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WORLD WINE DEVELOPMENTS IN THE 1990'S: AN UPDATE ON TRADE

Pierre Spahni

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Pierre Spahni
CIES Visiting Fellow and
Wine Economics Consultant
Quai Charles-Page 21B
CH-1205 Geneva
Switzerland

Phone (+41 22) 800 1607
Fax (+41 22) 800 1608
pspahni@vtx.ch

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NON-TECHNICAL SUMMARY

In the mid-1990s, three critical features characterised world wine trade over the medium term: (1) wine trade would continue to grow in terms of volume in spite of a continuing fall in the quantities consumed world-wide; (2) commitments undertaken by signatories to the GATT's Uruguay Round Agreements in Marrakech in 1994 would ensure that trade develops not just within trading blocs but amongst them too, and; (3) New World and Eastern-European exporters would threaten EU dominance of international markets.

This paper suggests that each of these expectations has played an important role. In the 1990s, the decline in alcohol consumption across the developed part of the world was outstripped by a rise in total alcoholic intake in most developing nations, to the extent that total world demand increased by over 10%. Not so for wine consumption which kept falling in the 1990s, as it had done ever since its peak in the late 1970s, at an annual rate of 1.3%. The trade numbers suggest, amongst other things, that the EU share of internal trade is diminishing (from 92% in 1990-92 to 85% in 1995-97, in value terms) along with its share of world exports (current EU15 members would have made up 69% of the reported value of trade in the early 1990s and only 63% five years later), thereby bringing the proportion of world trade imputable to purely internal EU trade to drop from 63% to 53% (i.e. some 10 percentage points below levels enjoyed at the beginning of the decade, to represent just over half world exchanges in the mid-to-late 1990s). And, the EU is shipping relatively less in just about every market (including its own) except Mercosur and Asia which is on the brink of becoming its second largest export market after North America.

Finally, this paper raises a number of contentious trade issues that are currently effecting world wine markets. These include production- and export subsidies; mutual recognition of oenological practices and agreement on the use of geographical indications; and the EU/US negotiations over the 1983 'Wine Accords'.

WORLD WINE DEVELOPMENTS IN THE 1990s: AN UPDATE ON TRADE

Pierre Spahni

Introduction

In the mid-1990s, three critical features looked set to characterise world wine trade over the medium term (Spahni 1995). This paper sets out to check on those expectations. They are that:

a) wine trade would continue to grow in terms of volume in spite of a continuing fall in the quantities consumed world-wide;

b) commitments undertaken by signatories to the GATT’s Uruguay Round Agreements in Marrakech in 1994 would ensure that trade develops not just within trading blocs but amongst them too, and;

c) New World and Eastern-European exporters would threaten EU dominance of international markets.

The short answer is a resounding, triple yes.

Growth in trade, in spite of contraction of demand worldwide

In the 1990s, the decline in alcohol consumption across the developed part of the world was outstripped by a rise in total alcoholic intake in most developing nations, to the extent that total world demand increased by over 10%. For spirits and beer, markets situated outside the OECD were generally eponymous to growth and led global companies to focus rapidly on them, also often to invest in local production facilities. The situation is much less straightforward for wine, which can only be produced under specific climatic conditions.

Developing economies generally spelt increasing demand for both ordinary and premium wine though there were cases where total demand fell during the 1990s. Argentina, for one, mirrored the hitherto negative trend prevailing in the three developed economies making up the hub of wine production - France, Italy and Spain.[1] The size of these traditional markets is such that free-falling sales of ordinary wines in one's home market could not possibly be compensated, in volume terms, by higher domestic demand for premium wines and rising exports taken together. World consumption thus kept falling in the 1990s, as it had done ever since the late 1970s, losing just over 20% at an annual rate of about 1.3%.[2] Yet according to OIV, a turnaround could be in the offing: Its latest set of data suggest that consumption of wine has picked up over the past two years, from 2.21 bn litres in 1996 to 2.23 bn in 1997 (provisional), whilst it is forecasted to inch up further by half a percentage point in 1998. (OIV 1999; and Aigrin 1999). Should this be confirmed by final figures and prove to be more than a blip, the bottoming out of world demand for ordinary and premium wines would mean that companies are bound for a much friendlier global environment - for the time being.

As long as it remained faced with a contraction in internal demand, the EU was under considerable pressure to expand sales overseas and/or to reduce its production potential, the more so as New World (NW) producers became increasingly successful at penetrating foreign markets and drew ambitious plans to expand their own acreage in *premium* wine grapes. For the 1998/99 marketing year, the EU Commission offered to remove 800 million litres of *ordinary* wines from the market through preventive distillation - a market support measure - and it is now seriously considering switching money from distilling surpluses to converting existing vineyards into premium wine grape production, particularly in the Mancha region - an area seven times larger than the Australian vineyard itself - which fiercely resisted eradication programs aiming at it.[3] Argentines have also stopped uprooting excess criollo vines in the Mendoza province responsible for the production of most ordinary wines. The US are currently faced with a sharp decline in the consumption of ordinary ('jug') wines and eager to sell them abroad.[4] Producers of cheap ordinary wine in Central and Eastern Europe, the former Soviet Union (FSU) and the Middle-East (Cyprus and Turkey) are also keen to fill in any momentary gaps in wine production caused by the vagaries of the weather (as in Spain,

[1] Traditional wine producing countries have developed huge domestic markets for ordinary wine, which have been falling rapidly as consumers' tastes and lifestyles became too sophisticated to accommodate this type of drink. There, the large quantities of ordinary wines drunk by people as part of their daily diet, are (still) being replaced with a combination of water (bottled or straight from the tap), drinks of lower alcoholic content (such as beer) and premium wines.

[2] This does not mean that the global value of wine output has decreased over the 1990s.

[3] La Mancha has about 650 000 ha , against 90 000 ha for Australia. See Dubos (1998) and Smart (1999).

following droughts in 1994 and 1995), and the EU is now defenceless against such intrusions. The international market for premium wines may be heading for better times, but ordinary wines are still caught in rough seas.

The current size of the imbalance of the world market can only be guessed in the best of circumstances, for matching production, consumption and trade data published by the UN and the OIV remains a perilous exercise. OIV, which is generally thought to produce the most detailed data on wine, but only related to volumes, has come up with new series this year,[5] which are more akin to those published by FAO, but there remain unacceptably wide, unexplained differences to anyone genuinely concerned with policy issues. As for trade, FAO and other UN sources insist on recording volumes in tons, which leads to misinterpretation by a few reporting countries thinking it fit to include the weight of the bottles in a 'wine' shipment and creates distortions which have to be weeded out from an otherwise useful set of data. Despite of all their shortcomings, volume shipments published by the UN can be used as a good proxy for the level of activity taking place in the international wine trade.

Regarding growth in 'world' trade between then and now, i.e. between 1992 and 1997, volumes have increased further, by some 28-37% (for imports and exports respectively, according to FAO data), whilst the value of shipments has edged up by 22-26% in real terms. In short, over the five most recent observations, world wine trade has continued to grow at a healthy rate - by about a third in volume and a quarter in value. World wine exports are now put at 6.6 bn litres for 12.8 bn US$, whilst imports are thought to total 6 bn litres for 12.5 bn US$.[6] The size of reported wine trade world-wide (about 40% in both volume and value) is comparable to that of beer in volumes terms and to spirits in value (see Figure A). Spirits and beer used to lag far behind wine trade in the early 1980s but have caught up with a stagnant[7] wine market during the 1980s (recall that, in 1986 and 1987, world wine trade had retreated well below the 5 bn litres levels it had managed to sustain during the first half of the 1980s, following the collapse of trade by transition economies as well as tumbling US orders.)[8] Wine

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[4] Gomberg, Fredrikson & Associates (1999). The recent rebounding of demand for all wines (since 1992) was mainly due to a sharp increase in sales of premium reds.

