rückgang beim Import zum AKZA stattgefunden hat. Gibt es hierfür einen bestimmten Grund?

Antwort: Kontingentsstruktur spielt hierfür eine grosse Rolle. Bei Gemüseproduzenten werden die Kontingente auf 50-70 verschiedene Importeure eingeteilt. Beerenkontingente sind anders strukturiert, 6 Importeure gehörten 90% der Kontingentsmenge und etwas 20 Händler mit den restlichen 10%. Wenn nun ein kleinerer Händler einen Anteil von 2% an 10'000kg Kontingent hat, ist es manchmal sehr schwierig zu berechnen wie viel er von einer Palette bestellen kann damit der tiefere Zoll für die ganze Ware angewendet werden kann. Vor allem da die Menge als brutto vergeben wird.

	Import under tariff quota (KZA)	Import out of tariff quota (AKZA-1)	Import out of tariff quota (AKZA)
2010	2580,5489	9,8691	15,4695
2011	841,7833	19,886	13,6995
2012	2019,2574	6,658	6,2019
2013	2944,5017	24,4347	20,6587
2014	718,6809	12,6077	19,1981

Aprikosen 0809.1011/1018/1019

- 51.) Haben die WTO Zollkontingente den Handel von Aprikosen verändert? Wie sieht der Trend für die Zukunft aus?

Antwort: Handel hat sich verändert, weil sich die Produktion verändert hat und nicht aufgrund WTO Zollkontingenten. Walliser Aprikosenproduzenten haben von 12 Jahren gemerkt, dass sie sich über Qualität/Marketing differenzieren müssen, da sie in Konkurrenz mit den qualitativ hochstehenden französischen Aprikosen stehen. Deshalb haben sie viel in die Forschung von Marketing entwickelt und seit die Valais/Valais Brand existiert, läuft die Werbekampagne sehr gut und es können hohe Absätze generiert werden. Der Zukunftstrend für Aprikosen ist wachsend. Sind teuer aber aufgrund von Marketing und Grenzschutz wird sich der Markt in den nächsten Jahren nicht verändern. Kommunikations- und Leistungsdifferenz beim Schweizer Produkt stimmt. So lange die Qualität dieselbe wie bei einer französischen Aprikose ist, wird die Schweizer Aprikose als besser angesehen. Produktion passiert hauptsächlich im Wallis aufgrund klimatischer Vorteile.

- 52.) Im Jahr 2014 wurden nur sehr wenige Zollkontingente für Aprikosen freigegeben. Was war der Grund hierfür?

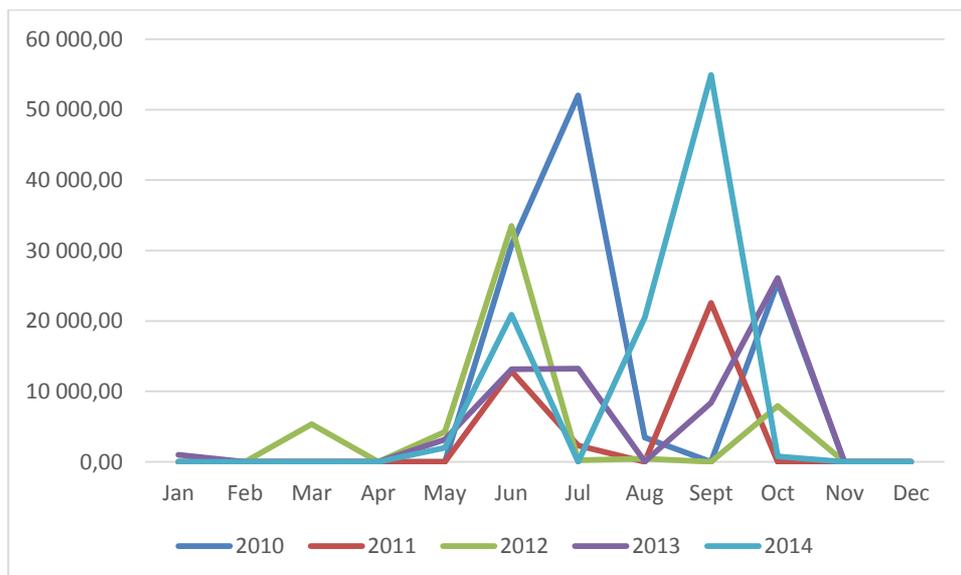
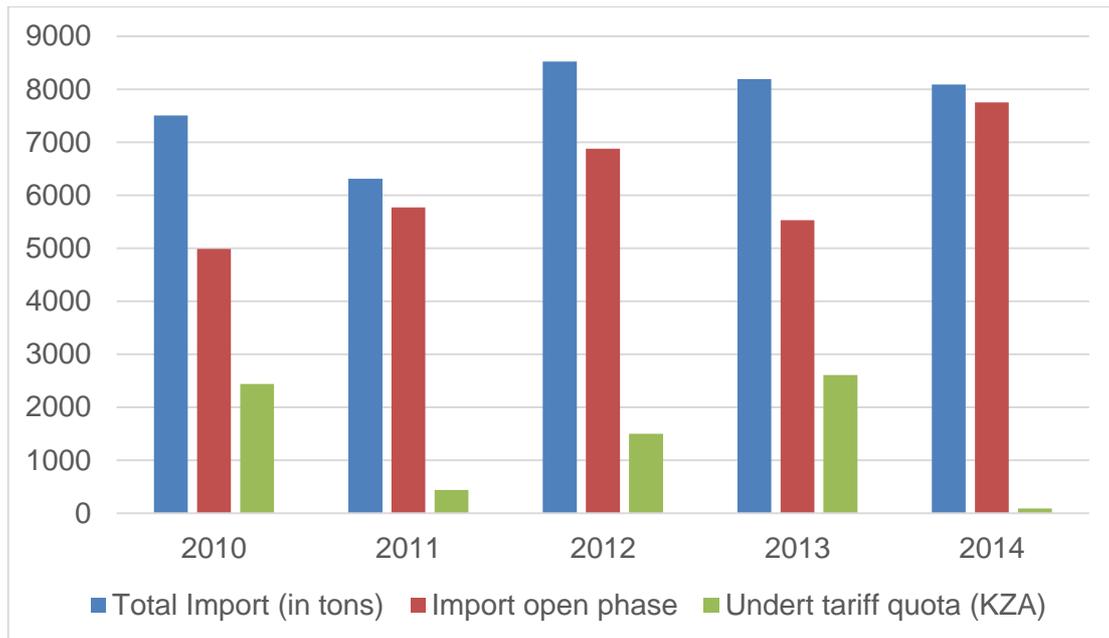
Antwort: Hervorragendes Aprikosenjahr.

