



Promoting alternative markets for EU agri-food exports

**Civil Dialogue Group
International Aspects of Agricultural Policy
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Export markets – new opportunities? (non-exhaustive list)

- Indonesia, Thailand, Vietnam
- Mexico, Colombia, Peru
- Morocco, Algeria, Tunisia
- Egypt, Saudi Arabia, Gulf Countries
- Turkey, Ukraine, Uzbekistan
- South Africa, Nigeria, Ethiopia

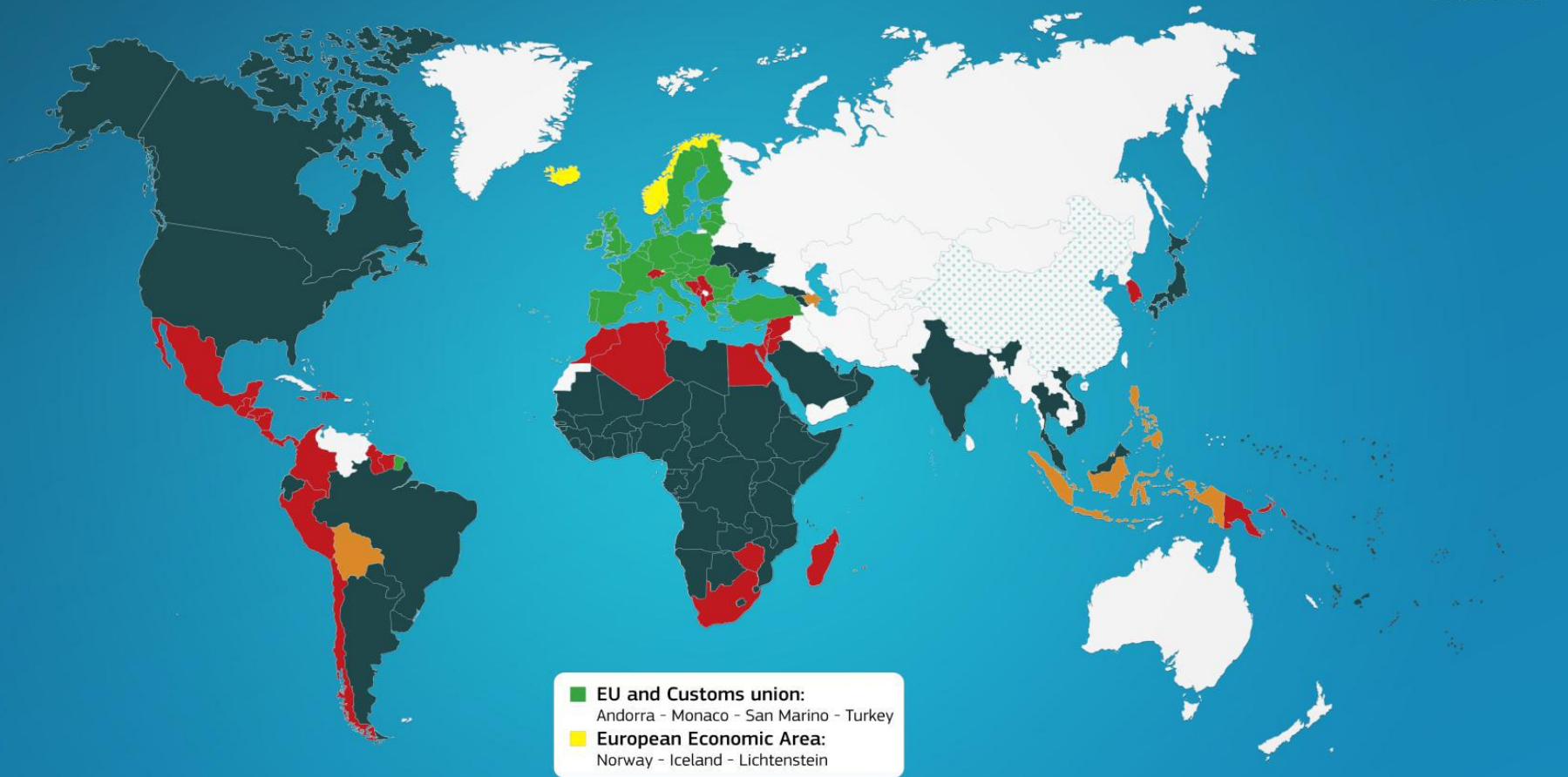
Summary of replies from EU delegations

- Overall potential for increasing EU exports
- Import tariffs – economic obstacle for some countries
 - **Free trade negotiations**



Trade agreements – state of play

- On-line overview:
http://trade.ec.europa.eu/doclib/docs/2006/december/tradoc_118238.pdf
- Information by country:
http://trade.ec.europa.eu/doclib/docs/2006/december/tradoc_118238.pdf



■ Countries with which the EU has a preferential trade agreement in place:

Mexico - Chile - Peru - Morocco - Algeria - Tunisia - Egypt - Jordan - Israel - Occupied Palestinian Territory - Lebanon - Syria - Former Yugoslav Republic of Macedonia - Albania - Serbia - Montenegro - Bosnia-Herzegovina - Switzerland - Republic of Korea (South Korea) - Antigua* - Barbuda* - Belize* - Bahamas* - Barbados* - Dominica* - Dominican Republic* - Grenada* - Guyana* - Haiti* - Jamaica* - St Kitts and Nevis* - St Lucia* - St Vincent and the Grenadines* - Suriname* - Trinidad and Tobago* - Colombia - Honduras - Nicaragua - Panama - Guatemala - Papua New Guinea* - Sth Africa - Madagascar* - Mauritius* - Seychelles* - Zimbabwe* - Costa Rica - El Salvador - Fiji* - Cameroon*