[5] It will also produce corrected data for the period 1985 onward this summer.

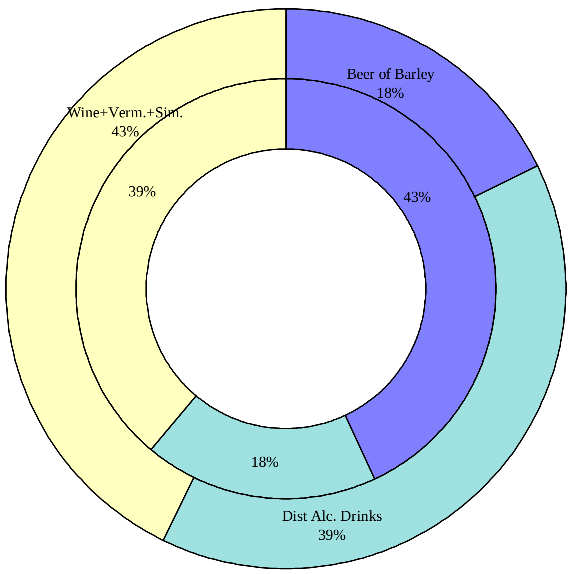
[6] Yielding a rough (Fob or Cif) value of US$ 2 per litre (or kg) on average. This, however, is barely more, in nominal terms, than the average prices achieved in 1992 and an indication that, if anything, real prices have tended to fall on average when expressed in US$.

[7] In (nominal) value - receding in volume.

[8] The volume of alcoholic drinks traded world-wide increased four-fold in between 1961 and 1996. In the All three categories showed vigorous growth in the 1990s, beer and spirits increasing each by an impressive 50%

exports have apparently grown further in volume in 1998, by some 2.5 - 3% on 1997, to reach 25% of world production (26.3 bn litres) and nearly 30% of global consumption (22.5 bn litres, according to OIV) (Aigrin 1999).

Figure A: World trade shares of the main types of alcoholic drinks by volume (inner circle) and value (outer circle), 1996.



Source: United Nations

The main thrust for this renewed vigour in trade laid with a rise in imports by the EU plus a strong recovery of imports by transition economies, on the heels of their economic recovery and, more recently, with a surge in imports by the US and Asia, just before it slumped into crisis. The EU did benefit from this bout of energy, but European economies in transition, Latin America, Oceania and the US increased their shipments at an even faster rate.

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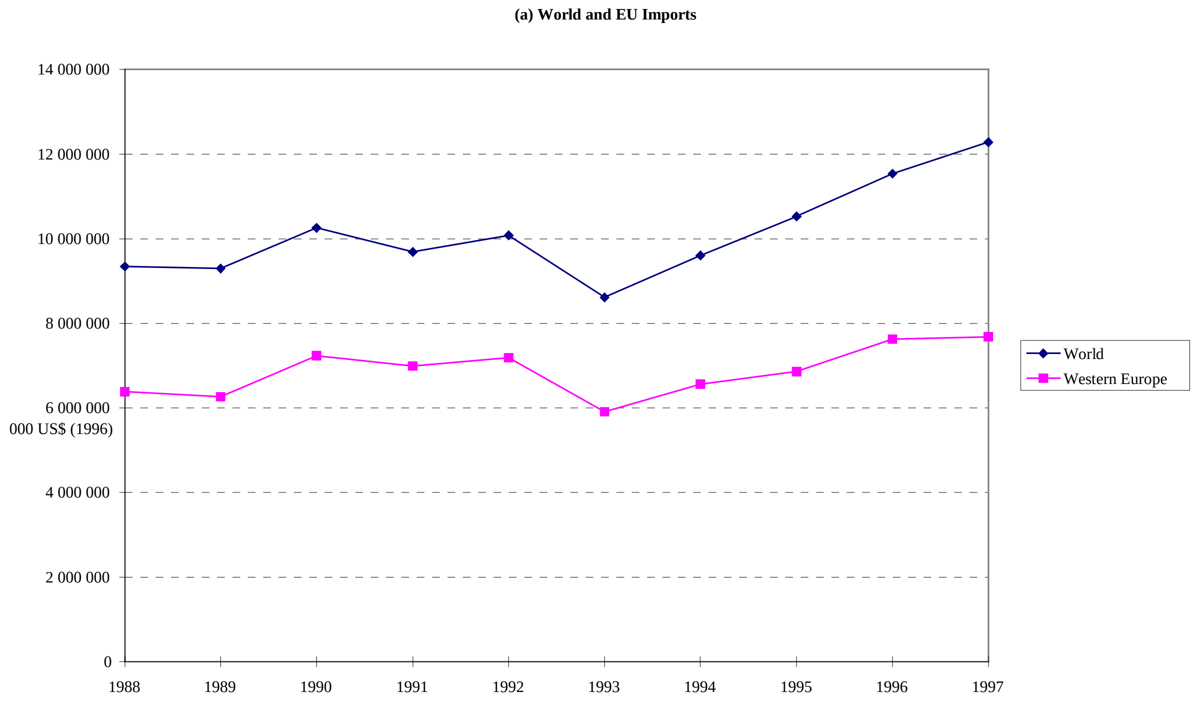
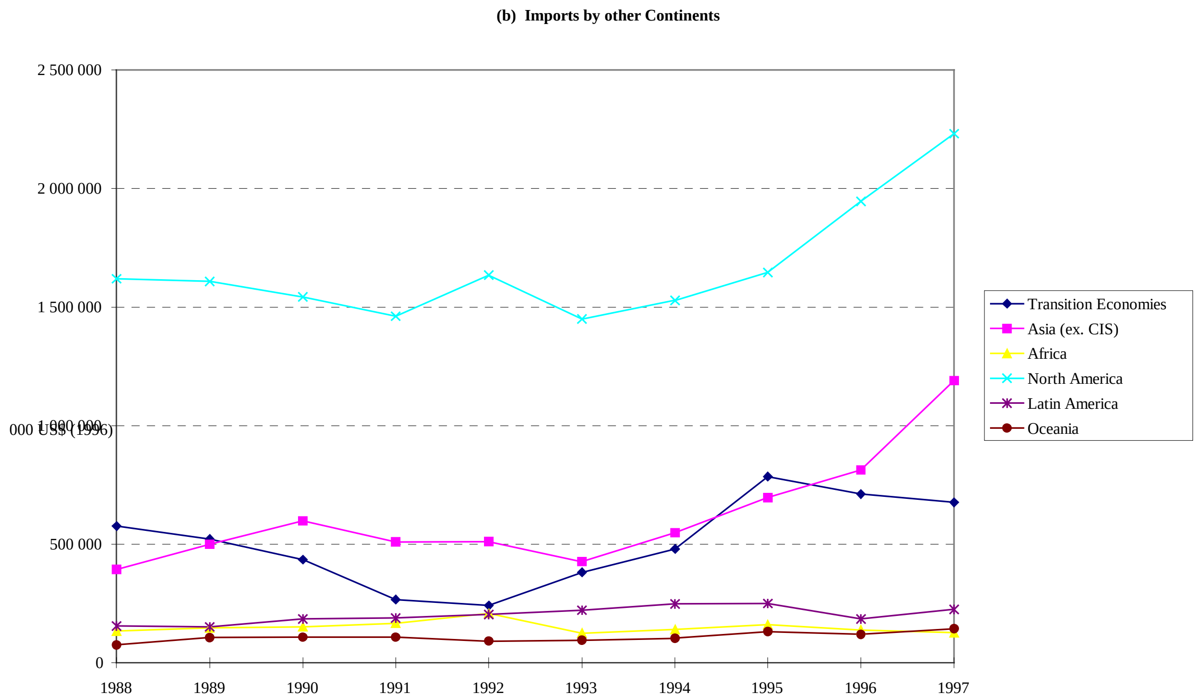
over just five years. The relative importance of wine halved over the years, from 73% of the volumes traded internationally in 1961 to 39% of them 35 years later whilst that of beer doubled over that time span, from 18 to 43%, as did sprits, from 8 to 18%. The main reason for wine's retreat was a dramatic drop in shipments from Western Europe to the US on the heels of successive scandals and an overall switch from bulk to bottle trade as well as to better wines in general. This led to a rise in the value of wine shipments on average, whilst beer and spirits benefited most from the birth of a truly global market for (premium) brands in beer and spirits. The increase in (recorded) international trade is even more impressive when it is expressed in value, from 1.1 bn US$ in 1961 to 28 bn 35 years later - a five times increase in real terms.

