

trade hot topics

Changing EU Policies and ACP Exports

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Background

Around three-quarters of all African, Caribbean and Pacific (ACP) goods exported to the EU receive no tariff preferences. These are the goods that are subject to no tariffs on a 'Most Favoured Nation' (MFN) basis, regardless of the trade regime under which they are exported. Of the 25 per cent of ACP exports to which tariff preferences apply, approximately 80 per cent is due to the agriculture, fisheries and food sectors. Tariff preferences are furthermore largely concentrated on products which fall under the EU's Common Agricultural Policy (CAP) or common fisheries policy, or those products which directly compete with CAP-covered commodities. This makes any change in EU agricultural policy particularly important for ACP exports, as it is in the sphere of food and agricultural exports that changes in policy are most profoundly felt. This issue of *Commonwealth Trade Hot Topics* discusses some of the resultant concerns for ACP states.

Traditional Market Management Tools and New Direct Aid Payments

ACP exports traditionally benefiting from trade preferences are now subject to accelerating processes of preference erosion. Five distinct sources of erosion of the value and margins of traditional ACP tariff preferences have emerged:

- (i) The erosion of the value of traditional ACP agricultural preferences arising from the process of CAP reform, involving a shift from price support for EU products to income support, which permits EU market prices to fall;
- (ii) The reduced net value of preferences due to the higher costs of supplying the EU market, resulting from the stricter application of EU sanitary and phytosanitary (SPS) and food safety regulations;
- (iii) The erosion of tariff preferences arising from the process of WTO dispute settlement, for instance in the banana sector;
- (iv) The erosion of preferences arising from the conclusion by the EU of bilateral preferential trade agreements; and
- (v) The erosion of ACP margins of tariff preference arising from multilateral trade negotiations.

Until now, the erosion of the value of traditional ACP agricultural trade preferences has largely been driven by effects of the CAP reform process.¹ The

¹ One notable exception is the banana sector, where the consolidation of the EU internal market by 1993, and subsequently the WTO dispute-settlement process, were the primary driving forces behind the erosion of the market position of certain ACP banana producers.

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area of policy change experiencing the greatest impact is the use of traditional market management tools. The most significant change is the shift from price support to income support, i.e. from minimum price arrangements to direct aid payments. This has allowed for a progressive reduction in administratively determined prices and a gradual shift to more market-based systems of price formation, for agricultural products domestically produced within the EU. The result is falling market prices for a range of CAP-covered commodities between 20 and 50 per cent, with EU prices in many of the sectors increasingly taking their lead from world market price trends.

Such changes have profound implications for the value of traditional ACP agricultural trade preferences, since they impact upon both the earnings obtained from exports and the overall volume of ACP exports, as ACP suppliers are squeezed out of the EU market or simply find the EU market less attractive than alternative markets. The most severely affected are the beef, rice and sugar sectors, and to a certain extent, fruit and vegetable products.

In the affected sectors, the nominal prices received by ACP exporters have fallen between 25 — 35 per cent, with real prices declining even more rapidly. The impact varies from country to country, and depends on the patterns of exports to the EU, and the underlying competitiveness of production. Most ACP rice and beef producers do not export to the EU, meaning that their exports have been largely unaffected. On the other hand, some ACP sugar sectors have been severely affected by the process of EU sugar sector reform. This contrasts with the fact that certain ACP sugar sectors have benefited from the full introduction of duty-free, quota-free access for ACP/LDC food and agricultural exports, which the process of CAP reform laid the basis for.

When looking at the impact of changing EU policies on ACP export growth and development, analysis is needed at the sector/country level due to differing country experiences. Equally, it is important to focus increasingly on assisting adversely affected sectors in individual ACP countries, enabling production and trade adjustments, designed to help producers to reposition themselves in the face of changing EU agricultural policies and evolving EU trade relationships. This is particularly vital since the process of CAP reform has not only laid the basis for the full introduction of duty-free, quota-free access for ACP/LDC food and agricultural

exports, but has also laid the basis for moves towards the progressive opening of EU markets to highly price-competitive non-ACP suppliers of food and agricultural products.

