



THE 2017 EU AGRICULTURAL OUTLOOK CONFERENCE

BRUSSELS – 18-19 DECEMBER 2017



AGENDA

Agriculture
and Rural
Development

Brussels, 18 and 19 December 2017
Location: ROOM DE GASPERI CHARLEMAGNE BUILDING
Rue de la Loi 170, 1040 Brussels

Foreword

Dear Participant,

It is my pleasure to welcome you to the third annual EU Agricultural Outlook Conference. Last year, we had the great honour to welcome the President of the Commission and Commissioners Arias Cañete and Vella. This year Commissioner Oettinger will join our annual rendez-vous to discuss with us about policy performance and budget focussed on results.

This year's edition comes just weeks after the European Commission adopted a Communication on the Future of Food and Farming. It is a blueprint for the future development of the European agricultural sector and places EU agricultural policy at the heart of the delivery of the Juncker priorities.

It is a great pleasure for me today to share with you my vision for the future of EU agriculture. Agriculture is about the food we eat every day, it is an integral part of our daily life. The recent public consultation 'CAP have your say', with more than 320.000 participants, confirms that citizens have a high interest in our policy.

This conference looks forward with optimism to a dynamic and vibrant agricultural sector, with a focus on the adaptation of the sector to consumers' expectation, particularly in terms of environmental care and climate action, but also in such areas as food safety, food quality, health and animal welfare standards. We will discuss the essential role of innovation and research in developing new ways of sustainable farming, having regard to the CAP as an economic, environmental and social policy. We will learn about concrete projects involving farmers, advisers and researchers.

Over the last decades, the CAP has evolved towards greater market orientation. Thanks to various policy reforms, the EU agricultural sector has been able to grasp global market opportunities turning the EU into the globe's top agri-food exporter, with a large and growing trade surplus. However, EU farmers are also more exposed to price volatility and we need to explore all possible ways to address risk and increase farmers' resilience. This conference is an opportunity to bring forward promising initiatives involving various actors of the supply chain.

The CAP represents a large share of the EU Budget and citizens expect that it brings real EU added value. It is thus a great honour for me to welcome Commissioner Oettinger to join us and to address this issue during the first day of the Conference. But performance is a much broader topic than making sure that public money is spent accurately. It is also our role to enhance the performance of farming by promoting the role of



advisers and the use of new technologies.

In 2017, once more agriculture was hit by several extreme weather events in many parts of Europe. This is why climate will be again at the heart of our discussions when presenting the market outlook during the second day of the conference.

In this agricultural market outlook, we are not interested only in how much the EU will produce by 2030 but also what is produced and how, as well as who will produce our food tomorrow. We need to make sure that farming is attractive to new generations, because millions of jobs in the food industry but also in upstream and downstream industries depend on a viable agricultural sector.

During the second day, the medium-term prospects for EU agricultural markets and income will be presented. This market outlook is not intended to constitute a forecast of what the future holds; instead it paints a picture of what may happen under a plausible set of assumptions and circumstances. For over two decades, the Directorate-General for Agriculture and Rural Development, in collaboration with the European Commission's Joint Research Centre, has published medium-term prospects for EU agricultural markets and farmers' income. In recent years, we have invested in additional analysis to identify the main sources of uncertainty and to quantify their possible impact on agricultural markets. To assure the quality and robustness of such analysis, an annual Workshop in October gathers modelling and market experts from the EU, the United States and International Organisations such as the World Bank, the FAO and the OECD.

I am confident that these two exciting days will be inspiring and will generate new ideas on the future of food production and farming. I am delighted that you have joined us and I look forward to your input in the discussions on the future of EU agriculture.

Phil Hogan

DAY 1 – Food and farming

08:00 Registration and welcome coffee

09:00-10:00 SESSION 1 - Opening session

Moderator **Peter Baader**, Senior Expert, Resources, DG Agriculture and Rural Development, EC

Introduction **Jerzy Plewa**, Director-General, DG Agriculture and Rural Development, EC

Why do we need a new CAP?

Phil Hogan, European Commissioner for Agriculture and Rural Development

A holistic approach to EU agriculture

Marion Guillou, President, Agreenium

Questions and answers

10:00-10:30 Coffee break

10:30-12:30 SESSION 2 – Research and innovation

Moderator **Peter Baader**, Senior Expert, Resources, DG Agriculture and Rural Development, EC

Deepening synergies between agriculture, the bio-economy and research

Robert-Jan Smits, Director-General, DG Research and Innovation, EC

The need to adapt the EU farming sector

Juergen Voegelé, Senior Director, Food and Agriculture Global Practice, World Bank

Questions and answers

Panel discussion **Reducing antibiotic use in pig farming**

Jeroen Dewulf, Professor, University of Ghent

Increase biodiversity and profitability

Felix Wäckers, Director, R&D Biobest

Soil quality, LANDMARK project

Rachel Creamer, Professor, Wageningen University

Data Driven Dairy Decisions for Farmers

Baiba Rivza, Professor, Latvian University of Agriculture

Nutrient recovery from bio-based waste for fertiliser production

Javier Brañas, Director, Fertiberia

Questions and answers

12:30-14:00 Lunch break

14:00-15:30 **SESSION 3 – Farm resilience****Moderator** **Alan Matthews**, Professor Emeritus, Trinity College, Dublin**Setting-the-scene: Which is the best risk management tool?****Alba Castañeda-Vera**, Researcher, Madrid University (UPM)**Farmers and risk****Jannes Maes**, President, European Council of Young Farmers (CEJA)**Panel discussion****Creating savings****Marine Raffray**, Research Analyst, French Agricultural Chambers (APCA)**Mutual funds, IPM and maize production in Italy****Paola Grossi**, Director-General, ASNACODI**3 examples of cooperatives adding value to farmers' production****Fernando de Antonio**, Director, Cooperativas Agro-Alimentarias de España**Short food supply chain, milk distributors in Greece****Ioannis Giannakopoulos**, Press Office Manager, THESgala Cooperative**Adding value from retail to farmers****Jef Colruyt**, CEO, Colruyt Group**Questions and answers**