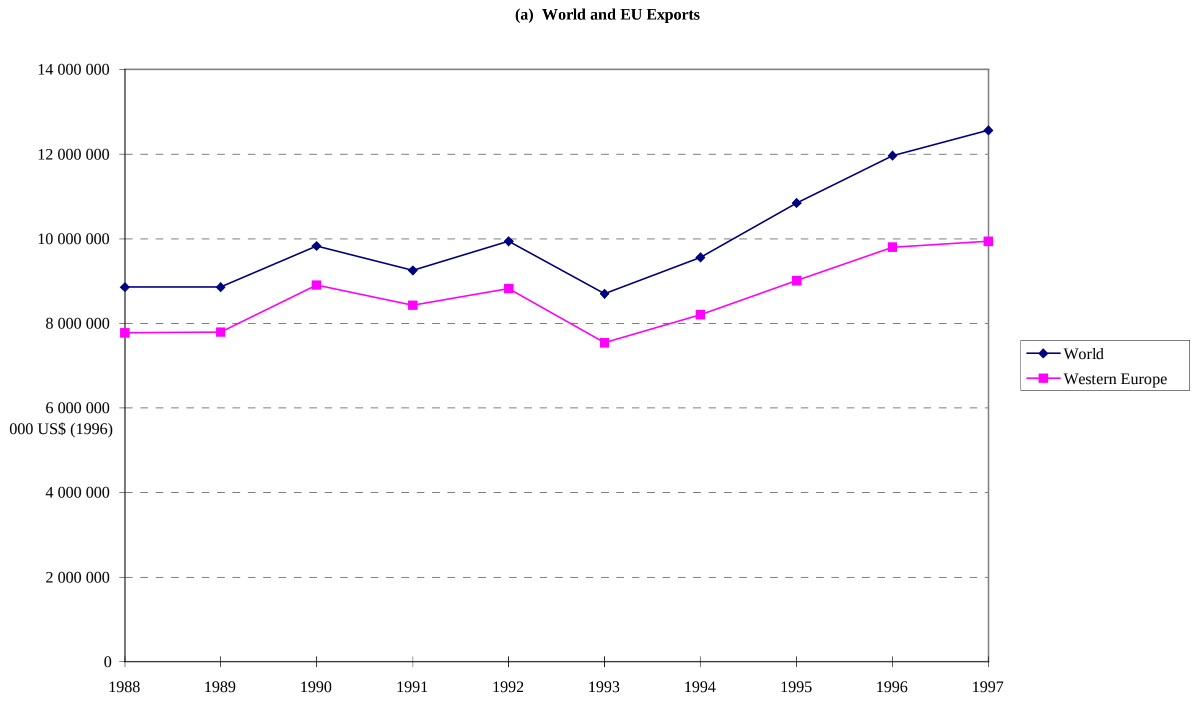
Figure B: Value of wine imports by region, 1988 to 1997.

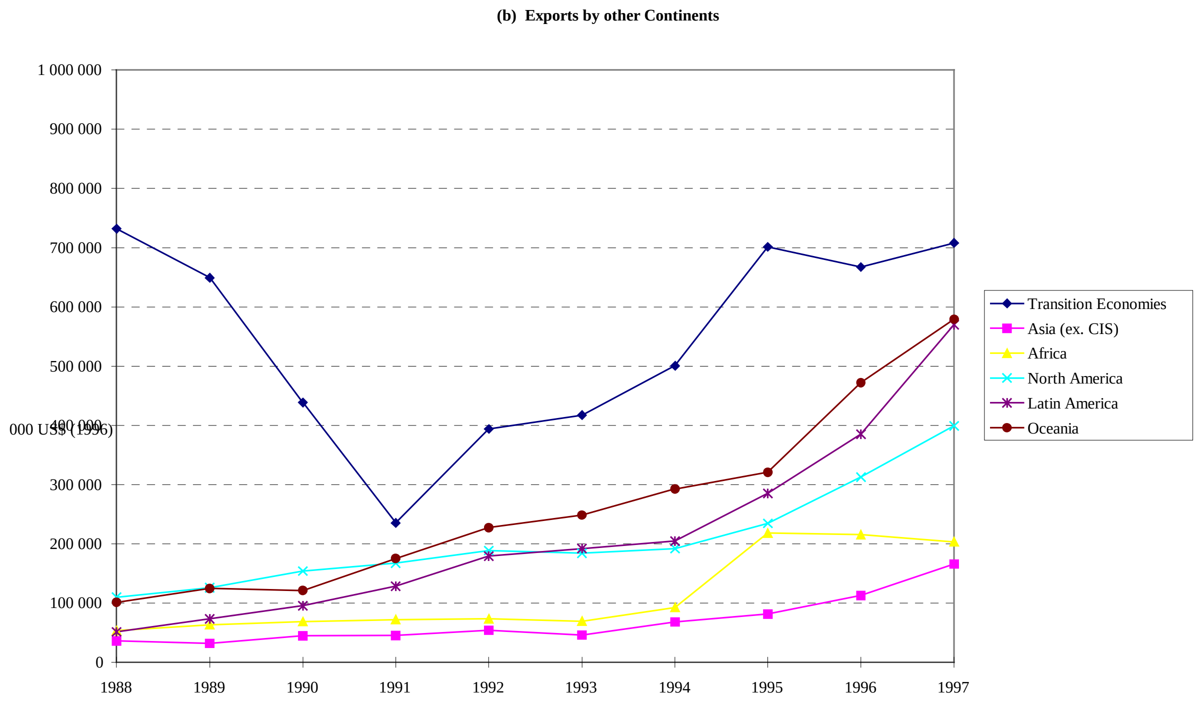




Source: United Nations.

Figure C: Value of exports by region, 1988 to 1997.





Source: United Nations

Diffusion of trade

The distribution of trade amongst economic blocs - the second question we sought to answer in here - is another critical matter since GATT's Final Act was meant to spur trade amongst, and not just within, trading blocs which many claim are just another route to a freer trading world but others feel is being done at an excessive cost - that of deflecting trade momentarily. The short answer is that whilst in 1988-90 nearly three quarter (73%) of the volumes shifted between countries amounted to intra-bloc trade basically, only two thirds (67%) did so in 1994-96.[9]

Much to rejoice about? Yes if one considers that the EU was instrumental in this, which became permeable with cheap wines as the result of its dropping a regime of minimum import prices in January 1995. Nearly 20% of its Members' imports now originate from outside the EU. The other contributors were NAFTA (who lowered its intra-bloc trade level from 9 to 6% in volume terms) and Oceania (from 75% to 34%), plus Asia in general. There are less encouraging news from Africa, Latin America and Central Europe, which have tended to fall back into regionalism, whilst Members of the former Soviet Union (the current CIS) still appear to source most of their wines in their closed circle (85% - see Figure D). Data are too imprecise at this stage to warrant further measures of the diffusion of wine trade.