The CAP's basic reform involving a shift to increasingly 'decoupled' direct aid payments also strongly influences the use of other traditional market management tools, from intervention buying and storage to export refunds, withdrawal of products from the market, processing aids, and even the need for production quotas. The changing use of these policy tools can impact upon the level of EU production and trade, transforming the EU's trading position. An EC-commissioned analysis (published November 2009) notes that in the absence of decoupled support, the area under durum wheat would fall a further 18 per cent if prices reverted to 2006 levels, or 4 per cent if prices and costs stayed at 2008 levels. If world market prices for durum wheat were to fall to 2006 levels, and all other factors (e.g. euro/US\$ exchange rates) remaining constant, the decoupling of durum wheat payments would transform the EU from a net exporter of durum wheat to a net importer. Furthermore, the dismantling of EU policy tools, or changes in the way they are used — for example, in the cereal sector — can have important knock-on effects for ACP consumers as well as producers.

Changes in the use of traditional EU policy tools can also have more direct effects. In the rice sector, a change in policy means that the reference price is no longer used to support the EU rice market price, but is seen as part of the 'safety net' policy for EU rice producers. This unconventional use of a traditional policy instrument has seen the differential between EU and world market prices for rice largely disappear. If CAP reforms are to be implemented in a development-friendly manner, the multiple and often interacting impacts of changes to the use of traditional EU market management policy tools, in key markets for ACP suppliers, need to be carefully assessed when designing and implementing EU policy as part of the 2013 round of CAP reforms.

The Changing Use of Trade Policy Tools

Traditionally, agricultural trade policy has been used to ring-fence the CAP reform process, as reforms are progressively rolled out and the price competitiveness of EU agricultural commodities is improved. While the process of reform has allowed contemplation of a more 'open' trade policy, the EU remains firmly wedded to a managed trade policy. It is this managed trade framework which enables

traditional ACP trade preferences for a transitional period. However, the successful implementation of CAP reforms is modifying the use of traditional EU agricultural trade policy tools, progressively opening up new sources of competitively priced inputs for the EU food and drinks industry. These modifications are eroding the margins of tariff preferences which ACP exporters have traditionally enjoyed in CAP-covered commodities, a process which is beginning to accelerate.

The opening up of food and agricultural markets itself is beginning to accelerate, as the balance of forces which influences the process of agricultural trade policy formulation in the EU is changing. This is in part a product of the wider changes in the EU economy, leading to broader economic and trade policy concerns having an increasing role in determining which specific agricultural trade preferences to extend in the context of new bilateral trade agreements. The debates on relaunching the Mercosur-EU free-trade area (FTA) agreement negotiations illustrate precisely this trend.

The acceleration in the opening up of food and agriculture markets is also, in part, a product of the advanced stage of the CAP reform process. The greatest contribution to the jobs and growth priorities of the EU lies not in agricultural production per se, but rather in adding value to food and agricultural products, and in the effective production and marketing of quality-differentiated food and agricultural products. This gives rise to a tricky policy conundrum: how to reconcile demand from EU farmers for continued protection, with the needs of the EU value-added food products industry for world-market-priced sources of raw materials. In part, the shift from price support to income support is seen as one means of reconciling the interests of both farmers and the processors of value-added food, since it allows EU market prices to fall, which enhances the competitiveness of EU agricultural production without undermining the basis for agricultural production in the EU. However, farmers continue to demand ongoing tariff protection and expanded 'safety nets'. Efforts are under way to develop further policy measures to square this circle of conflicting interests.

In part, the fiscal constraints felt by EU member states can be seen as fuelling the quest for new, less costly policy instruments and the redefinition of use of the existing policy instruments. Overall, this suggests that a further acceleration of the process of

erosion of the margins of ACP agricultural trade preferences is likely, plus an increasingly strict application of SPS and food safety measures, which may increase the costs of production.

Responding to an Accelerating Process of Preference Erosion

In the context of the accelerating processes of preference erosion, the critical issue facing ACP producers is how to make best use of the time and revenues available to prepare for the longer-term, post preference reality. In a number of affected sectors in several ACP countries and regions, strategies have been adopted to proactively engage with this evolving reality by supporting production and trade adjustments aiming to reposition ACP suppliers both within evolving markets and particular supply chains. For example:

- the EU-supported, private-sector-based regional programme for the Caribbean rum sector, which has provided investment support for production and trade adjustments, designed to reposition the Caribbean rum industry to serve premium-brand markets for quality-differentiated bottled rum not only in the EU but across the globe;
- an almost wholly privately financed scheme in the Namibian beef sector to move up the value chain, to the supply of ready-for-the-shelf, prepared, packaged and bar-coded, quality-differentiated beef cuts (and also similarly prepared game-meat products);
- the comprehensive, sector-wide restructuring programme of the Mauritian sugar sector, aimed at diversifying revenue streams from sugar cane production, moving up the sugar value chain and getting production costs firmly under control.

