Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

Agri-Food Regional Profile

European Union

February 2006

Canada

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Canada

European Union

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Executive Summary

- The European Union (EU) is a diverse, dynamic and competitive market.
- The EU constitutes approximately 7% of the world's population. Representing 25 member states, the EU represents a wide variety of consumer tastes and markets.
- The addition of 10 new member states in 2004 adds new challenges for the EU in addition to greater market opportunities for international trading partners.
- The European Union is the world's leading exporter of goods and the second largest importer, accounting for one fifth of the world's trade.
- Due to weak domestic and international demand, the EU's growth was just under 2% in 2005. Economic recovery is expected, although it has been slower than originally hoped.
- Total exports of goods and services from Canada to the EU were worth $24.5 billion in 2005, an increase of almost 7.5% over 2004. Imports from the EU increased by 8% to a total of $45 billion in 2005.
- Canada's principal markets in the European Union are the Belgium, UK, Italy, Spain and Germany.
- Canada's agricultural exports to the EU totalled $2.0 billion in 2005. Agri-food imports from the EU totalled $3.0 billion. Both represent significant increases over previous years.
- Canada's top agricultural exports to the EU were wheat at $377.1 million, linseed at $151.4 million and soy beans at $136.4 million.

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Economy

The European Union (EU) was established in November 1993 with the ratification of the Maastricht Treaty. The EU is a union of sovereign member states. The union now consists of 25 countries.

EU-25 Member States	
Austria	Latvia
Belgium	Lithuania
Cyprus	Luxembourg
Czech Republic	Malta
Denmark	Netherlands
Estonia	Poland
Finland	Portugal
France	Slovakia
Germany	Slovenia
Greece	Spain
Hungary	Sweden
Ireland	United Kingdom
Italy	

The EU contains five of the ten largest economies in the world, and has international influence only rivalled by the United States. In January 2007, Bulgaria and Romania are expected to join the EU as two new member states. This would increase the EU population by 29 million people, and add an approximate US$250 billion in GDP to the EU. Other candidate countries for membership to the EU include Turkey, Croatia, Ukraine, the Western Balkans and Macedonia.

The EU aims to be the most competitive and dynamic knowledge-based economy in the world by 2010. It strives to sustain growth while creating better jobs and greater social cohesion. However, the EU is currently experiencing some difficulty. Commerce is unstable, economic growth is lower than potential, and the unemployment rate is higher than desired.

Overview

The countries of the EU share common policies, political structure and trade practices. The EU continues to advance towards its goal of creating an internal market. Pursuit of product and capital market reform and the undertaking of the final steps toward a single currency in the euro area have assisted in reaching this goal. Control of public finances has been maintained despite lower economic growth, and a competition policy has been actively enforced as well. This strategy is also being supported by trade policy, allowing open markets for non agricultural products.

The internal market is a great achievement for the EU. Enhanced employment and commercial opportunities, as well as wider choices of goods and services, lower prices, labour mobility and international competitiveness have a direct effect on EU citizens and the economy.

The Broad Economic Policy Guidelines (BEPG) for the EU emphasizes safeguarding macroeconomic stability. This can be done by fulfilling pledges for budgetary balance that were made in the Stability and Growth Pact (SGP) and by continued moderation in wage demands. Other objectives are to raise productivity through product market reform, to foster entrepreneurship and the knowledge-based economy, and to achieve financial market integration. Finally, in their commitment to sustainable development, member states are committed to reduce labour costs, strengthen incentives for people to participate in the labour force, and remove barriers to labour mobility.

Expansion

There are large economic differences between individual member states. The five largest economies of the EU are Germany, the United Kingdom, France, Italy and Spain. Together these countries account for approximately 71% of the EU's total GDP. Comparatively, the smaller economies of Lithuania, Cyprus, Latvia, Estonia and Malta, cumulatively account for only 0.5% of the EU's total GDP. The ten new member states make up the union's smallest economies.

With the addition of the 10 new member states in 2004, the EU saw the greatest fall in average per capita income of any EU enlargement. As a result of this widened gap between the wealthiest and poorest members in the union. Economic convergence will be a key challenge for the accession countries. It is estimated this convergence process will take at least two decades, and up to half a century before these developing economies will have caught up with the developed countries in the EU. Most of the new member states are seeing their highest growth rates to date as they converge with the EU economy. New member states have also been experiencing their lowest rates of unemployment since accession.

Euro

The euro is the official currency of the EU, and was introduced as hard currency in 2002. Denmark, Sweden and the United Kingdom have not adopted the euro; however, they have introduced euro accounts and credit cards for both customers and businesses, allowing for the currency to be used in these countries. In addition the 10 new member states have yet to adopt the euro as they work towards meeting Maastricht criteria which is set out for adoption of the currency. Estonia, Lithuania and Slovenia expect to adopt the euro as early as January 2007. In 2008, Cyprus, Latvia and Malta are expected to join, again enlarging the euro area.

The introduction of a single currency is intended to provide greater transparency in prices, and to improve market access among European producers. Business can now be conducted in one currency instead of twelve, and exchange rate risks are reduced which creates a more predictable investment and trading environment. The Central European Bank in Frankfurt defines interest rates, the amount of currency circulating and exchange rates.

Current situation

The EU economy grew 1.5% in 2005, representing a slight drop over 2004 growth rates, but still significantly higher than 2002 and 2003 growth rates of around 1%. Weak domestic and international demands for EU products, as well as global uncertainties have repressed growth in recent years. High saving tendencies by EU consumers has also contributed to slower economic growth. The increased growth in 2004 was largely driven by the export sector, performing strongly despite the euro's appreciation against the United States' dollar.

Although continued recovery of the overall economy is expected, it will be limited as high unemployment continues to repress consumption. Poland and Slovakia share the highest rates for unemployment with rates of 17% and 16% respectively, while Denmark and Ireland have the lowest rates, both just under 4.5%. The overall EU-25 unemployment rate at the end of 2005 stood at 8.5%. Although current unemployment rates are considered a key hindrance to economic growth, the outlook is getting better as 16 out of 25 EU members recorded decreases in their unemployment rate between 2004 and 2005.

In attempts to deal with low productivity and economic stagnation in the EU, the European Council adopted the Lisbon Strategy in 2000, which was aimed at making the EU the world's most dynamic and competitive economy. The strategy is to be achieved by making the union the largest knowledge based economy by 2010. In March 2005, the council renewed its commitment to the Lisbon strategy, narrowing the focus to increasing economic growth and decreasing unemployment.

Gross Domestic Product (2005)

GDP	US$13.3 trillion
GDP growth	1.5% (2005) 2.1% (2006)
GDP/ capita (PPP)	US$28,100

GDP by Sector (2005)

Services	70%
Industry	22.5%
Construction	5%
Agriculture	2.5%

The services industry represents the majority of EU GDP. The services sector has grown on average 2.5% per year since 1995. This is a result of consumers with higher disposable incomes, who are spending more and more of their income on services rather than hard goods. Although the service sector is 70% of GDP, it accounts for only a minimal amount of the EU's trade. Industry however, accounts for almost 23% of GDP and is responsible for 30% to 50% of EU exports.

Forecast

The EU will continue to strive to reach its main objectives of promoting balanced economic and social development by establishing an area without internal borders, one with strong economic and social cohesion and finally, the establishment of an economic and monetary union. Developing a common foreign and economic policy, introducing a Union citizenship, encouraging close co-operation in jurisdiction and internal affairs, and furthering development of the communal legal system are also objectives of the European Union.

Economic growth is predicted to be 2.1% in 2006. Growth in 2007 and 2008 is expected to rise just slightly to 2.3%, with growth slowing again in 2009 to 2.1%. Growth remains somewhat uncertain as new member states continue to develop at varying rates as they strive to hit economic targets. Generally, the outlook anticipates growth will remain below par in the short term. Rising oil prices, sagging consumer confidence and limited pro-cyclical government policies are the main contributors to sluggish growth.