One of the traits of international wine trade is that it is heavily concentrated on Europe, still particularly the EU15 who, in 1997 accounted for 57% of world consumption.[10] Wine trade is quite EU centric, as is witnessed by the presence of all the Union's members except Greece amongst the world's top 20 wine importers by value, which themselves account for 95% of world trade (see Table A).

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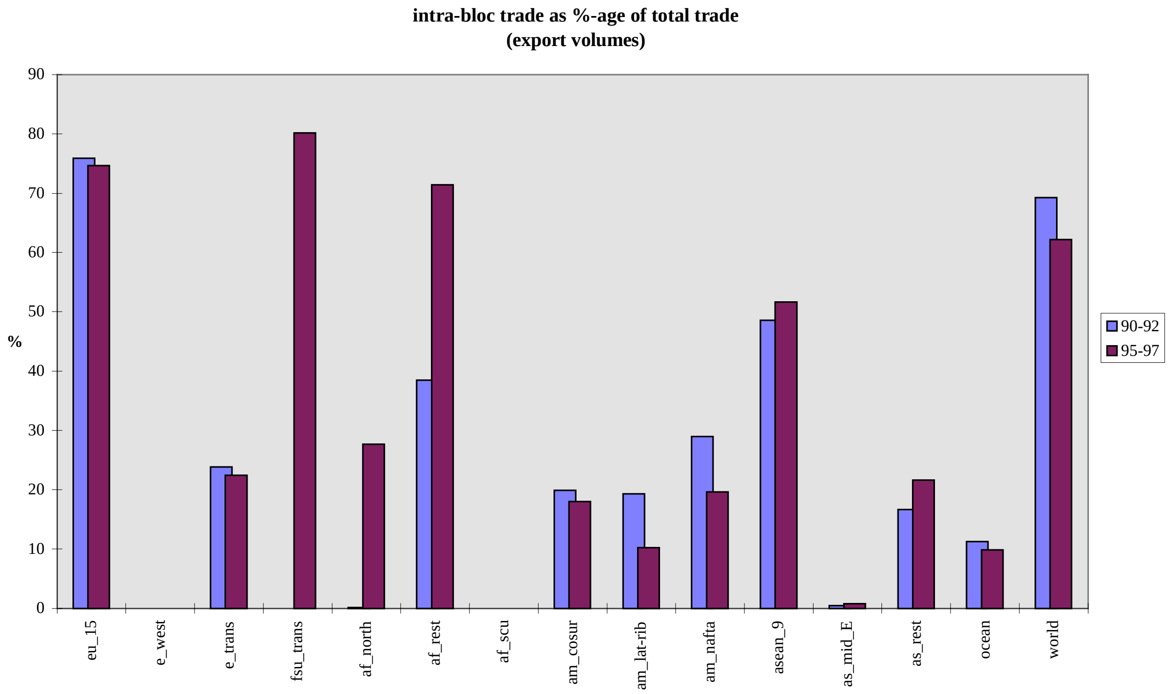
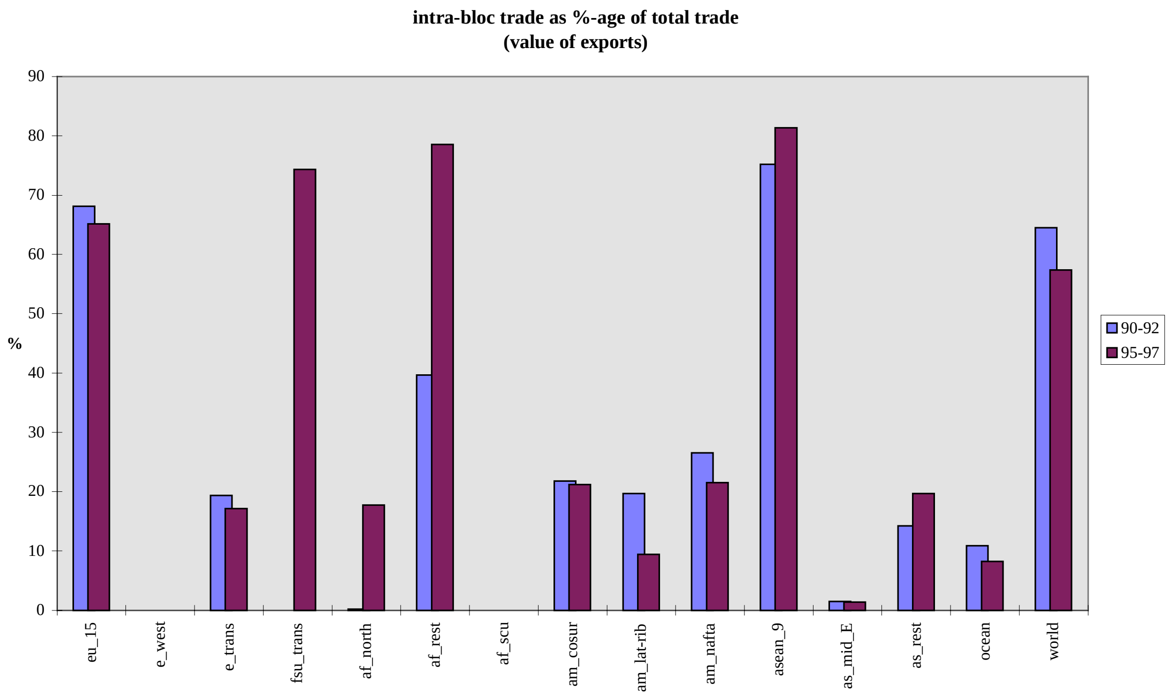
[9] Calculations based on import volumes reported by the UN Statistical Office Services. Trading groups were 'actualised' back to 1988 (eg. Austria was considered to be part of the EU at that time), for the sake of simplification.

[10] 12.7 bn litres out of a world consumption of 22.3 bn (Aigrin, 1999).

Figure D: Shares of intra-bloc trade in total exports of different region, 1990-92 and 1995-97.





Source: UN Statistical Services.

Table A: Top 30 wine importers, 1994 to 1997.

