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Main trends for the European agricultural markets and the future of the CAP

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Main trends for the European agricultural markets and the future of the CAP

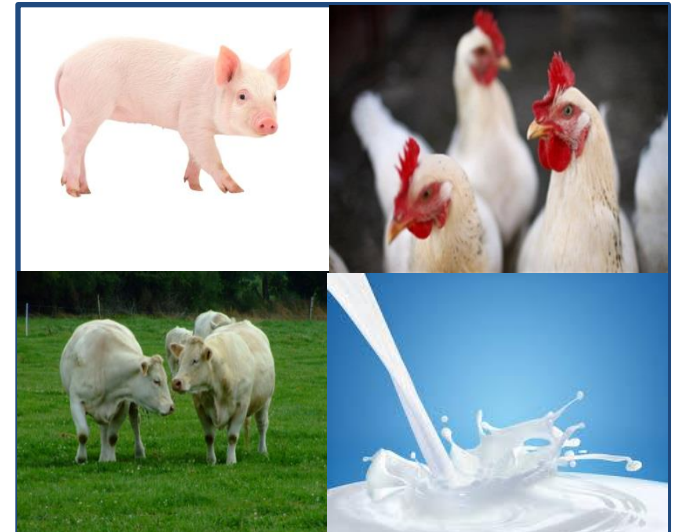
With a focus on animal productions



Vincent CHATELLIER
INRA, UMR SMART-LERECO



Tokyo, 16th January 2018



Plan

1- EU agriculture and agri-food trade

2- Animal productions in the EU

2-1- Pig sector

2-2- Poultry sector

2-3- Beef sector

2-4- Dairy sector

3- The Common Agricultural Policy (CAP)

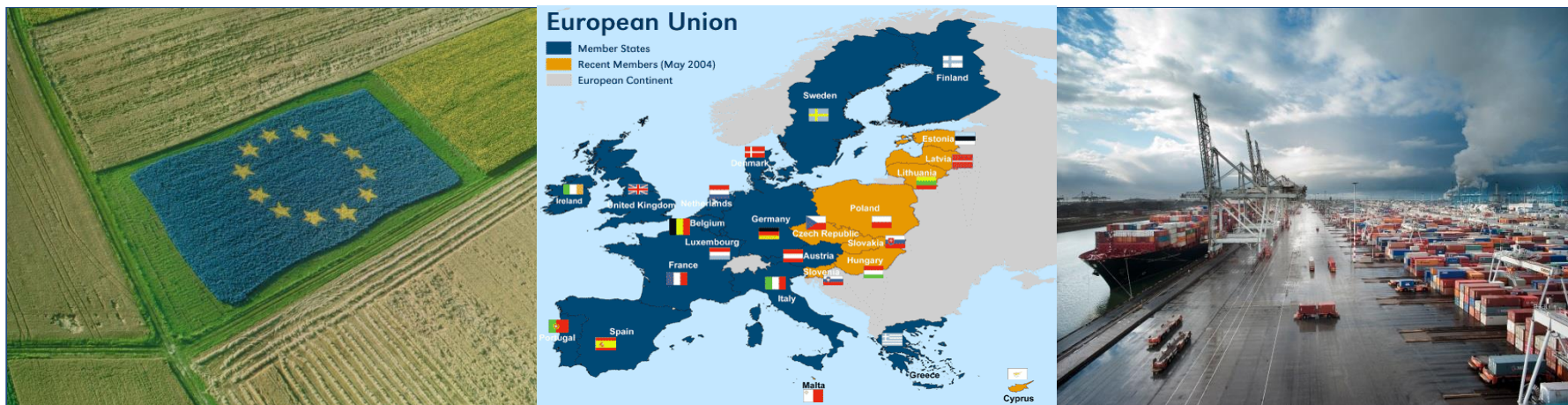
3-1- The previous CAP reforms and subsidies to EU farmers

3-2- The future of EU and CAP

Introduction: EU-Japan Economic Partnership Agreement

- ❑ Over time around **85% of EU agri-food products (in tariff lines) will be allowed to enter Japan entirely duty-free** (such as Pork).
- ❑ Tariffs will be cut from 38% to 9% over 15 years for a significant volume of **beef products**.
- ❑ The tariffs on **wine** will be scrapped from day one, as will tariffs for other alcoholic drinks.
- ❑ As regards **cheese exports**, high duties on many hard cheeses such as Gouda and Cheddar (which currently are at 29.8%) will be eliminated, and a duty-free quota will be established for fresh cheeses such as Mozzarella.
- ❑ The EU-Japan agreement will also **scrap today's customs duties (with a transitional period) for processed agricultural products** such as pasta, chocolates, cocoa powder, candies, confectionary, biscuits, tomato sauce, etc. There will also be significant quotas for EU exports (duty-free or with reduced duty) of malt, potato starch, SMP, butter and whey.
- ❑ The EU-Japan agreement recognises the special status and offers protection on the Japanese market to more than **200 European agricultural products from a specific European geographical origin**, known as Geographical Indications (GIs).

1- EU agriculture and the agri-food trade



EU : population, territory and agricultural specialization

→ EU Population: 510 million (7% of the world population)

- Germany (82) ; France (66) ; UK (65) ; Italy (60) ; Spain (46) ; Poland (38)
- People living in rural areas: 20%
- 16% of the EU-28 population is younger than 15 years
- Average population density : 116

→ Territory (land cover): 437 million ha

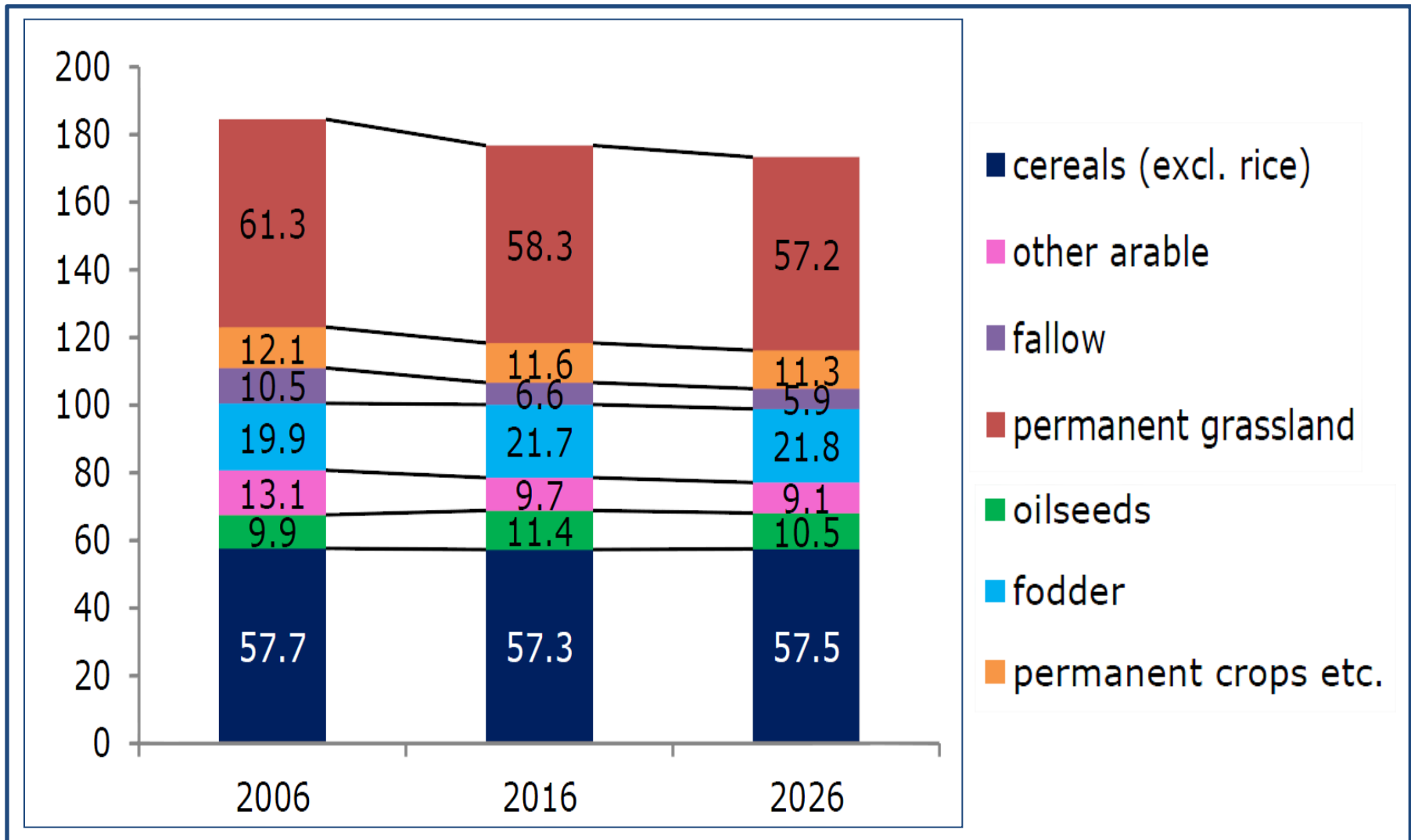
- 174 million ha of Usable Agricultural Area (UAA = 40% of EU land cover)
- 61% of the UAA is used for arable crops
- 6% of the total UAA is irrigated
- 6% of the total UAA is under organic farming

→ Agricultural output: 358 billion euros

- Crop output (57%)
- Animal output (43%)

Agricultural land-use developments in the EU

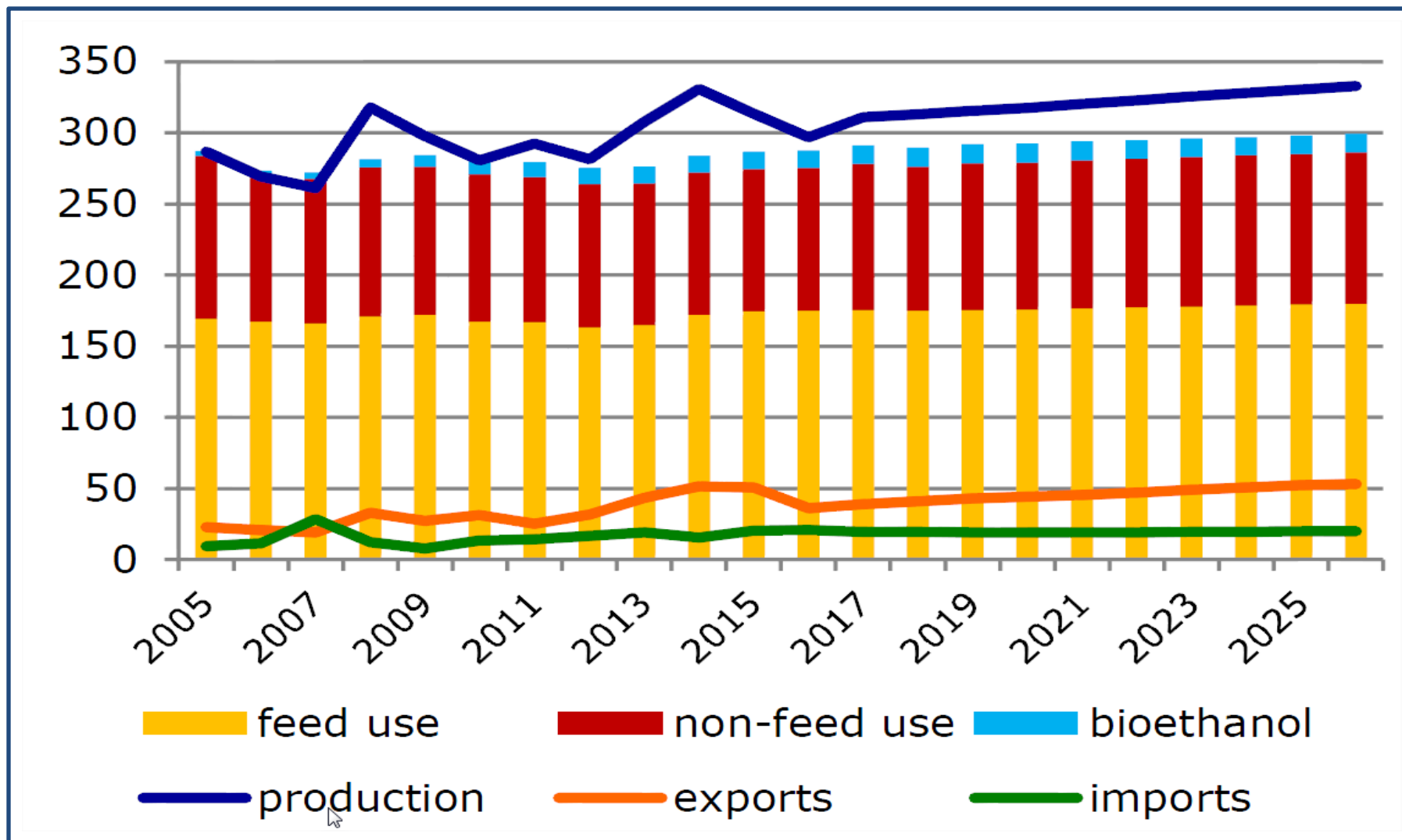
(Million hectares)



European Commission-DGAGRI

EU cereal market developments

(Million tons)

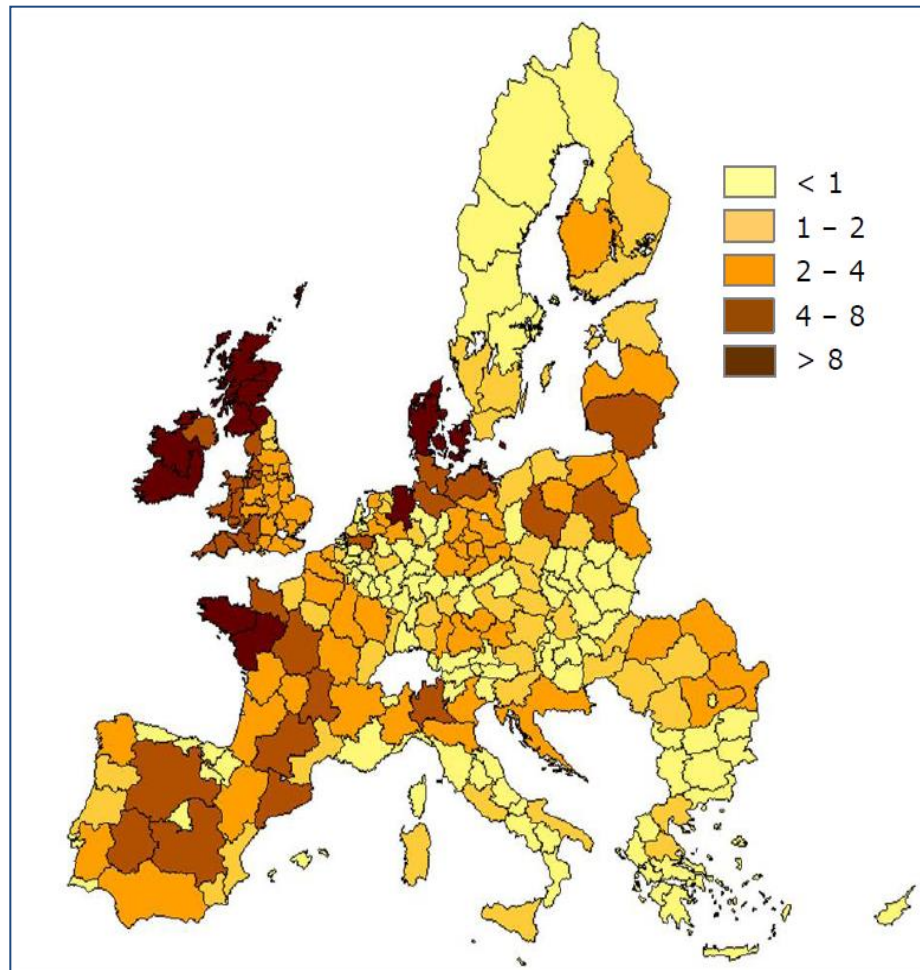


European Commission-DGAGRI

Non-CO2 greenhouse gas (GHG) emissions in 2030 in the EU

(Million t CO2 equivalent)

Million t CO2 equivalent



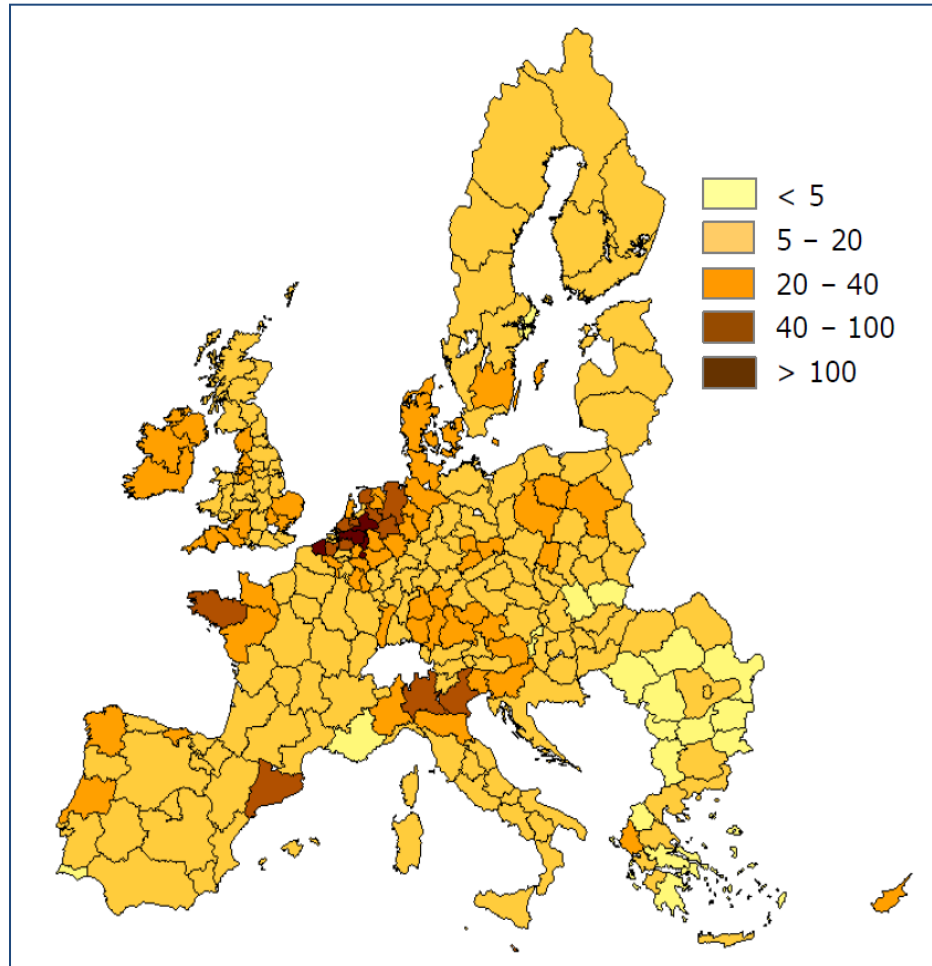
- ❑ Agriculture accounts for slightly more than 10 % of EU-28 GHG emissions.
- ❑ According to the CAPRI projection, total non-CO2 (CH4 and N2O) GHG emissions from agriculture are **expected to decrease by 2030** (-1.5 % to 433 million t CO2 equivalent) compared to 2008.
- ❑ Overall, the **livestock sector will contribute directly to 72 % of the non-CO2 GHG emissions of agriculture** in 2030, if emissions from manure on the field are allocated to the livestock sector.
- ❑ In 2030, **livestock will continue to be responsible for 99 % of all methane (CH4) emissions from agriculture**, the biggest share (85 %) coming from ruminants digestion.

DG JRC, based on the 2016 CAPRI baseline

Ammonia emissions in 2030 in EU

(Million hectares)

Kg NH₃ per ha of UAA



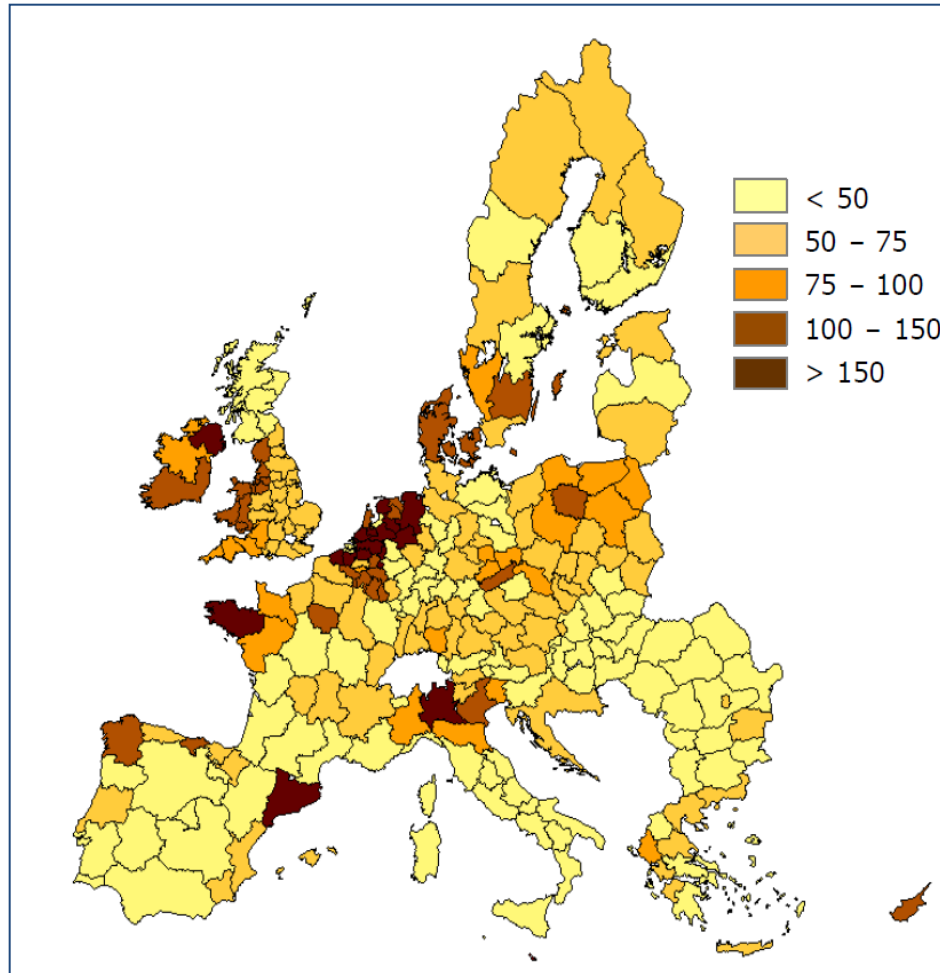
- ❑ **93 % of the EU-28 NH₃ emissions is associated with agriculture**, especially with manure management (80 %) and mineral fertiliser use (20 %).
- ❑ In the atmosphere NH₃ can combine with other forms of air pollutants such as nitrogen oxides released by transport, industrial and household activities, and contribute to the formation of airborne particulate matter (PM_{2.5}), with strong negative impacts on human health.