New challenges will present themselves as Bulgaria and Romania push forward in their bids for accession in 2007. Benefiting old members and new, these two countries will enhance stability and security in Europe, remove barriers to trade and business, thus giving increased access to developing markets, improved environmental standards across Europe, increased economic growth, and reduced pressures for economic migration.

Government Role

While comprised of 25 individual, sovereign states, the EU has a number of umbrella governing bodies. The European Commission upholds the interests of the entire EU. Each national government is represented on the European Council, while the European Parliament is elected by the citizens. Although different parts of the EU administration are out of several different cities spanning member countries, the administrative center of the EU is located in Brussels, Belgium.

The European Parliament has three main functions. The Parliament shares the power to legislate with the Council. Its second function is to share budgetary authority, which enables them to influence EU spending; finally, the Parliament also exercises democratic supervision over the Commission.

The Council of the European Union has a number of responsibilities. The Council acts as the EU's legislative body, exercising co-power with the Parliament. As the main decision-making body of the EU, the Council coordinates the broad economic policies of the member states, and facilitates international agreements with member states and international organizations and nations. The Council makes the decisions necessary for outlining and implementing the common foreign and security policy, coordinates activities of member states, adopts measures for police and judicial cooperation in criminal matters, and shares budgetary authority with Parliament.

The European Commission is an important force in the EU's institutional system. The Commission has four main roles including proposing legislation to Parliament and the Council, administering and implementing Community policies, enforcing Community law (jointly with the Court of Justice) and negotiating international agreements (mainly ones relating to trade and cooperation). In addition to proposing legislation, the Commission is responsible for implementing European legislation, and acts as the EU's international representation.

The European Commission has an objective to ensure that the European internal market functions effectively. Key areas of importance have been outlined. These include:

- elimination of unjustified obstacles to enable the free movement of goods and services and freedom of establishment
- coordination of rules concerning public procurement, financial services, postal services, protection of personal data, company law, accounting, industrial and intellectual property, commercial communications and electronic commerce while ensuring the free movement of goods and services and freedom of establishment within the internal market
- raising awareness and providing information concerning internal market rights and opportunities for business and citizens
- free movement of people (recognition of professional qualifications)
- the international dimension of the internal market (access to and from non-EU countries, facilitating accession of new Member States)

The EU is an expanding area. The government has focused greatly on the enlargement of the union. The addition of 10 new Member States in 2004 occurred smoothly, and the union is looking forward to the addition of Romania and Bulgaria in

2007. However, it appears as though enlargement might be halted after 2007 as ratification of the Constitutional Treaty is causing internal conflict, with several members calling for the enlargement process to be halted.

Infrastructure

The main objective of transport policy in the EU is to ensure a sustainable mobility system. The EU wants to have a world class transportation system for passengers and freight that is safe and acceptable for both society and the environment. Current infrastructure varies significantly between member states; however the union is working towards removing these differences.

The most significant initiative in the EU with regards to infrastructure is the Marco Polo proposals. The proposals give the union a direction on transportation policy for the future. The intention in the union is to encourage the use of rail, short sea shipping and the use of inland waterways, to reduce environmental impacts and highway congestion. In addition, it is intended for transportation policies across the EU to be harmonized between individual member states.

Consumer Market

The European Union constitutes approximately 7% of the world's population. Comprised of 25 different countries with a variety of ethnic backgrounds, the EU represents a multitude of consumer tastes and diverse markets. The EU is home to some of the most renowned local products. The mention of some EU members brings about national products and complete menus.

The consumption patterns of member states within the EU are different due to varying disposable income, shopping habits and preferences; as a result, it is difficult to define one EU consumer. However, when analyzed over time, consumption patterns across EU member states appear to be converging. Factors contributing to this convergence are household income, relative prices, demographic changes, and concern about nutrition and preventative dietary habits. As well, the internationalization of the food industry and greater economic coordination within the EU is exposing greater institutional similarities.

Population by Country (2005)	
Germany	82,431,400
France	60,656,200
United Kingdom	60,441,500
Italy	58,103,000
Spain	40,341,500
Poland	38,635,100
Netherlands	16,407,500
Greece	10,668,400
Portugal	10,566,200
Belgium	10,364,400
Czech Republic	10,241,100
Hungary	10,006,800
Sweden	9,001,800
Austria	8,184,700
Denmark	5,432,400
Slovakia	5,431,400
Finland	5,223,400
Ireland	4,015,700
Lithuania	3,596,600
Latvia	2,290,200
Slovenia	2,011,000
Estonia	1,332,900
Cyprus	780,100
Luxembourg	468,500
Malta	398,500
Total	455,030,300

Current food and drink expenditures of consumers across the EU member states are quite varied. Consumers in the recently acceded countries spend more on food and drink than most of the original EU-15. This is characteristic of developing economies which have a lower average income than developed economies. These developing economies spend much more of their disposable income on food and beverage consumption. There is a drastic increase of the average percentage of income spent on food of the original EU-15 to the present EU-25, which coincides with a similar decrease in consumer purchasing power.

Demographics	
Total Population	455 million
Population Growth Rate	0.15%
Breakdown by Age	
0-14 yrs	16.0%
15-64 yrs	67.2%
65 yrs and over	16.8%
Life Expectancy	
Male	75.1 years
Female	81.6 years
Total	78.3 years

The following data indicates above average consumption and income for much of the EU-15. Of the larger economies such as Belgium, Finland and France all have GDP per capita of close to US$30,000 or more and spend on average 13.5% of their income on food purchases. Luxembourg is another example of significant consumption, reporting almost US$63,000 GDP per capita, with nearly 10% of income spent on food.

Of the EU-25, several new member states also represent significant food and beverage consumption. Notable economies are Cyprus, Czech Republic and Slovenia, all reporting GDP per capita larger than US$18,000. Food and beverage expenditure in these countries are higher than 16% of income, representing substantial agri-food markets.

Although consumption expenditures on food and non-alcoholic drink vary greatly across the diverse economies of the EU, consumption patterns can still be generalized across the union. Food consumption in the EU is dominated by fresh foods and produce; however, the EU market has seen an increase in the demand for prepared, pre-packaged and convenience goods. Due to fast paced lifestyles, snack food is one of the fastest growing sectors; the savoury snack sector is valued at over EUR10.8 billion (EUR4 billion of which is potato chips). The consumption of beverages, especially new and innovative drink products have increased in recent years, while carbonated and concentrate drink products are less desired.

Country	GDP per capita (PPP) US$	% income spent on food and beverage
EU-25	$28,100	15.4
EU-15	$30,100	12.6
Austria	$32,000	10.6
Belgium	$31,800	13.6
Cyprus*	$21,600	16
Czech Republic*	$18,100	17.2
Denmark	$33,500	11.4
Estonia*	$16,400	20.5
Finland	$30,300	12.8
France	$29,900	14.4
Germany	$29,700	11.7
Greece	$22,800	15
Hungary*	$15,900	17.7
Ireland	$34,100	9.3
Italy	$28,300	14.5
Latvia*	$12,800	24
Lithuania*	$13,700	28
Luxembourg	$62,700	9.8
Malta*	$18,800	18.1
Netherlands	$30,500	11
Poland	$12,700	19.4
Portugal	$18,400	17.2
Slovakia*	$15,700	19.7
Slovenia*	$20,900	15.8
Spain	$25,100	16
Sweden	$29,600	12.3
United Kingdom	$30,900	8.9
*New Member State	Source: CIA World Factbook	Source: Eurostat

Products experiencing steady growth include yogurt, desserts, ice cream, fish and shellfish, shrimp, pasta, soup, cheese and meat. Consumption trends are generally a result of smaller families, single person households and more women in the workplace. Fresh food and produce consumption reflects consumers' desire to maintain healthier diets. Soy food sales have increased substantially in recent years, growing more than 20% in 2004, providing further evidence of a health conscious society. In addition to organic fruits and vegetables, organic meat is in large demand, as the organic industry continues to flourish.

The largest difference in developing economy food consumption lies in the consumption of energy-rich, but nutrient poor foods. The price premium on healthy foods in developing economies is greater than developed ones, making healthy foods less affordable to low income consumers. This is not to say there isn't growth in the food products previously mentioned; growth is just at a slower pace, matching income increases over time.