000 US$

		94	95	96	97a	**94-96 average**	
1	UNTD.KINGDOM	1 773 391	1 969 965	2 296 128	2 659 146	2 013 161	
2	GERMANY	1 447 022	1 726 723	1 938 873	1 789 400	1 704 206	
3	USA,PR,USVI	1 142 688	1 273 209	1 554 527	1 850 242	1 323 475	
4	BELGIUM-LUX	648 319	772 701	749 955	665 141	723 658	
5	SWITZ.LIECHT	458 458	573 061	611 432	585 518	547 650	
6	NETHERLANDS	513 230	539 700	568 715	532 162	540 548	
7	FRANCE,MONAC	437 595	537 634	527 673	545 060	500 967	
8	JAPAN	374 160	484 421	523 539	669 038	460 707	
9	RUSSIAN FED			437 274	575 196	450 000	
10	CANADA	313 382	332 026	385 309	418 999	343 572	85.2 %
11	DENMARK	258 378	341 210	368 634	446 615	322 741	
12	SWEDEN	273 763	178 258	283 968	241 089	245 330	
13	ITALY	134 834	164 227	157 219	174 935	152 093 b	
14	SINGAPORE	49 106	64 255	232 832	108 971	115 398	
15	SPAIN	53 879	139 341	80 096		91 105	
16	NORWAY,SB,JM	61 318	81 167	101 194	106 042	81 226	
17	IRELAND	61 503	69 728	89 883	104 086	73 705	
18	AUSTRIA	49 048	72 063	80 144		67 085	
19	PORTUGAL	69 095	74 028	52 043	47 171	65 055	
20	FINLAND	40 625	68 465	62 183	66 009	57 091	97.8 %
21	BRAZIL	44 048	59 179	47 021	62 472	50 083	
22	NEW ZEALAND	47 595	45 014	51 865		48 158	
23	AUSTRALIA	42 025	52 441	49 212	67 278	47 893	
24	China HK SAR	35 302	38 323	68 736	138 344	47 454	
25	POLAND	25 686	28 805	41 003		31 831	
26	MEXICO	37 073	18 020	25 790	40 106	26 961	
27	CZECH REP	22 120	22 036	30 717	32 573	24 958	
28	THAILAND	8 265	17 657	33 508	14 250	19 810	
29	GUADELOUPE	25 536	32 631			19 389	
30	ARGENTINA	20 211	12 755	12 607	19 733	15 191	101.1 %
	Total a	8 620 195	9 998 416	11 682 868	12 110 248	10 100 493	100.0 %

a incomplete reporting
b guestimate

Source: UN Statistical Services

The EU's diminishing share of internal trade (from 92% in 1990-92 to 85% in 1995-97, in value terms) and its diminishing share of world exports (current EU15 members would have made up 69% of the reported value of trade in the early 1990s and only 63% five years later), have brought the proportion of world trade imputable to purely internal EU trade to drop from 63% to 53% (i.e. some 10 percentage points below levels enjoyed at the beginning of the decade, to represent just over half world exchanges in the mid-to-late 1990s).[11]

A glance at trade matrices featured in the Appendix suffices to illustrates this point: the EU has lost ground in all but two of the featured 14 economic regions (trade blocs) of the

[11] 1995-97 vs 1990-92 (UN Statistical Services).

world except in transition economies and in Mercosur (the EU was particularly successful at penetrating those markets in the mid-1990s).[12] The EU experienced difficulties in fending off its own turf against a host of newcomers from the East, the West and the Southern hemisphere, still only from a very tiny base. Same for the rest of Western European distributors who are increasingly looking at alternative sources overseas.

Latin America outside Mercosur is increasingly trading with members of her won continent, at the expense of the EU, whilst NAFTA is doing the same in addition to ordering ever more wines from Oceania (shipments increased five fold in ten years) and soaring orders from South-Africa ever since she abandoned apartheid. The same happens in Oceania where the EU's share has dropped considerably in favour of greater local trade and increasing flows from the American and (South-)African producers. Only Asia is proving reluctant to switch to non-EU sources. Yet by all means the share of the EU remains high, hovering above the 80% mark in most trade blocs except those producing wines themselves in a significant manner, such as transition economies and South America, where the EU share is more likely to near on the 50% mark these days, in terms of value.

"New World" exporters' challenge to EU dominance

European dominance is more felt in wine than in spirits or beer. Western Europe currently imports over two thirds of world-wide shipments and exports nearly 70% of them. Adding to this a 14-15% share enjoyed by transition economies leaves merely 15-20% to be traded by the rest of the world. The share of the EU is even more impressive when it comes to values: over 80% of exports and less than 65% of imports. [13]

The situation is most salient when looking at the top league of wine exporting countries (see Table: The five main producers from the EU took the first five places, accounting for over 80% of World trade.[14] They have New World challengers on their heels however: Australia, the US, Chile and South-Africa occupy the next five ranks, leaving the tenth place to Hungary as sole candidate from transition economies. Argentina, Romania and

[12] In value terms (volume shares are too unreliable at this stage to construct meaningful aggregates).
[13] 1995-97 averages based on FAO data.
[14] Greece and Austria, both deemed small (to European standards even negligible) entities ranked 12th and 17th (Bel-Lux, with its small vineyard can be safely considered to be a re-exporter, as are the UK and Holland because of their extensive experience in colonial and wine trade).

Cyprus lag behind because of the generally low value of their exports. Exports are even more concentrated than imports, as the Top ten accounts for over 93% of the value of trade and the top twenty for 98% (Table B).

Table B: Top 30 wine exporters, 1994 to 1997.

(000 US$)

		94	95	96	97*	**94-96 average**		
1	FRANCE,MONAC	3 973 928	4 606 603	4 814 784	5 211 231	4 465 105		
2	ITALY	1 808 550	2 184 160	2 372 327	2 270 042	2 121 679		
3	SPAIN	849 845	992 458	1 164 160		1 002 154		
4	GERMANY	496 703	531 357	525 431	440 093	517 830		
5	PORTUGAL	446 930	496 007	539 339	523 082	494 092		
6	AUSTRALIA	278 755	306 226	431 650	534 412	338 877		
7	USA,PR,USVI	178 493	220 997	302 037	389 104	233 842		
8	CHILE	143 687	182 433	294 371	427 929	206 830		
9	S.AFR.CUS.UN	69 200	186 422	184 990		146 871		
10	HUNGARY	93 543	124 363	96 052	96 475	104 653	93.4	%
11	UNTD.KINGDOM	61 569	91 721	141 907	221 983	98 399		
12	GREECE	62 159	80 577	78 074	70 313	73 603		
13	BELGIUM-LUX	54 008	71 174	85 565	88 918	70 249		
14	ARGENTINA	35 255	78 596	83 733	128 878	65 861		
15	NETHERLANDS	42 581	47 728	50 287	68 778	46 865		
16	NEW ZEALAND	25 789	31 490	44 908		34 062		
17	AUSTRIA	27 775	30 572	31 657		30 001		
18	SINGAPORE	19 597	32 749	35 797	46 259	29 381		
19	ROMANIA	19 180	25 320	34 639	46 033	26 380		
20	SWITZ.LIECHT	16 158	19 252	38 327	65 477	24 579	98.2	%
21	CYPRUS	16 528	20 521	21 277	15 531	19 442		
22	CROATIA	12 090	25 997	17 635	14 642	18 574		
23	POLAND	19 030	23 403	11 536	4 899	17 990		
24	BRAZIL	13 043	13 031	15 960	16 804	14 011		
25	DENMARK	9 818	13 657	15 191	27 527	12 889		
26	SLOVAKIA	12 913	9 758	9 316	8 921	10 662		
27	SLOVENIA	10 529	10 024	9 855	5 947	10 136		
28	ALGERIA	1 789	10 520	14 314		8 874		
29	MOROCCO	6 292	8 694	6 330		7 105		
30	TUNISIA	8 201	6 315	6 600	5 786	7 039	99.5	%
	Total a	8 869 310	10 523 479	11 544 595	N/a	10 312 461	100.0	%

a incomplete reporting

Source: UN Statistical Services.