53.) In der folgenden Grafik sehen wir, dass der Import im 2014 unter KZA sehr klein war. Steht diese Frage im Zusammenhang mit der vorherigen Frage, dass im Jahr 2014 nur sehr wenige Zollkontingente herausgegeben wurden?

Antwort: Ja, wenn keine Kontingente auch keine Ausschöpfung und kein Import.

54.) Die folgende Grafik zeigt die Exportdaten von Aprikosen. Wie ist es möglich, dass Aprikosen trotz nicht ausreichender Inlandproduktion exportiert werden können?

Antwort: Export ist nicht interpretierbar. Nur möglich bei Überschüssen



55.) Beim Import von Aprikosen zum AKZA hat es einen drastischen Anstieg im 2012 gegeben. Was war der Grund hierfür?

Antwort: Kein gutes Produktionsjahr. Zudem kann auch die Kontingentszuteilung eine Rolle spielen. Zum Teil können nur ganze Palette oder Camion gekauft werden und daher kann die importierte Menge den individuellen Zollkontingentsanteil manchmal übersteigen.

56.) Die Inlandproduktion von Aprikosen und Erdbeeren ist über die letzten Jahre stetig gestiegen. Wird vermehrt in den Anbau dieser Produkte investiert oder hatten beide Produkte schlicht Wetterglück?

Antwort: Marketing, Produktforschung.

Zukunft

Chancen und Gefahren für den Schweizer Agrarmarkt bei den weiteren Doha Verhandlungen?

Chancen: Gesundheitssensibler. Lifestyle Produkte. Welternährungshandel = Fleischkonsum drosseln und Gemüsekonsum ankurbeln. Kontinuierliche Produkteentwicklung und andere Nutzung von Produkten. Forschung ist bei Gemüse sowie Früchte sehr gross.

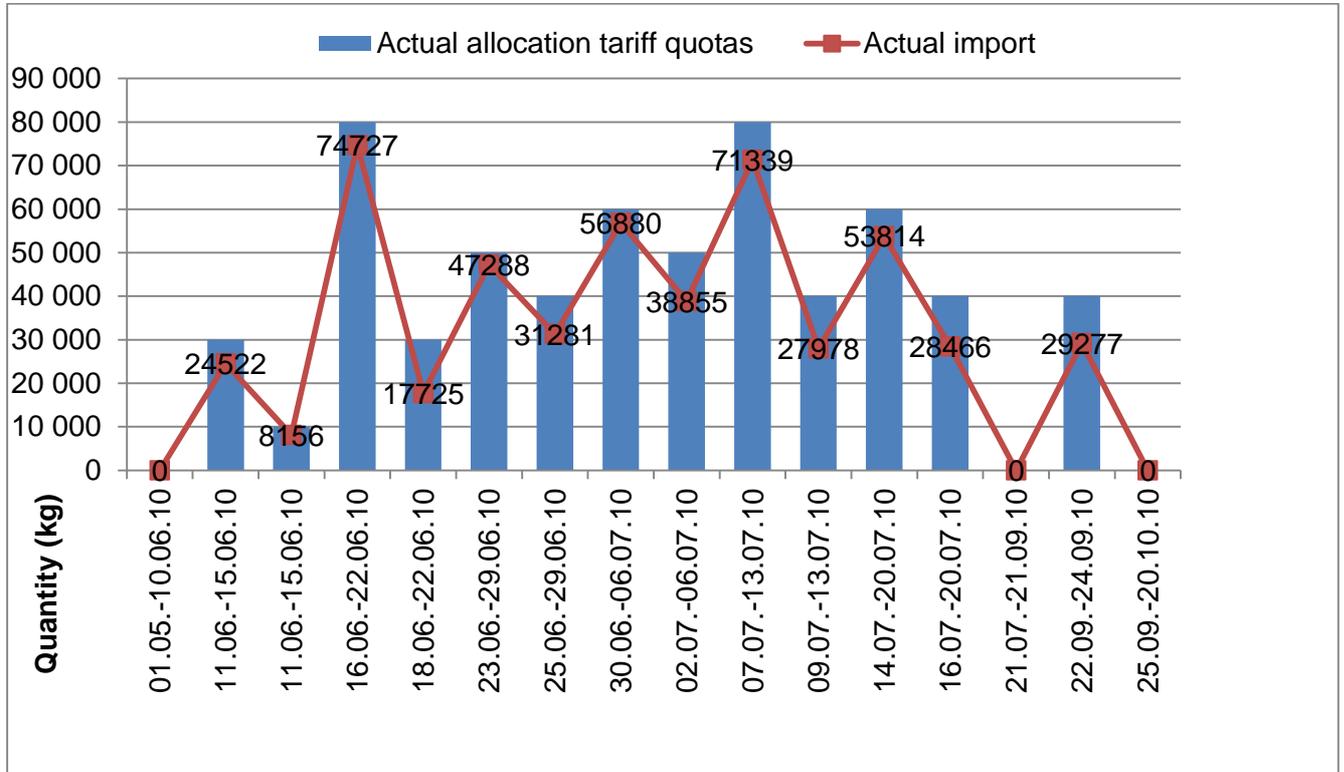
Gefahren: Produktionstechnisch an Anschlag kommen was schon bei Cherry Tomaten zu sehen ist. Früchteallergien. Ein Markt der 50% Inlandanteil hat läuft besser als einer der 90% hat. Kein Überschuss, Ware steht immer im ersten Rang. Markt läuft gesünder wenn Angebot beschränkt ist.