What each of these proactive responses has in common is a commitment to market-led, private-sector-based production and trade adjustments. In each, a clear understanding of market trends is established and a strategy formulated for repositioning ACP producers in evolving markets; these strategies can provide the framework for the effective deployment of highly targeted Aid for Trade support, which can greatly facilitate the process of production and trade adjustment. This role for pump-priming, public-sector financial assistance, in stimulating proactive responses to trade and production adjustment challenges, is implicitly recognised in the allocation of over €53

billion in public aid to value-addition or quality-based production and trade adjustment programmes in the EU food and agricultural sector, under axis 1 of its rural development programmes. Axis 1 explicitly targets aid at measures to enhance the competitiveness of EU food and agricultural production, which in many respects represents an important evolving feature of the EU policy tool box, with the focus gradually shifting from production subsidies to investment support. This shift is likely to be a growing feature of the CAP beyond 2013.

The significance of this policy development for the ACP lies in the fact that many ACP food and agricultural exporters need to undertake similar production and trade adjustments in the face of the evolving market context in the EU. Potentially the EU's axis 1 rural development programmes hold important lessons for EU Aid for Trade support to ACP countries that seek to get to grips with accelerating processes of preference erosion.

The Emergence of New Policy Tools and Refocusing Existing Policies

Growing pressure from wider EU trade and economic concerns, and the emerging fiscal constraints, have stimulated the development of new EU policy initiatives. Existing policies are refocusing, such as the initiative to refine the EU's agricultural product quality policy. There is now more attention on effectively differentiating EU products on 'quality' grounds, to ensure that EU farmers are better placed to secure higher prices for their quality-differentiated products. Other new EU policy initiatives include the consolidating of EU sanitary and phytosanitary and food safety policy and more rigorous enforcement of existing standards, the consolidating and clearer definition of agricultural product quality policy, and improvement to the functioning of food and agricultural supply chains. Through these policy developments, policy makers hope that EU producers will be able to secure price premiums which enable them to sustain production in an increasingly liberalised market place.

There are also growing demands from EU farmers for such policy initiatives, with the motive of equating EU farm products with safe, high-quality food production, implicitly denigrating the safety and quality of imported food products. This could increase the costs for ACP farmers producing for export to the EU, while at the same time restricting commercial opportunities for ACP exporters in securing higher prices on 'quality-differentiated'

product markets in the EU. To avoid this, an intensified dialogue is required between ACP stakeholders and EU policy makers on the design and implementation of both EU agricultural product quality policy and EU food safety and SPS policies, in order to minimise the cost-increasing effects of such measures, and ensure that opportunities for the marketing of quality-differentiated products are open to all suppliers who meet the requisite standards, regardless of country of origin.

Policy initiatives which strengthen the position of producer organisations within food and agricultural supply chains have a direct relevance to ACP producers and exporters, particularly in the context of moves over to more market-based systems of price formation in ACP-EU agricultural trade — for example, the sugar and banana sectors. This suggests that a clear development dimension should be built into new, emerging EU policy initiatives on the functioning of food and agricultural supply chains. The extension of policy initiatives to improve the functioning of supply chains to the ACP-EU level could constitute an important part of a policy response, aimed at preparing ACP agro-food sectors for life beyond traditional tariff preferences.

Making A Shift From Subsidies to Investment Support

Since 2000, the EU has prioritised the creation of income-earning opportunities beyond agriculture in rural areas, via greatly expanded rural development programmes. This is in parallel to an ongoing focus on establishing effective 'safety nets' for EU farmers. Such policy measures are intended to engineer a shift from subsidy to investment support, and are likely to continue to grow in importance.

More recently, these investment support tools have been used to address agriculture and climate change concerns. There is a growing recognition in the EU of the multi-dimensional links between agriculture and the process of climate change, and the need to ensure the long-term, environmental and commercial sustainability of EU food and agricultural production, in particular to address concerns about the impact of agricultural production on climate change, and the impact of climate change on the distribution of agricultural production across the EU and globally.

In terms of ACP-EU agricultural trade, there are concerns that efforts to limit the climate effects of agricultural production processes could lead to a

process of ‘carbon leakage’, whereby EU efforts to combat climate change through stricter regulations leads to the displacement of agricultural activities to production zones outside the EU where climate-change-related regulations are less strict. This is leading to pressure to ‘internationalise’ EU greenhouse gas emission standards, which could increase the costs to ACP producers, depending on how such measures are defined and implemented. It is even giving rise to calls for the imposition of ‘carbon taxes’ on imports from countries that do not adopt climate change measures equivalent to those being implemented in the EU. Such debates and the specific measures they give rise to could adversely impact ACP exports to the EU. There is therefore a need for ACP agricultural interests to engage with these debates and discussions to ensure that specific policy measures are set in place to minimise the cost-increasing effects for ACP suppliers, and to recognise and reward the lower greenhouse gas emissions of certain ACP production systems.