The EU is shipping relatively less in just about every market (including its own) except Mercosur and Asia which is on the brink of becoming its second largest export market after North America. The transition economies of Central and Eastern Europe have renewed their shipments into the FSU which is becoming as important as the EU itself. North-Africa is still dependent on the EU for most of its exports and has not quite managed to penetrate markets outside the Mediterranean basin. This is very much unlike SAF who succeeded in other countries of the Southern Hemisphere as well as NAFTA and Western Europe. Mercosur is shipping relatively less to other South American destinations and Asia, but it has been increasingly popular in Western Europe. Basically the same applies to other American exporters - Chile in particular - who have been blossoming in Western Europe and Asia: the US, for instance, have shipped rising quantities of wine to Asian nations outside 'Asean 9'. Relations amongst America's trading blocs have not intensified during the 1990s as people have looked ever further beyond their continent, particularly to Asia and Europe, in order to sell their wines. Middle-Eastern exporters (Cyprus and Turkey) remain heavily dependent on Europe, but they, too, tend to diversify into Asian markets as well as those of the FSU. Oceania realises 80% of its export earnings with NAFTA and, above all, with the EU which it is now tackling on several fronts after relying on a few key clients for years. Trade has been greatly facilitated by the conclusion of the EU-Australian trade agreement.

Open Trade Reform

Production- and export subsidies as well as tariff levels have fallen in line with WTO commitments since 1995, though there appears to be an attempt, by the EU, to relocate money hitherto used to reduce supply, to programs aiming at upgrading the quality of the wines produced, with a view to rendering them more competitive on foreign markets. Export refunds are only used extensively by the EU (South Africa is phasing them out). Most wine exporting countries have set up export promotion programs assisting wineries in their endeavours to create and maintain a presence on foreign markets, eg. the US's Market Access Program and those devised by various EU Member States, South Africa, Argentina and Australia. Barring discriminatory ones, duties and consumer taxes have yet to be harmonised. The lucrative 'private' trade taking place between the Northern shores of France and the South of England is just one more proof of the ability of tax differentials to deflect trade.

Other contentious trade issues include mutual recognition of oenological practices and agreement on the use of geographical indications. The EU and the US are still at odds on the issue - the 1983 'Wine Accords' granting temporary exemption from EU restrictions on certain oenological practices and certification procedures expired in 1993 but were then periodically extended for another year, until a compromise may be reached eventually, likely to be modelled on the Australian-EU agreement, which would offer a trade-off between further liberalisation of trade in wine and greater protection of geographical indications (GIs) under the TRIPS Agreement. This can be regarded as part of the commitment, by WTO Members, to start negotiations on relinquishing the right to exceptions granted by art 24 of the TRIPS agreement, to the high protection awarded to wines (and spirits) in matters designation. Regarding Intellectual Property rights, WTO Members are still working on a system of notification and registration of GIs. Aim is to fend off a claims, by some countries, to the sole and rightful use of particular GIs as well as the phasing out of (semi-)generic terms used in several NW countries and often enmeshed in protected trademarks. Another contentious issue is the wish, by the EU, to widen the scope of art 23 - i.e. the definition of a GI - to include traditional expressions as well, which it decided to protect after the conclusion of GATT's Final Act.

The outcome of the current talks between the US and the EU on the 'Wine Accords' may give a taste of things to come, for an explicit link was made by some delegations during the Uruguay Round of talks, between negotiations aiming to free up trade in agricultural products and those seeking to improve the protection of GIs (Geuze 1997). This is an important issue for New World exporters wishing further reduction in tariffs and other trade barriers slowing down the diffusion of wine trade, such as the mutual recognition of oenological practices, and a sharp reduction in domestic support programs.

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APPENDIX

1. ABBREVIATIONS USED

IECV	Institut Européen de Conjoncture Viti-vinicole
OIV	Office International de la Vigne et du Vin
WDT	World Drink Trends

2. BILATERAL WINE TRADE MATRICES, 1990 TO 1997.

(a) Country group definitions

eu_15	EU 15
e_west	Other Western Europe
e_trans	European economies in transition
fsu_trans	Former Soviet Union
af_north	North Africa
af_rest	Rest of Africa
af_scu	South-African Customs Union
am_cosur	Mercosur
am_lat-rib	Latin Amrica and Carribeans (excluding Mexico and Mercosur)
am_nafta	NAFTA
asean_9	Brunei, Indonesia, Japan,Malaysia, Philippines, Singapore, S. Korea Thailand, Vietnam
as_mid_E	Middle-East (incl. Cyprus and Turkey)
as_rest	Rest of Asia (i.e. excl. Asean 9, the former Soviet Union and the Middle-East)
ocean	Oceania (Oz + NZ + two dozen islands ranging from Christmas Is. to Wallis Fut. Island)
All reps	All reporters (to UN Statistical Services)

(b) Matrices of wine import and export values [see following pages].

Import values 000 US$ (1996) I M P O R T E R S

			EU_15r	E_westr	E_transr	Fsu_tra	Af_northr	Af_restr	Af_scu	Am_cosurr	Am_lat	Am_naftar	Asean_9r	As_mide_E	As_restr	Oceanr	All reps		
	1990	eu_15	6,100,105	661,144	11,137		3,251	31,865		20,586	46,102	1,431,847	469,949	3,160	29,762	66,088	8,874,993		
		e_west	9,135		288							1,639	539		198	125	11,925		
		e_trans	131,254	5,888	9,879					65		17,184	8,364	120		734	173,489		
E		fsu_trans	15,457	1,636								252	97		64		17,506		
X		af_north	21,060	3,124			111	587									24,881		
P		af_rest																	
O		af_scu	12,095	1,427				235		70			342		161		14,329		
R		am_cosur	8,615	1,406	10,666					1,470	1,233	8,189	8,687				40,267		
T		am_lat-rib	13,951	1,116	702					6,005	8,552	30,163	3,902			422	64,813		
E		am_nafta	45,106	8,135			62			180	3,242	32,030	30,624	76	2,111	429	121,995		
R		asean_9	1,810									137	194		354		2,494		
S		as_mid_E	22,048	5,606				218				2,254	2,193			299	32,617		
		as_rest	1,621									104	1,468		385		3,578		
		ocean	80,089	2,375				202				39,471	13,435		1,708	26,146	163,426		
		world	6,534,762	692,979	32,818		3,530	33,821		28,984	65,474	1,564,491	542,081	3,896	35,174	95,762	9,633,771	6,178,872	intra-bloc trade
	1991	eu_15	5,949,673	590,108	9,166		2,585	18,447		17,643	44,979	1,328,129	384,751	2,464	27,305	51,554	8,426,804		
		e_west	6,738									1,343	545		239		8,866		
		e_trans	145,545	4,345	2,468							16,855	8,349	99		331	177,992		
		fsu_trans	12,150	1,073	2,186												15,410		
		af_north	21,946	772			84	513				162					23,477		
		af_rest						74									74		
		af_scu	17,627	2,038				219				72	352		288		20,597		
		am_cosur	8,313	1,633						3,102	1,624	8,956	8,737				32,366		
		am_lat-rib	24,994	3,713						8,373	13,487	41,600	3,827		111	246	96,351		
		am_nafta	57,581	7,979				74		148	2,786	39,451	26,184	97	2,565	369	137,233		
		asean_9	1,679									107	375		300		2,460		
		as_mid_E	25,049	3,945								2,028	1,618			316	32,957		
		as_rest	2,063	63								92	1,397		485		4,100		
		ocean	114,589	4,731								45,033	13,844		2,640	21,511	202,347		
		world	6,455,238	621,191	14,168		2,811	19,992		30,125	69,263	1,484,838	451,878	3,072	34,185	75,488	9,262,249	6,030,710	
	1992	eu_15	6,092,414	542,360	17,521		2,741	22,364	3,068	18,087	47,525	1,452,798	376,235	2,764	30,584	48,587	8,657,047		
		e_west	7,647									1,988	585		248		10,468		
		e_trans	159,910	3,545	36,905							18,158	6,451	138		260	225,368		
		fsu_trans	13,583	1,046	452							59					15,140		
		af_north	17,483	718				591				142					18,934		
		af_rest	149		58												207		
		af_scu	31,372	2,099	94			432			92	2,168	989		464		37,710		
		am_cosur	9,523	1,573						3,716	3,292	12,619	9,452				40,175		
		am_lat-rib	40,415	6,344						10,081	15,113	63,965	3,082			388	139,388		
		am_nafta	81,679	10,221	572					663	4,386	49,952	26,210	161	3,008	661	177,511		
		asean_9	1,597									111	871		226		2,805		
		as_mid_E	25,212	2,893								2,854	420			271	31,649		
		as_rest	1,760	143								504	1,513		351		4,270		
		ocean	160,802	5,009	336						57	55,297	12,880		2,509	20,905	257,795		
		world	6,707,997	577,069	56,790		3,039	23,705	3,268	33,507	77,646	1,661,590	440,748	3,591	38,136	71,991	9,699,077	6,220,226	