DG JRC, based on the 2016 CAPRI baseline

N surplus in 2030

(Kg N per ha of UAA)

N surplus in 2030 (kg N / UAA ha)



- ❑ High levels of N surplus indicate higher losses of nitrogen to the atmosphere (NH_3 and N_2O emissions) and nitrate leaching to surface and underground water, leading to eutrophication.
- ❑ In 2030, the projected average N surplus in the EU- 28 is close to 63 kg N/ha, 2.6 % lower than in 2008. This is due to a general increase in N-use efficiency.
- ❑ The average N surplus per ha increases specially in regions where animal numbers (mainly pigs) increase, together with a decrease in UAA (e.g. Catalonia).

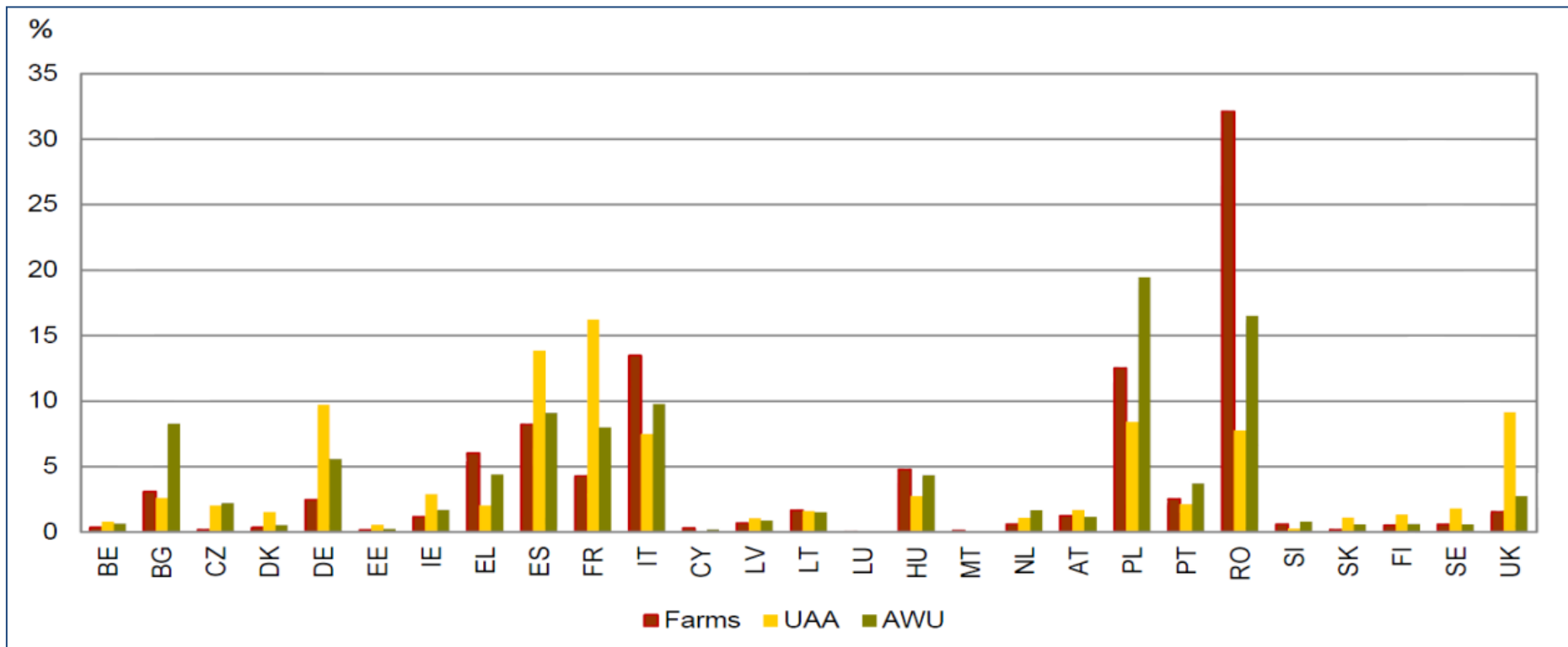
DG JRC, based on the 2016 CAPRI baseline

EU agriculture: keys elements

➔ **Agricultural Work Unit (AWU): 9,5 million** (22 million people)

➔ **EU farms: 11 million**

- 34% arable crops ; 21% grazing livestock ; 17% permanent crops ; 14% mixed farming ; 10% pigs and poultry ; 2% horticulture



A delicate context for too many EU farms

→ A lack of profitability and cash flow difficulties

- Some important productivity gains, but insufficient economic return
- Sales prices of agricultural products are too low compared to production costs
- Strong dependence on direct aids and future directions of the CAP

→ Uncertainty weighing on generational transitions

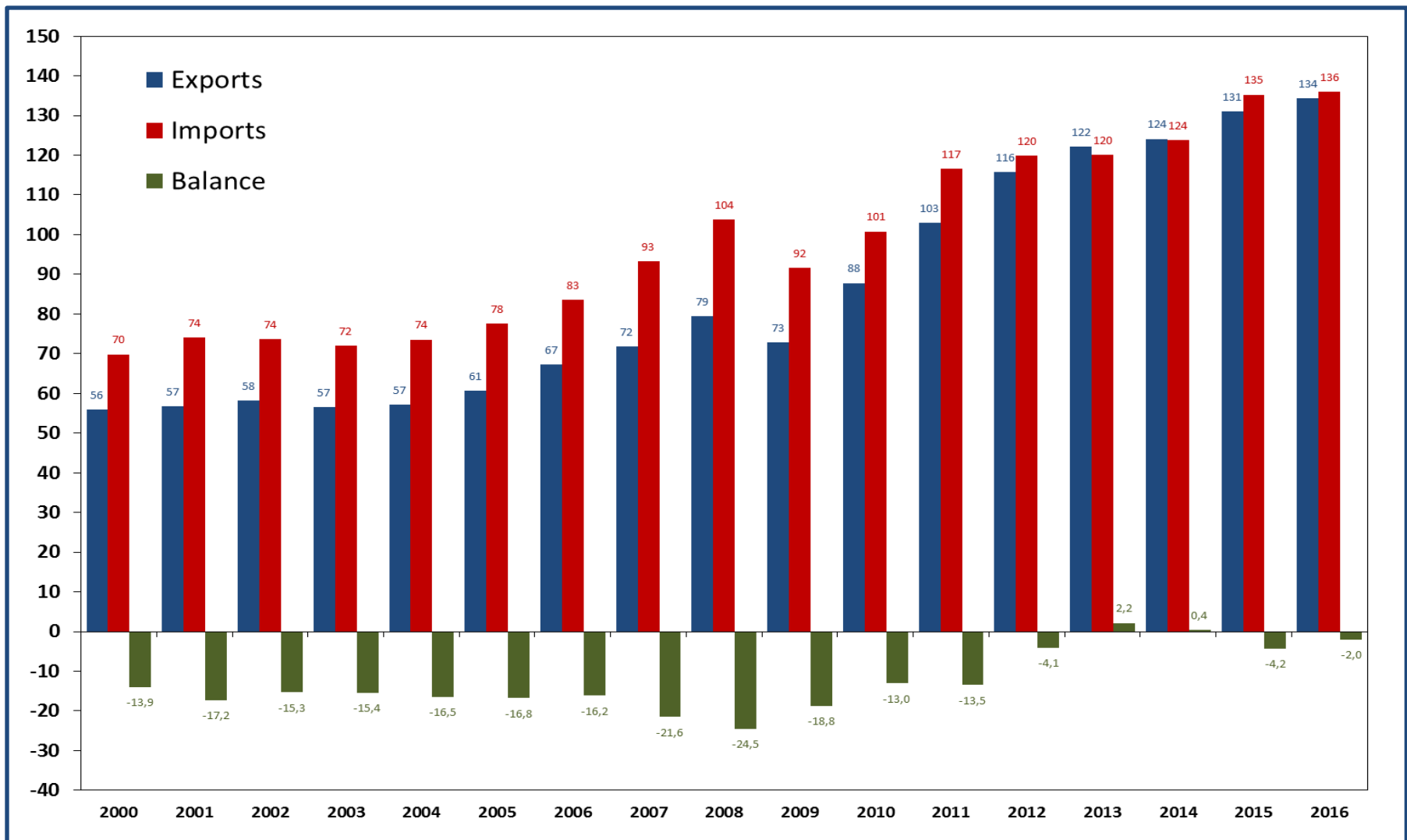
- Price volatility weakens investment strategies
- It is difficult (quite impossible) for young farmers to buy a farm
- The requirement on working conditions implies more collective work

→ Agriculture is the subject of much criticism by citizens

- Debates with citizens are rarely informed by scientific knowledge
- Consumers demand a lot, but without paying the price

EU agri-food trade

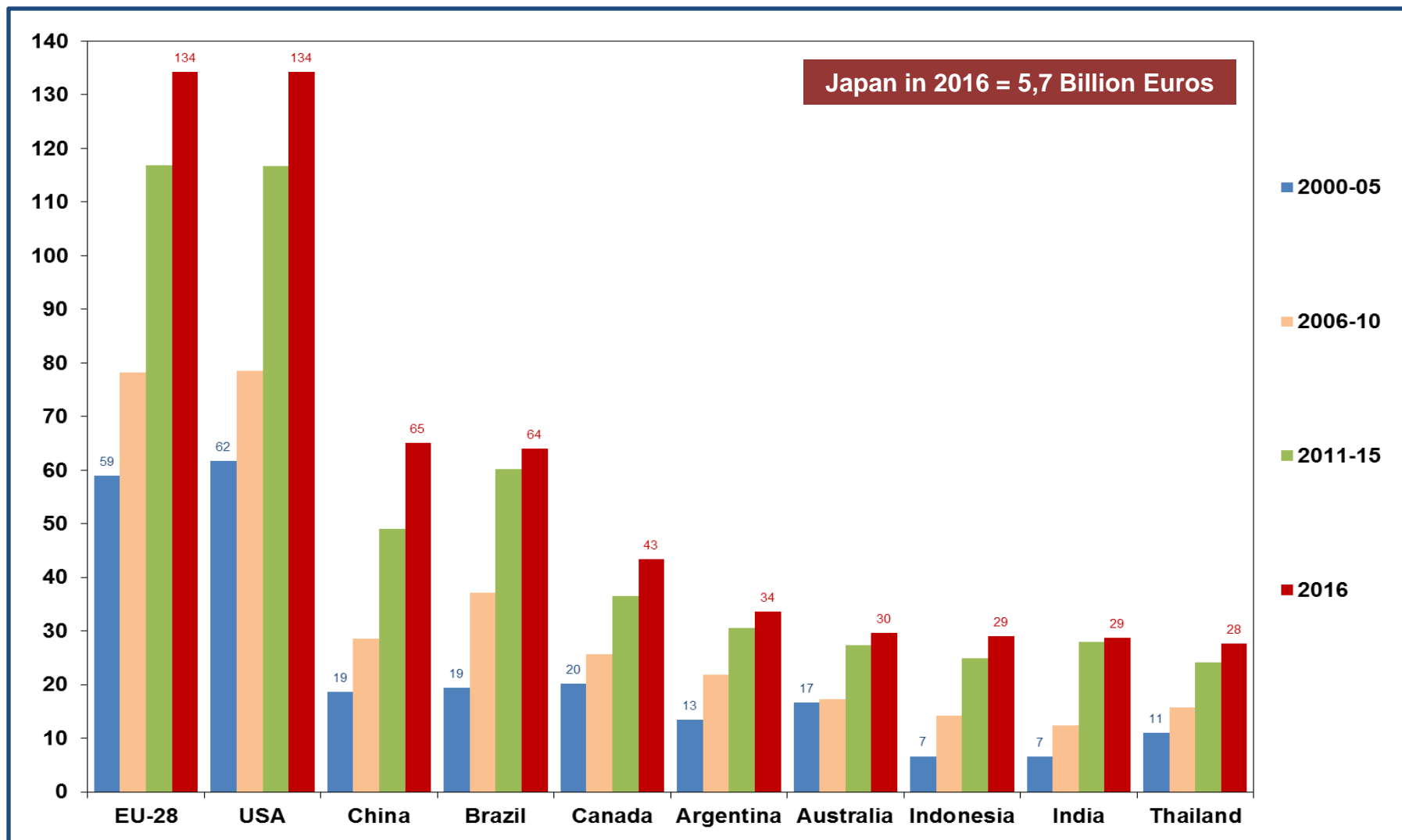
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Top 10 global exporters in the agri-food sector

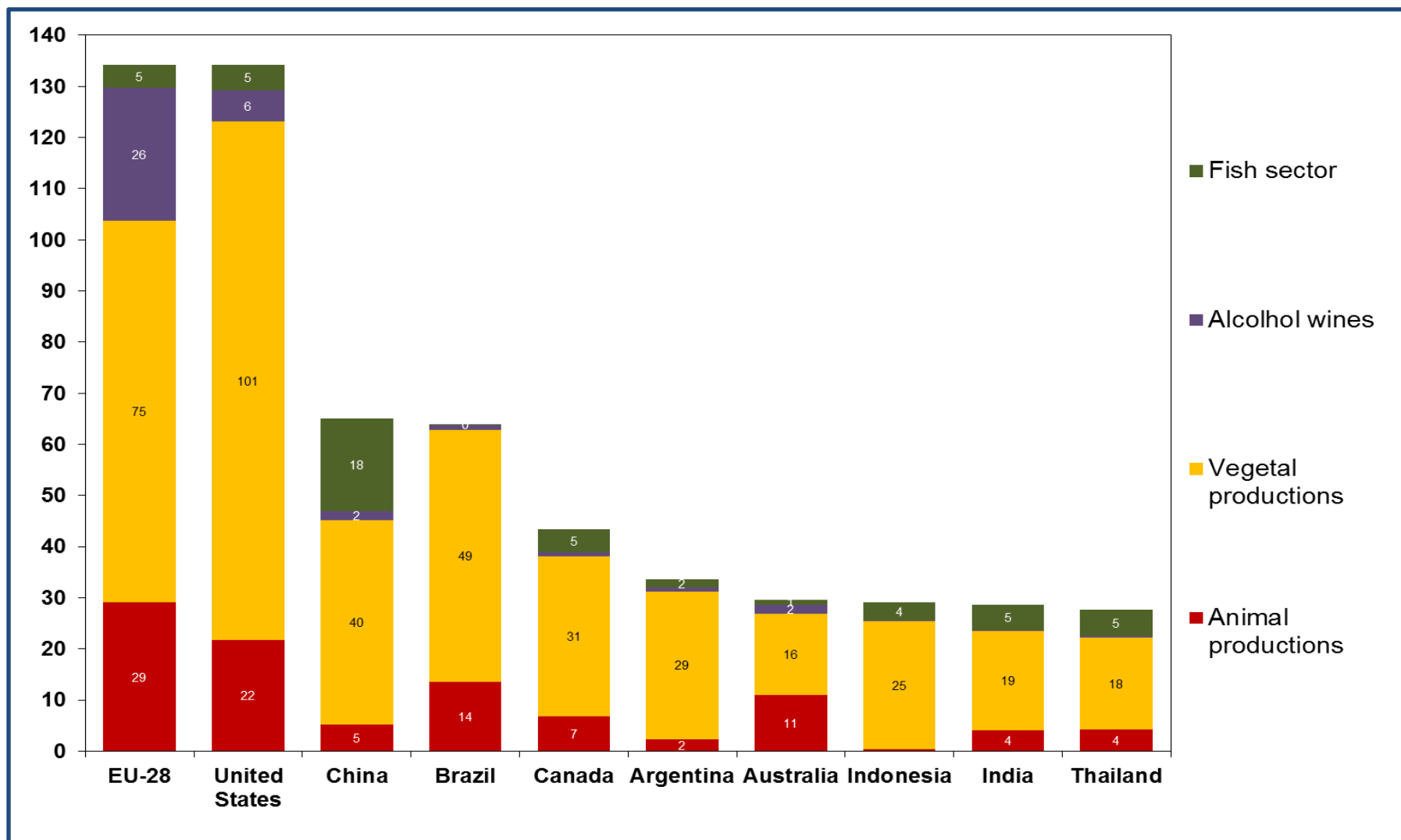
(Billion current euros, 2000 to 2016)



COMTRADE / INRA, SMART-LERECO

Top 10 global exporters in the agri-food sector in 2016

(According to the types of products, billion euros)



COMTRADE / INRA, SMART-LERECO



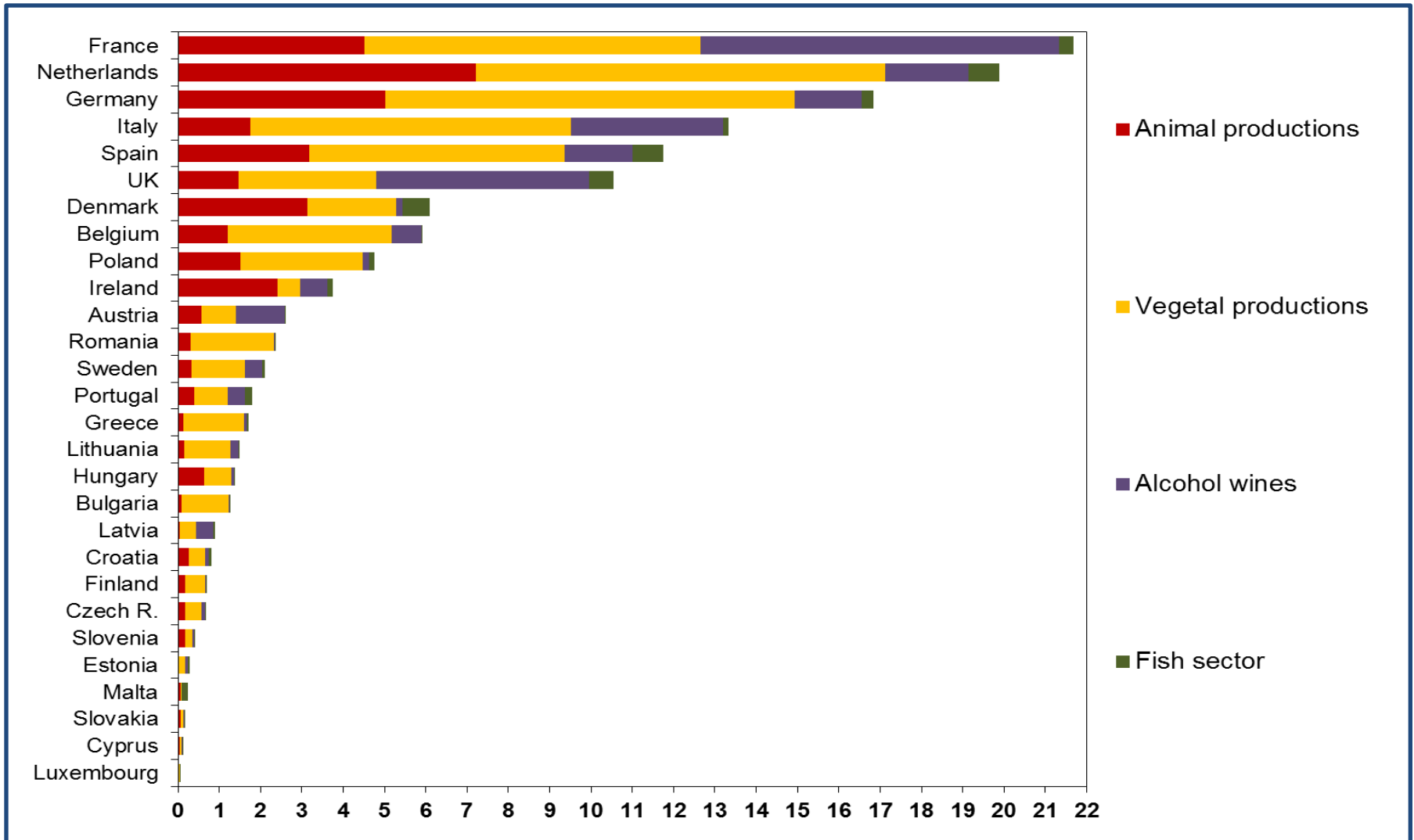
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EU Member states agri-food exports to non-EU markets in 2016

