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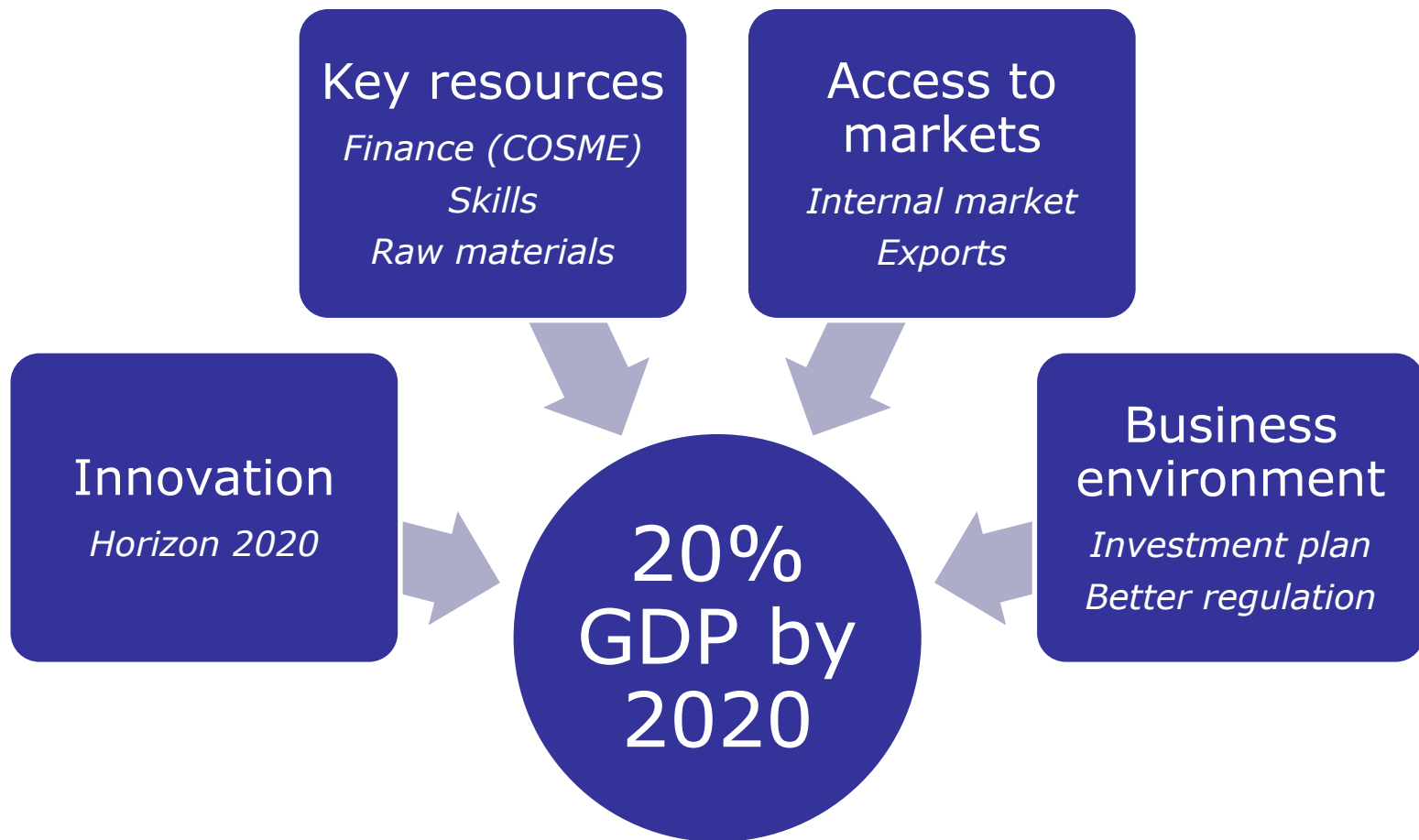
Industrial policy and food supply chain

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Industrial policy



Food and beverages in the EU

Huge market

15% household expenses (21% with catering)

Over 500 million consumers

Major role in EU economy

17 million companies and agric. holdings

6% of EU GDP (whole supply chain)

No. 1 EU manufacturing sector

in value added and turnover (EUR 1 trillion)

in employment (4.2 million)

EU = No. 1 on global food markets

19% of total food export flows

...but the share is decreasing (it was 22% in 2004-2006)



