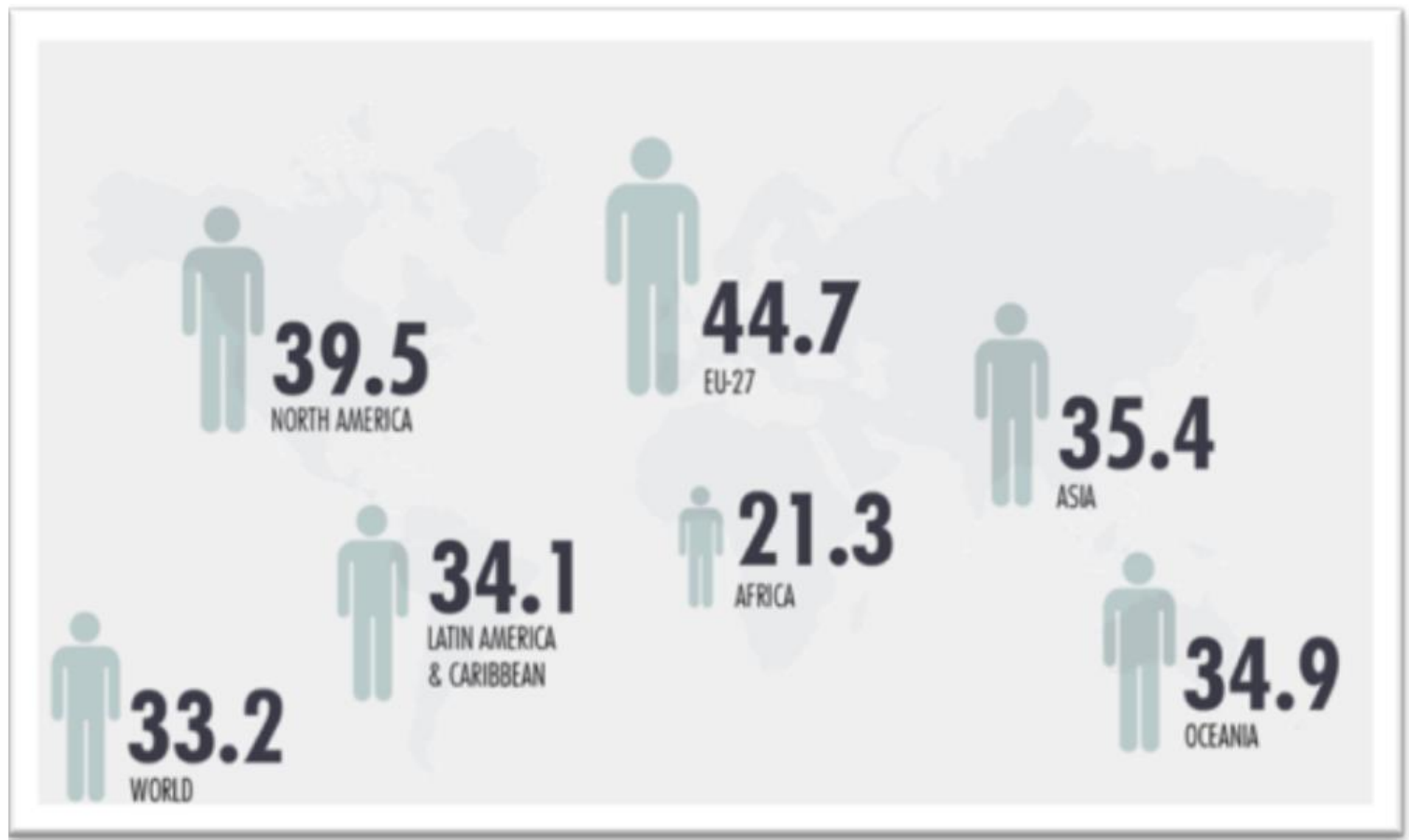


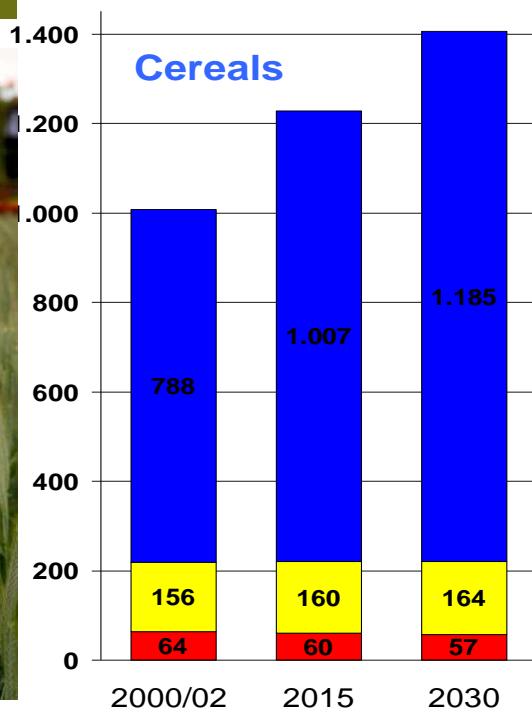


Preliminary views on EU trade strategy to 2020

Population aging and new markets opportunity in 2050



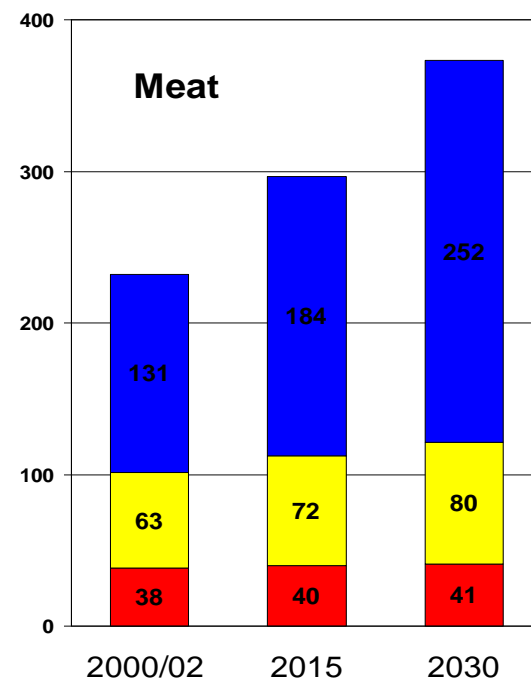
World growth food demand versus mature EU markets



Developing countries

OECD countries

European Union



EU well integrated in the world market



- Trade balance positive since 2009 with a surplus of 18 billion euros;**
- 70% of EU exports are processed products;**
- agri-food chain employ 40 millions peoples in EU28;**
- EU import more than the other developed countries from least developed countries;**
 - 40% of raw material processed in EU are non-EU origin;**
 - EU need 35 million ha outside EU to feed its 500 millions of Consumers;**

Multilateral framework for trade

WTO negotiations should stay a priority :

- **The unique fora to address at the same time export and domestic support and market access;**
 - **EU agriculture has implemented fully all the WTO requirements in all the chapter of agriculture;**
 - **A better Gis recognition should go through a multilateral system to solve the issue of coexistence with trade mark;**
- ⇒ **An early harvest in MC10 should improve the current rev4 on competition pillar;**
- ⇒ **MC10 should give a clear signal to countries which increase their domestic distortive support**

Versus bilateral trade

- **EU has focused its strategy on developed countries where value is high but competition too;**
- **Bilateral trade negotiations is not addressing domestic support for agriculture;**
- **The non tariff barrier issues should progress significantly;**
- **GIs recognition.**

Food markets should be strategic for EU