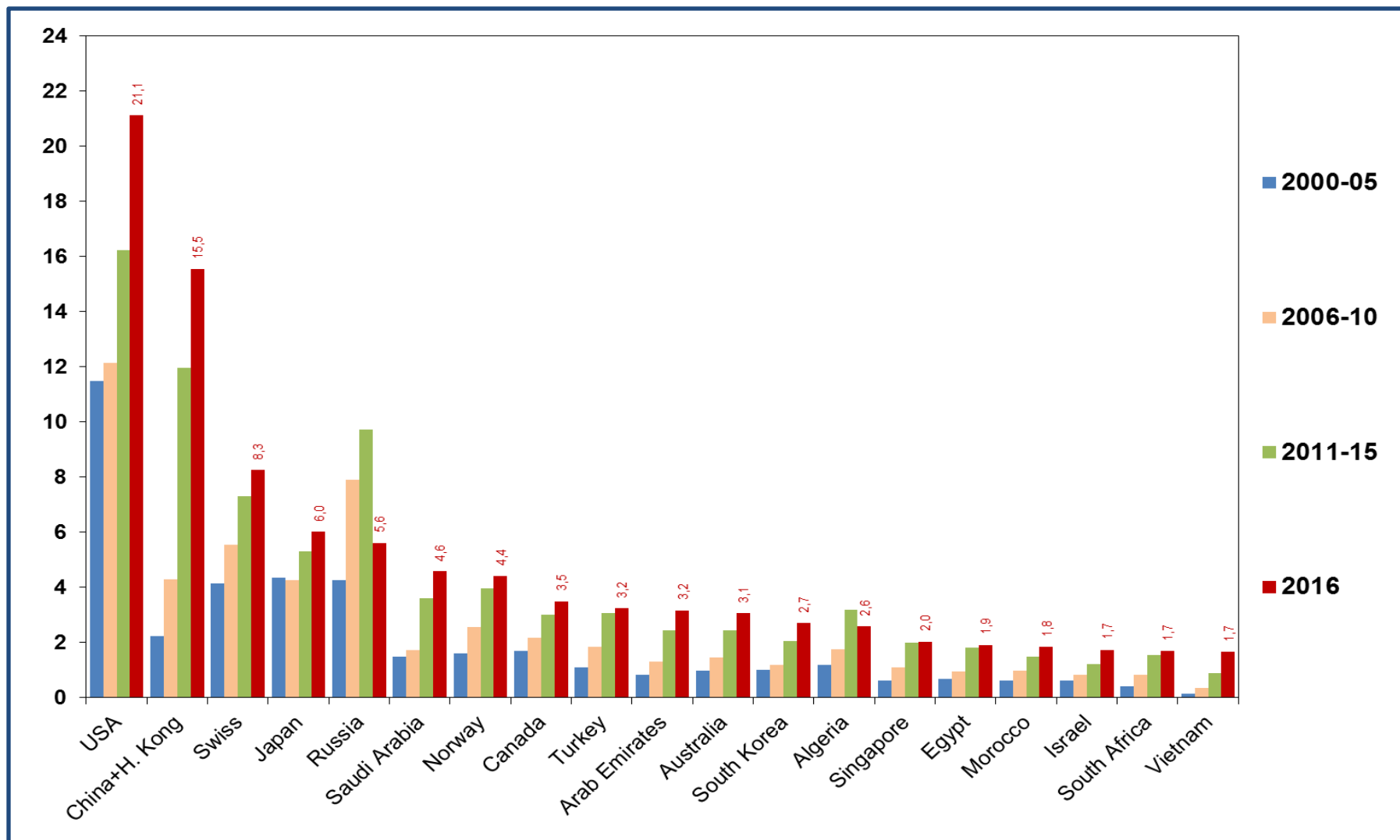
(According to the types of products, billion euros in 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

The top 20 EU customers in the agri-food sector

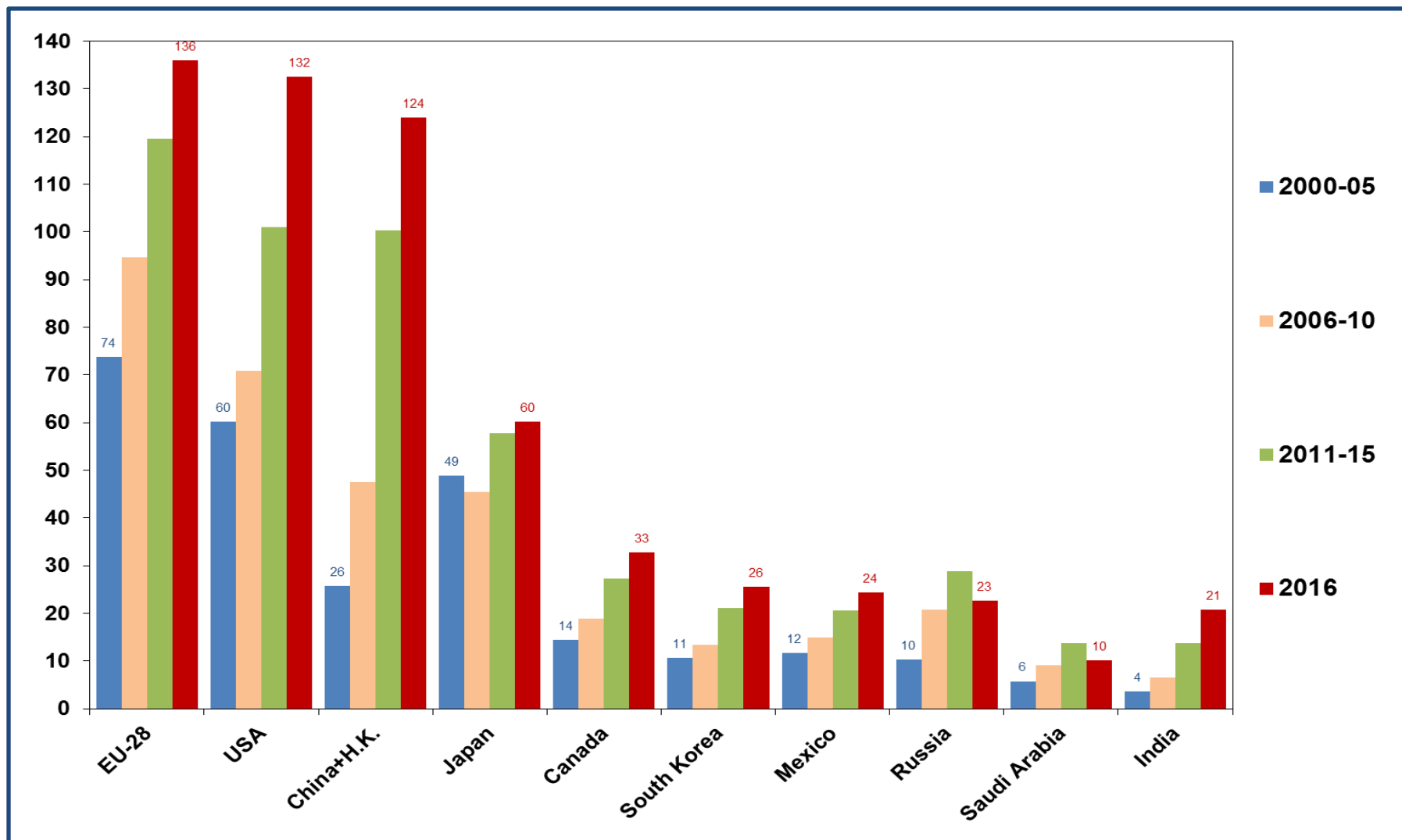
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Top 10 global importers in the agri-food sector

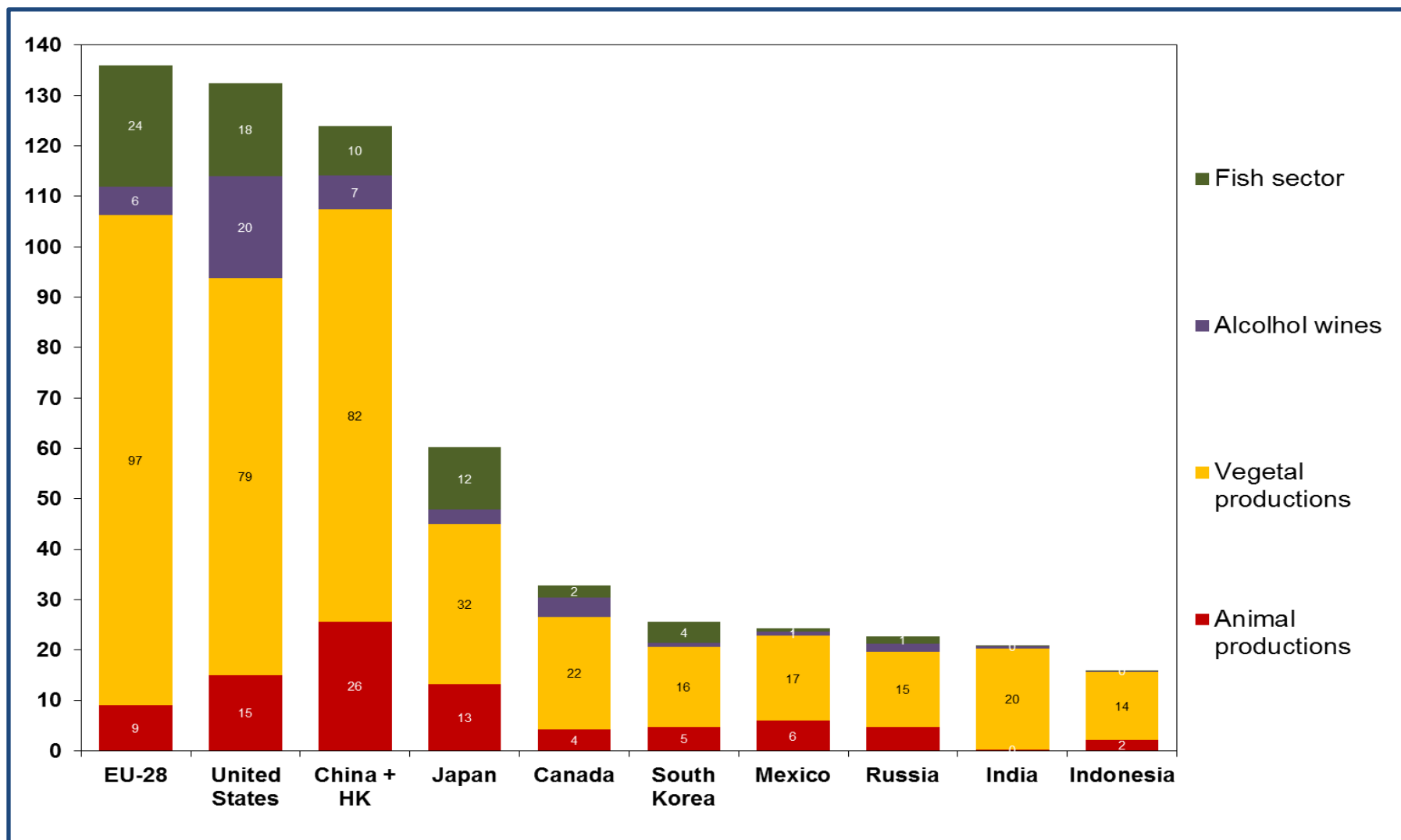
(Billion current euros, 2000 to 2016)



COMTRADE / INRA, SMART-LERECO

Top 10 global importers in the agri-food sector in 2016

(According to the types of products, billion euros)



COMTRADE / INRA, SMART-LERECO



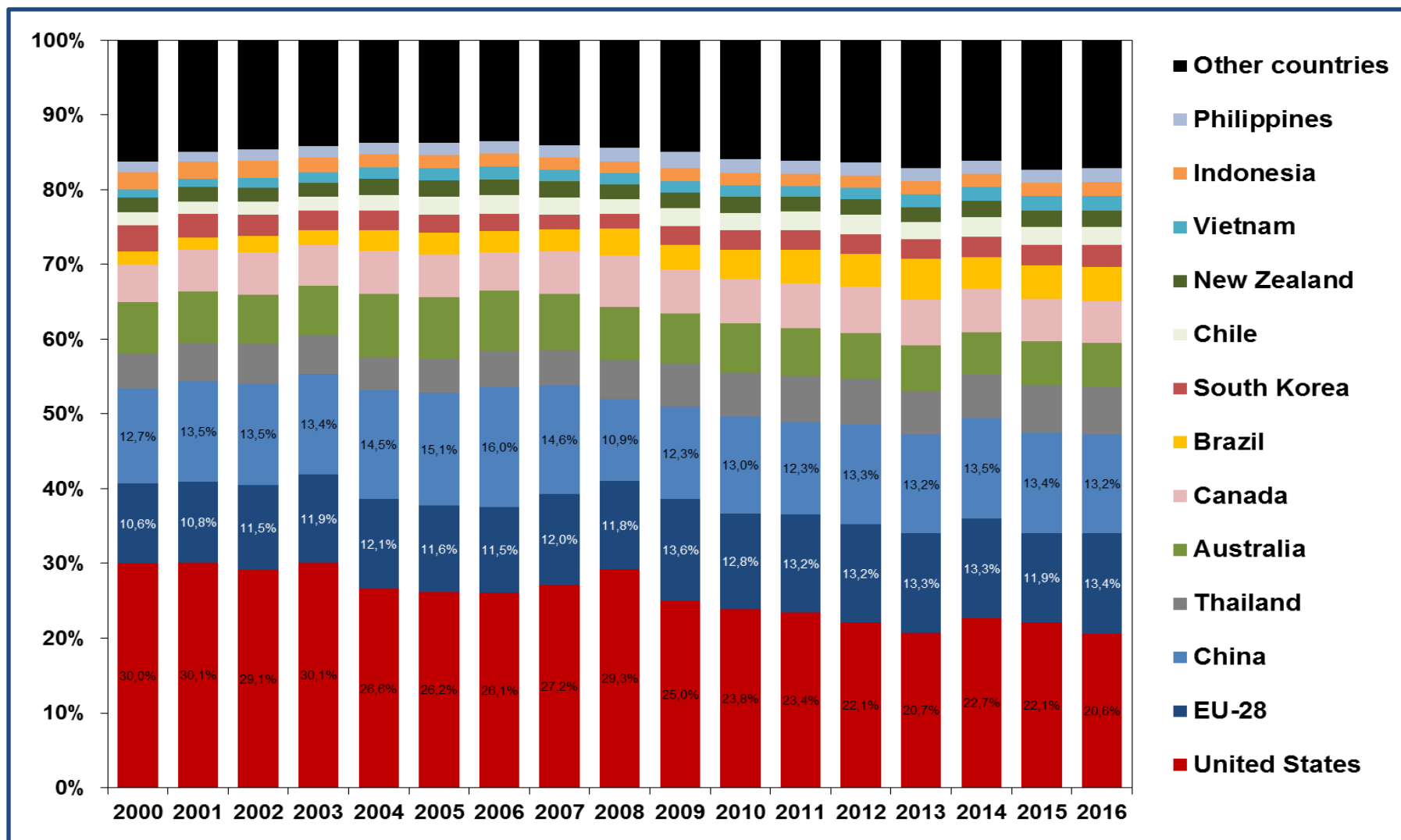
Tokyo, 16th January 2018

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The EU's place in Japan agri-food imports

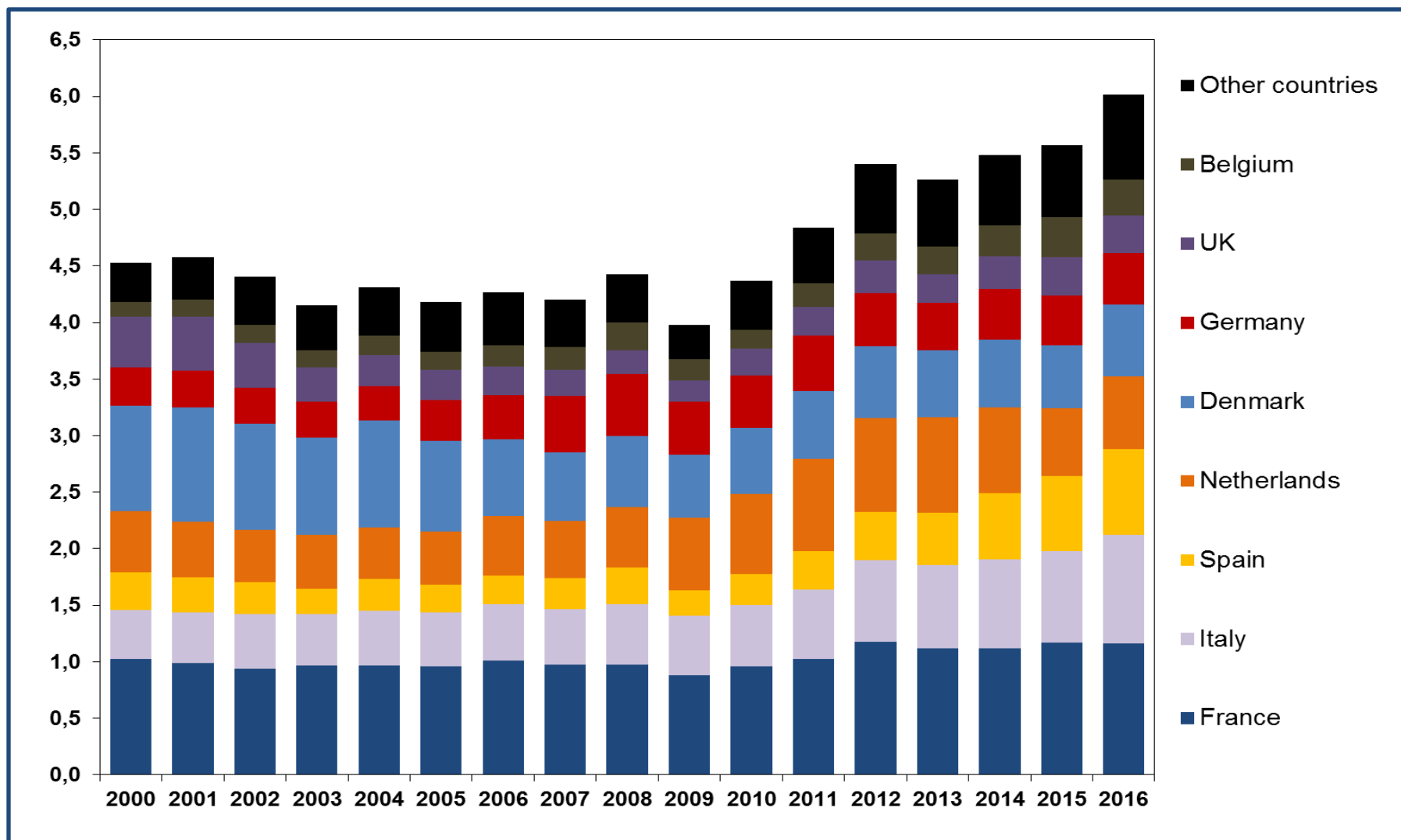
(%, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

The EU Member states exports of agri-food towards Japan

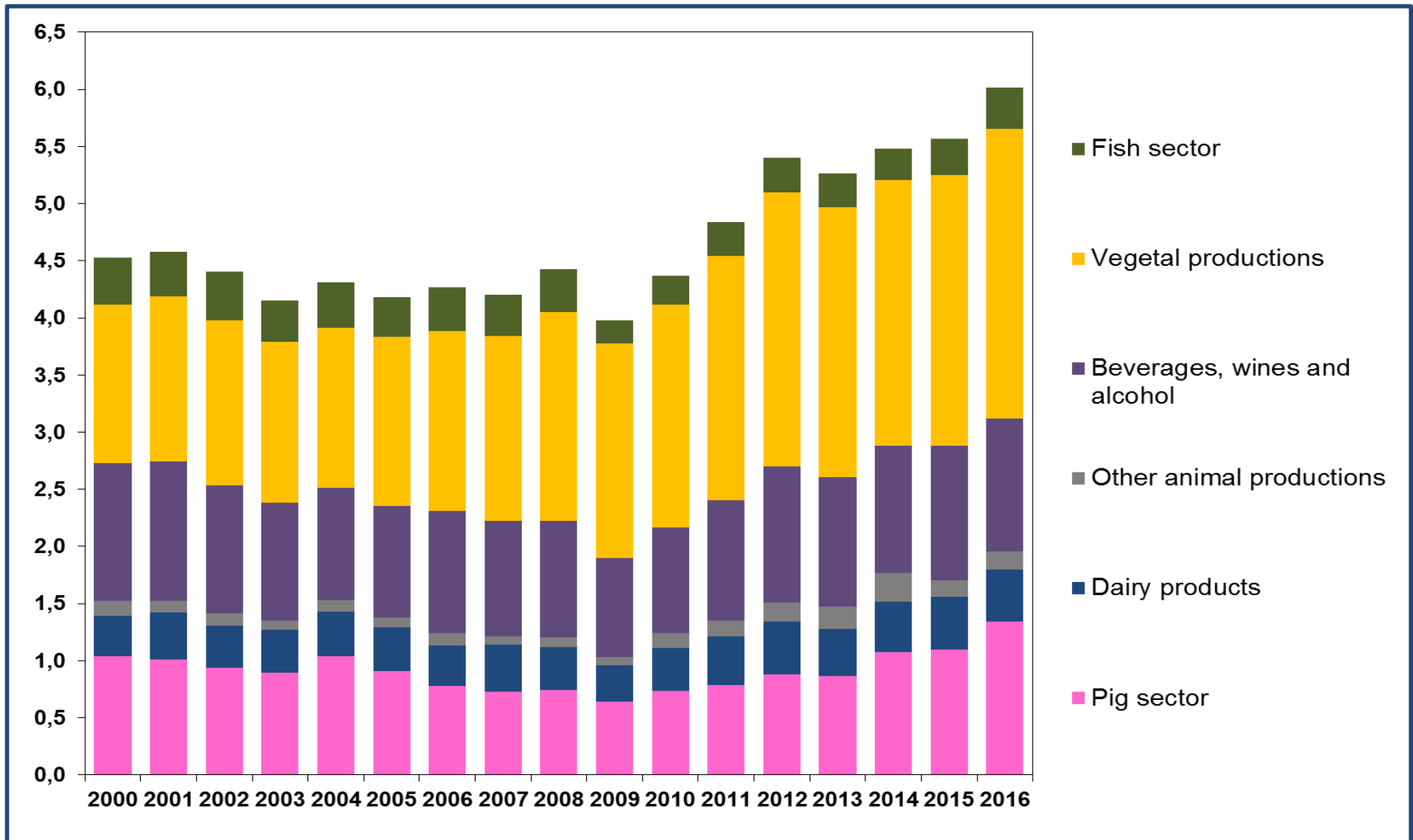
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