Import values 000 US$ (1996) I M P O R T E R S

		EU_15r	E_westr	E_transr	Fsu_transr	Af_northr	Af_restr	Af_scur	Am_cosurr	Am_lat-ribr	Am_naftar	Asean_9r	As_mide_E	As_restr	Oceanr	All reps	
1995																	
	eu_15	5,986,674	610,030	25,734	3,126	2,524	28,951	3,565	66,938	54,305	1,404,706	514,497	3,433	35,474	61,258	8,801,215	
	e_west	10,354		74							1,067	650		141		12,287	
	e_trans	180,272	9,869	35,887	1,224				94		12,832	10,208	404		201	250,992	
E	fsu_trans	11,606	1,017	6,366	5,018										96	24,104	
X	af_north	18,240	627			4,629	331				54					23,880	
P	af_rest		101				82				305					488	
O	af_scu	84,180	5,317	1,716			1,989			182	10,793	2,949		373	1,940	109,439	
R	am_cosur	36,618	1,401					599	7,505	1,442	13,022	13,338			404	74,330	
T	am_lat-rib	66,592	7,323			2,990		96	18,680	19,356	75,638	5,228		394	2,887	199,183	
E	am_nafta	118,104	21,932	549	134			163	862	6,064	51,471	34,831	67	4,188	2,095	240,460	
R	asean_9	939	476									363		223		2,001	
S	as_mid_E	30,964	4,467				266				2,338	600			256	38,892	
	as_rest	1,577	72								82	1,933		374	58	4,096	
	ocean	223,388	10,092				82	129	58	276	82,716	16,437		4,199	29,417	366,793	
	world	6,834,780	673,786	74,987	9,770	10,413	32,341	5,071	95,305	90,506	1,656,383	603,639	4,431	46,178	99,534	10,237,122	6,140,778
1996																	
	eu_15	6,195,647	636,154	44,287	76,562	3,731	16,444	5,469	51,269	17,599	1,589,279	707,938	3,916	65,412	53,246	9,466,953	
	e_west	22,927		207	69						1,260	1,457				25,920	
	e_trans	192,170	9,676	49,034	5,598			127			16,605	10,652	618	144	509	285,133	
	fsu_trans	11,735	577	3,760	349,389						360		59			365,880	
	af_north	18,780	556			9,433					130					28,899	
	af_rest						53	170			53					276	
	af_scu	129,928	6,651	389	131		1,518			58	14,682	5,779		657	2,020	161,813	
	am_cosur	47,076	4,507		2,154	3,007		6,487	7,540	1,550	21,089	13,522		152	601	107,685	
	am_lat-rib	116,502	11,846		271	593		274	15,663	20,934	134,012	11,667	212	924	3,538	316,436	
	am_nafta	183,135	24,954	795	1,499			163	1,181	3,870	67,194	41,325	178	7,827	908	333,029	
	asean_9	1,819	1,191		58						597	446		648		4,759	
	as_mid_E	36,676	4,286		757		68				4,106	345		161	400	46,799	
	as_rest	2,219	137								69	2,479		724		5,628	
	ocean	304,351	17,603		184			366	122	53	114,759	22,814	73	6,802	39,202	506,329	
	world	7,275,379	719,153	101,017	437,274	16,862	18,741	13,605	77,640	53,618	1,965,626	820,687	5,692	84,590	101,173	11,691,057	6,739,596
1997*																	
	eu_15	5,892,670	590,485	25,031	118,981	349	240		61,146	14,260	1,783,205	631,584	4,501	143,758	52,319	9,318,529	
	e_west	37,641									1,424	3,256		422		42,742	
	e_trans	181,789	9,468	25,725	15,401						15,624	17,093	498	2,030	456	268,084	
	fsu_trans	9,007	489	988	421,719						798	131				433,132	
	af_north	16,215	300								212					16,726	
	af_rest	54									128					182	
	af_scu	142,020	7,147		214				180	107	16,461	8,035		1,052	357	175,573	
	am_cosur	37,402	2,222		535				8,754	9,186	31,542	24,784		711		115,136	
	am_lat-rib	168,645	18,085	177	106				16,463	12,528	179,675	21,888	473	4,117	1,425	423,581	
	am_nafta	213,497	31,090	64	2,624				1,383	5,855	71,381	43,453	371	10,876	647	381,241	
	asean_9	1,910	295								779	172		1,340		4,496	
	as_mid_E	32,192	2,325		885						3,671	285		86	284	39,729	
	as_rest	2,416	110								205	1,931		3,097		7,759	
	ocean	357,311	20,948		741				265	640	157,635	22,902	126	13,179	9,246	582,994	
	world	7,185,301	683,963	53,883	566,263	459	458		88,927	44,427	2,264,118	777,103	6,796	181,584	66,916	11,920,198	6,445,292