HIGH LEVEL FORUM

for a Better Functioning Food Supply Chain

Report 2014

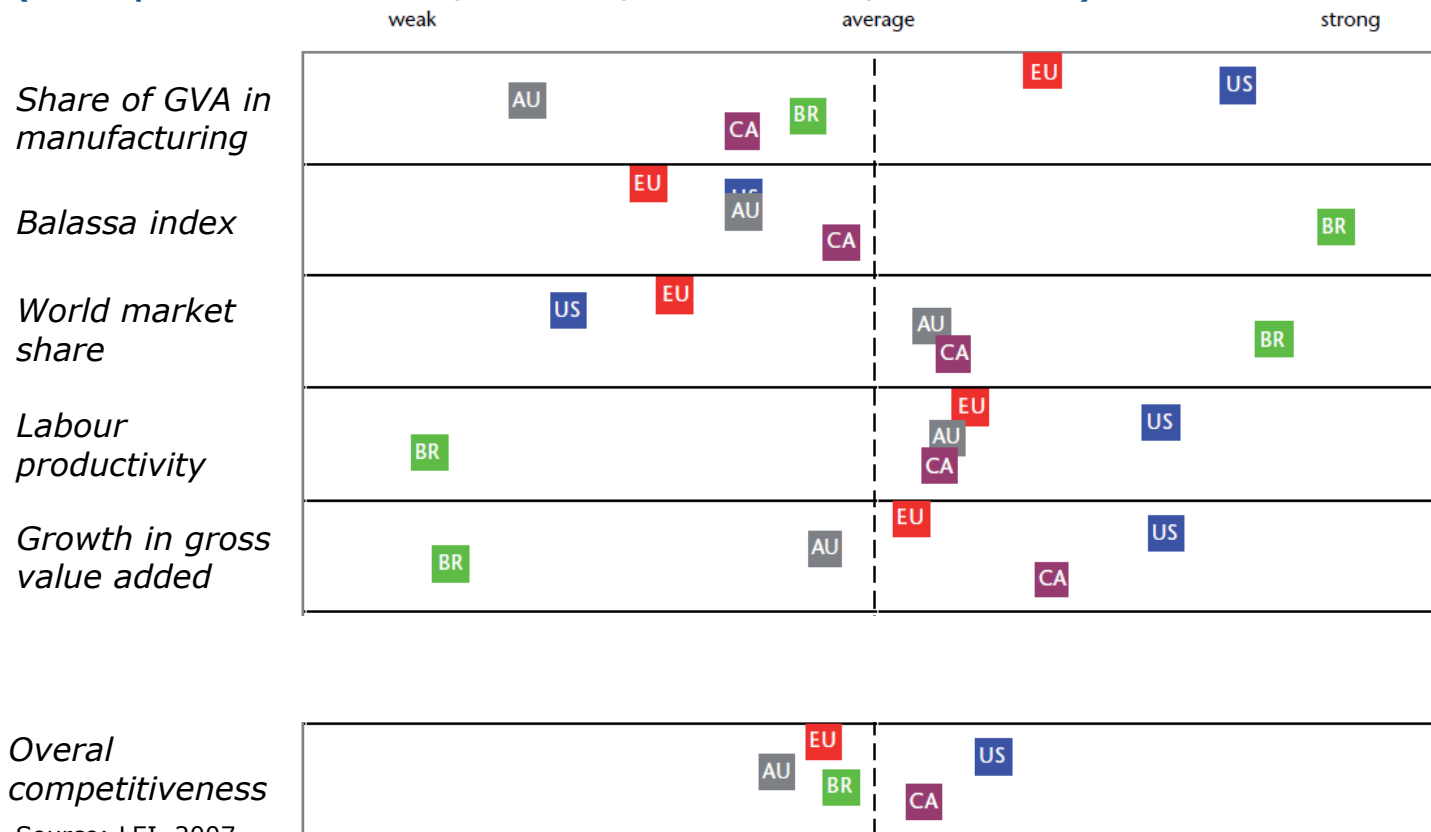
Mandate expired, to be relaunched until 2019.

Work still needed:

- Competitiveness & SMEs
- B2B trading practices
- Food price monitoring
- Internal market
- International trade
- Sustainability
- Innovation
- Social dialogue

Competitiveness in EU food & drink

In 2007, global position of EU foods was eroding (compared to USA, Brazil, Australia, Canada).



Have trends changed since then?

Unfair B2B trading practice

Commission communication, July 2014

Self-regulation

- The Supply Chain Initiative
- Launched September 2013
- Wide participation needed
- Monitoring by Commission

National enforcement

- Public enforcement needed
- Working group with Member States to monitor developments

Commission report (2016)

EXPO 2015 (May-October, Milan)

- First time the EU has a pavilion in a universal exhibition
- "Feeding the planet. Energy for life"
 - Opportunity to promote the EU food industry
- 200 events organised by the EU (10% by DG GROW)
- Many events around industry and SMEs including
 - Food Industry week (29 June – 3 July)
 - Ecotrophelia innovation contest
 - Agricultural machinery
 - Beer day
 - Confectionary sector
 - etc.

International trade

- EU leads global processed food and drink exports
 - Share (~19%) is decreasing, but
 - Value is increasing (+ 4% per year)
 - Balance > € 30 Bn [€ 44 Bn exports, € 12 Bn imports]
- Trade negotiations widen growth opportunities
 - Recent agreements: South Korea, Canada, SADC, neighbourhood countries, etc.
 - Bilateral negotiations: Japan, USA, Vietnam, Iceland, Malaysia, India, etc.

Next steps in 2015

- New High Level Forum
- EXPO until October
- 2 studies:
 - Competitiveness
 - Monitoring of unfair B2B trading practice
- International negotiations



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Thank you for your attention!