The EU exports of agri-food products towards Japan

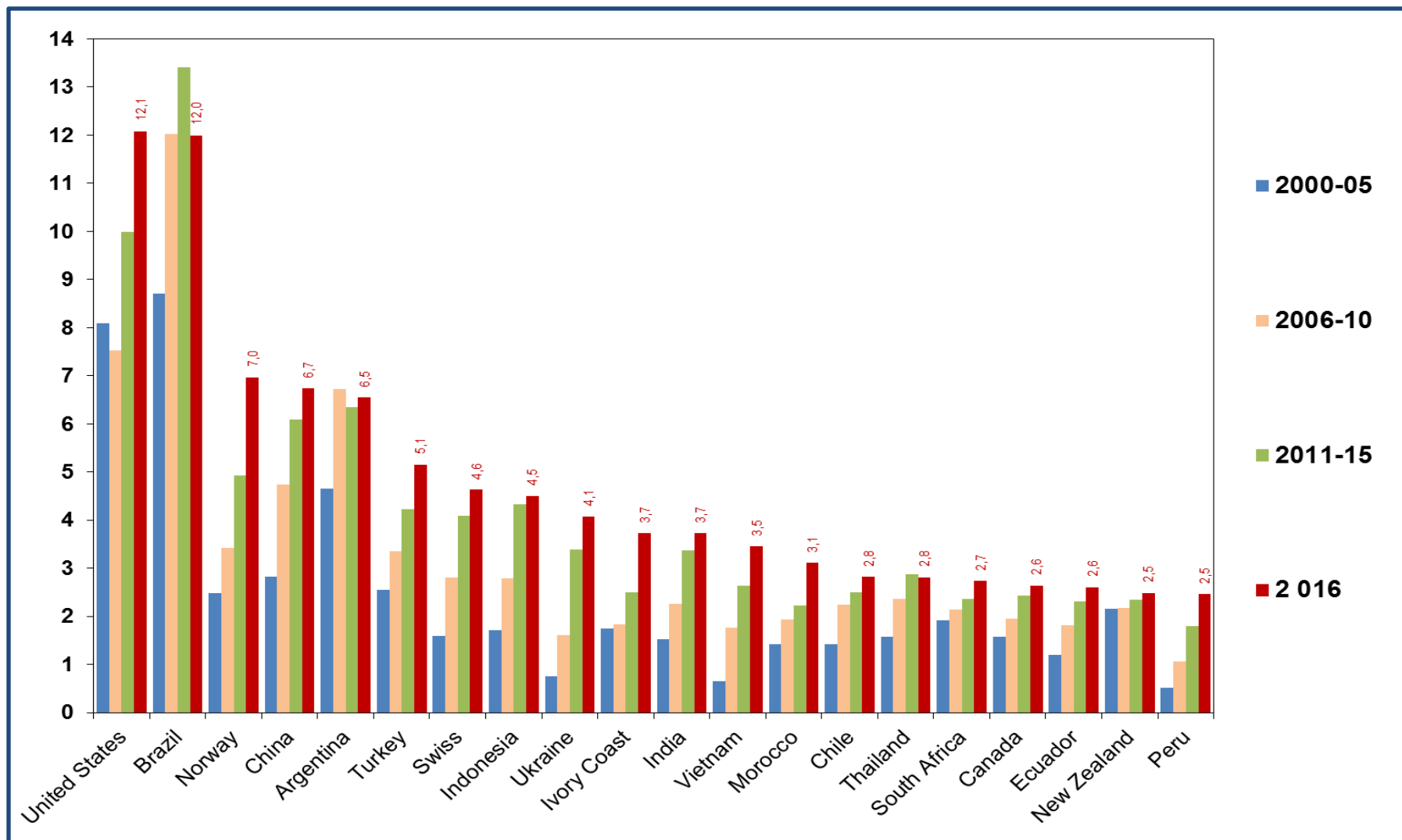
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

The top 20 EU suppliers in the agri-food sector

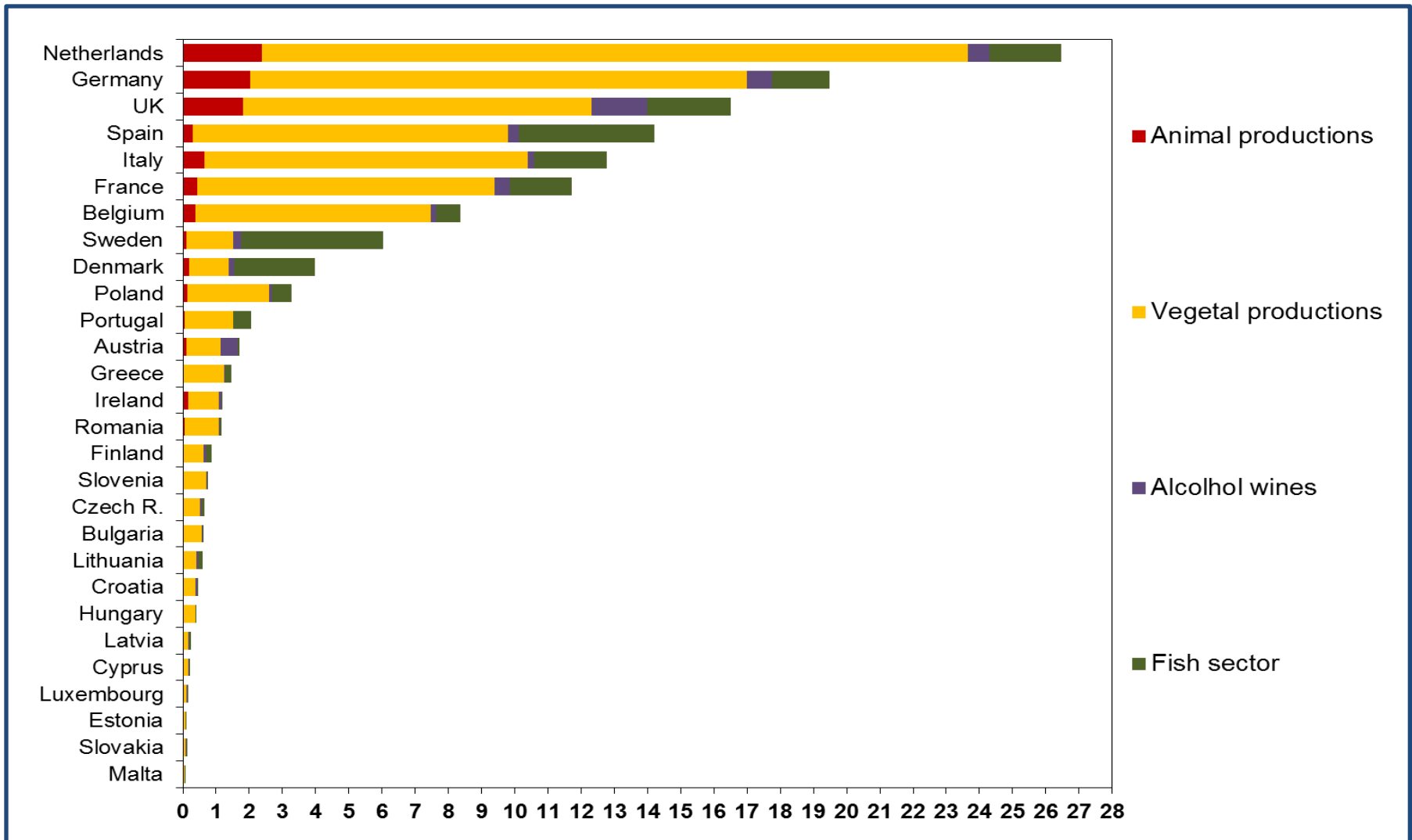
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU Member states agri-food imports from non-EU countries

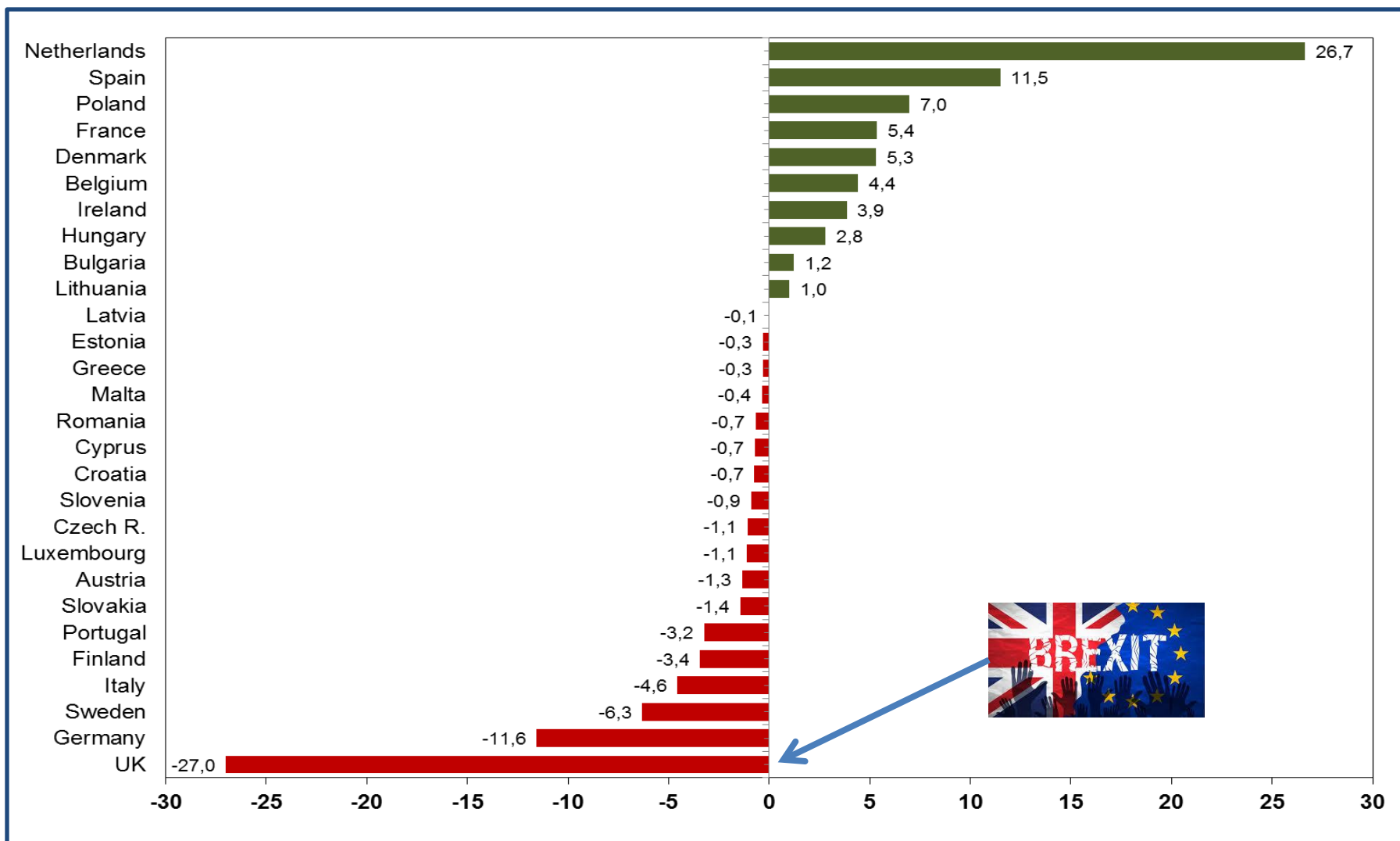
(According to the types of products, billion euros in 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Agri-food balance* of the EU Member States in 2016

(Billion euros, 2016)



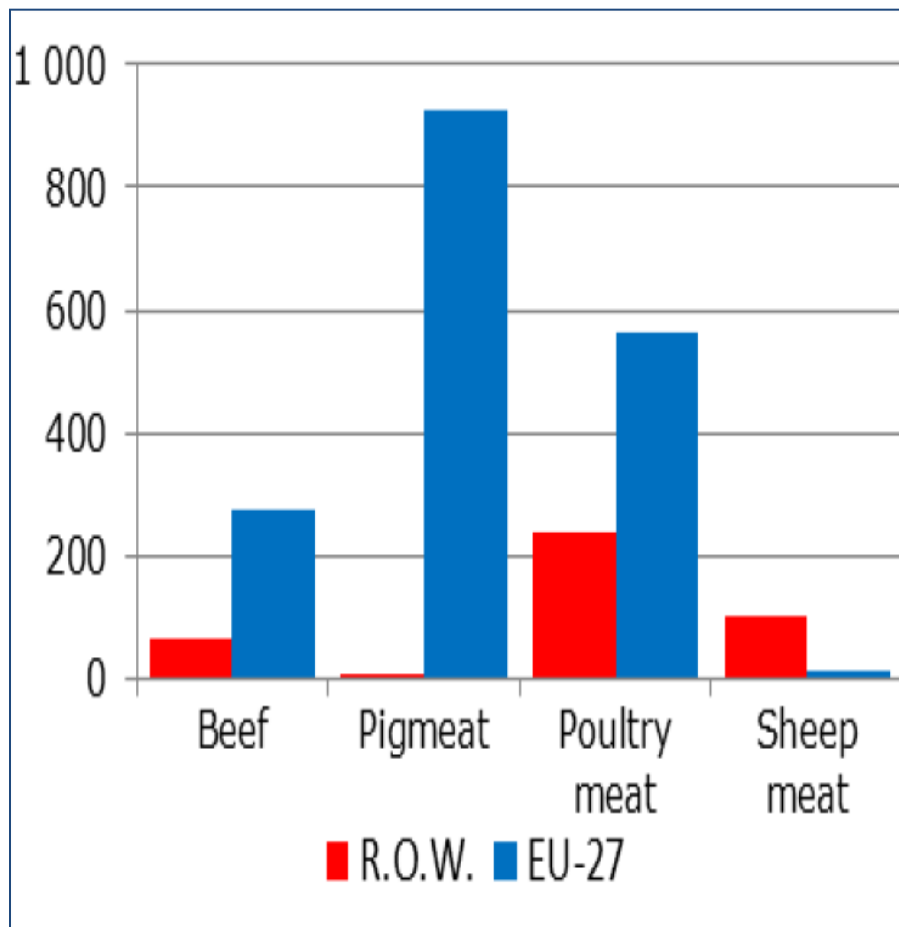
(*) Intra-EU and extra-EU

Eurostat - COMEXT / INRA, SMART-LERECO

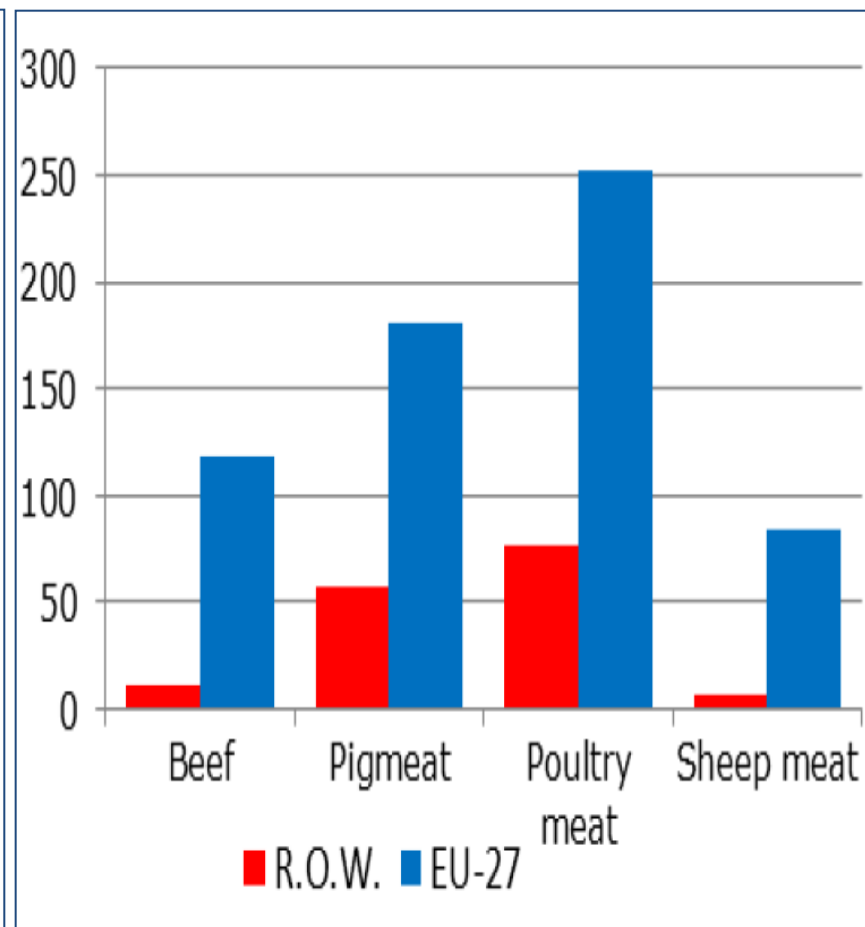
United Kingdom trade in meat productions

(Thousand tons, average 2014-2016)

UK imports by meat type
(average 2014-2016, 1 000 t)



UK exports by meat type
(average 2014-2016, 1 000 t)



European Commission - DGAGRI

A focus on the French agri-food sector: main challenges

→ Increasing intra-Community competition (Northern countries)

- Standards (social, environmental, etc.) less demanding than in France
- Poland increase its production (poultry and milk) ; Spain (pork and vegetables)
- Germany is geographically located in the heart of Europe

→ Only external markets are really increasing

- Russia and Ukraine develop their export of cereals
- The rise of food imports is strong especially in the developing countries

→ How to preserve or develop our competitiveness?