- **Beyond food trade, food production is factor of stability in several regions;**
 - **The monitoring of agri and food market is becoming strategic to anticipate potential crises; a market;**
 - **Reasoning in term of consumer rather than on geographical approach.**
-
- ⇒ **Set up an EU market intelligence is necessary. FAO initiative is not enough ;**
 - ⇒ **Establish an EU economic diplomacy strategy;**
 - ⇒ **Promote the European technical standard to facilitate trade from EU and also inclusive trade in regions**
 - ⇒ **Cumulative effects of trade agreements**

Increase exports in a more uncertain world

- **Various regions are under pressure for energy, water or other resources;**
- **Globalisation of various markets spread volatility across agri-food market;**
- **The new comers in the world market increase competitions between the various type of agriculture;**
- ⇒ **Promotion program should integrate also mission to negotiate sanitary certificate;**
- ⇒ **Involvement of European Investment Bank to set up export credit insurance ;**
- ⇒ **Energy chapter in trade negotiations should address also fertilizer to ensure faire competition on the world market;**

Non tariff barrier : progress are needed

- **As EU agri-food products trade is based on processed products, SPS measures are relevant;**
 - **EU is not yet recognized as a single entity for sanitary certificate despite recognition of USA or Brazil as single entity;**
 - **Standards of productions such as animal welfare, biodiversity protection are not in SPS measures.**
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- ⇒ **Better coherence between internal and trade policies;**
 - ⇒ **Overcome the SPS dossier before open a new bilateral trade;**
 - ⇒ **Annual priority list of Non Tariff Barrier**