The majority of consumers regard quality, freshness, price and taste as the most important product attributes. Depending on the region, consumers prefer high quality imports over domestic products or vice versa, regardless of quality or price. EU consumers have shown an increasing demand for value added products. This is satisfied by the continually growing choice of such products. Also, the EU's ethnic configuration is changing due to immigration and travel of EU citizens; this shift increases the demand for diverse and exotic food products.

Consumers have demonstrated a growing concern over health and safety issues. Food safety confidence has been shaken by a number of crises in recent years, leading to stricter laws and policies in the union. While GM foods are unwelcome by many consumers, organic products have gained popularity based on their safer and healthier associations. While this trend is fluctuating in many markets, most experts agree that organic foods will continue to be a significant market sector.

Labelling of food products are increasingly important to EU consumers as more attention is being focussed on health risks and decreasing the additives in food. EU consumers prefer food using as few chemicals as possible at both the production and the processing stages. There are a number of different labelling requirements for organically grown products, depending on the percentage of the product that was grown and produced organically.

Trade and Investment

The EU is the world's leading exporter of goods, and the second largest importer next to the United States. Accounting for almost one fifth of the world's trade, the EU depends on trade to make up more than a fifth of its GDP. The EU continues to pursue trade liberalization through multilateral, regional and bilateral initiatives. The EU is a loyal supporter and promoter of the World Trade Organization.

The EU is greatly interested in an open and transparent world trading system. It is committed to such a trading system with all of its trade partners. The EU has substantial influence when it comes to the composition of the world's trade and investment.

EU imports totalled US$1.463 trillion in 2005 while EU exports were US$1.332 trillion. Generally, the majority of trade for EU member states is with neighbouring EU countries. As an entity, the EU's top exporting destinations were USA, Switzerland, China, Russia and Japan. The EU's top importing sources were USA, China, Russia, Japan and Switzerland.

Although slipping in recent years, the largest source of foreign direct investment for the EU is the United States. With the accession of several developing economies into the EU, many investment opportunities have opened up as mass privatization of key utilities continues.

Trade Agreements

The EU grants Most Favoured Nation (MFN) treatment in all product categories to nine members of the WTO. These countries are Australia, Canada, Chinese Taipei, Hong Kong, China, Japan, Republic of Korea, New Zealand, Singapore, and the United States.

Preferential tariffs are granted by the EU to more than 100 developing countries and roughly 40 overseas territories under the Generalized System of Preferences (GSP). The GSP applies if goods are originated in a beneficiary country, and if the goods are transported to the EU directly from that country. A system of providing certificates of origin has been established to ensure that goods are not diverted through GSP countries to take advantage of the lower tariff concessions.

Under the WTO, the EU is a strong supporter of the Doha Development Agenda (DDA). These negotiations aim at further liberalising trade whilst enhancing development. The agreement will bring a substantial cut in trade-distorting agricultural support, elimination of trade-distorting export competition practices and contribute to a significant opening of agriculture markets while allowing for special treatment of sensitive food products.

Economic Partnership Agreements (EPA) have been negotiated between the EU and African, Caribbean and Pacific (ACP) countries since 2002 and expect to come into force in 2008. EPAs are an instrument for development by strengthening regional integration and improving the business environment in a credible and sustainable way. The mandate of EPAs is to build markets rather than open them.

The EU also shares a free trade agreement with the European Economic Area (EEA), which consists of Iceland, Liechtenstein, Norway and Switzerland. Most industrial products and some processed agricultural products are exempt from import duties within these 29 countries (EU-25 plus the above mentioned 4).

Finally, the EU has free trade agreements with Mexico, South Africa, South American countries (Mercosur) and the Mediterranean countries. Israel has also negotiated a free trade agreement with the EU, although this agreement does not include agricultural goods.

Market Access

The EU food market is attractive due to its size, high consumption patterns and generally high income per capita. However, the EU is a market which is difficult to enter and maintain market-share due to the strong partnerships between member states and the already mature market.

Developing countries have increased exports to the EU in recent years although they face challenges in gaining market access. The diversity of the EU market presents different opportunities and requires differing approaches in each region of the union. As well, high competition levels demand that product quality increases, product innovations develop more quickly, and excellent client service exists. High competition also results in shortened product life cycles, and lower product prices. Exporting countries are also faced with marking, labelling, certification, compliance regulations and market requirements of international standards.

There is a great benefit to exporting countries once market access has been achieved. If products meet standards and are certified by the EU departments, the products can freely cross borders within the EU countries and potentially grow market share.

Tariffs

Tariff lines in the EU have been bound in the WTO. The average tariff for Most Favoured Nations (MFN) is at 6.4%. The average tariff for non agricultural products is 4.1%. Agricultural products have a much higher average tariff of 16.1%.

Tariff rates depend on the economic sensitivity of products as a way of protecting the EU's economic interests. Raw materials and semi-manufactured goods usually benefit from low duty rates because they are often not internally produced, but they are needed to produce goods. Agricultural custom duties have a seasonal element and depend on the price paid at the time of import.

The EU is committed to helping developing countries. It has reduced the tariffs applied to the poorest countries. Duty and quota free access to the EU market is given to the 49 poorest countries in the world under the "Everything but Arms" initiative. This includes sensitive products such as beef, dairy products, and fruit and vegetables.

Under the Doha Development Agenda, and as a developed region, the EU is required to cut agri-food tariffs by 36% over six years, averaged across all agri-food products. However, a minimum tariff reduction of 15% must be made for each individual good.

Excise Tax

Excise tax is levied on some products such as soft drinks, wine, beer, spirits, tobacco, sugar, and oil and petroleum products. These duties may vary among member states of the EU because they are not harmonized. These taxes are paid by the importer in addition to customs duties and value added tax.

Value Added Tax

Value added tax (VAT) is levied on all imported products being sold in EU. For basic necessities the tariffs are low, and for luxury items the tariffs are higher. Ranging from 0-25%, the value added tax is not harmonized across all member states at this time, with the tax varying by the product and the country it is being exported to.

Certification Requirements

A commercial invoice is required for customs clearance in EU. The invoice is to contain a clear, precise description of the product, terms of sale and all details which are necessary to establish the full cost, insurance and freight price. A bill of lading (air way bill) is also required for customs clearance in EU. This should bear the name of the party to be notified.

A packing list is compulsory if the shipment contains more than one package and if the contents of each package are not shown in the commercial invoice. In all circumstances, a packing list facilitates clearance.

A certificate of origin is required for goods subject to quota restrictions. The need for a certificate of origin should be verified directly from the importer or the appropriate customs authority prior to shipment.

Products such as fresh fruits, vegetables and other plant materials which are being exported to the EU require phytosanitary certificates. This verifies that the product was in healthy condition when it left its country of origin. An authorized food inspection agency in the country of origin must inspect the product to ensure that it is free of disease and insects.

The EU also requires a sanitary certificate for commodities composed of animal products or animal by-products. This applies whether or not these products are for human consumption.

The Food and Veterinary Office (FVO) is the overall governing body for food safety, animal health, plant health and animal welfare in the EU. While individual member states are responsible for following and enforcing EU food legislation, the FVO does periodic checks each year throughout the union. For more information regarding import requirements and a list of approved agri-food processing establishments in Canada, please visit the **European Commission** Website.

Import Licenses

An import license must be issued to the exporter prior to customs clearance. However, once an import license has been issued it is valid throughout the EU. Import licenses are mostly needed for agriculture and food items such as wine, milk, wheat, meat, and rice, but are also needed for coal and lignite fuel, some specific base metal products such as steel, various apparel and textile products and controlled items such as arms and ammunition. The Department of Trade and Industry issues these licenses. They can be issued at the time of export or import.