- Reduce production costs throughout the agrifood chain
- Make imitation difficult (technology, quality, environmental standards...)
- Use of non-transferable resources (Geographical Indications)
- Innovate and reinvest margins to ensure differentiation

2- Animal productions in the EU

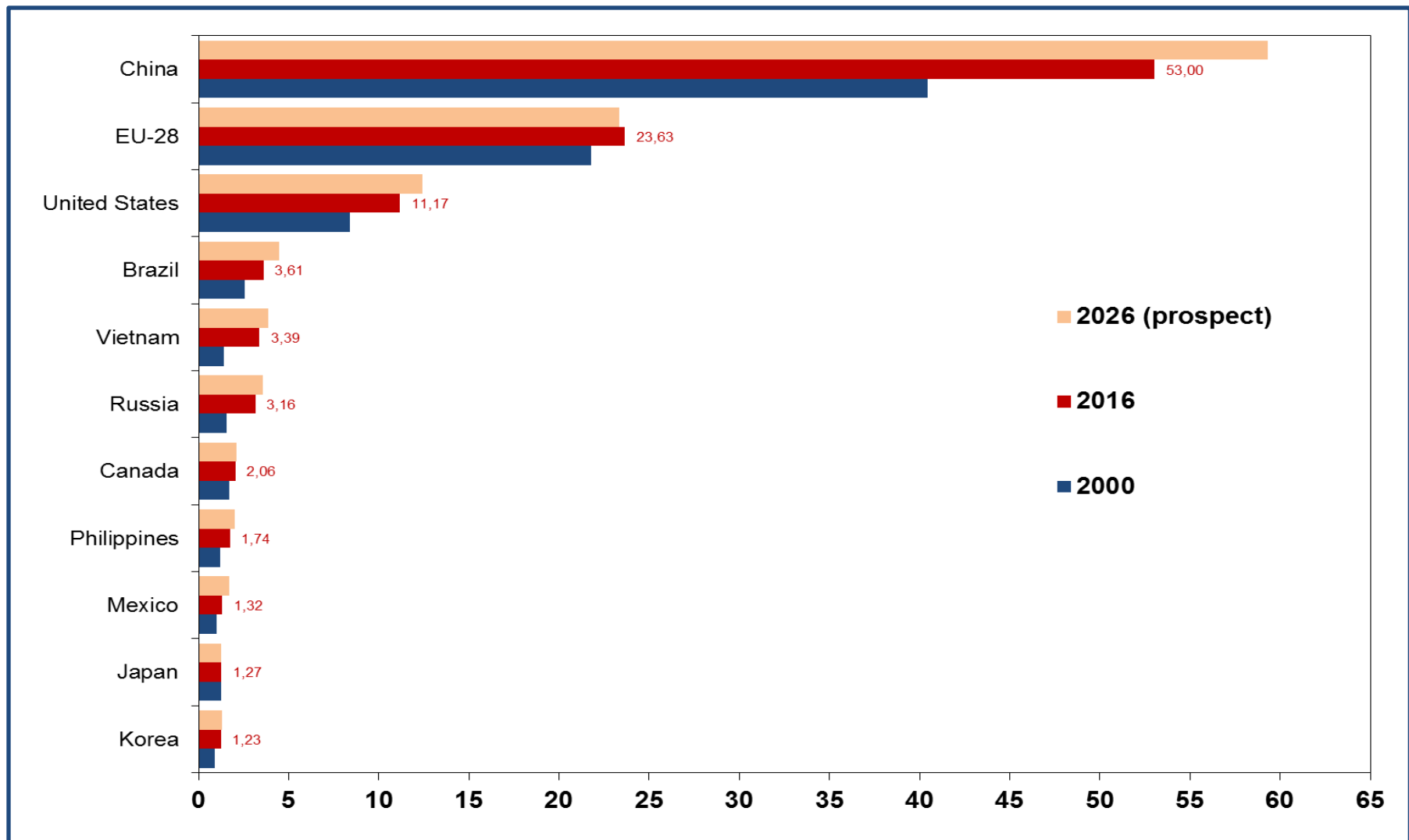


2-1- Pig sector in the EU



World pig meat production: main countries

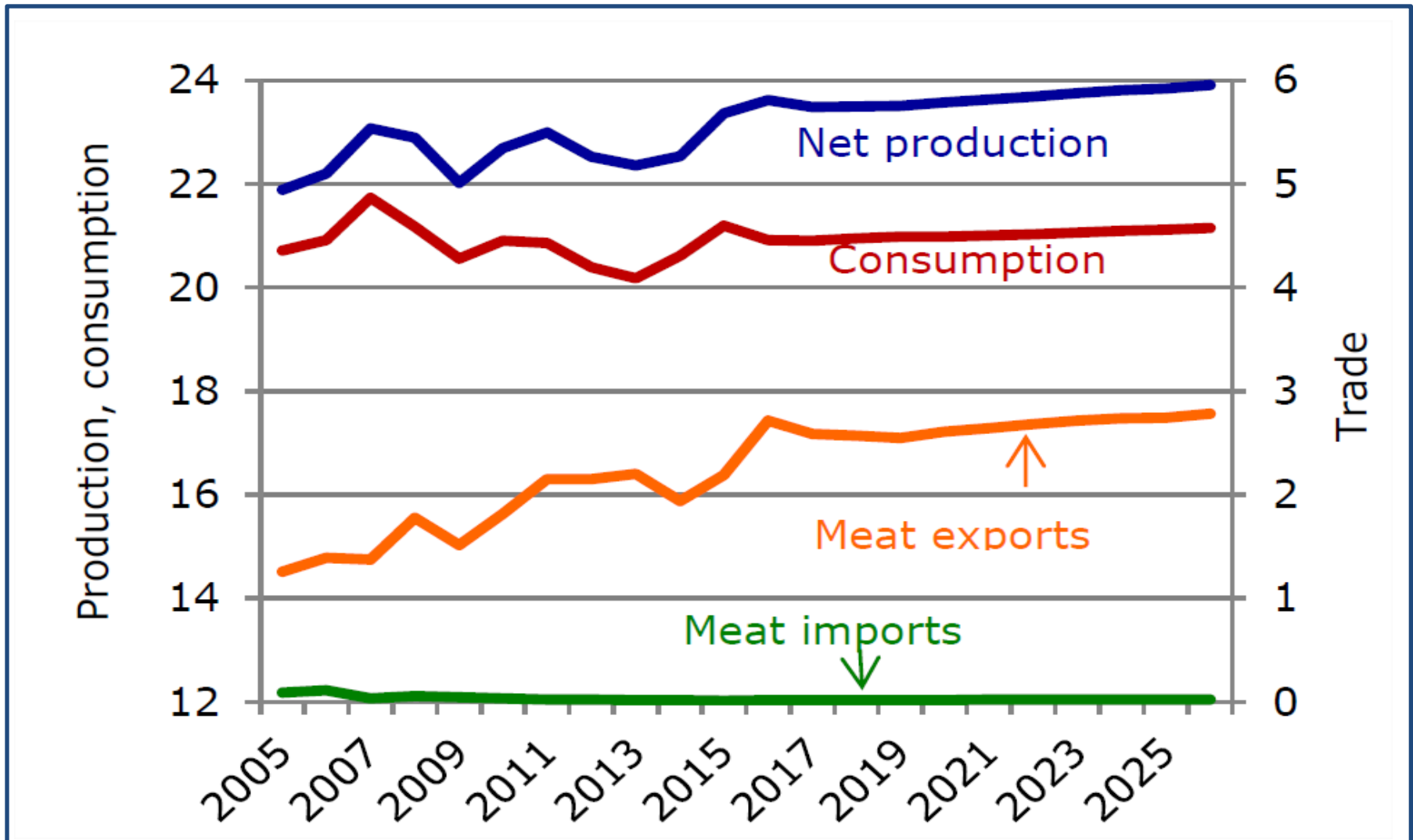
(Million tons, 2000, 2016 and prospect 2026)



OECD-FAO agricultural outlook 2017-2026

EU pig meat sector

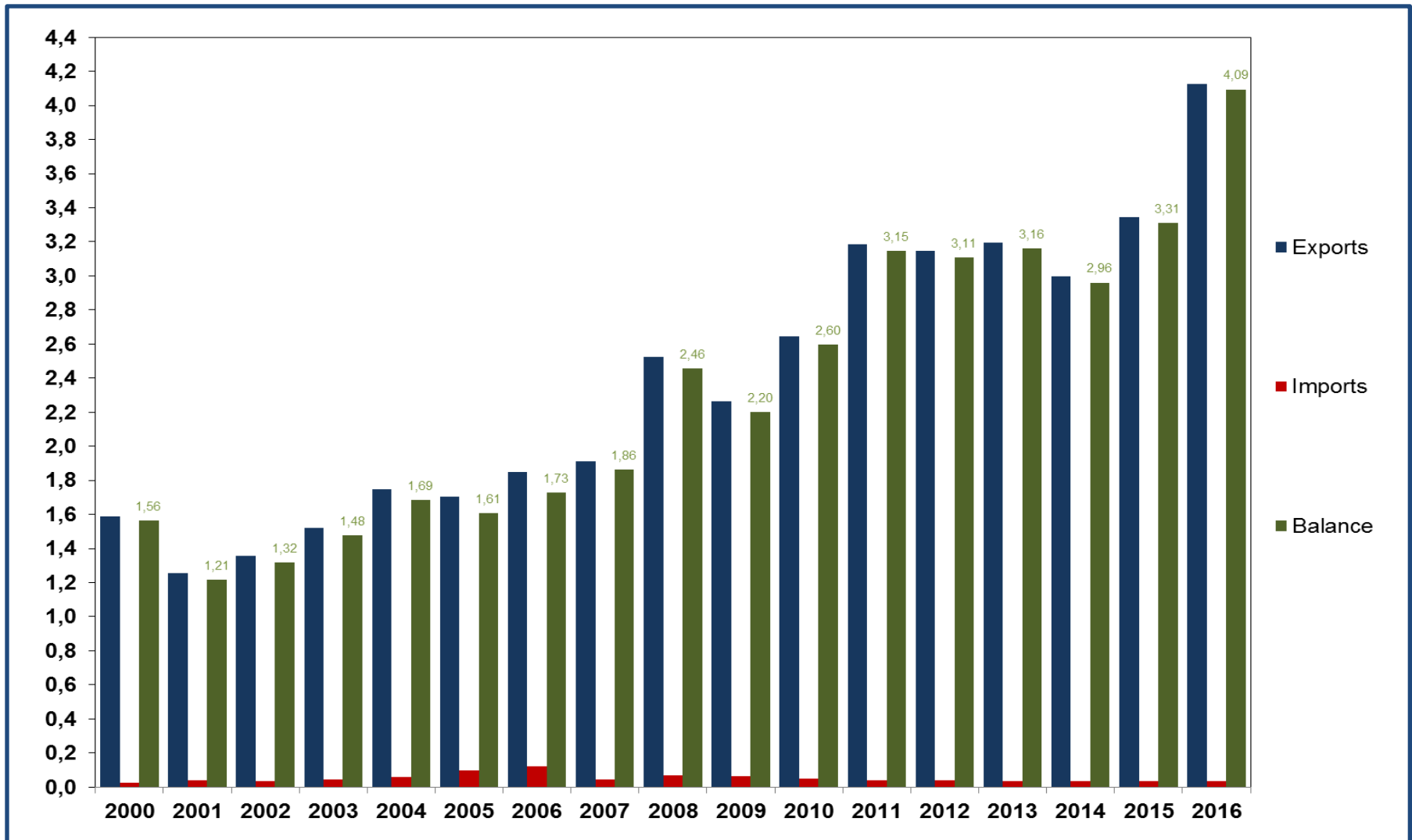
(Million tons, 2005, 2016 and prospect 2026)



European Commission – Prospects for agricultural markets 2016-2026

EU export, import and trade balance for pig meat

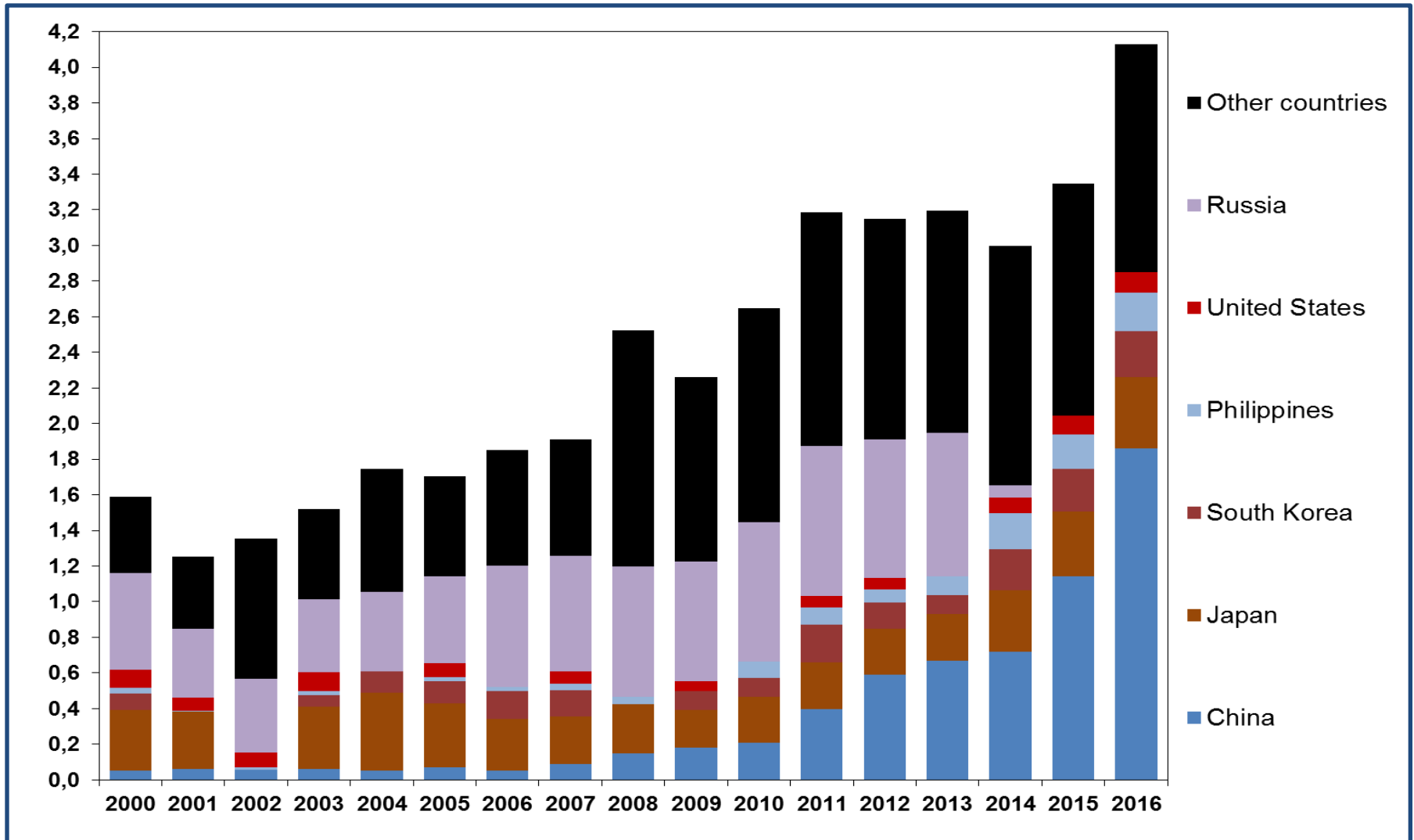
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU export of pig meat: main customers

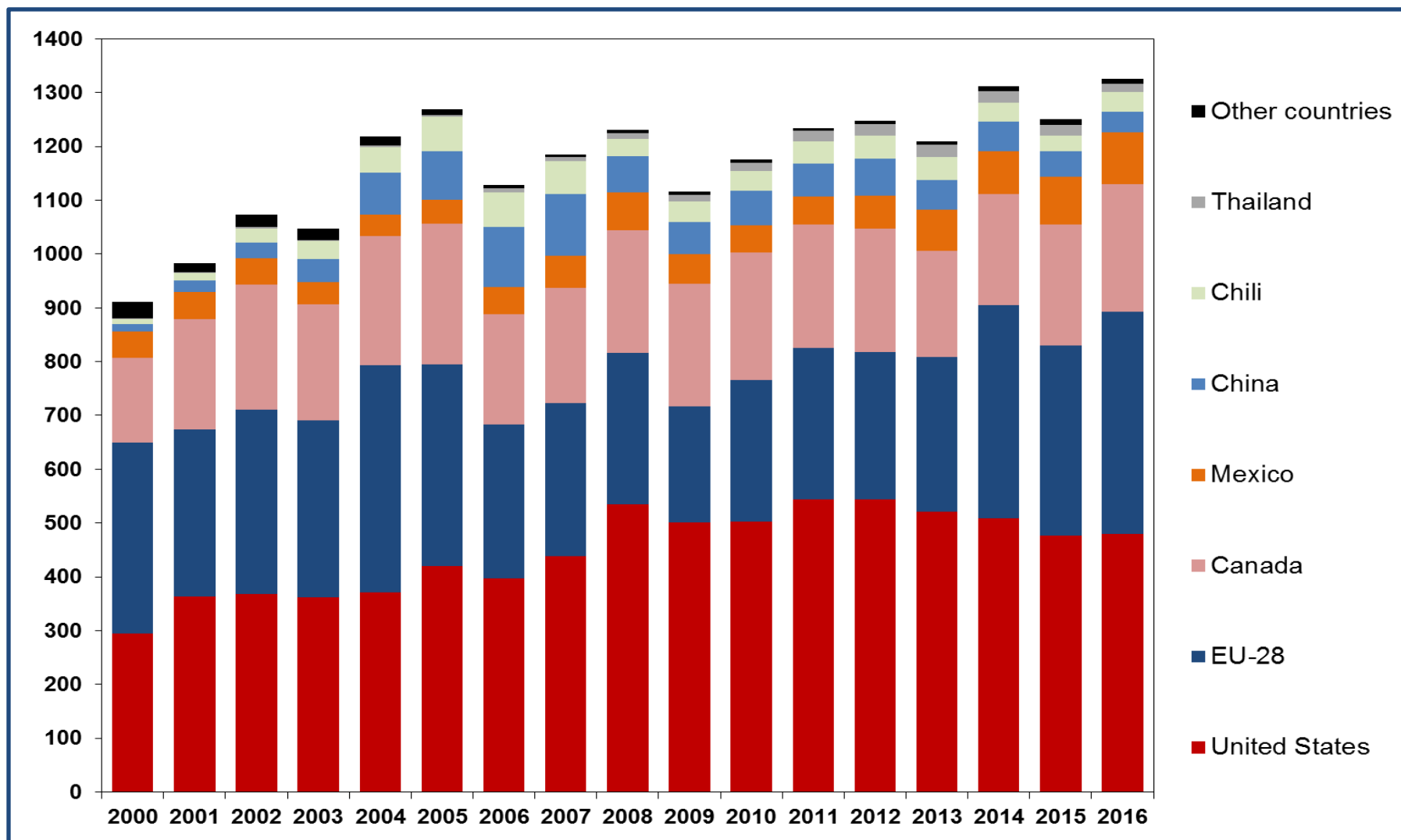
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Japan import of pig meat: main suppliers

(Thousand tons of carcass equivalent, 2000 to 2016)

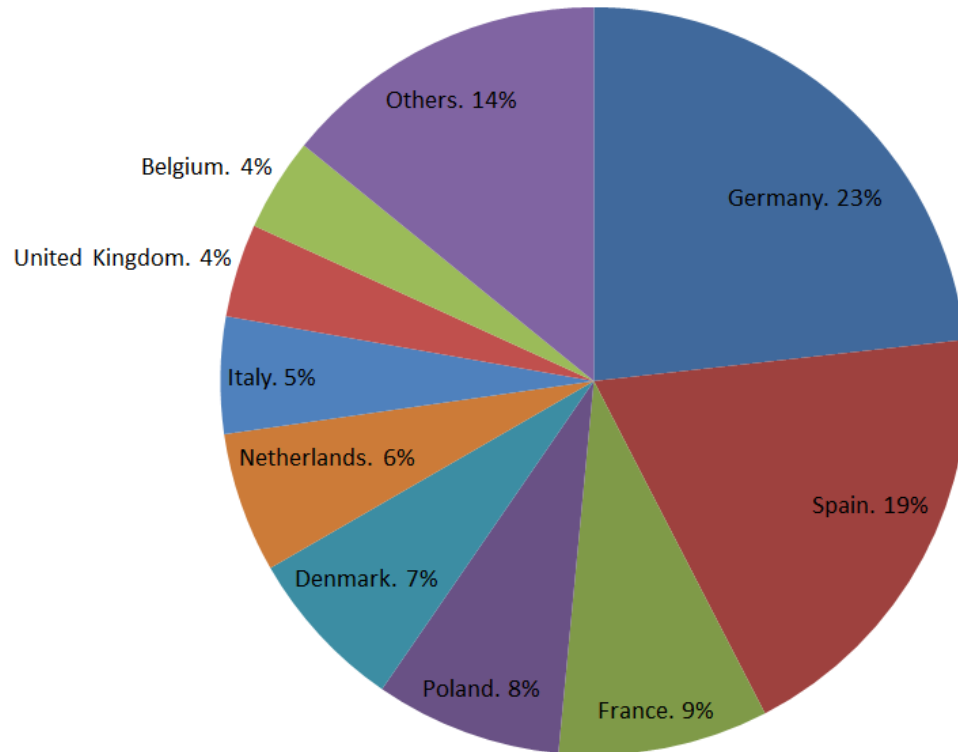


2016 : Denmark (150 300 tce) ; Spain (108 500) ; Netherlands (39 600) ; Germany (27 300) ; Hungary (26 800) ; France (16 000)

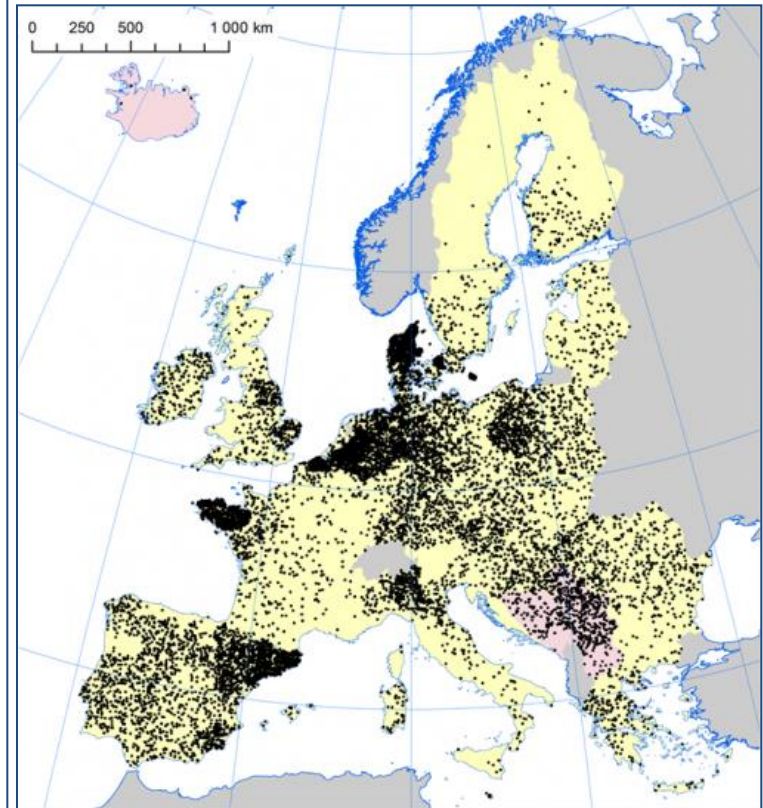
Eurostat - COMTRADE / INRA, SMART-LERECO