* incomplete reporting

Export values 000 US$ (1996) I M P O R T E R S

1990		eu_15	e_west	e_trans	fsu_trans	af_north	af_rest	af_scu	am_cosur	am_lat-rib	am_nafta	asean_9	as_mid_E	as_rest	ocean	world		
	EU_15r	5,946,039	660,996	60,692	2,152	5,376	120,583	3,828	34,277	105,485	1,362,050	390,461	14,439	41,435	78,260	8,883,494		
	E_westr	10,048			162	71					995	2,085		176		14,196		
	E_transr	53,189	2,618	11,601	317						6,189	2,518	222		67	77,100		
E	Fsu_transr																	
X	Af_northr	18,209	1,875		14,904	214	1,530				1,560					39,359		
P	Af_restr				372		363									797		
O	Af_scur																	
R	Am_cosurr	7,880	1,163	2,305					3,187	1,601	9,314	4,995				31,084		
T	Am_lat-ribr	12,966	821						6,331	13,205	25,022	2,299			317	63,593		
E	Am_naftar	51,726	5,678	753			1,888		207	8,749	34,138	32,928		4,095	833	143,448		
R	Asean_9r	404									329	3,025		2,116	378	7,305		
S	As_mide_Er	16,135	2,495	4,956			200				2,337	258	358		286	29,118		
	As_restr	914										509		596		2,510		
	Oceanr	73,153	1,999				144				33,901	12,221	866	2,215	22,817	148,889		
	All reps	6,190,662	677,646	80,306	17,908	5,660	124,707	3,828	44,001	129,041	1,475,835	451,298	15,884	50,632	102,958	9,440,893	6,035,541	intra-bloc trade
1991	EU_15r	5,771,430	595,522	49,764	6,441	7,456	118,817	3,112	25,483	103,118	1,250,141	321,651	14,893	34,903	64,397	8,424,071		
	E_westr	11,612			111						1,338	2,073		207		16,038		
	E_transr	9,710	163	4,034	512						1,662	1,007	193			17,545		
	Fsu_transr																	
	Af_northr	18,928	545		14,153		1,949				135	94				38,303		
	Af_restr															62		
	Af_scur																	
	Am_cosurr	6,466	716	1,459					5,916	1,871	7,743	5,118				30,224		
	Am_lat-ribr	23,015	3,143						8,464	22,174	35,646	2,600		105	282	96,571		
	Am_naftar	61,404	5,927	814	75		1,698		62	10,273	43,801	31,084	77	3,632	1,168	162,371		
	Asean_9r	329									327	18,978	63	2,169	527	23,429		
	As_mide_Er	18,061	2,046	327			118				1,970	220	379		232	24,905		
	As_restr	1,258									58	535		410		2,758		
	Oceanr	113,951	3,836				236				40,982	11,669	602	2,786	20,266	195,862		
	All reps	6,036,163	611,898	56,397	21,292	7,456	122,818	3,112	39,924	137,435	1,383,804	395,029	16,208	44,212	86,873	9,032,139	5,887,387	
1992	EU_15r	6,062,445	542,969	26,851	27,710	4,826	155,443	3,289	27,190	111,173	1,355,170	307,953	18,174	42,760	59,548	8,796,467		
	E_westr	11,709			195	94					1,649	2,410		97		16,824		
	E_transr	61,118	2,534	26,558	17,663					193	11,722	1,377				123,313		
	Fsu_transr																	
	Af_northr	15,644	325		2,121		2,440				141					22,675		
	Af_restr															57		
	Af_scur	29,143	1,067	468			10,458		66	141	2,143	921		957		46,705		
	Am_cosurr	7,923	377						14,137	4,070	12,017	5,737				45,264		
	Am_lat-ribr	37,174	5,355						9,521	22,046	54,090	1,966			292	131,610		
	Am_naftar	75,001	5,520	691	415		778		555	12,328	52,280	29,243	67	4,850	757	184,802		
	Asean_9r	478									316	21,156		2,941	626	26,668		
	As_mide_Er	19,378	1,691		334		132		86		3,238	211	475		297	27,716		
	As_restr	1,079	69		3,875						106	873		803		7,437		
	Oceanr	145,316	3,872				174	90			50,819	11,776	1,043	3,015	20,079	237,743		
	All reps	6,466,408	563,779	54,568	52,315	4,920	169,425	3,378	51,555	149,951	1,543,692	383,623	19,758	55,424	81,599	9,667,281	6,219,979	

* incomplete reporting

Export values 000 US$ (1996) I M P O R T E R S

EXPORTERS

1995	eu_15	e_west	e_trans	fsu_trans	af_north	af_rest	af_scu	am_cosur	am_lat-rib	am_nafta	asean_9	as_mid_E	as_rest	ocean	world	
EU_15r	6,275,509	618,687	48,542	157,718	4,117	101,969	4,233	81,806	116,583	1,297,029	433,751	27,651	63,228	69,490	9,352,465	
E_westr	14,334		58	103						2,098	3,254		207		20,881	
E_transr	76,100	4,370	32,686	95,335		143		58		8,442	2,870	211		77	227,066	
Fsu_transr			331	7,834											8,312	
Af_northr	19,605	189	76		3,958	644				62					27,070	
Af_restr						312									476	
Af_scur	99,688	8,622	66			16,065		1,962		8,679	2,841	528	896	1,709	238,411	
Am_cosurr	38,723	1,012	64				1,594	20,355	4,279	15,144	10,939			800	93,904	
Am_lat-ribr	62,088	6,643		101	280	57	151	16,914	28,599	63,646	4,182	92	392	2,958	188,589	
Am_naftar	98,007	15,049	560	873		259	100	713	12,481	55,653	35,830	64	8,206	2,017	232,305	
Asean_9r	423									521	28,656		3,557	821	35,423	
As_mide_Er	22,012	3,251		1,265		193	134	97		2,591	238	549		394	32,385	
As_restr	1,466								56		2,083		1,022		5,205	
Oceanr	207,278	9,086		433		143	150		56	71,628	15,691	1,405	5,646	31,256	344,608	
All reps	6,915,234	666,909	82,383	263,662	8,355	119,786	6,361	121,906	162,053	1,525,492	540,334	30,500	83,154	109,522	10,807,101	6,486,390

1996																
eu_15	6,583,138	619,967	63,252	113,381	5,055	83,237	6,340	76,191	57,575	1,471,649	492,829	24,227	127,175	68,058	9,837,408	
e_west	27,463		50	346						3,316	6,369		891		39,344	
e_trans	74,435	2,458	38,171	50,361	652					9,926	3,874	563	530	292	185,644	
fsu_trans	492		4,789	13,608		362				110		1,967	60		21,714	
af_north	17,862	552	61		7,236					133					28,305	
af_rest						229									275	
af_scu	134,359	6,613		272		11,909		3,339		15,552	5,266	459	1,275	1,705	187,996	
am_cosur	27,831	2,004		1,515	520		4,344	23,501	5,339	21,544	11,076		72	199	102,984	
am_lat-rib	103,975	10,191		96			291	16,624	27,715	117,949	10,914	334	1,433	3,614	296,949	
am_nafta	146,891	16,336	846	618		470		1,602	14,880	70,868	41,100	239	11,115	686	308,162	
asean_9	84					66				482	31,819	90	4,409	643	39,137	
as_mid_E	23,488	3,061	52	1,372	56	64	102	62		3,775	1,355	484		418	36,140	
as_rest	2,345									52	2,202		799		6,018	
ocean	280,661	14,008		105	60	142	144	110		102,035	25,127	1,312	10,639	40,205	476,621	
world	7,423,024	675,190	107,221	181,674	13,579	96,479	11,221	121,429	105,509	1,817,391	631,931	29,675	158,398	115,820	11,566,697	6,837,773

1997*																
eu_15	5,347,571	514,388	50,325	103,264	3,487	60,110	7,572	75,565	46,767	1,523,545	581,344	27,974	312,348	72,399	8,763,710	
e_west	47,874			183						3,943	8,182		4,350		65,283	
e_trans	74,680	3,038	30,635	49,081						9,166	5,725	420	1,970	207	179,557	
fsu_trans	99		1,415	10,832		165				106	129	191	87		13,415	
af_north	3,539									61					7,685	
af_rest						336									367	
af_scu																
am_cosur	36,044	1,755		1,376		1,125	5,839	28,808	15,408	29,243	22,532	67	1,577	350	145,222	
am_lat-rib	149,861	18,225	73	107		49	319	22,102	29,045	164,816	20,939	581	7,382	3,927	422,025	
am_nafta	194,625	20,225	957	336	51	626	101	2,138	15,189	74,429	47,858	518	31,864	905	392,201	
asean_9	895	102					204			480	39,906	142	5,528	772	48,847	
as_mid_E	20,896	1,762		1,563		216		55		3,438	274	310	156	351	30,338	
as_rest	2,159	54							74	49	2,213		1,693		6,600	
ocean	281,558	17,647		564		222	342	355	67	135,325	24,746	1,574	21,479	38,914	523,933	
world	6,159,801	577,196	83,405	167,307	3,538	62,849	14,376	129,023	106,549	1,944,602	753,849	31,775	388,435	117,825	10,599,183	5,602,479

* incomplete reporting

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