Packing and Labelling

In response to concerns in recent years over food safety, new regulatory requirements have been put into place regarding labelling of food products of all origins to ensure traceability. Composition, content and destination country in EU currently must be marked at the time of sale on some products. The European Commission is currently reviewing its entire food labelling system. The purpose of this review is to find ways to simplify food labels, harmonize label appearance, educate consumers, and find methods to provide non-essential information via pamphlets, phone lines or websites.

Container sizes have been prescribed for a number of food products. These include butter, fresh cheese, salt, sugar, breakfast cereals, pasta, rice, dried fruits and vegetables, coffee, frozen fruits and vegetables, fish fillets, fish fingers, ice cream, preserved fruits and vegetables and products sold in metal containers.

The CE marking is a European standard set for products produced both internationally and domestically. The CE designation is a sign to consumers that the product meets standards set out by the European Commission. Having the CE mark allows the product to have free access to all markets in the union, thus reducing inspection hassles for distributors. The mark is also becoming a signal of superior quality to consumers.

Market Constraints

The EU has one of the most attractive food markets in the world due to its size and high consumption patterns.

The addition of the ten new member states has increased this diversity, and has increased the market size. However, the EU market on the whole is already mature. It is stable and highly protected. High competition in the region command high quality and innovative products that are backed by excellent customer service. Sales increases for companies are generally related to gains in market share instead of market growth. One indication of the EU's market maturity is the general stability of per capita consumption.

Restrictions such as import quotas, surveillance measures and safeguard measures may apply. Some products are prohibited from being imported to the EU due to safety and health considerations. Medicines, pesticides, plants and foodstuffs, electrical products, and exotic animals and plants are some of the restricted products.

Distribution and Sales Channels

The EU market is diverse, dynamic and competitive. The level of competition has increased dramatically in the last few years with the addition of ten new members to the union and the reduction of border and market barriers. Exporters must study specific target markets in the EU, examine the trade and distribution channels, and assess their capabilities in preparation for the competitive market. It is a good idea to market products specifically to individual markets due to cultural and language barriers, where no single marketing plan will be successful in so many countries.

In an effort to make successful inroads into the union with products and services Canadian exporters are encouraged to develop business relationships with agents and distributors in the EU regions being targeted. However, exporters must exercise caution when choosing agents and distributors as the EU moves toward an internal market. When a distributor is chosen to launch a product, control of pricing and the method used in presenting the product is often surrendered to the distributor. An agent allows the exporter to control pricing and presentation of the product.

The retail market is quickly consolidating with large corporations and hypermarkets. These larger retailers have a greater negotiating strength when dealing with suppliers. Retailers are usually looking for suppliers that can provide large volumes of their product. Although the smaller, growing economies have less consolidated retail markets they are quickly heading in that direction, but still have many smaller retailers which may be good entry points for new and smaller exporters. Consolidated distribution systems will benefit major trading countries in the EU that act as distribution centers for the rest of the EU.

Although many of the member states are at different points in retail stages, some trends are emerging across the EU. Price clubs and food malls are gaining popularity while supermarkets are expanding to become hypermarkets. Quality and service infused into a retail shopping experience is increasingly important to EU consumers.

Agriculture and Agri-food Overview and Outlook

Despite the decline of agriculture's economic influence, agriculture still plays an important role in the EU. Employing just less than 5% of the civilian workforce, agriculture accounts for a significant part of the EU’s budget. It is expected that agriculture will once again be prominent in policy discussion when it comes to the accession of new member states due to budget restraints of the Common Agricultural Policy.

EU agricultural output is very diverse, ranging from field crops to fruits and vegetables to fish, cattle and sheep. The EU is home to some of the largest wine producing nations in the world, making the union the world's largest producer of vineyard products. The leading European Union food producers are France and Italy, followed by Germany, Spain, and United Kingdom.

Three product groups – livestock (20.5%), cereals (14.3%), and dairy (14%) make up nearly half of total agricultural production in the EU. Other important agricultural outputs are wine, fresh vegetables, fresh fruit, and eggs and poultry, each accounting for between 5% and 8% of agricultural production. Although the EU is a large producer in these areas, it is a major importer of many different types of products.

As a percentage of GDP, agriculture is most important to Greece (6.2%), Lithuania (5.7%) and Ireland (5%). With regards to employment, agriculture is most important to Poland, where the sector employs close to one quarter of the population who are engaged in farming (although much of it is subsistence or semi-subsistence agriculture). However, for the majority of the remaining member states, the sector accounts for much less than 4% of GDP. Agriculture does contribute substantially to the EU manufacturing sector, accounting for over 14% of total manufacturing output.

Although agriculture plays a relatively small direct role in the income-generating activities of the EU, it occupies a significant share of employment in rural areas, and accounts for more than 6% of EU's international trade and a substantial portion of intra-EU trade. Agriculture also has a great influence on the manufacturing sector, accounting for 14.2% of EU manufacturing output.

New challenges faced the European Union in 2004. The addition of the 10 new member states added an additional 4 million farmers to the existing 7 million that existed in the EU-15. The enlargement also added approximately 38 million hectares of farmland, an increase of 30%; however, production in the EU-25 will only expand by 10 – 20% in most agricultural sectors. Rural areas are currently challenged to increase efficiency and economic prosperity. Resulting from the open internal market, processing industries are quickly consolidating, particularly in the meat sector as companies face greater competition.

Agriculture has suffered social and economic decline in less productive regions. Several of the new member states have agricultural sectors mostly characterized as semi-subsistence. The integrated approach to economic activity and the environment in rural areas by the EU is beginning to improve these agricultural sectors with a vision to help farms become commercially viable and competitive in the marketplace. It is embracing objectives of more extensive agricultural production, stable rural communities and maintenance of ecological functions that will carry this vision to reality. With more than 50% of the total population residing in rural areas, it is in the best interests of the union to sustain rural economies.

Rural areas are increasingly under pressure as the rural economy becomes less dependent on agriculture. Although agriculture dominates land use (almost 50% of the EU) and the appearance of the countryside, the proportion of land used for agriculture in the EU has fallen while urban and forested areas have expanded.

Accounting for 3.3% of total agricultural area in 2002, organic agriculture is a growing trend in the EU. Environmental and consumer benefits are driving demand and EU producers are increasing organic production to fill the market worth EUR10 billion. In addition to organically grown foods, EU consumers are increasingly aware and concerned about animal welfare, which has led the adoption of the Community Action Plan on the Protection and Welfare of Animals.

Environmental concerns have led to measures to protect and preserve fish stocks, which has resulted in a 20% decrease in fishery production, despite a rising aquaculture production. GMO crops have also been under the spotlight, causing some conflict within the EU region with regards to the use of genetically modified organisms in the food system. Environmental issues are a prominent concern of the EU and are a large part of the Common Agricultural Policy (CAP)

Agricultural Policy / CAP Reform

Agriculture is a particularly important part of the EU mandate. It is essential to provide an affordable and safe food supply and to preserve the environment. The European landscape is largely a product of the farming practices that have occurred on it over many centuries. European Union policies address and protect these issues to reflect that agriculture is a key part of the sustainability of both urban and rural areas of the EU.

The Common Agricultural Policy is the cornerstone of the economic integration of the EU. Early forms of the CAP date back to 1950, with a commitment to guarantee the security of food supplies at stable and reasonable prices, to modernize agricultural structure, and to ensure a fair standard of living for farmers. The European Community established a system of common prices, production and marketing aids, storage arrangements, mechanisms for import controls, export restitutions and specialization of production to facilitate these goals.

Since its beginnings, CAP has evolved to meet current needs of the EU population, and agricultural sector. In the 1990s important changes were made to reduce and remove surpluses of major farm commodities by introducing production limits and quotas in several sectors. This was the beginning of a radical overhaul of CAP in 2003, giving EU a firm direction on agricultural policy to the year 2013 when CAP should be in full effect.

The reformed CAP takes into account many factors including the needs of farmers, the needs of the general population, food safety and security, and the environment. The new policy allows farmers to produce in accordance with market demand, and be guaranteed a stable income without incentives to overproduce. Income stabilization payments will be in the form of a single farm payment (SFP) and is partially tied to a farmer's management of the environment, food safety, and animal welfare practices. Tying stabilization payments to these aspects gives consumers access to safe food and a clean environment, which bolsters support for the program that costs tax payers over EUR50 billion annually.