EU pig meat production according to Member states

% of EU-28



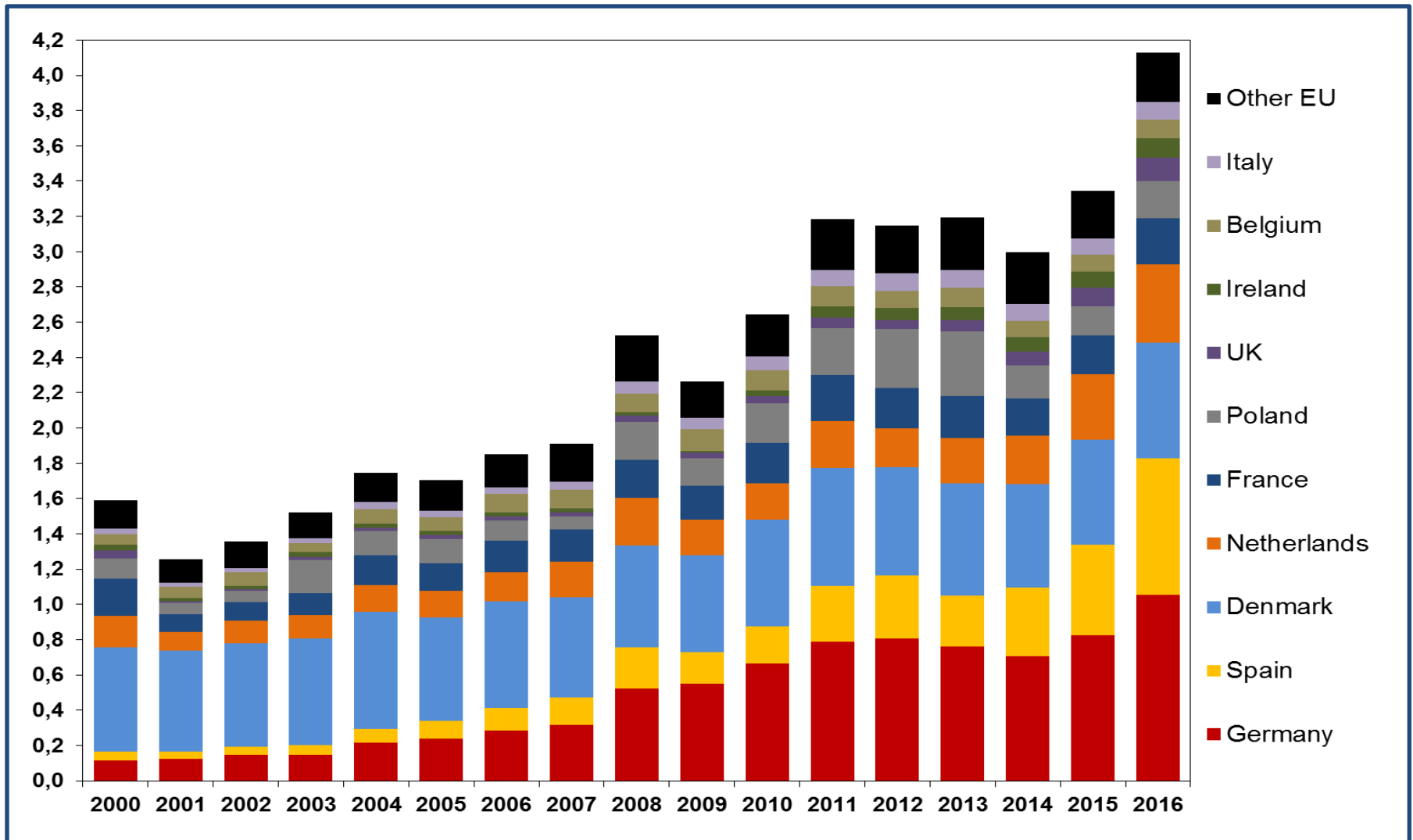
Number of sows



OECD-FAO agricultural outlook 2017-2026

EU Member states export of pig meat towards non EU countries

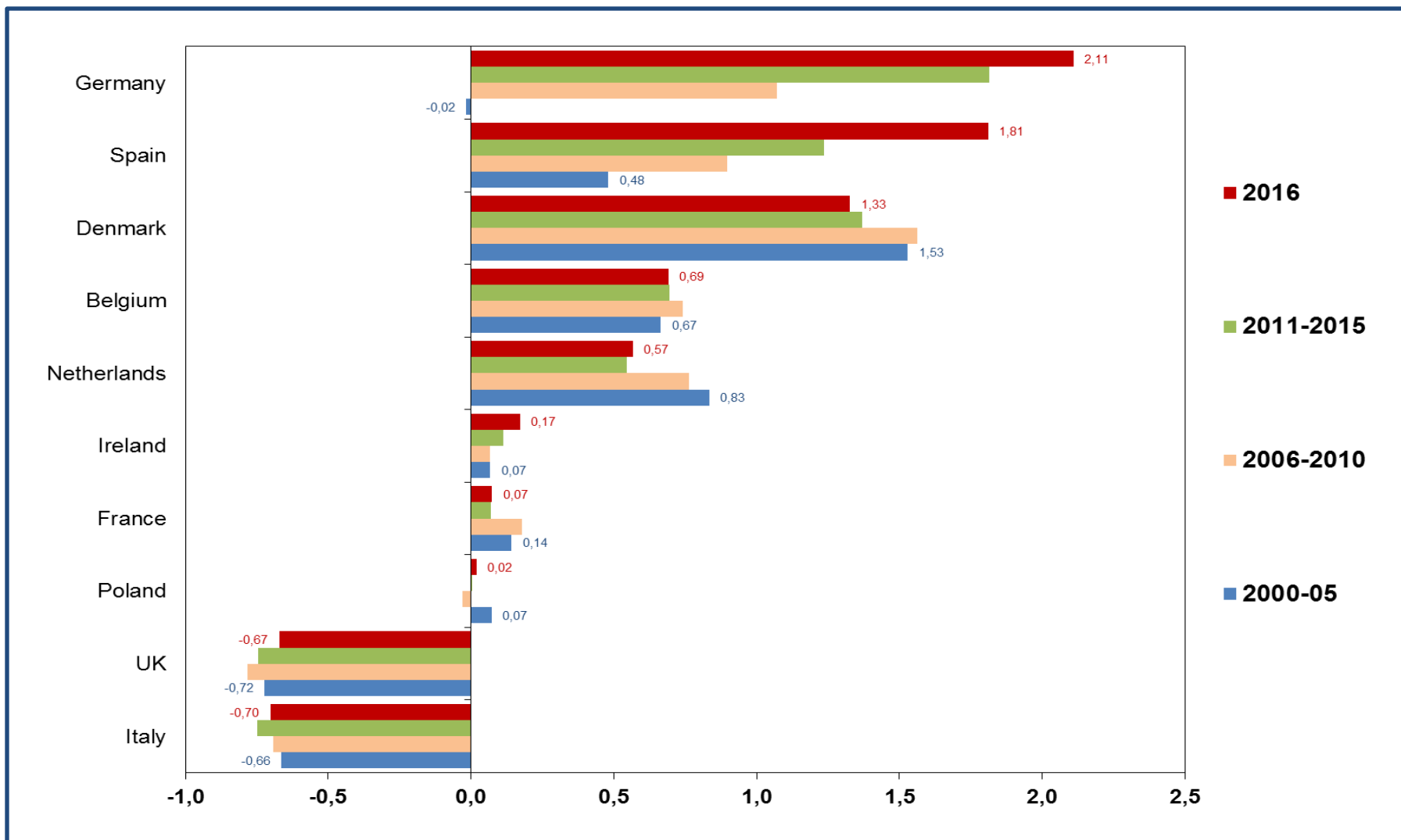
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Trade balance* for pig meat in some EU member states

(Million tons of carcass equivalent, 2000 to 2016)



(*) Intra-EU and extra-EU

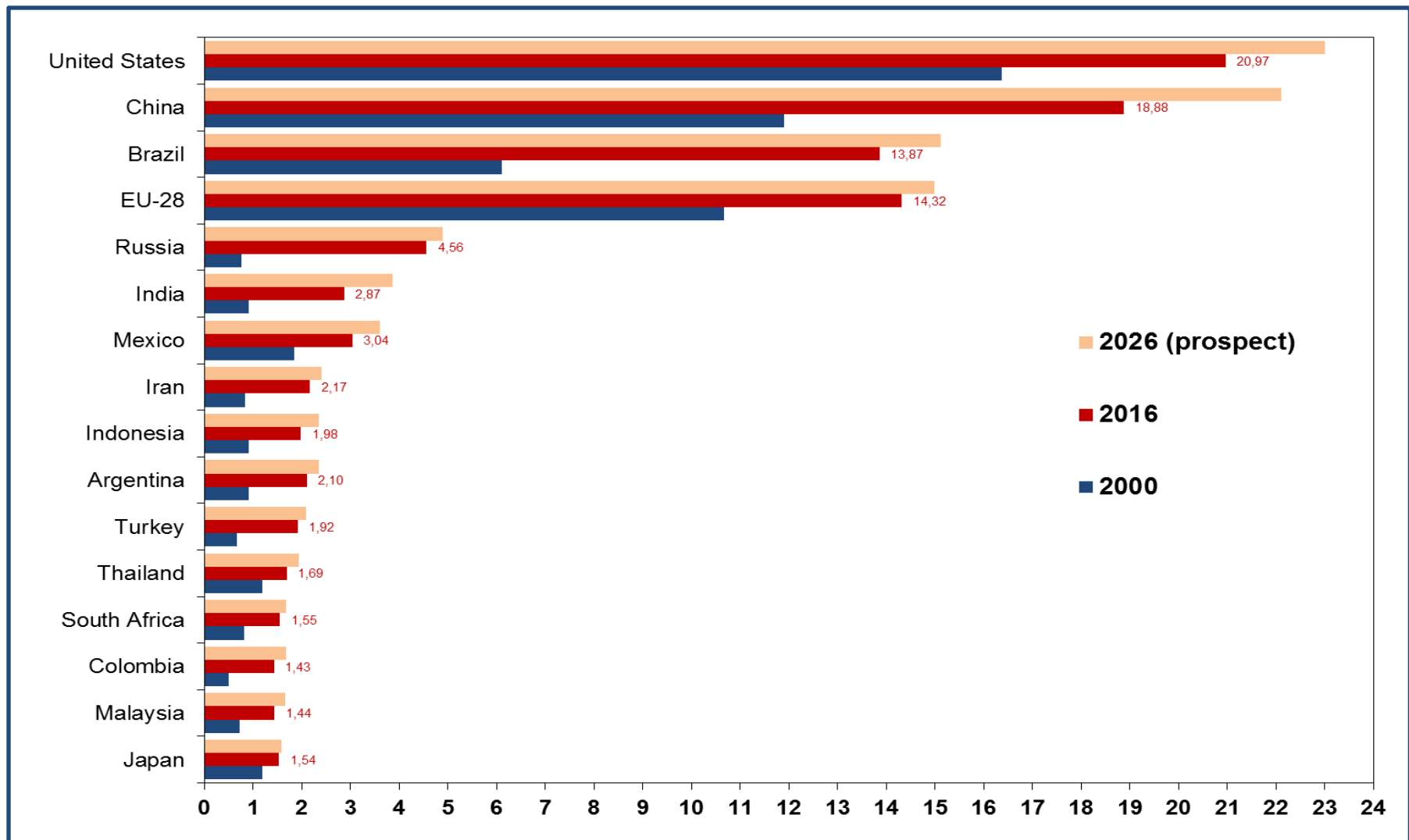
Eurostat - COMEXT / INRA, SMART-LERECO

2-2- Poultry sector in the EU



World poultry meat production: main countries

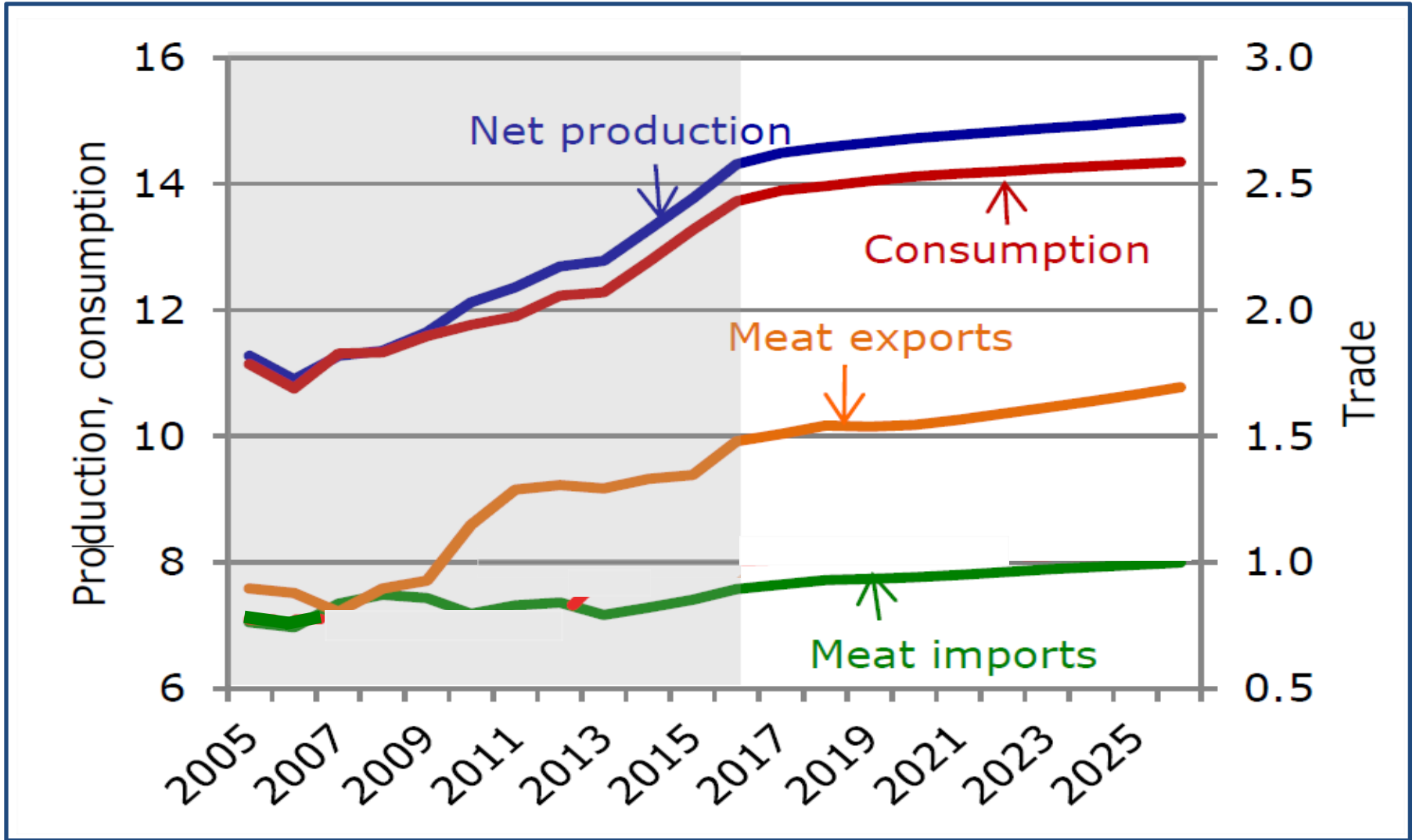
(Million tons, 2000, 2016 and prospect 2026)



OECD-FAO agricultural outlook 2017-2026

EU poultry meat sector

(Million tons, 2000 to 2016)



A tariff-rate quota (TRQ)

European Commission – Prospects for agricultural markets 2016-2026

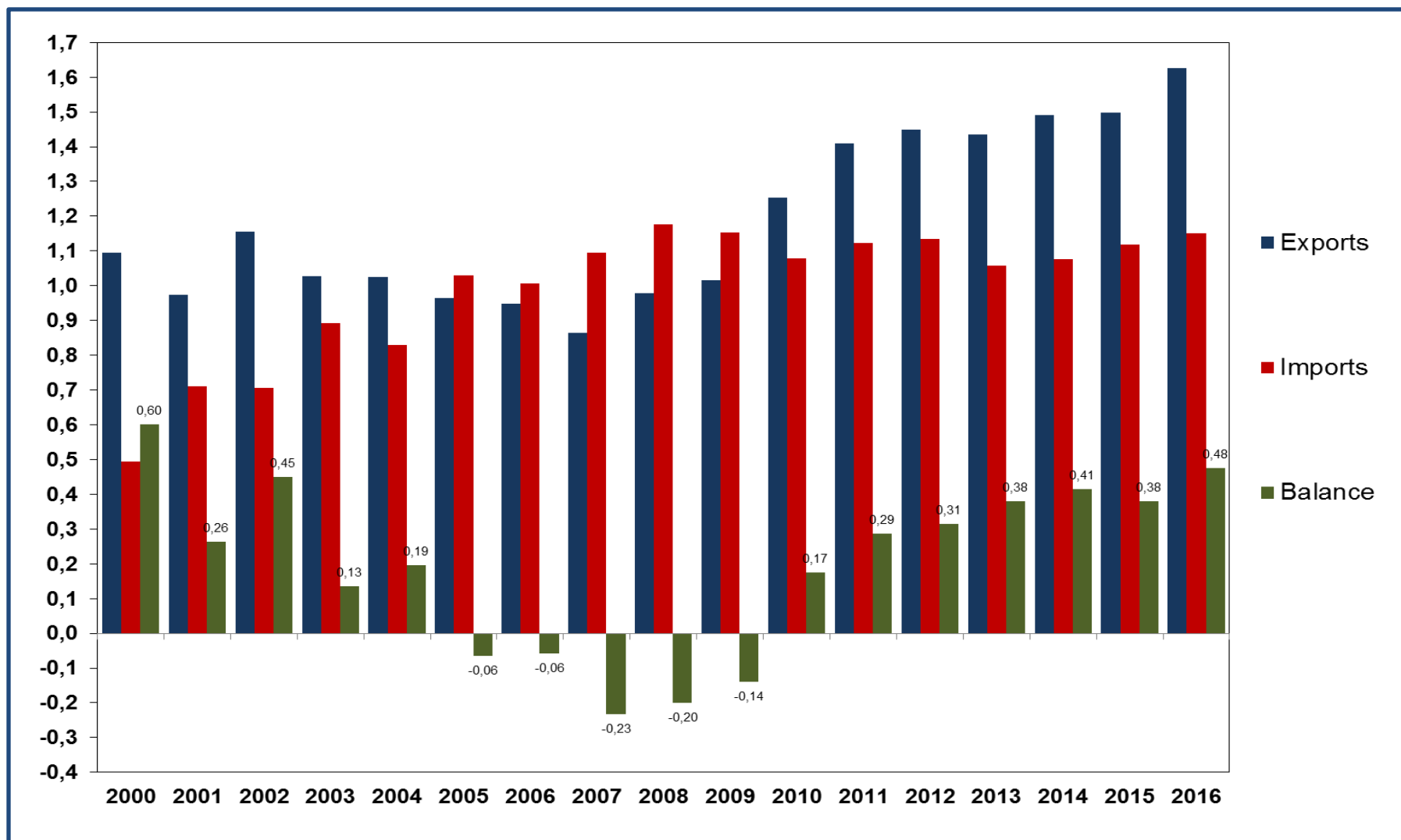


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EU export, import and trade balance for poultry meat

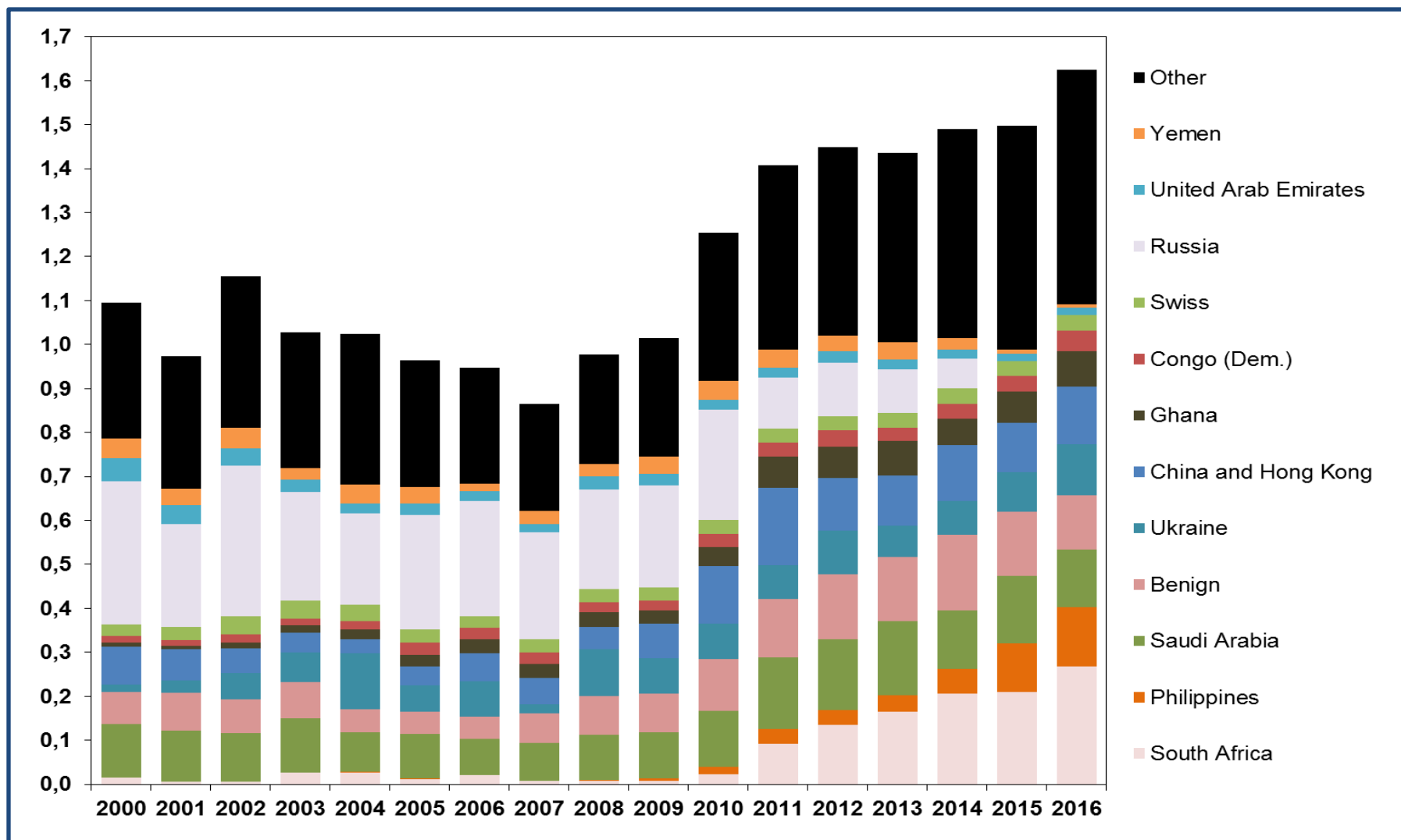
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU export of poultry meat: main customers