■ Countries with which the EU negotiates or has a preferential agreement pending official conclusion:

Canada - India - Malaysia - Brazil - Argentina - Uruguay - Paraguay - Saudi Arabia - Botswana* - Ivory Coast* - Kuwait - Qatar - United Arab Emirates - Oman - Bahrain - Libya - Cook Island* - Kiribati* - Lesotho* - Swaziland* - Mozambique* - Marshall Islands* - Micronesia* - Nauru* - Samoa* - Solomon* - Tonga* - Tuvalu* - Vanuatu* - Angola* - Namibia* - Comoros* - Djibouti* - Eritrea* - Ethiopia* - Malawi* - Sudan* - Zambia* - Burundi* - Kenya* - Rwanda* - Uganda* - Tanzania* - Central African Republic* - Chad* - Congo* - Democratic Republic of Congo* - Equatorial Guinea* - Gabon* - Sao Tome and Principe* - Benin* - Burkina Faso* - Cape Verde* - Gambia* - Ghana* - Guinea* - Guinea-Bissau* - Liberia* - Mali* - Mauritania* - Niger* - Nigeria* - Senegal* - Sierra Leone* - Togo* - Zambia* - Vietnam - Moldova - Armenia - Georgia - United States of America - Thailand - Japan - Ukraine - South Africa* - Mauritius* - Madagascar* - Seychelles* - Zimbabwe* - Papua New Guinea* - Singapore - Morocco - Ecuador

■ Countries with which the EU is considering opening preferential negotiations:

Azerbaijan - Brunei Darussalam - Indonesia - Philippines - Bolivia

■ Countries with which the EU is negotiating a stand-alone investment agreement:

China

*Economic Partnership Agreements

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- SPS barriers frequently mentioned
 - **SPS Market Access Working Group**

Priority markets for SPS market access activities

Priority country	Sector/product
BRAZIL	Pork, dairy, bovine
CHINA	Bovine, pork, dairy
CHILE	Pork, fruits and vegetables
COLOMBIA/PE RU	Pork, poultry, dairy
INDIA	Pork, poultry, dairy
INDONESIA	Fruits and vegetables (port access)
MEXICO	Pork, fruits and vegetables
TURKEY	Bovine, poultry, dairy, fruits and vegetables
USA/CANADA	Bovine, dairy, fruits and vegetables
VIETNAM	Fruits and vegetables

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- Comments by topic
 - **Trade climate, retail sector, promotion aspects etc**

Comments by topic

- Economic prospects
- Trade climate / EU position in the market
- Retail sector – availability and access to distribution chains
- Promotion aspects: trade fairs, opportunities outside the capitals, possible constraints
- Other comments: cooperation among chambers of commerce, role of Member States etc.

+	positive comments	o	mixed comments	-	negative comments
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Country	Economic Prospects	Trade Climate / EU position	Retail sector	Promotion aspects	Other Comments
Colombia		+ implementation of trade agreement since 01/08/2013 - some difficulties in implementing SPS chapter		+ opportunities apart from capital also in main cities o joint strategy EU + MS with trade promotion offices could be developed	+ EU delegation has been active in communicating about trade agreement
Peru		+ trade agreement is already implemented - some difficulties in implementing SPS chapter		+ increase in trade promotion and business missions by Member States seen during recent months	o Peru is net-exporter in agricultural products
Mexico	+ large population	o trade agreement in force, - but not covering agricultural tariffs nor SPS issues - competitive advantage for US due to NAFTA			o new government programme to bring the agri-food trade balance to equilibrium
United Arab Emirates	+ high population growth rate + growth in purchasing power + very dynamic market for food, including organic	+ low import tariffs + 80% of consumption has to be imported + EU is already the main supplier	- high cost for retailing + some EU companies have invested in distribution - structural limitations for foreign companies to operate in the UAE		o bottleneck in retailing sector to be overcome o lack of branding and brand recognition of EU products
Saudi Arabia	+ high average income	+ SPS ban on bovine lifted + good prospects for specific products (high-quality, mid-priced)		o currently no visible promotion for EU products, except for French apples	
Egypt		+ big increase in EU agricultural exports to Egypt in Jan-Aug 2014		+ good possibilities for promotion, will be discussed with Economic and Commercial counsellors	

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- Comments by market

	Fruit	Vegetables	Meat	Dairy	Cereals	Sugar	Wine	other
Colombia	pref. access for EU products	pref. access for EU products	pref. access for EU; although some difficulties in implementing SPS chapter	pref. access for EU; although some difficulties in implementing SPS chapter				TRQ for food preparations (code 2106.90); duty free access for fish products
Peru			some problems with SPS certification					no specific products indicated by delegation
Mexico	apples: if available at low prices		pig meat (structural deficit), cooked meat; SPS problems to be solved	cheese and milk powder (but high import duties)				
United Arab Emirates							restricted market	potential market for brand name goods, Gis and organic; no specific sectors indicated
Saudi Arabia	berries, apples, pears: high quality and mid-priced	high quality at mid-range prices	veal: ban is lifted since Sept		wheat and flour			
Egypt								no specific products indicated by delegation
Morocco	problem with entry price system solved; wants to increase citrus fruit exports to Russia	wants to increase tomato exports to Russia			wants to increase cereals exports to Russia			wants to increase olive oil exports to Russia no specific products indicated for EU exports to Morocco

Conclusions

- Encouraging reaction from delegations
- Availability for further support
- Specific situation for countries and products to be kept in mind
- SPS market access activities of key importance
- Scope for cooperation among Member States, chambers of commerce, promotion agencies