The reforms to CAP are also good news to international agricultural producers. By decoupling subsidization payments from output, the EU is taking away incentives for farmers to over produce, thus removing trade distorting farm income stabilization. This will make a more level playing field between EU and non-EU agricultural producers.

CAP is administered by each member country and therefore the reforms are being implemented in each country when it is suitable to do so. Ten of the 25 members have already implemented the new Common Agricultural Policy in 2005, with the rest slated to have the program in place by 2009. The timelines proposed pose problems for developing nations in the EU with a subsistence level of agriculture. For this, a five year program has been created to help subsistence farms become commercially viable through a development support system, which provides financial and technological support.

The addition of Bulgaria and Romania to the EU in 2007 will cause budget strain on CAP given a budget increase cap of only 1% after 2006. However, current adjustments made to CAP will ensure that the EU is able to provide a sustainable and predictable policy framework for the European Model of Agriculture over the coming years. The EU will be able to ensure a transparent and more equitable distribution of income support for farmers and a better response to the demands of consumers and taxpayers.

Food Safety Policies

Consumer confidence in the safety and quality of the European food system has been shaken over the past decade by a number of food related health crises. The EU published its White Paper on Food Safety setting out a legislative action plan for a pro-active new food policy. Within this publication, a strategy to restore faith in the quality and safety of food was developed. "From the farm to the fork" is a new regulatory approach which was presented by the European Commission in 2000 and has since led to the establishment of the European Food Standard Agency. Progress has been made in implementing more than 80 separate actions outlined in the policy. They cover issues of animal feed, animal health and welfare, hygiene, contaminants and residues, additives, flavourings, packaging, irradiation and traceability.

The General Food Law, which was adopted in 2002, provides a framework which is aimed at protecting public health and consumers' interests in relation to food. This framework places the responsibility for the safety of products into the hands of producers and food businesses. The food law establishes the rights of consumers to safe food and to accurate and honest information. The following principles are the basis of the law:

- Responsibility for ensuring the delivery of safe food and animal feed belongs to the food and feed manufacturers. Unsafe food and feed must be withdrawn from the market.
- Foodstuffs, animal feed and feed ingredients must be traceable.
- Clear procedures should be established for developing food law and dealing with food emergencies.
- Feeding stuffs will be covered by a Rapid Alarm System to be triggered as soon as doubts arise about their safety. It obliges notification of any direct or indirect threat to human

health, animal health or the environment.

The EU also made changes to its hygiene policy in 2004. These changes were aimed to merge, harmonize and simplify complex past policies. A single hygiene regime covering food and food operators was created for all sectors. This regime, coupled with effective instruments to manage food and safety and any possible food crises throughout the food chain strives to uphold food safety and consistency. Food producers will bear primary responsibility for the safety of food through the use of a "Hazard Analysis and Critical Control Points" system (HACCP). Certain food establishments will need to be registered or to be approved by the competent authorities. The new hygiene policy has laid down specific rules for meat and meat products, bivalve molluscs, fishery products, milk and dairy products, eggs and egg products, frogs' legs, snails, animal fats, gelatine and collagen. Imported products are required to comply with the new hygiene rules which entered into force on January 1, 2006.

Legislation regarding GMOs has been passed to protect people's health and the environment. The release and marketing of GMO products is determined by a case-by-case assessment. Currently EU legislation only allows products with lower than 5% GMO content into the union. Legislation includes whole products and ingredients of final products that have originated from a genetically modified organism. Monitoring is mandatory of the interactions between GMOs and the environment, in addition to mandatory labelling and traceability rules.

At the other end of the spectrum, the EU also has stringent laws for organic products, which must bear the organic logo, be at least 95% from organic ingredients and bear the name of the producer, processor or vendor and the name of the inspection body.

Agri-Food Import Market Competitors

The EU is the world's largest importer of agricultural goods. Since 1995, the EU has continuously opened its market to imports of agricultural products, including an increase of imports from developing countries. The EU is the largest importer of farm products from developing countries, importing as much food from developing countries as the United States, Japan, Canada, Australia and New Zealand combined.

Canada's relative market position, from year to year, within the EU has a great deal to do with the market requirements of the EU agri-food sector. Many of its agricultural sector principal products are also produced in Canada. As such, Canada is often seen as a competitor to domestic goods in many EU markets. This competition has increased a lot in importance since 2004 with the addition of 10 new member states, all of which bring greater agricultural diversity to the union. While the EU is self-sufficient for well over half of its food requirements, it must rely on imports to make up the difference.

The EU's largest agricultural imports are fruits and nuts which are supplied mostly by southern countries. The second and third largest imports are meat products and beverages and spirits, both of which are mostly imported from the CAIRNS group of countries. Brazil supplies 80% of EU's beef imports. Imported beef is becoming more important as domestic production dwindles.

Canada - EU Trade and Investment

An open and rules-based international trading system is strongly supported by both Canada and the EU. Traditionally, Canada and EU countries have been in agreement on issues affecting international trade. The solid relationship between Canada and the EU has led to an increasing level of two-way trade and investment.

The EU accounts for almost 8.5% of Canada's total trade. The EU is Canada's second largest trading partner, next to the United States. Canada is among the countries given Most Favoured Nation (MFN) treatment by the EU in all product categories. Trade relations between Canada and the EU are based on the 1976 Framework Agreement for Commercial and Economic Cooperation. This foundation has been built on by the EU-Canada Joint Declaration and Action Plan of 1996 and the EU-Canada, Trade Initiative (ECTI) of 1998. The latter is a comprehensive program which covers multilateral and bilateral trade areas. Agreements such as the Mutual Recognition of Conformity Assessment, Veterinary equivalence, Customs co-operation and co-operation regarding competition matters have been reached. Negotiations regarding an agreement on trade in wines and spirits were completed in 2003, addressing a number of issues including the labelling of those products.

The EU and Canada have recently adopted the Canada-EU Partnership Agenda, which identifies broad areas that would improve their bilateral relationship. Included in the agenda is the Framework of the Canada-EU Trade and Investment Enhancement Agreement (TIEA) which is currently being negotiated. The TIEA is an ambitious and forward looking initiative, intended to respond to current issues, while anticipating future challenges. It is the intention of TIEA to create opportunities to broaden and deepen trade, investment and overall relations between Canada and the EU.

With regards to agricultural products, Canada and the EU do not enjoy preferential trade. The EU restricts access of imports of agricultural products using tariffs, quotas, labelling, traceability and GMO regulations. Alignment of agricultural trade practices between the two would be a welcome step in the WTO negotiations. Canada has also been seeking the maximum possible reduction or elimination of production and trade distorting financial support to EU farmers, giving Canadian producers fairer access to EU markets.

Trade with the EU had been declining over the past decade, but there were large increases in 2004 and 2005, possibly due to the addition of the 10 new member states. Total exports of goods and services from Canada to the EU were worth $22.2 billion in 2004, representing an increase of approximately 12% over 2003. Exports from the EU to Canada also increased by over 4% and totalled almost $42 billion.

Canada - EU Bilateral Trade (2005)	
EU Total Trade	**US$2.8 trillion**
Exports	US$1.3 trillion
Imports	US$1.5 trillion
Balance	(US$0.2 trillion)
Canada-EU Trade	**$70.0 billion**
Exports	$24.5 billion
Imports	$45.5 billion
Balance	($21.0 billion)
Canada-EU Ag-Trade	**$5.0 billion**
Exports	$2.0 billion
Imports	$3.0 billion
Balance	($1.0 billion)

Canada's principal agri-food markets in the EU are the United Kingdom, Belgium, Italy, Spain and Germany. In 2005 these countries accounted for almost 70% of Canada's agricultural exports to the EU and just over half of Canada's agricultural imports from the EU. Canada's agricultural exports to the EU exceeded $2 billion in 2005. Imports from the EU exceeded $3 billion. Imports of alcohol account for almost 100% of Canada’s $1 billion agri-food trade deficit with the EU (wine $580 million, beer $150 million, liquor $100 million).