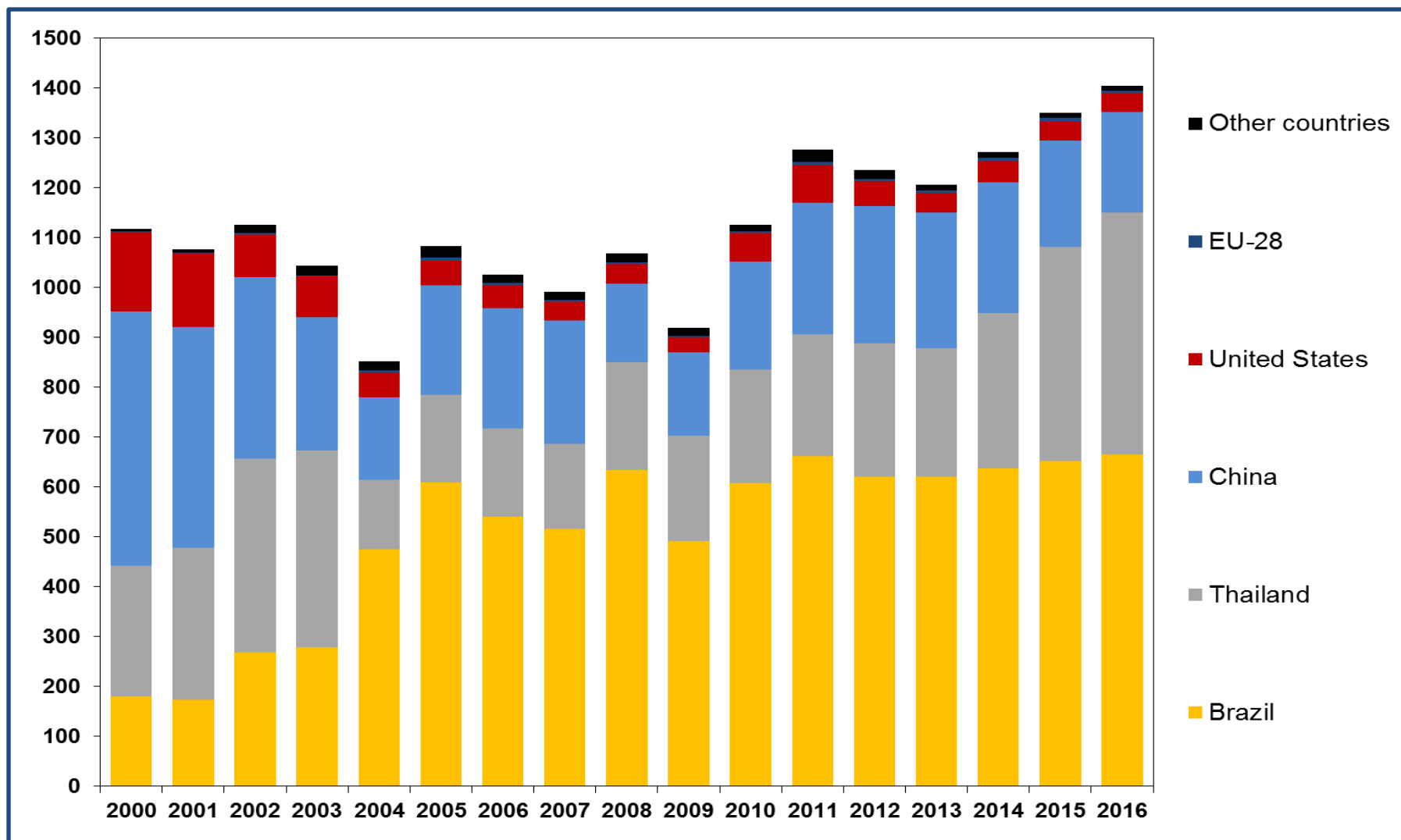
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Japan import of poultry meat: main suppliers

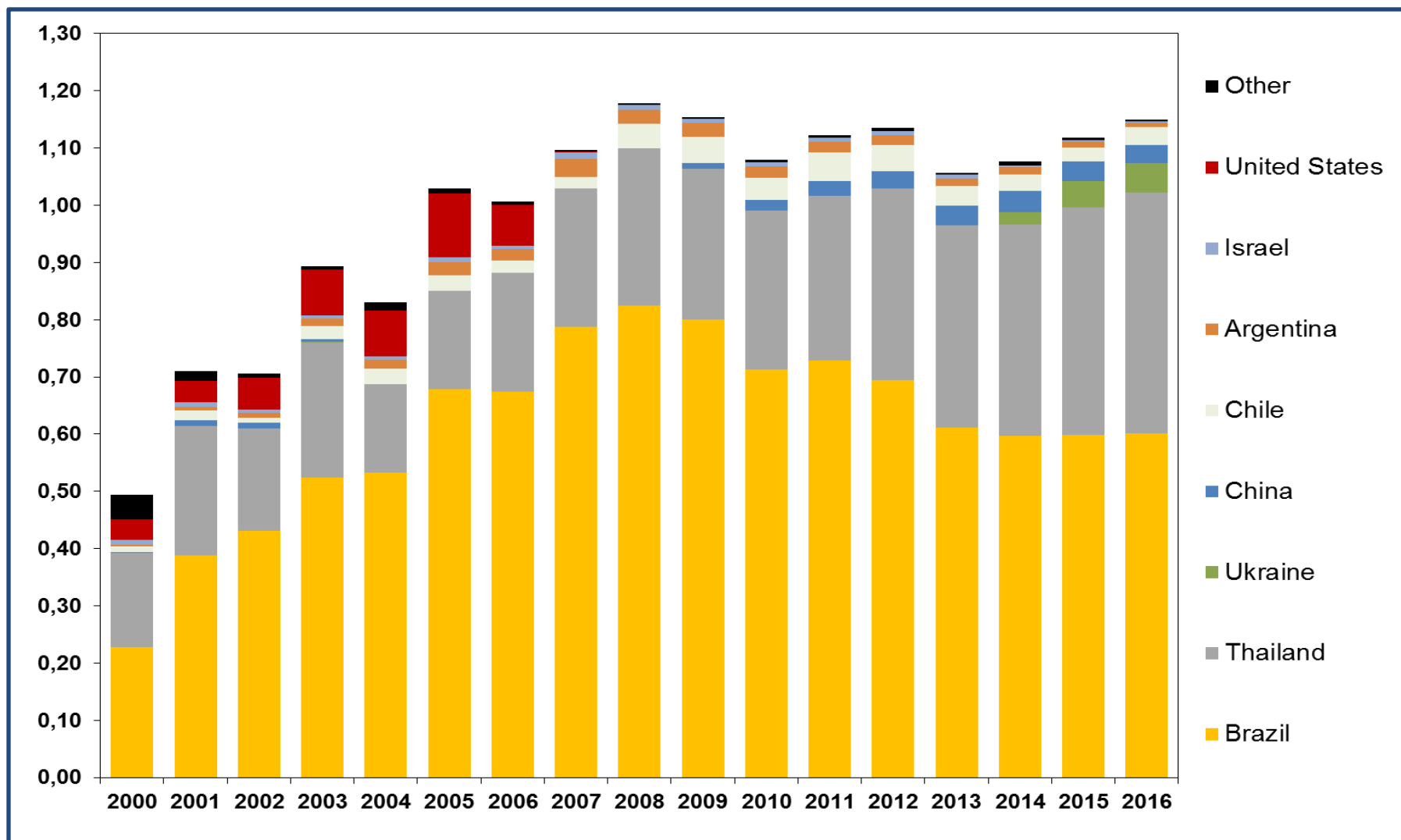
(Thousand tons of carcass equivalent, 2000 to 2016)



Eurostat - COMTRADE / INRA, SMART-LERECO

EU import of poultry meat: main suppliers

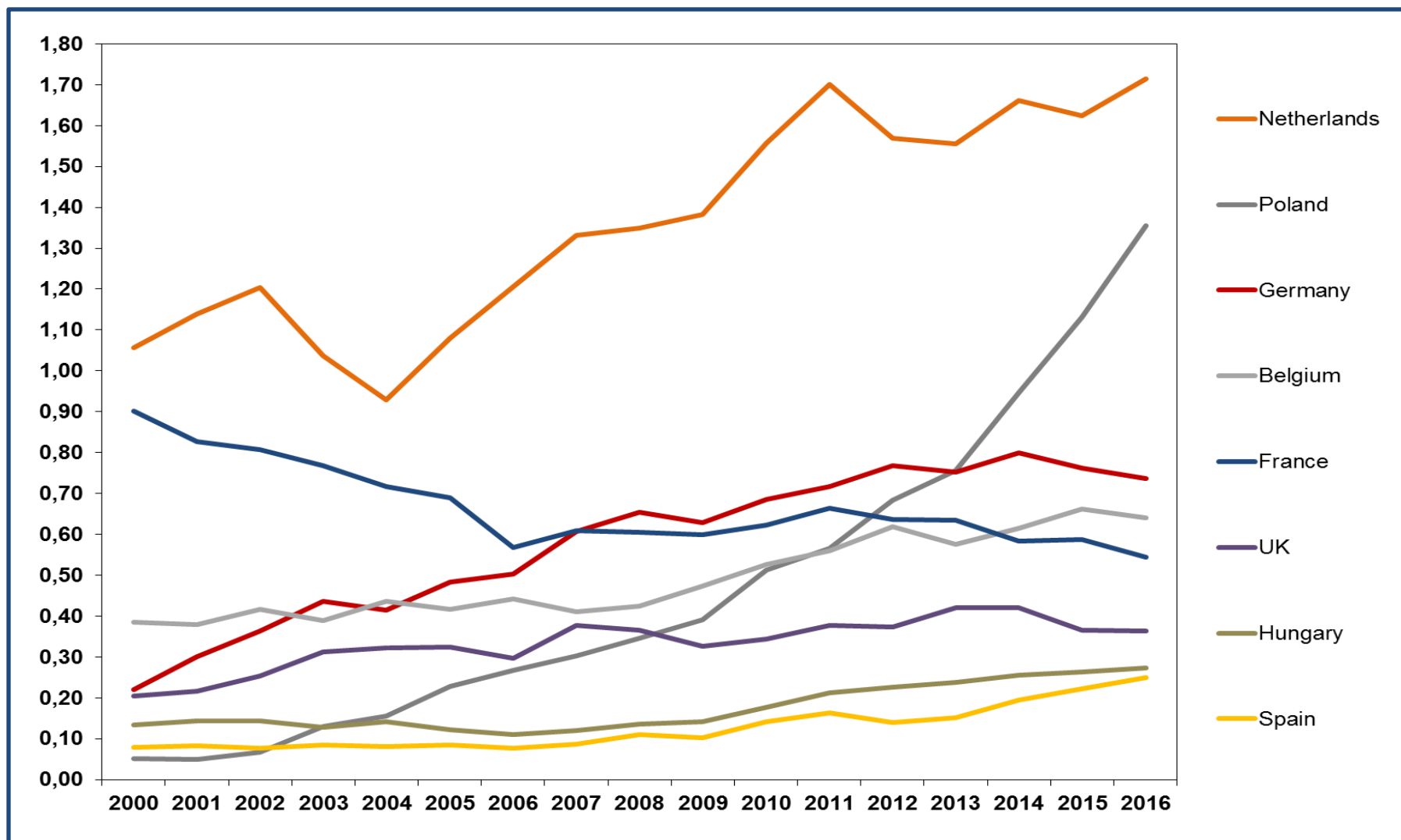
(Million tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU member states poultry production

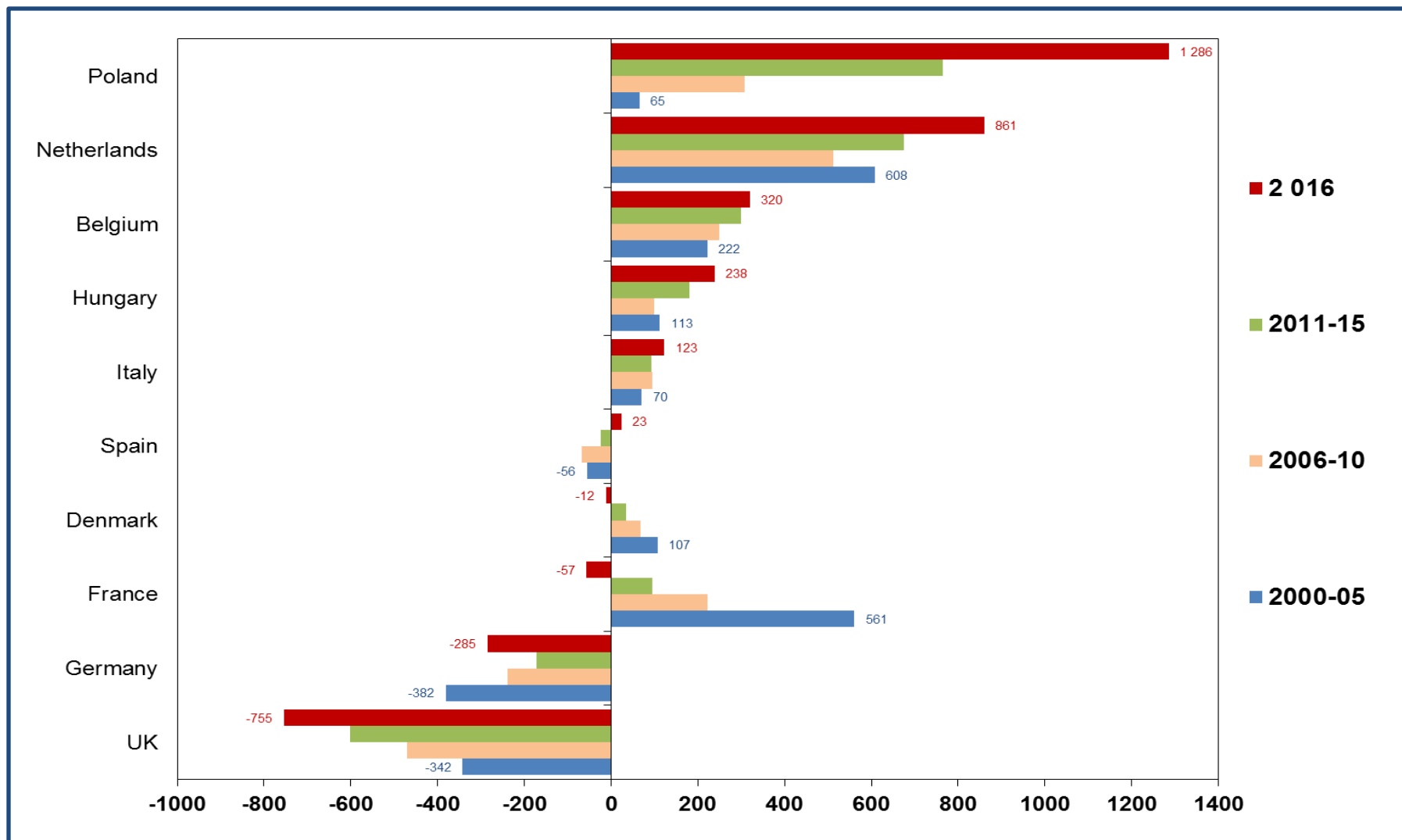
(Million tons of carcass equivalent, 2000 to 2016)



European Commission - Eurostat

Trade balance* for poultry meat in some EU member states

(Thousand tons of carcass equivalent, 2000 to 2016)



(*) Intra-EU and extra-EU

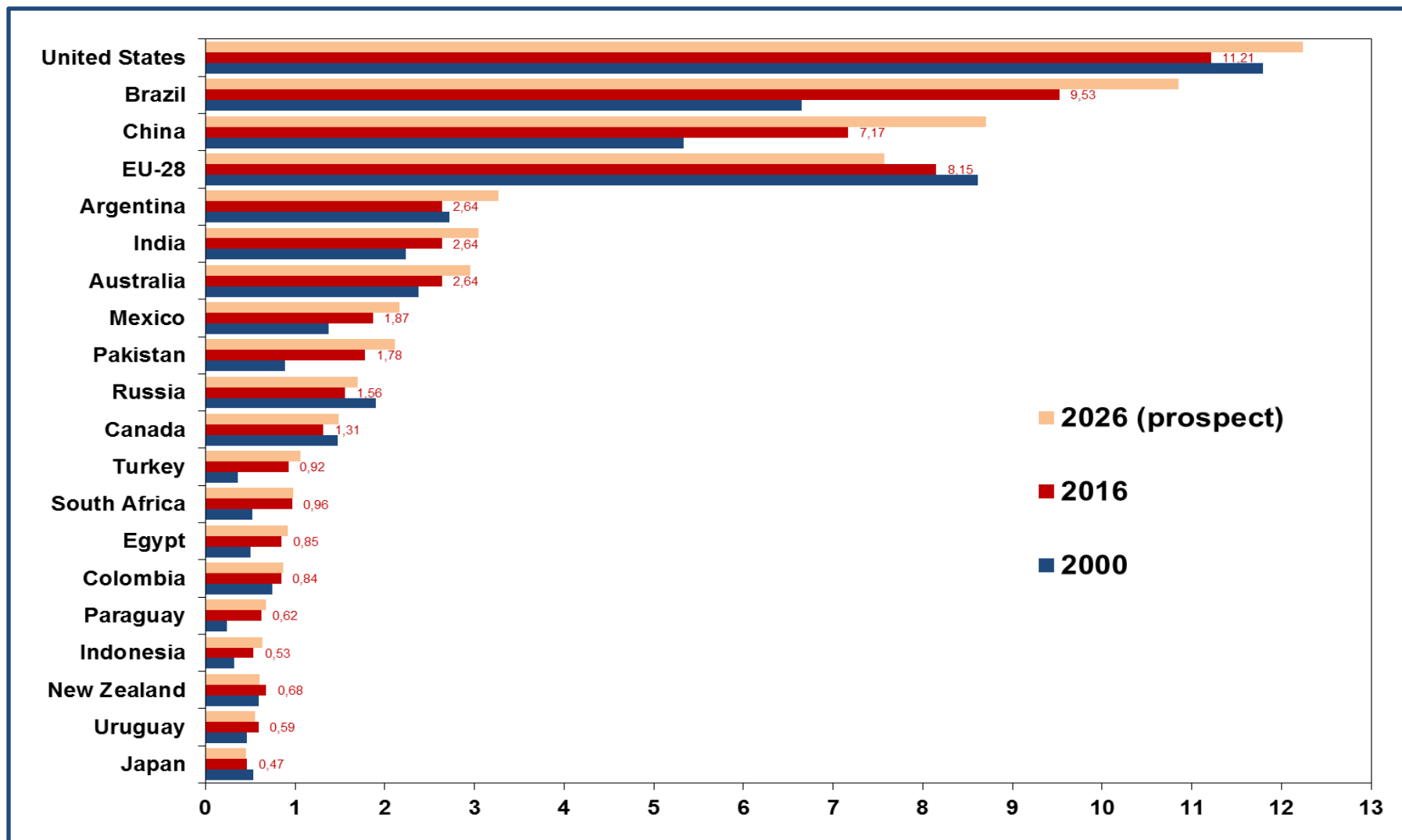
European Commission - Eurostat

2-3- Beef sector in the EU



World beef meat production: main countries

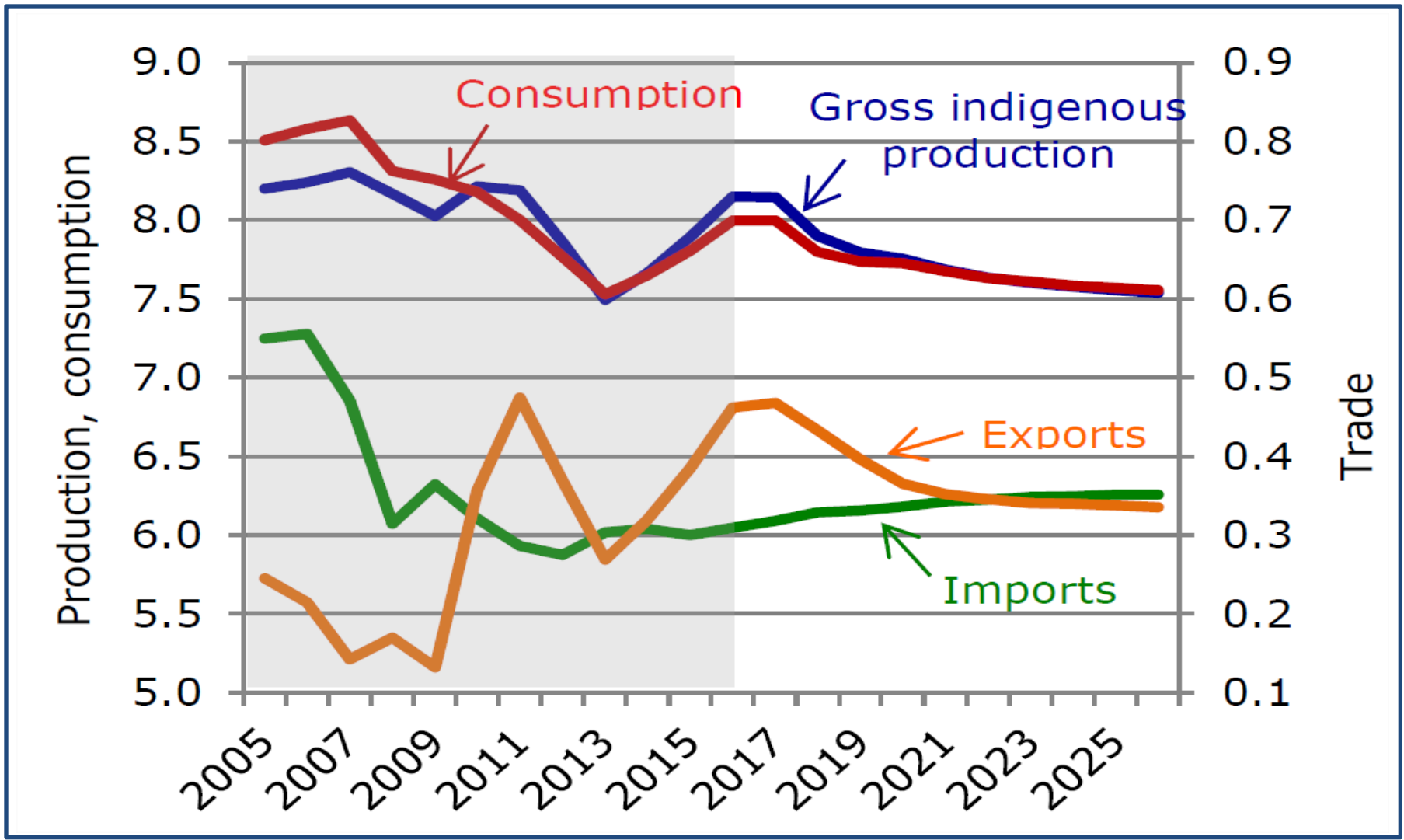
(Million tons, 2000, 2016 and prospect 2026)