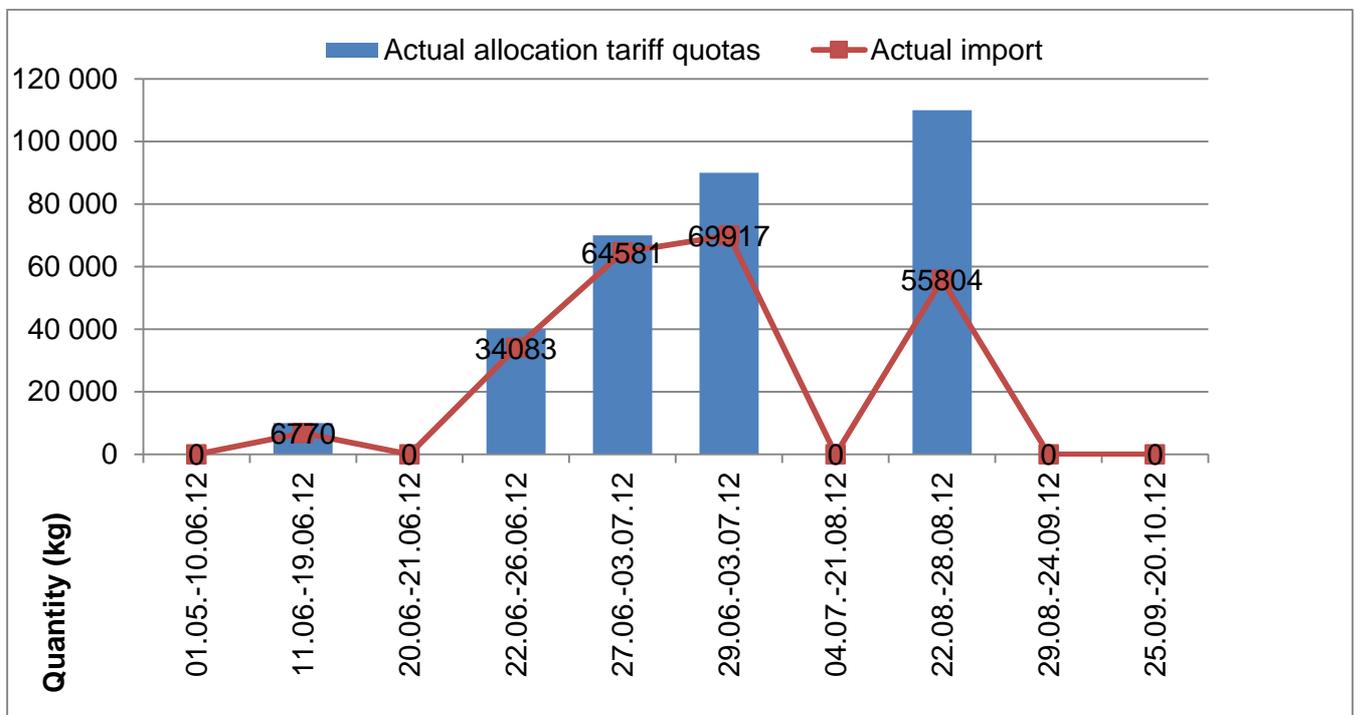
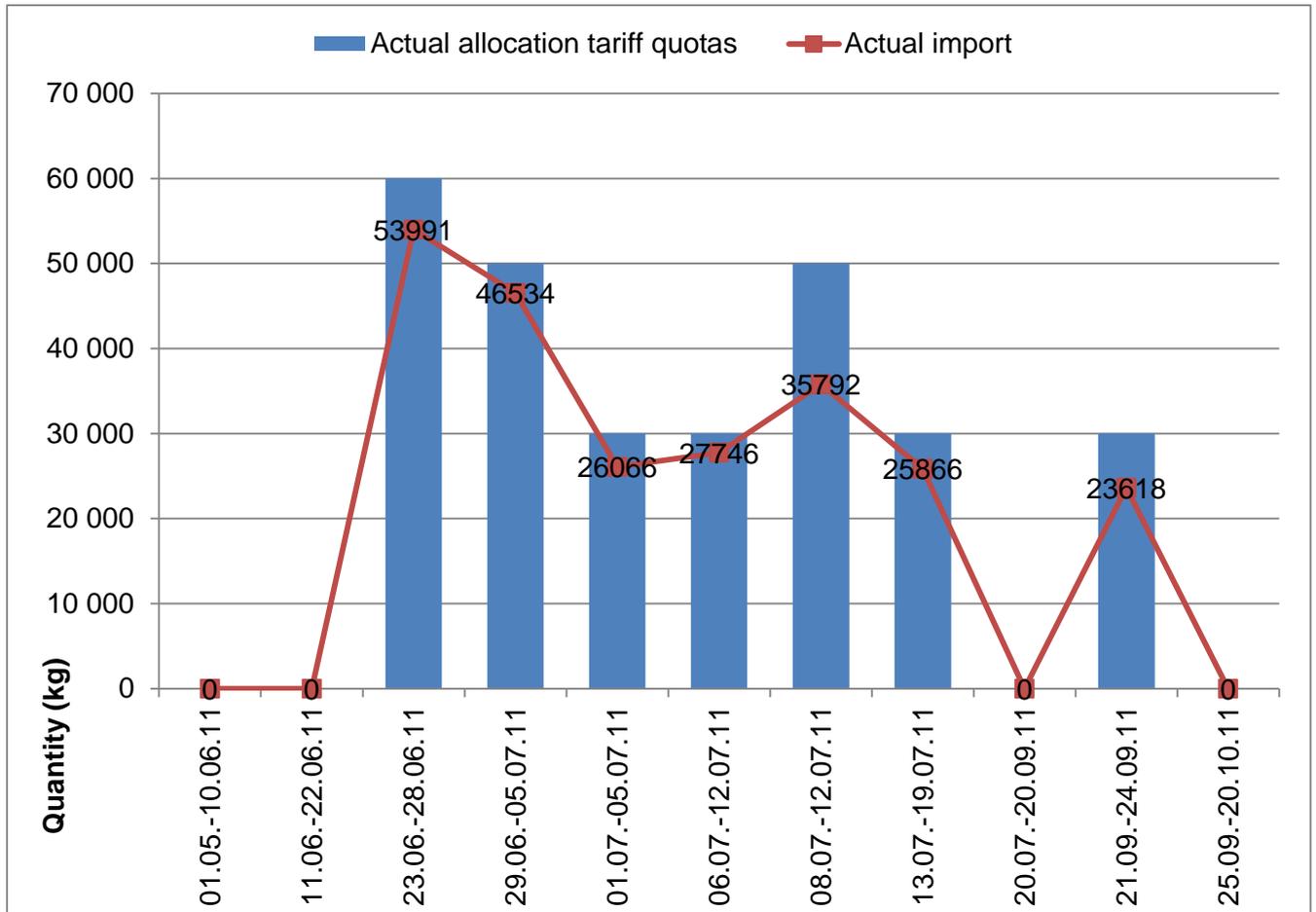
Was passiert bei Öffnung von Markt?