Canadian Agri-food Exports to EU – millions of dollars (2004)	
United Kingdom	348.0
Belgium	334.8
Italy	288.4
Spain	238.1
Germany	178.1
France	148.5
Netherlands	117.1
Denmark	114.2
Portugal	62.3
Greece	31.5
Czech Republic	25.4
Sweden	23.4
Ireland	22.9
Poland	21.5
Finland	15.0
Estonia	10.9
Lithuania	10.6
Austria	9.0
Hungary	4.9
Slovakia	3.2
Latvia	2.8
Slovenia	2.0
Cyprus	1.8
Malta	0.7
Luxembourg	0.4

The agricultural trade relationship between Canada and the EU has typically been characterized by the export of bulk commodities and the importation of luxury; goods, however, Canada's exports of consumer goods and intermediate goods is increasing and currently represents almost 50% of total exports. Canada's agricultural exports to the EU were dominated by all varieties of wheat, peas, shrimps and prawns, soy beans, linseed, lobsters beans and green lentils. Canada's imports from the EU were dominated by wines, beers, liqueurs and cordials, spirits, olive oils, teas and chocolates. However, these dominant products are shifting.

Canadian Agri-food Imports from EU – millions of dollars (2005)	
France	651.5
Italy	565.2
United Kingdom	371.3
Netherlands	320.8
Germany	257.1
Spain	172.6
Belgium	169.6
Ireland	138.7
Denmark	101.7
Portugal	61.0
Greece	60.0
Sweden	42.5
Poland	42.3
Austria	26.6
Finland	12.8
Czech Republic	12.6
Hungary	7.3
Estonia	6.6
Slovenia	2.4
Slovakia	1.1
Latvia	1.0
Cyprus	0.9
Lithuania	0.5
Malta	0.3
Luxembourg	0.04

Trends are showing that Canadian exports to the EU will focus less on commodities, and more so in processed and value added agri-food products. Most Canadian processors appear to be in a position to comply with the strict list of food regulations that the EU has imposed on imports, including the requirement of a traceability certificate.

Bulk exports to the EU fell just short of $715 million in 2005, representing a 32% decline since 2003. Bulk exports have been quite variable, with a high of $1.1 billion in 2003, and a low of $663 million in 2002. Contributing to 56% of bulk exports, lower bulk oilseed and cereal grain shipments are responsible for overall drop in bulk exports.

Intermediate exports to the EU reached $475 million in 2005. These exports have quickly grown, increasing more than 40% since 2002. Growth is driven by exports of edible vegetables, roots, tubers and pulses, which account for almost 60% of all intermediate exports. This is an all time high, almost 2.5 times the value of intermediate exports in 2002. Intermediate exports have grown very quickly in the past 4 years, due to incredible growth in exports of peas and lentils, which together account for over 80% of intermediate good exported to the EU from Canada.

Consumer exports to the EU reached $350.8 million in 2005. Exports of consumer goods to the EU from Canada have steadily grown, increasing by over 17% since 2002. Growth appears to be from all product categories, led by beverages, spirits and vinegar, which grew almost 40% in 2005 over 2004.

The EU is Canada's largest source and destination of foreign direct investment (FDI) after the United States. Total Canadian Direct Investment Abroad (CDIA) in the EU has significantly increased over the past decade. In 2004 CDIA totalled $118.1 billion. FDI in Canada from the EU was valued at $91.2 billion, a slight drop over 2003 levels.

Canada's top 10 Agri-Food Exports to the EU (2005)

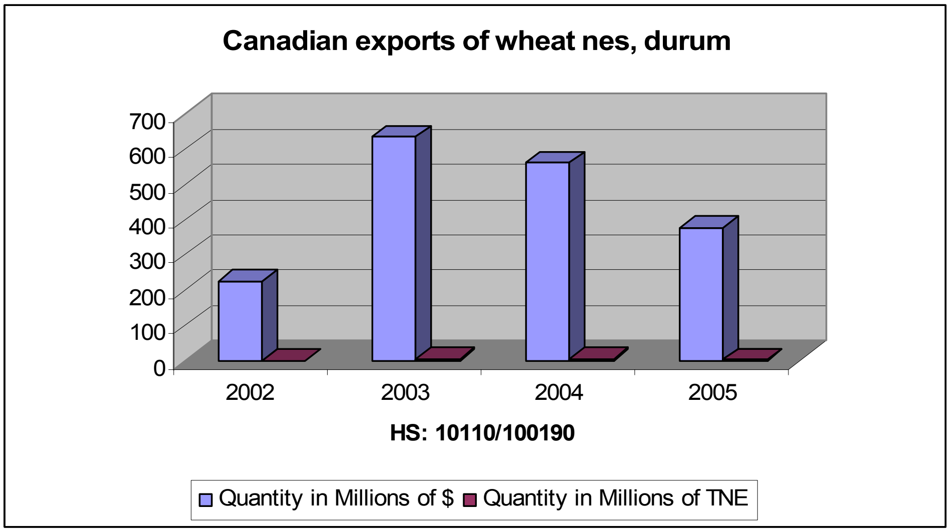
Wheat	$377,123,122
Linseed	$151,439,313
Soya Beans	$136,389,796
Dried, shelled peas	$131,022,212
Shrimps and prawns, frozen	$114,395,148
Lobsters, live or frozen	$58,350,477
Lentils, green, nes	$54,619,092
Navy/white pea beans	$47,924,695
Food preparations	$43,110,336
Blueberries, frozen	$40,094,783

Canada's top 10 Agri-Food Imports from the EU (2005)

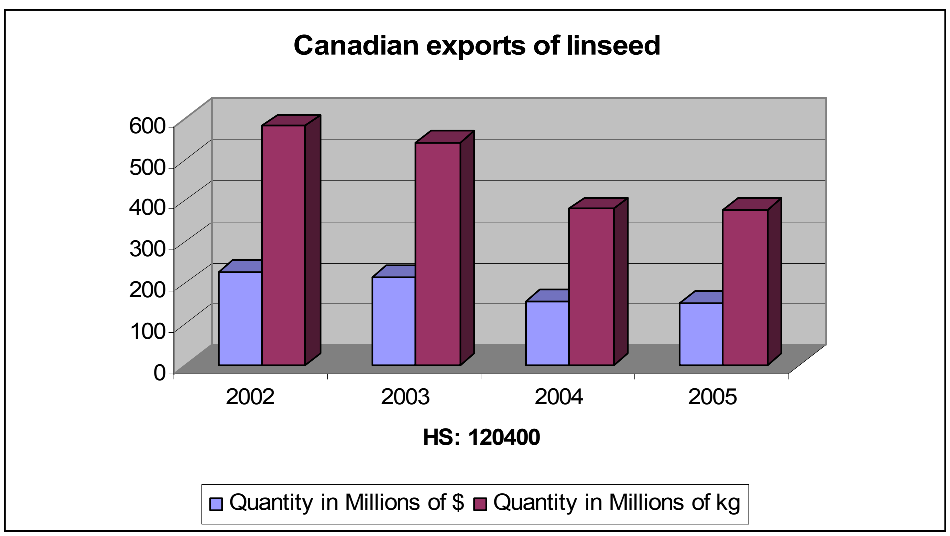
Red grape wine	$364,235,950
White grape wine	$150,262,616
Beer, nes	$146,138,091
Liqueurs and cordials	$100,600,403
Whisky, scotch, excluding bulk	$82,555,833
Lager beer from malt	$81,063,505
Virgin olive oil	$74,241,835
Sparkling wine	$63,513,189
Black tea	$59,394,031
Chocolates for retail sale	$53,787,070