15:30-16:00 Coffee break

16:00-18:00 **SESSION 4 – Enhancing the performance of EU policy and farming****Moderator** **Charlina Vitcheva**, Deputy Director-General, Joint Research Centre, EC**Panel discussion****Common monitoring and evaluation framework of the CAP: lessons and challenges****Tassos Haniotis**, Director, Strategy, Simplification and Policy Analysis, DG Agriculture and Rural Development, EC**Challenges of assessing actual results of policy action****Hans Bruyninckx**, Director, European Environment Agency (EEA)**Changing CAP, changing statistics****Mariana Kotzeva**, Director-General (acting), DG Eurostat, EC**How technology and big data can help****Thia Hennessy**, Professor, Cork University Business School**The role of independent advice****Poul Henning Petersen**, Senior Specialist Crop Innovation, Seges**Questions and answers****17.30-18.00** **An EU Budget Fit for Tomorrow: a Quest for European Value Added****Günther Oettinger**, European Commissioner for Budget and Human Resources**18:00**

Concluding remarks by Jerzy Plewa, Director-General, Agriculture and Rural Development, EC

DAY 2 – EU Agricultural Outlook to 2030

08:00 Registration and welcome coffee

09:00 **Introduction** by Rudi Mögele, Deputy Director-General, DG Agriculture and Rural Development, EC

09:10-10:10 **SESSION 5 – Climate change and the EU agricultural outlook**

Moderator **Yvon Slingenberg**, Director, International and Mainstreaming and Policy Coordination, DG Climate Action, EC

Introduction:

Climate change and EU agriculture adaptation

Tassos Haniotis, Director, Strategy, Simplification and Policy Analysis, DG Agriculture and Rural Development, EC

Panel discussion

Eberhard Faust, Executive Research Expert, Munich RE Reinsurance Company

Tassos Haniotis, Director, Strategy, Simplification and Policy Analysis, DG Agriculture and Rural Development, EC

Robert Johansson, Acting Deputy Under Secretary, Farm Production and Conservation & Chief Economist, USDA

Brunella Morandi, Assistant Professor, Arboriculture and Fruit Tree Physiology, University of Bologna

Questions and answers

10:10-10:40 Coffee break

10:40-11:15 **SESSION 6 – The EU agricultural outlook – agricultural income and labour**

Moderator **Josefine Loriz-Hoffmann**, Director, Rural Development, DG Agriculture and Rural Development, EC

Main drivers of EU agricultural market outlook

Pierluigi Londero, Head of Unit, Analysis and Outlook, DG Agriculture and Rural Development, EC

The challenges of demographic change for agricultural employment

Arnd Spahn, Agriculture Secretary, European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)

Questions and answers

11:15-12:15 **SESSION 7 – The EU agricultural outlook for specialised crops**

Moderator **John F. Ryan**, Director, Public Health, Country Knowledge, Crisis Management, DG Health and Food Safety, EC

EU agricultural outlook for wine, olive oil, apples and tomatoes

Marijke Van Schagen, Unit Analysis and Outlook, DG Agriculture and Rural Development, EC

Consumption trends for fruit, vegetables and wine

Pascale Hébel, Director of Consumer and Business, Research Centre for Study and Monitoring of Living Standards (CREDOC)

Panel discussion

Antonio Martinez, Director, Communication, Interprofessional Spanish Olive Oil

Valtiero Mazzotti, Director-General for Agriculture, Region Emilia Romagna

Rafael del Rey, Director-General, Spanish Observatory for the Wine market (OeMv)

Questions and answers

12:15-13:45

Lunch break

13:45-15:00

SESSION 8 – The EU agricultural outlook for meat and dairy**Moderator**

Fabien Santini, Adviser, Observatory of agricultural markets, DG Agriculture and Rural Development, EC

EU outlook for meat and dairy

Sophie Helaine, Deputy Head of Unit, Analysis and Outlook, DG Agriculture and Rural Development, EC

Livestock, climate and environment: Trends, challenges and alternative pathways

Marc Müller, Food and Agriculture Organization of the United Nations

Panel discussion

Arnaud Fossey, President, Isigny Sainte-Mère

Verena Schütz, Head of Livestock and Meat Division, Deutscher Raiffeisenverband e.V.

Angus Woods, National Livestock Chairman, Irish Farmers Association

Questions and answers

15:00-16:30

SESSION 9 – The EU agricultural outlook for arable crops and biofuels**Moderator**

Jens Schaps, Director, Markets and Observatories, DG Agriculture and Rural Development, EC

EU outlook for arable crops (including sugar) and biofuels

Koen Mondelaers, Unit Analysis and Outlook, DG Agriculture and Rural Development, EC

The interaction between the sugar and biofuel industries

Plinio Nastari, President, DATAGRO and Representative of Civil Society at Brazil's CNPE (National Council on Energy Policy)

Panel discussion

Bernhard Conzen, President, International Confederation of European Beet Growers (CIBE)

Benjamin Lammert, Secretary, French Federation of Oilseed and Protein Producers (FOP)

Raffaella Mellano, Biodynamic agriculture entrepreneur, Società Agricola Mellano S.S.

Stefano, Research, Rabobank

Questions and answers

16:30

Concluding remarks by Tassos Haniotis, Director, DG Agriculture and Rural Development



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