Other Areas of EU Support

Beyond the main policy tools, the EU makes extensive use of transitional adjustment programme measures, emergency measures and national aid programmes to manage the processes of change facing the food and agricultural sector. For example, the process of globalisation in the EU sugar beet industry is transforming the EU sugar processing sector from primarily sugar beet-based, European-focused firms to increasingly sugar-cane-based global sugar and food ingredient companies. This has important implications for future EU trade arrangements for sugar, affecting beneficiaries.

Furthermore, EU emergency measures and national aid programmes in certain sectors - for instance, dairy - are combined to insulate EU farmers from the effects of declining prices. The OECD however points out that compensating farmers for low prices merely contributes to higher volatility in world prices. Care needs to be taken when using such measures as part of ‘safety net’ arrangements, so as to avoid simply displacing adjustments costs to non-EU producers.

Developing an ACP Policy Response

Given the impact that the CAP has had and continues to have on ACP-EU agricultural trade, and the importance of agriculture in the overall preferential trade relationship historically, there is a need to design future EU agricultural policy changes

in ways that take into account the impact of changes in the use of traditional policy tools on traditional ACP suppliers. Initiatives may be possible in four areas: (a) changes in core CAP policies, (b) trade-policy-driven acceleration in preference erosion, (c) building ACP concerns into new EU policy initiatives on SPS and food safety issues, agricultural product quality and functioning of the supply chain, and (d) effective engagement with climate change related issues. Against this background, the following recommendations may be considered:

- Strengthening and deepening the consultations process and dialogue with the ACP, on:
 - Proposals for change in the core CAP policy areas which impact the ACP, for instance the future of national production quotas in the sugar sector, the future of minimum price guarantees in the fruit and vegetable sector, the future of direct aid payments in the cotton sector, the implications for international markets of importance to ACP countries of the abandonment of public storage as an EU policy tool, the future use of export subsidies and minimising the trade effects of EU ‘safety net’ policy measures;
 - The management of the opening of EU food and agricultural markets to third-country suppliers, perhaps through deepening existing cooperation arrangements for market management in the sugar sector and extending such arrangements to other affected sectors.
 - The trade consequences of evolving EU policies responding to climate change, in order to minimise the effects of measures introduced on ACP exports to the EU.
- Targeted and effective deployment of ‘aid for trade’ support in sectors affected by preference erosion, in order to facilitate timely adjustment to the new market realities that will create.
- Building clear and comprehensive ‘development dimensions’ into evolving EU policies on SPS and food safety control, agricultural product quality and the functioning of food and agricultural supply chains.
- Making sure to take into account the effects of EU biofuel policies on markets of importance to ACP exporters, with adverse effects being addressed within the process of policy design, or as part of comprehensive accompanying measures.

International Trade & Regional Co-operation Section at the Commonwealth Secretariat

This Trade Hot Topic is brought out by the International Trade and Regional Co-operation (ITRC) Section of the Economic Affairs Division (EAD) of the Commonwealth Secretariat, which is the main intergovernmental agency of the Commonwealth — an association of 54 independent states, comprising large and small, developed and developing, landlocked and island economies — facilitating consultation and co-operation among member governments and countries in the common interest of their peoples and in the promotion of international consensus-building.

ITRC is entrusted with the responsibilities of undertaking policy-oriented research and analysis on trade and development issues and providing informed inputs into the related discourses involving Commonwealth members. The ITRC approach is to scan the trade and development landscape for areas where orthodox approaches are ineffective or where there are public policy failures or gaps, and to seek heterodox approaches to address those. Its work plan is flexible to enable quick response to emerging issues in the international trading environment that impact particularly on two highly vulnerable Commonwealth constituencies — least developed countries (LDCs) and small states.

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ITRC undertakes activities principally in three broad areas:

- It supports Commonwealth developing members in their negotiation of multilateral and regional trade agreements that promote developmentfriendly outcomes, notably their economic growth through expanded trade.
- It conducts policy research and consultations increase understanding of the changing of the international trading environment and of policy options for successful adaptation.
- It contributes to the processes involving the multilateral and bilateral trade regimes that advance the more beneficial participation of Commonwealth developing country members, particularly small states and LDCs.