Canada's Agri-Food Exports to the European Union

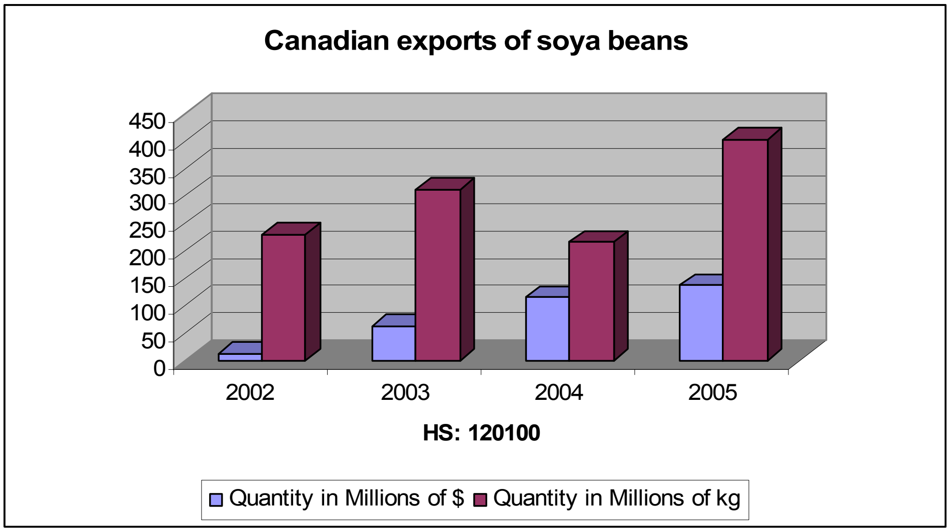
The following ten products represented almost 58% of Canada's agricultural exports to European Union in 2005. Data provided by STATS Can.



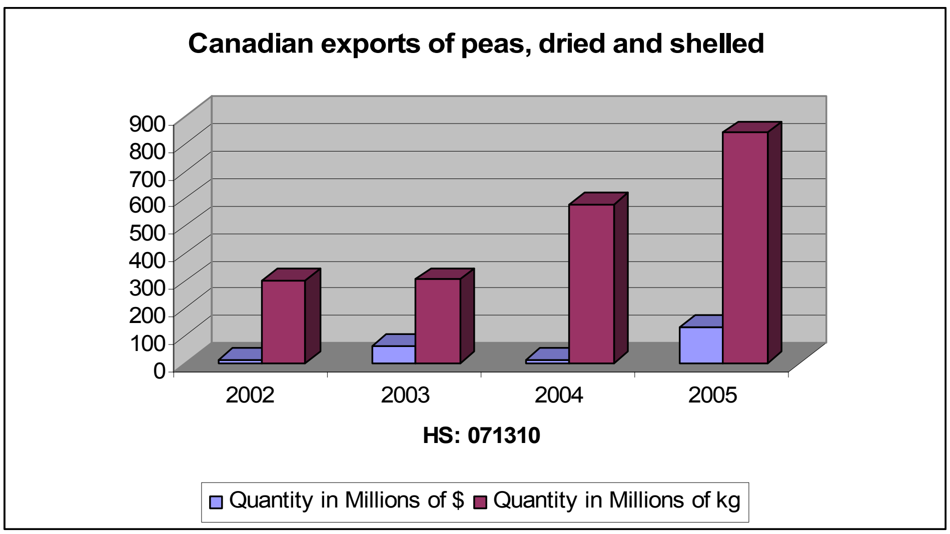
Exports of wheat represented 18.9% of Canada's agri-food exports to the EU in 2005. Canada exported $377.1 million of wheat to the EU in 2005. This is a decline of almost $185 million over 2004 and represents a three year low.



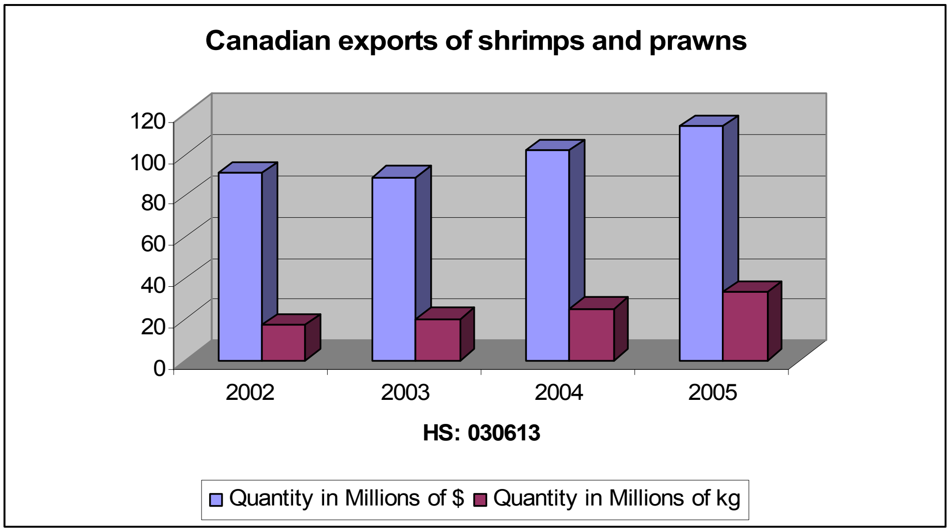
Exports of linseed represented 7.6% of Canada's agri-food exports to the EU in 2005. Canada exported $151.4 million of linseed to the EU in 2005. This is $5 million less than 2004 and represents a four year low.



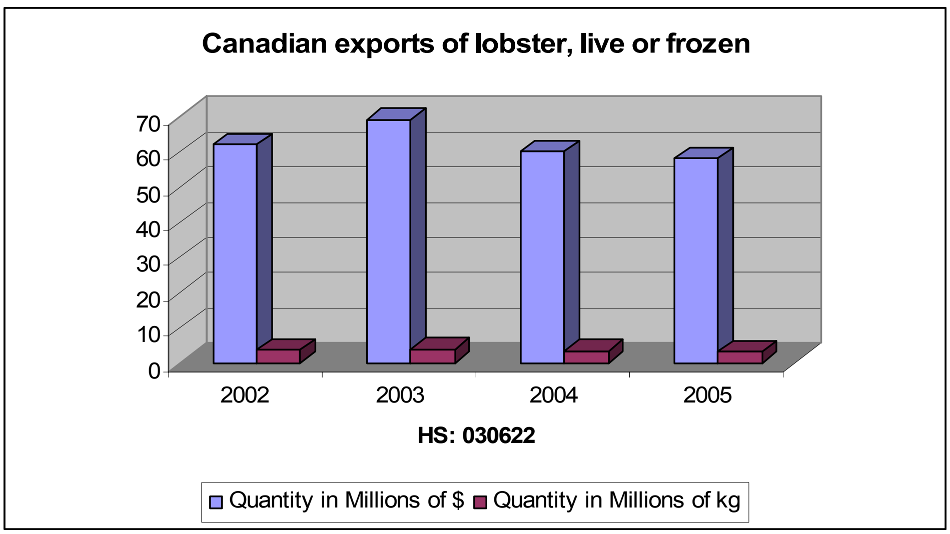
Exports of soy beans represented 6.8% of Canada's agri-food exports to the EU in 2005. Canada exported $136.4 million of soy beans to the EU in 2005. This is an increase of more than $33 million over 2004 and represents a four year high.



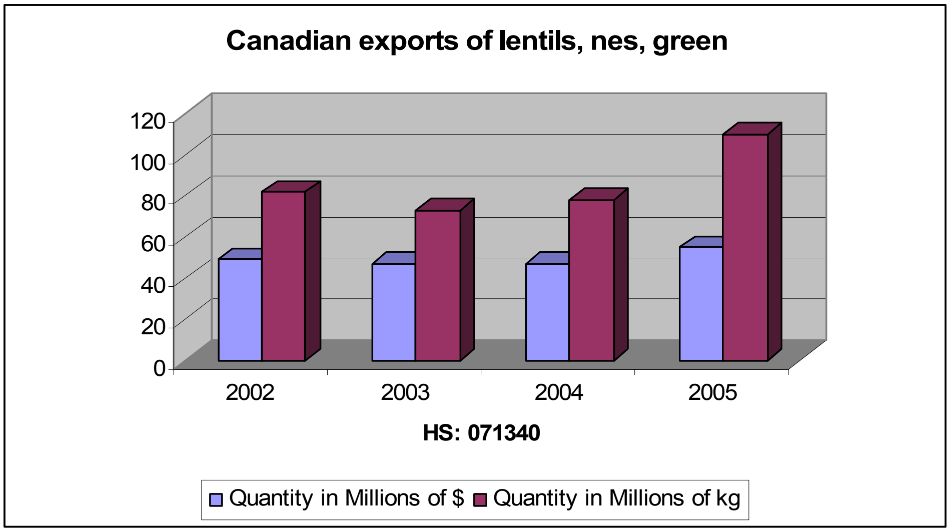
Exports of dried and shelled peas represented 6.6% of Canada's agri-food exports to the EU in 2005. Canada exported $114 million of dried and shelled peas to the EU in 2005. This is an increase of $18 million over 2004 and represents a four year high.