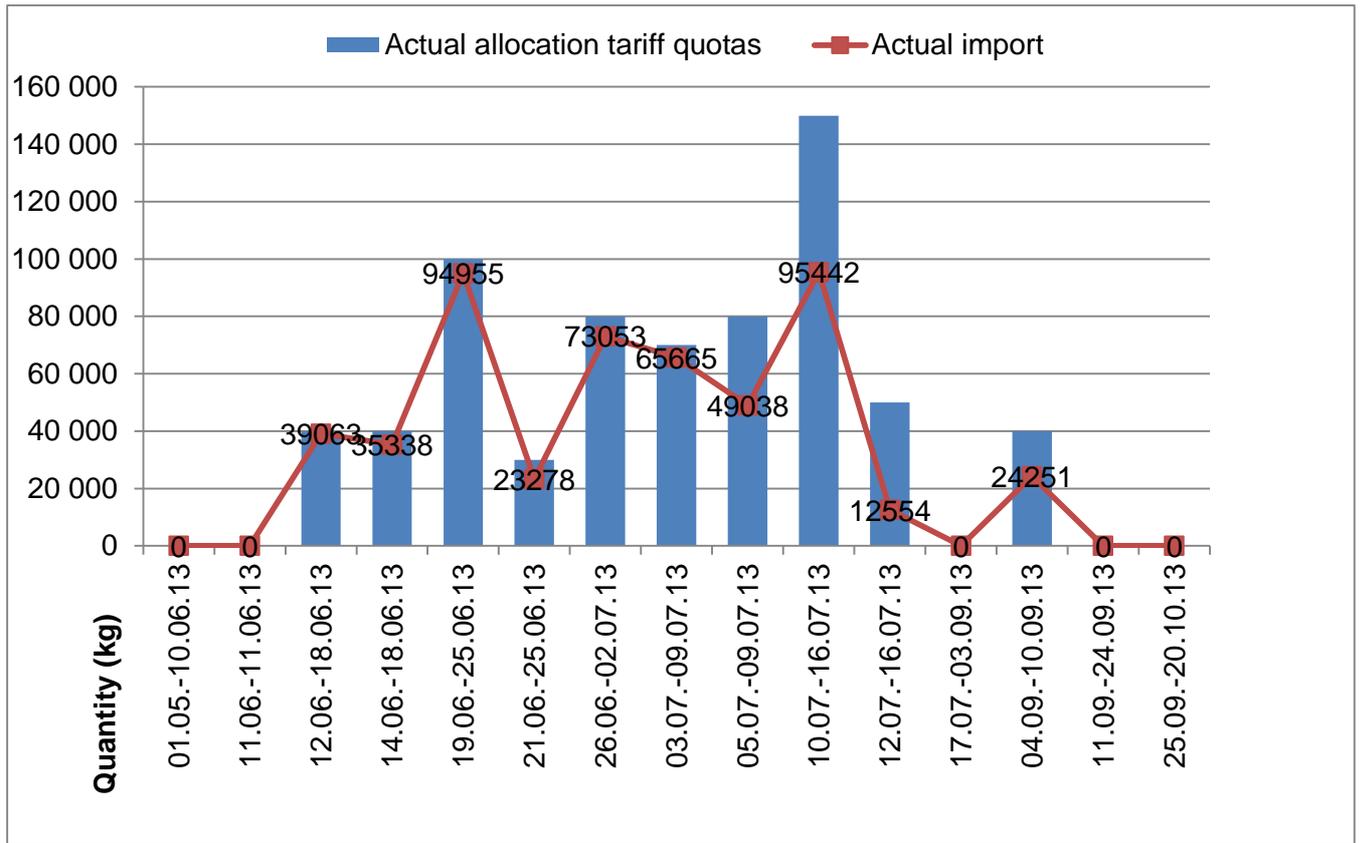
Antwort: Import würde zulegen, da eine Preissensibilität vorhanden ist. Muss sich täglich mit Lebensmittelpreisen auseinandersetzen und sieht dort Sparpotenzial. Konsument sieht Sparpotenzial obwohl er nur 8% für Lebensmittel ausgibt. Preise würden nochmals mehr unter Druck kommen. Gesamtwirtschaftlich würde eine Öffnung vom Markt begrüsst werden. Landwirtschaft müsste aber noch mehr subventioniert werden. Gefahr von bilateralen Abkommen ist grösser als, dass die Doha Runde weitergeführt wird. Landwirtschaft ist der Grund warum die WTO zum Stillstand gekommen ist.