ITRC Recent Activities

ITRC's most recent activities focus on assisting member states in the WTO Doha Round and the Economic Partnership Agreement (EPA) negotiations involving the African, Caribbean and Pacific countries (ACP) the European Union (EU), undertaking analytical research on a range of trade policy and development issues, and supporting workshops/dialogues for facilitating consensus-building on issues of Commonwealth members' interest, exchange of ideas, and disseminating results from informed analysis.

Selected Recent Meetings/Workshops supported by ITRC

16 September 2010: Session by the Commonwealth Secretariat at the WTO Public Forum 2010, on 'Africa in international trade: impediments and opportunities', WTO Headquarters, Geneva, Switzerland.

28 June 2010: Consultation Meeting on WTO Accession, held in Brussels, Belgium

26 June 2010: Workshop on Policy Barriers in Intra-regional Trade in South Asia, held in Dhaka, Bangladesh

14-15 June 2010: High Level Workshop on Aid for Trade in East African Community countries, held in Dar-es-Salaam, Tanzania

3-4 June 2010: Trade policy Workshop with the Members of Parliaments in the Pacific, held in Samoa

27-28 May 2010: Trade policy Workshop with East African Members of Parliaments, held in Arusha, Tanzania

4 May 2010: Workshop on Potential Supply Chains in South Asian Textiles and Clothing, held in Colombo, Sri Lanka

3-4 May 2010: Commonwealth Investment Experts Group Meeting for the Pacific, held in Port Vila, Vanuatu

3 April 2010: Workshop on Developing Supply Chains in the Textile and Clothing Industries in South Asia, held in Dhaka, Bangladesh

15-16 March 2010: Commonwealth Roundtable - Regional Trading & Integration Arrangements, held in Hampshire, UK

2 November 2009: High-Level Meeting for WTO Representative of ACP Missions, held in Geneva, Switzerland

26 October 2009: Discussion meeting with the WTO's Geneva Week Participants, held in Geneva, Switzerland

Selected ITRC Publications

Cali, M with Kennan, J (2010). 'The Global Financial Crisis and Trade Prospects in Small States', Economic Paper, London: Commonwealth Secretariat.

Milner, C et al. (2010). Policy Responses to Trade Preference Erosion: Options for Developing Countries. London: Commonwealth Secretariat

Grynberg, R and Kabuleeta, P (forthcoming). Investment and Economic Partnership Agreements: Issues for ACP Negotiators. London: Commonwealth Secretariat.

Jones, E et al. (2009). Manoeuvring at the Margins: Constraints Faced by Small States in International Trade Negotiations. London: Commonwealth Secretariat.

Razzaque, M A (ed) (2009). Trade, Migration and Labour Mobility. London: Cameron May.

Srinivasan, T N (2009). LDCs, Landlocked Developing Countries and Small States in the Global Economic System. London: Commonwealth Secretariat.

Stevens, C et al. (2009). The CARIFORUM and Pacific ACP Economic Partnership Agreements: Challenges Ahead?, Economic Paper No. 87, London: Commonwealth Secretariat.

Winters, L A et al. (2009). An EU-India Free Trade Agreement: Reflections on the Implications for Excluded Countries. London: Commonwealth Secretariat.

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Milner, Chris (2008). Trading on Commonwealth Ties: A Review of the Structure of Commonwealth Trade and the Scope for Developing Linkages and Trade in the Commonwealth. London: Commonwealth Secretariat.

Turner, L (2008). 'Quantifying Aid for Trade: A Case Study of Tanzania'. Economic Paper, London: Commonwealth Secretariat.

Qalo, Veniana (ed) (2008). Bilateralism and Development: Emerging Trade Patterns. London: Cameron May.

Grynberg, Roman and Bilal, Sanoussi (eds) (2007). Navigating New Waters: A Reader on ACP-EU Trade Negotiations. London: Commonwealth Secretariat.

Mbirimi, Ivan (ed) (2007). After Hong Kong: Some Key Trade Issues for Developing Countries. London: Commonwealth Secretariat.

Razzaque, Mohammad A and Laurent, Edwin (eds) (2007). Global Rice and Agricultural Trade Liberalisation: Poverty and Welfare Implications for South Asia. London: Commonwealth Secretariat.

Ongoing Policy Research Projects

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- Commonwealth Investment Framework Agreement
- Trade effects of Government Procurements on developing countries
- Development issues under EPAs
- Development aspects of trade-related issues and trade in services
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- Implications of the EPAs on Pacific ACP and CARIFORUM
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