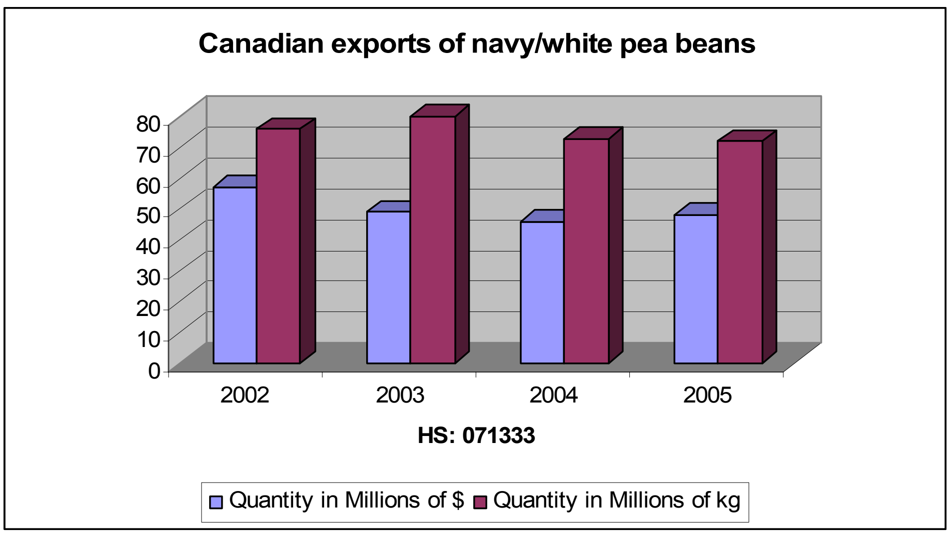
Exports of shrimps and prawns represented 5.7% of Canada's agri-food exports to the EU in 2005. Canada exported $114.4 million of shrimps and prawns to the EU in 2005. This is $13 million more than in 2004 and represents a four year high.



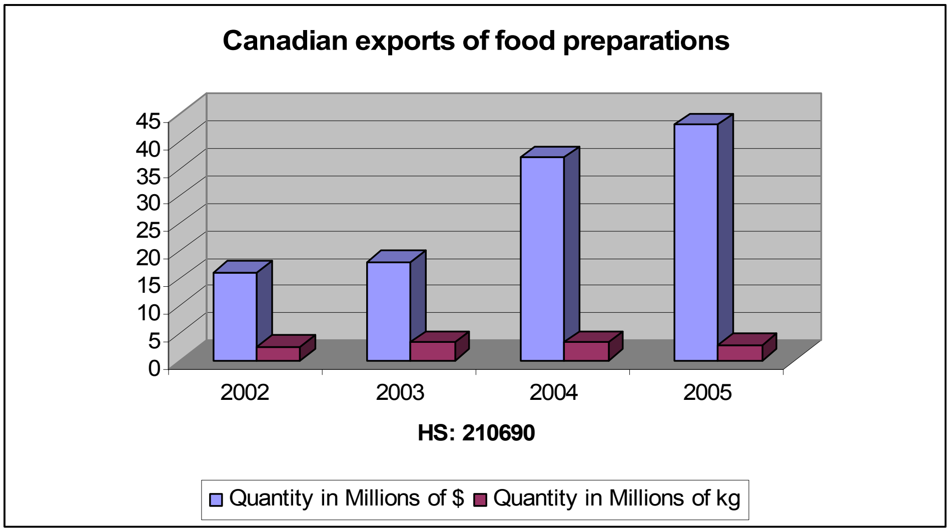
Exports of live and frozen lobster represented 2.9% of Canada's agri-food exports to the EU in 2005. Canada exported $58.4 million of live and frozen lobster to the EU in 2005. This is $2 million less than in 2004, and represents a 4 year low.



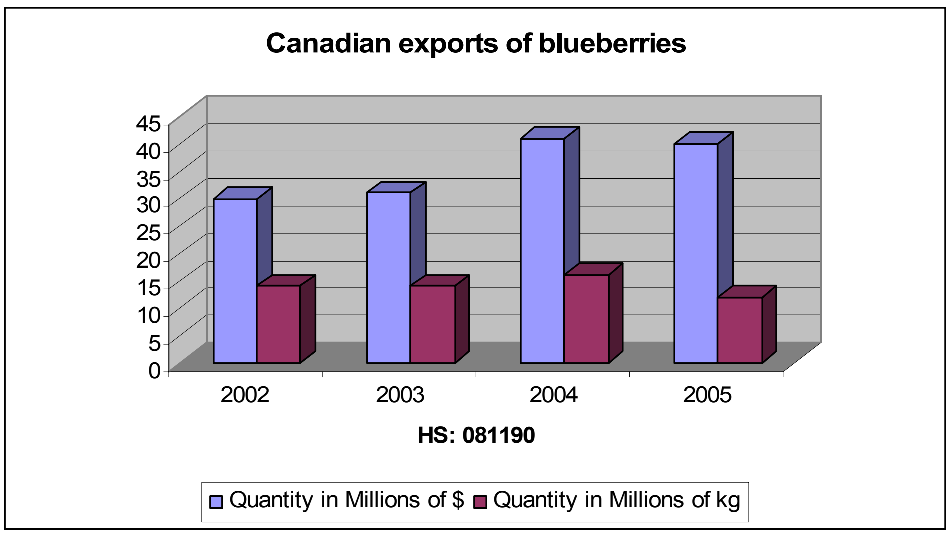
Exports of lentils represented 2.7% of Canada's agri-food exports to the EU in 2005. Canada exported $54.6 million of lentils to the EU in 2005. This is an increase of $6 million over 2004 and represents a four year high.



Exports of navy/white pea beans represented 2.4% of Canada's agri-food exports to the EU in 2005. Canada exported $47.9 million of navy/white pea beans to the EU in 2005. This is an increase of $2 million over 2004, although is $10 million below 2002 levels.



Exports of food preparations represented 2.2% of Canada's agri-food exports to the EU in 2005. Canada exported $43.1 million of food preparations to the EU in 2005. This is an increase of $6 million over 2004 and represents a four year high.



Exports of blueberries represented 2% of Canada's agri-food exports to the EU in 2005. Canada exported $40 million of blueberries to the EU in 2005. This is a decline of $.05 million over 2004, although still more than $10 million higher than 2002 exports.

Bulk exports to the EU totalled $714.9 million in 2005. This value declined by $154 million over 2004. Exports in 2005 represent a three year low.

Intermediate exports to the EU totalled $475.1 million in 2005. This is a $45 million increase from 2004 and represents a four year high.

Consumer exports to the EU totalled $350.8 million in 2005. This is a slight increase of $1 million from 2004 and represents a four year high. Overall, consumer exports have been growing at a steady pace.

Additional Information

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Promotional Venues

For an up to date trade events listing for Europe, please follow this link:
http://www.ats.agr.gc.ca/events/events_europe-e.htm

Websites:

European Commission: http://europa.eu.int/comm/index_en.htm#
EU food import rules: http://www.useu.be/agri/usda.html
European Action Plan for Organic Food and Farming: http://www.orgap.org/