10.2 Graphs

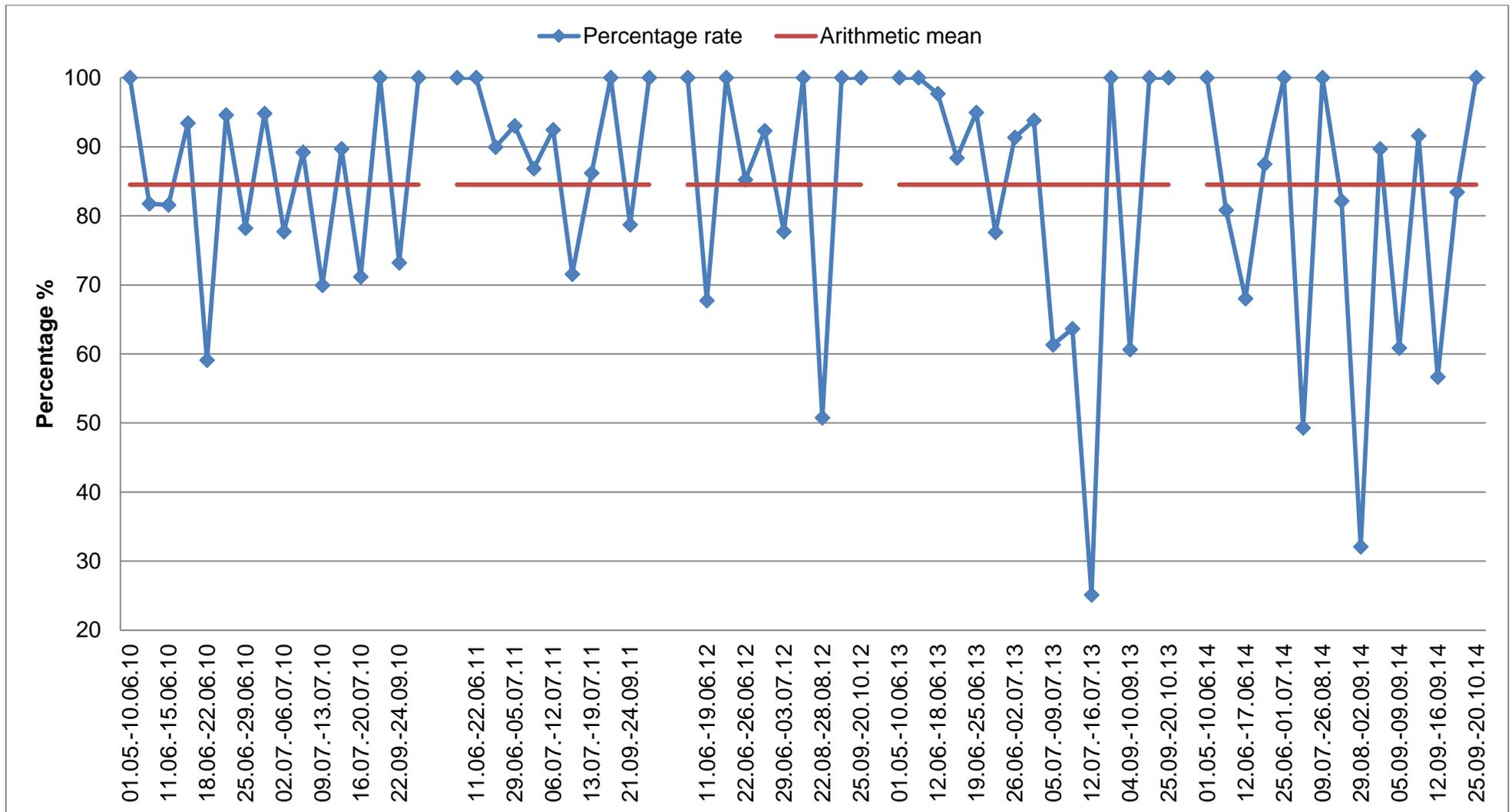
Cherry tomatoes - Utilisation of tariff quotas 2010 – 2014





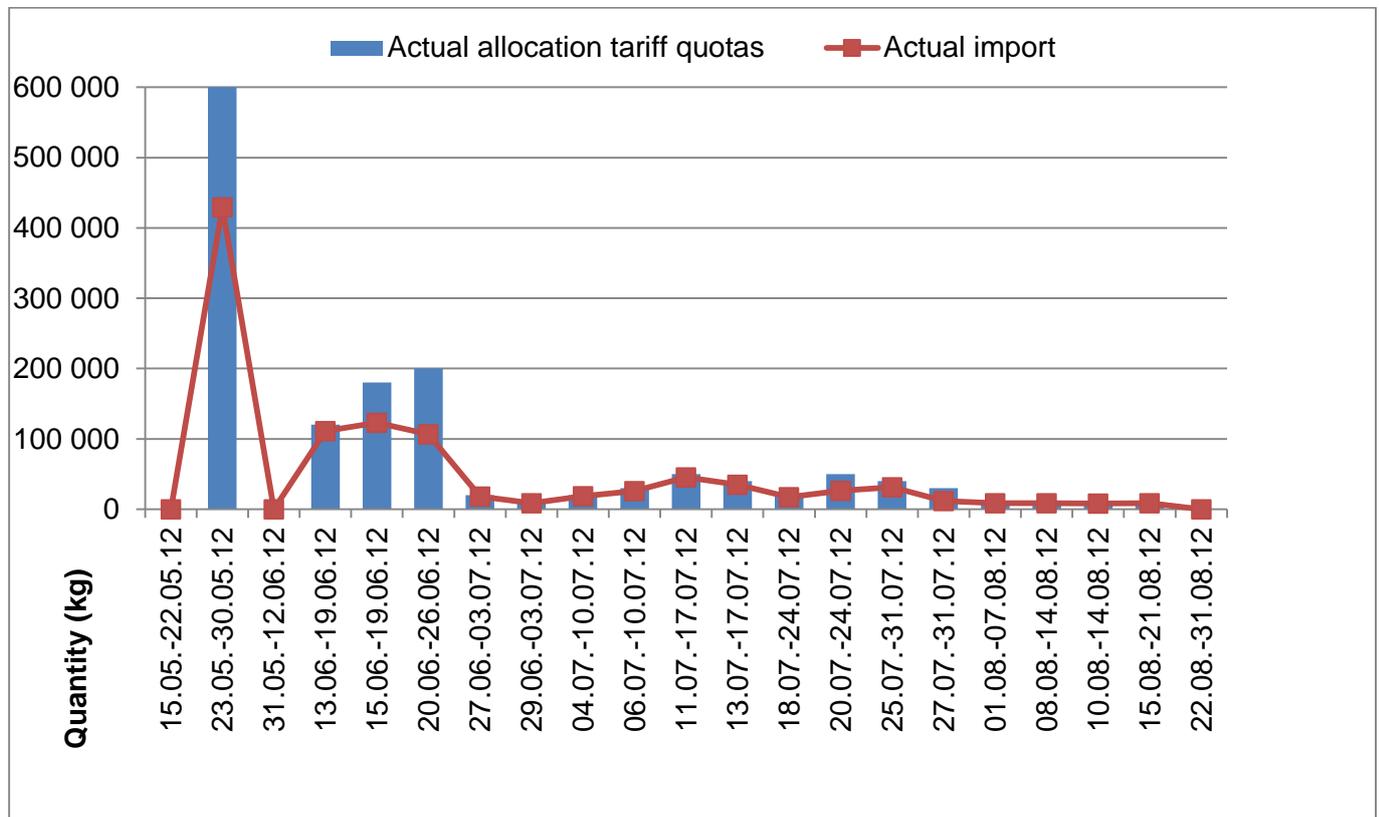
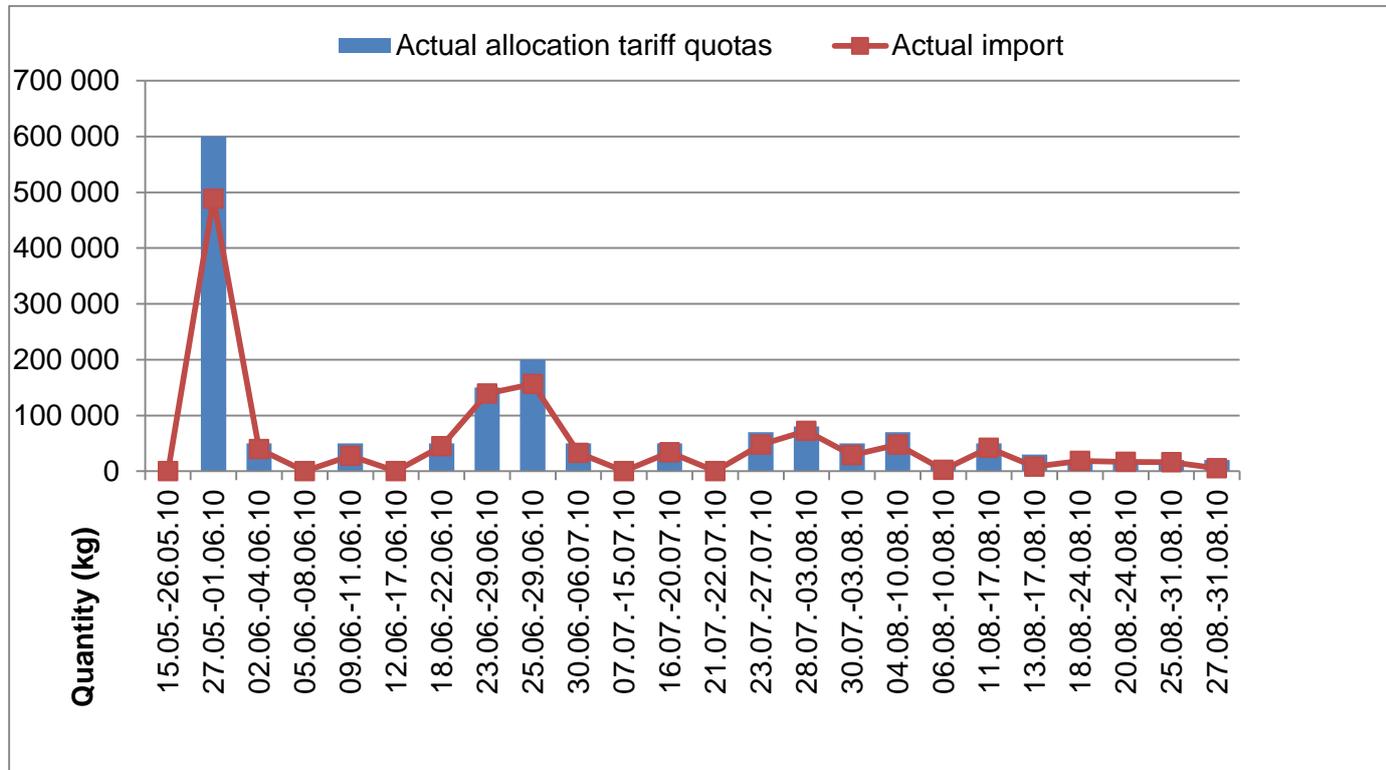


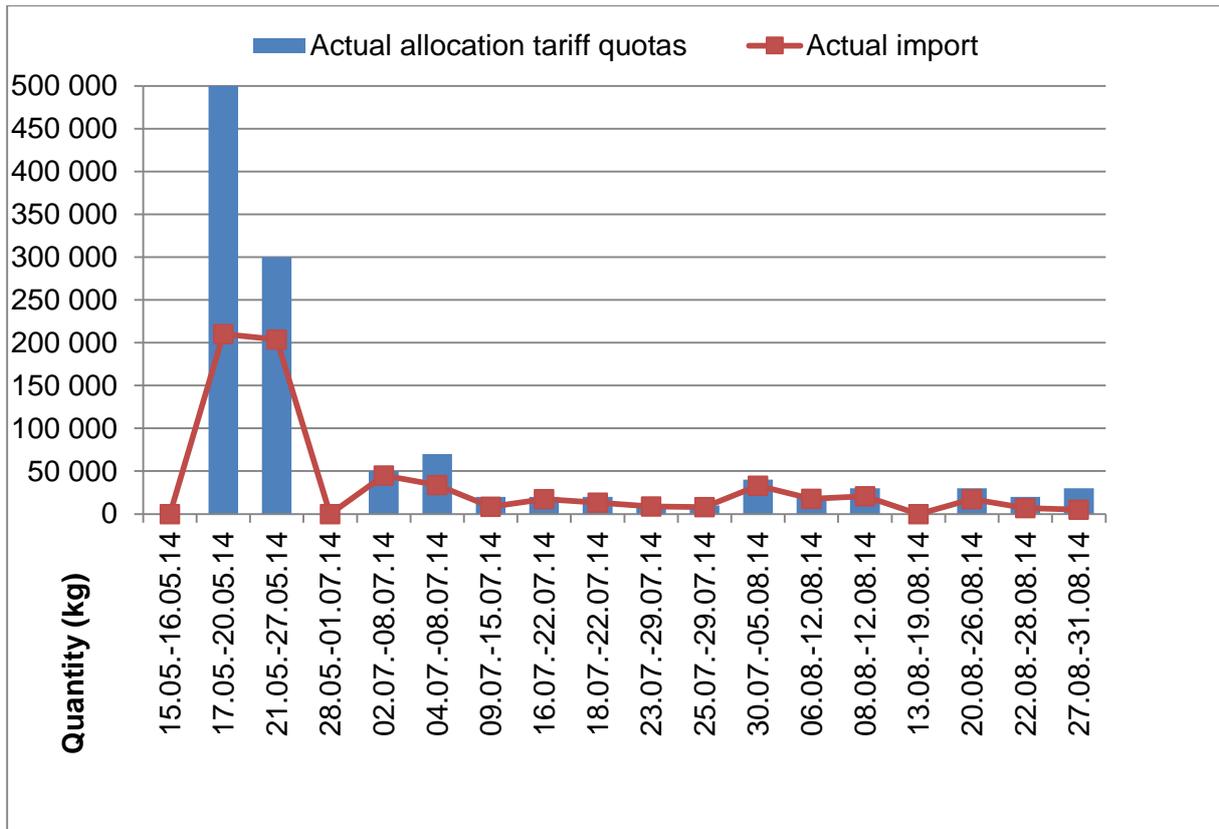
Cherry tomatoes – Utilisation rate in percentage of tariff quotas 2010 – 2014



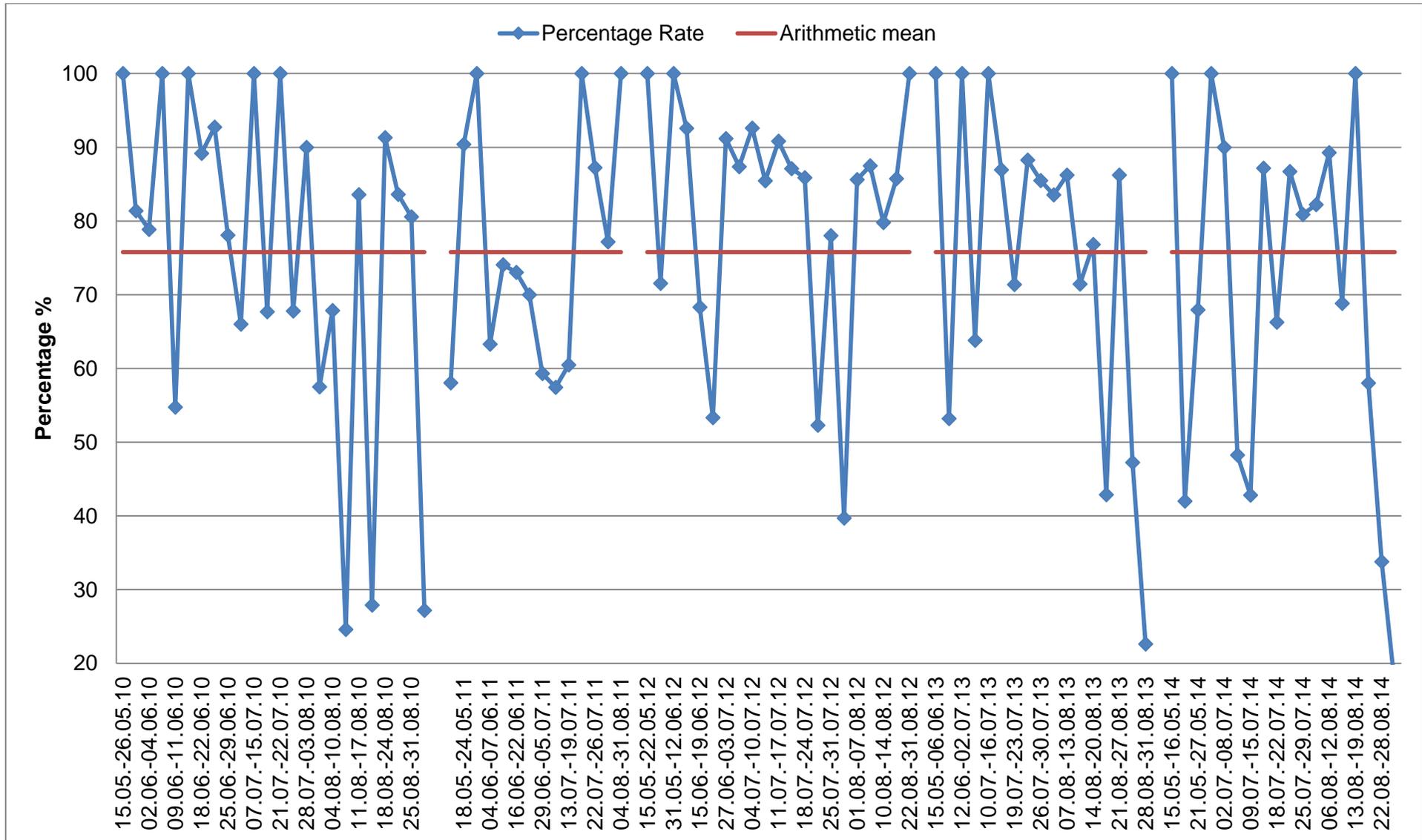
Strawberries

Strawberries - Utilisation of tariff quotas 2010, 2012 and 2014



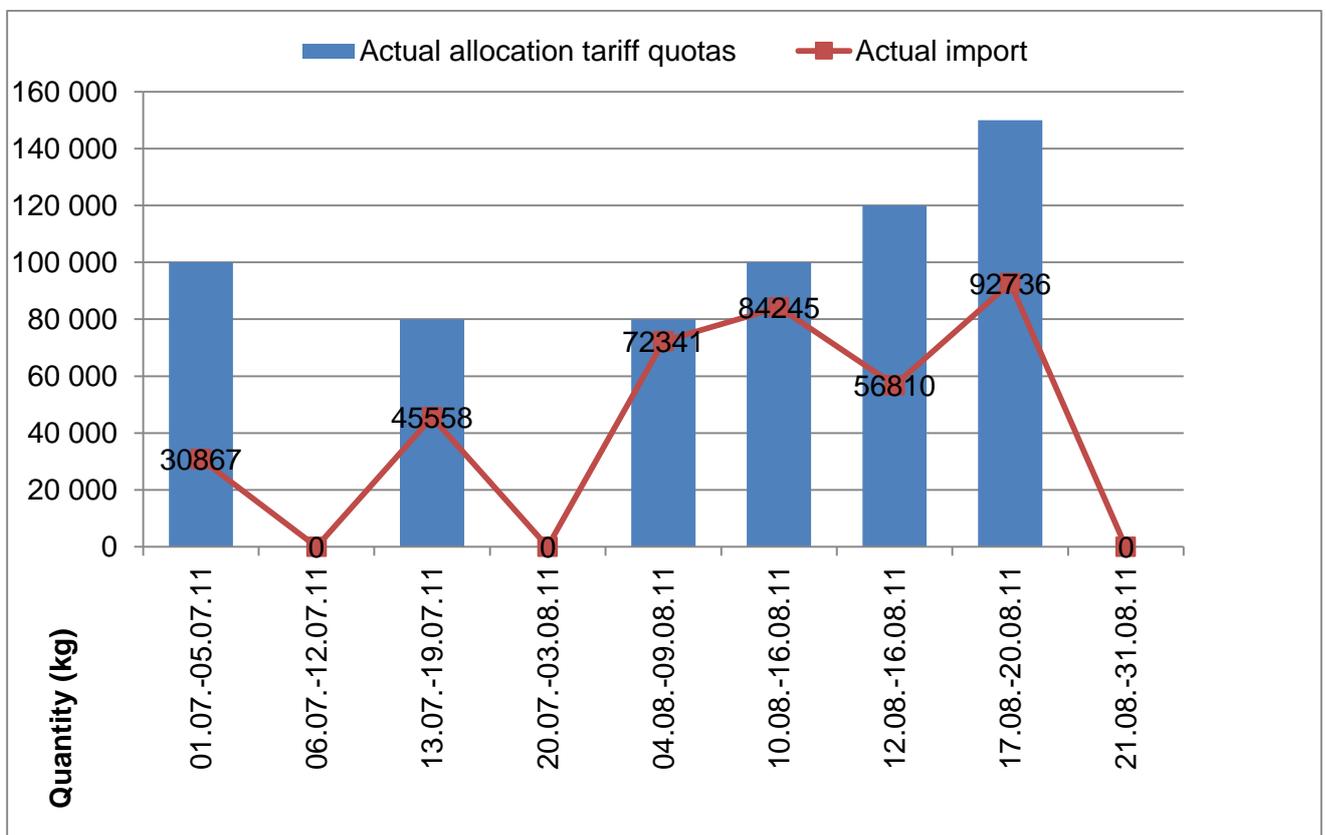
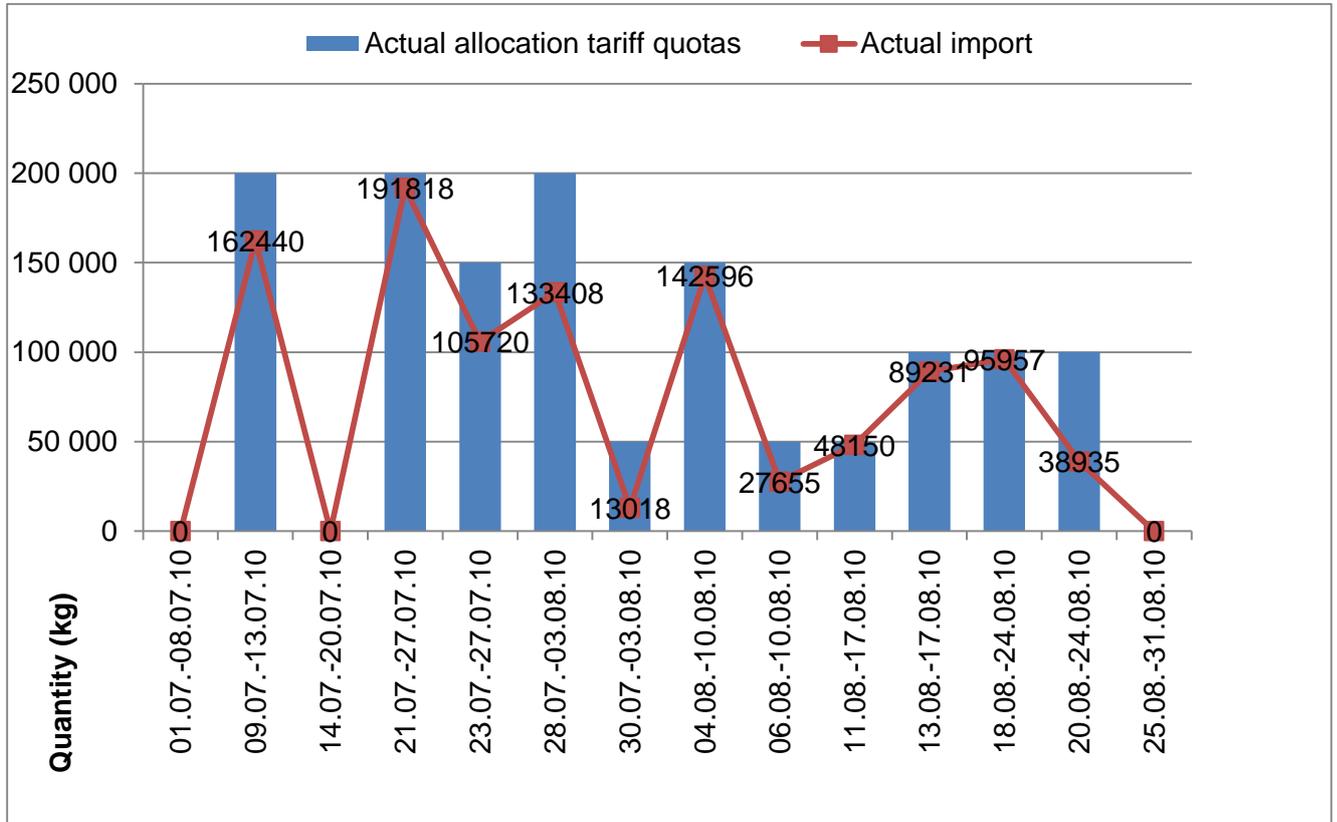


Strawberries – Utilisation rate in percentage of tariff quotas 2010 – 2014



Apricots

Apricots - Utilisation of tariff quotas 2010 and 2011



Apricots – Utilisation rate in percentage of tariff quotas 2010 – 2014