OECD-FAO agricultural outlook 2017-2026

EU beef sector

(Million tons, 2000 to 2016)



European Commission – Prospects for agricultural markets 2016-2026

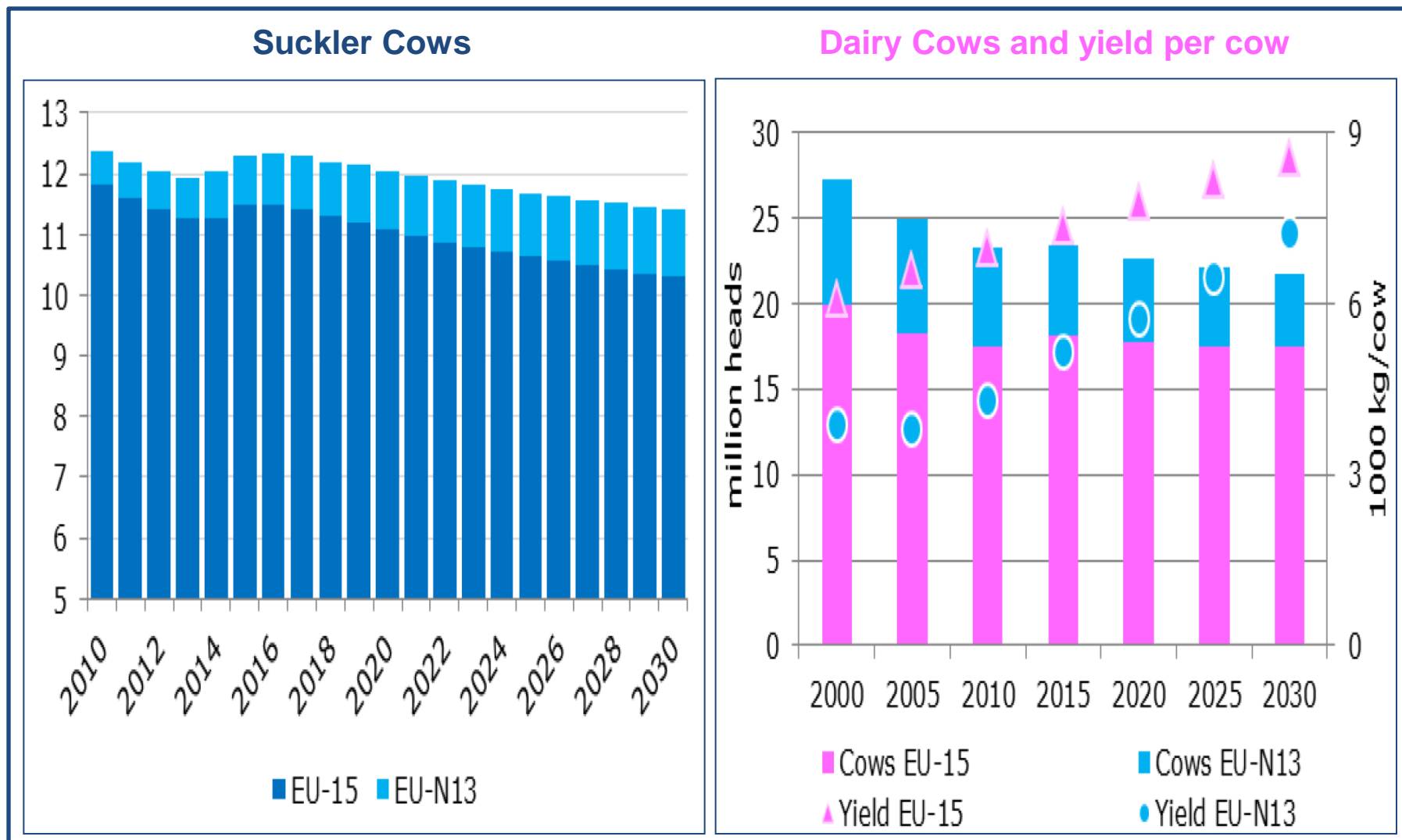


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EU cows (suckler and dairy) number

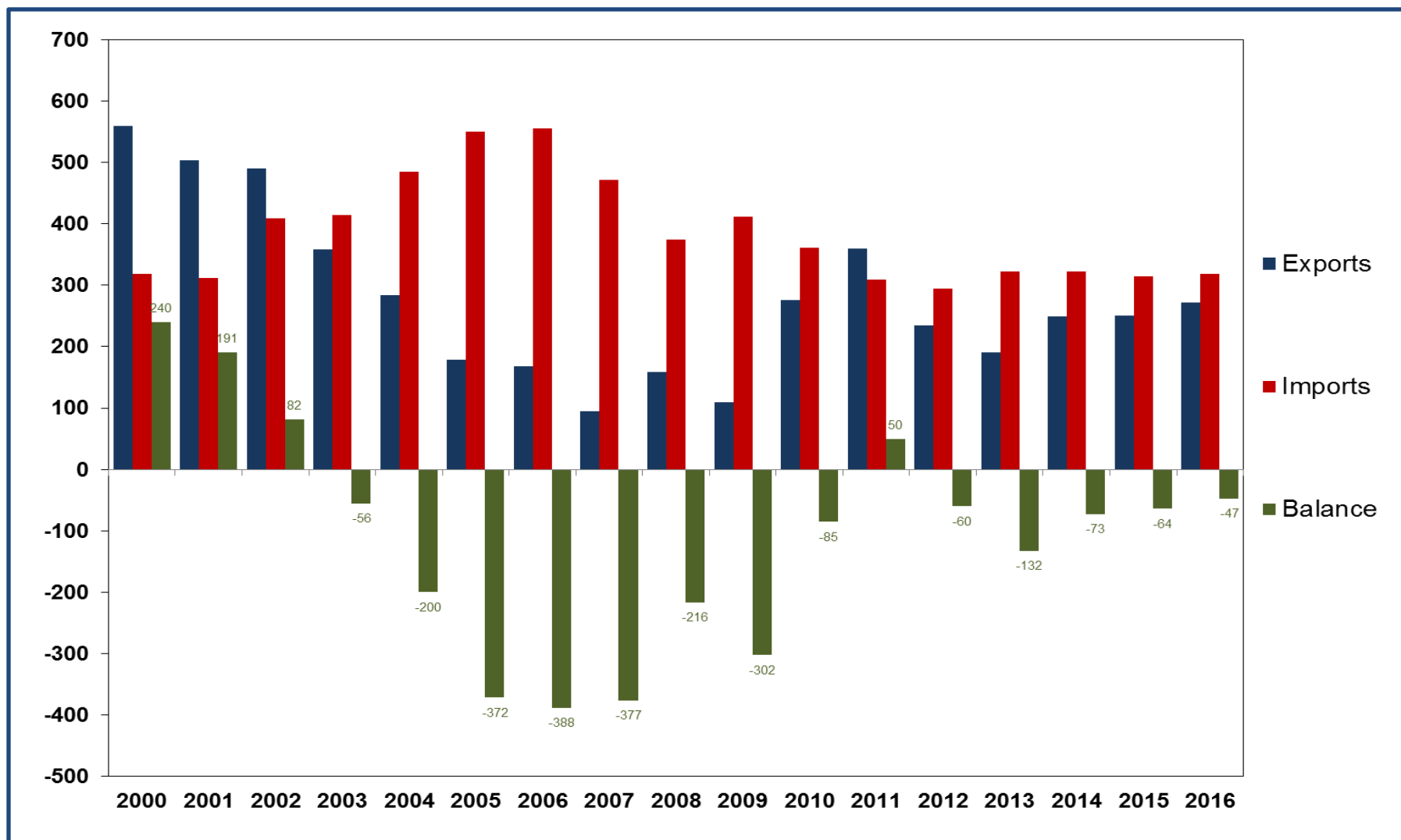
(Million heads, 2000 to 2015 - prospect 2030)



European Commission - DGAGRI

EU export, import and trade balance for poultry meat

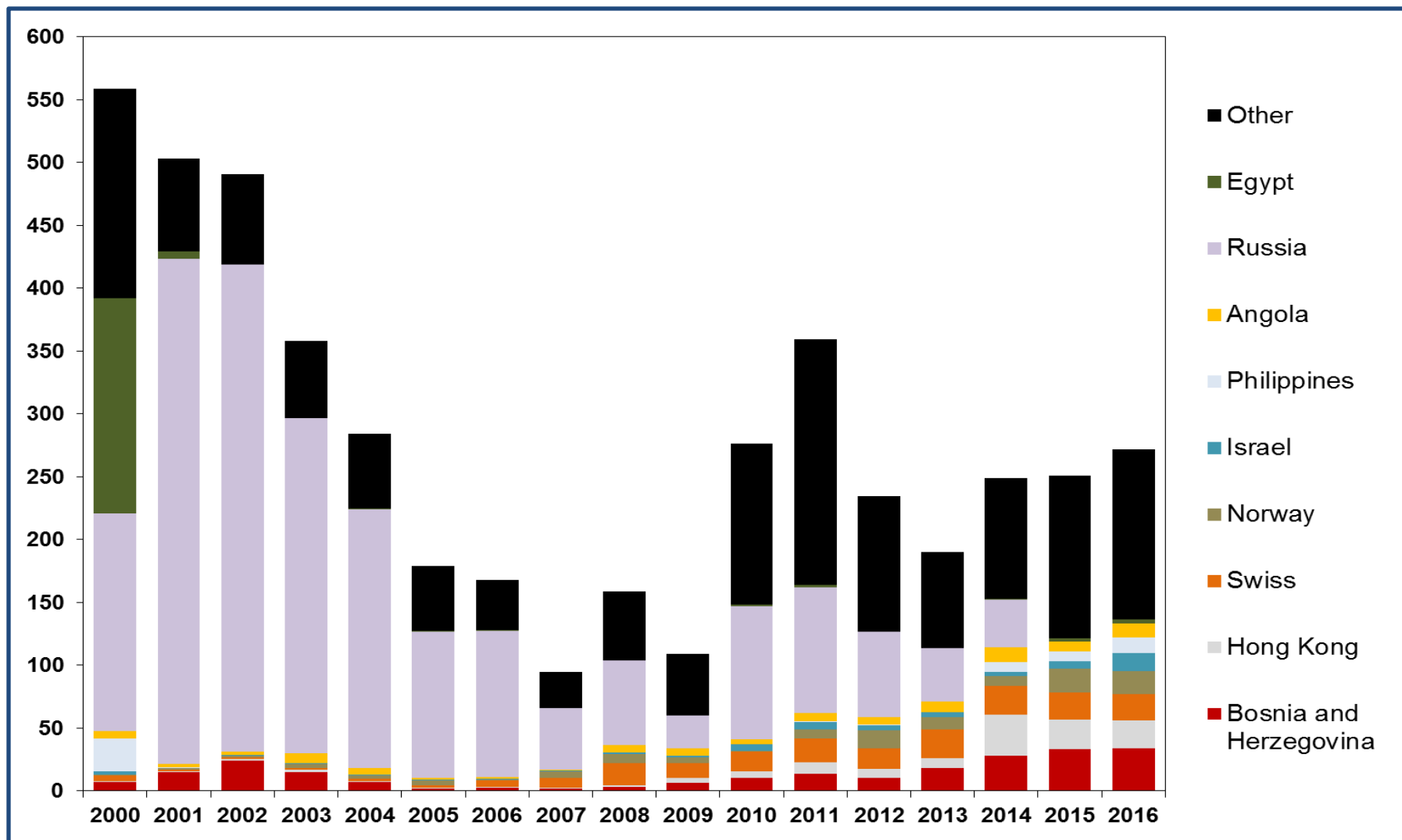
(Thousand tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU export of beef meat: main customers

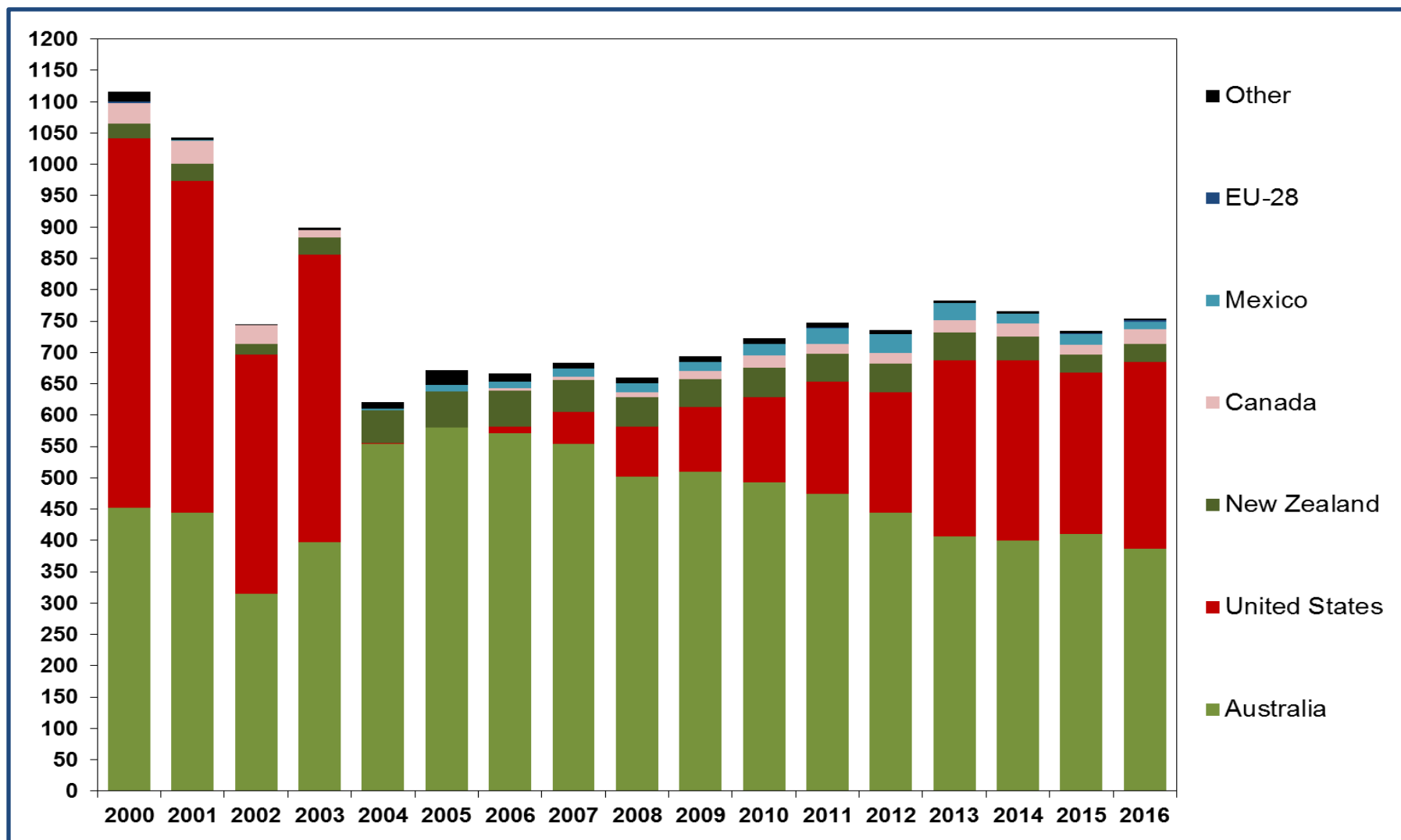
(Thousand tons of carcass equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Japan import of beef meat: main suppliers

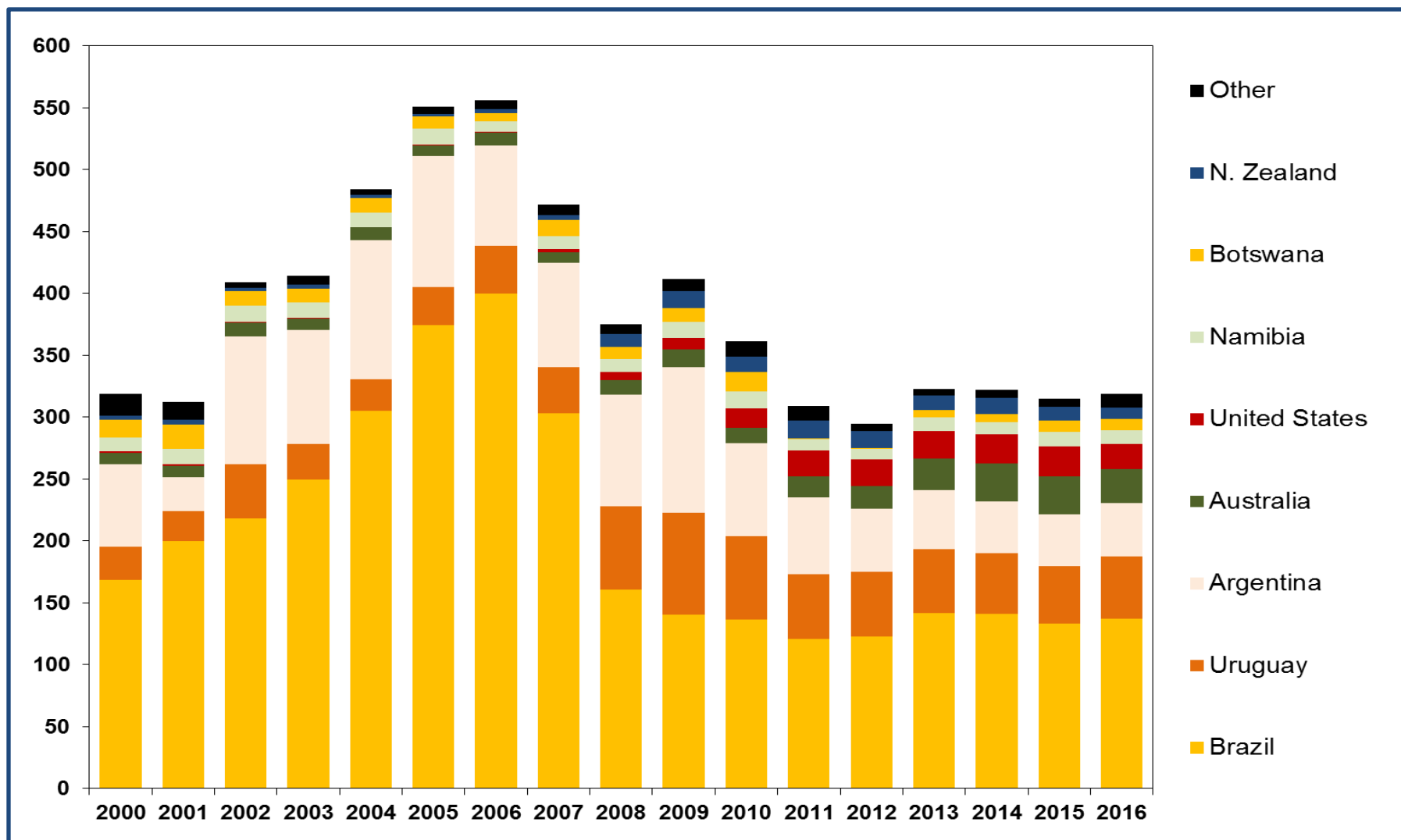
(Thousand tons of carcass equivalent, 2000 to 2016)



Eurostat - COMTRADE / INRA, SMART-LERECO

EU import of beef meat: main suppliers

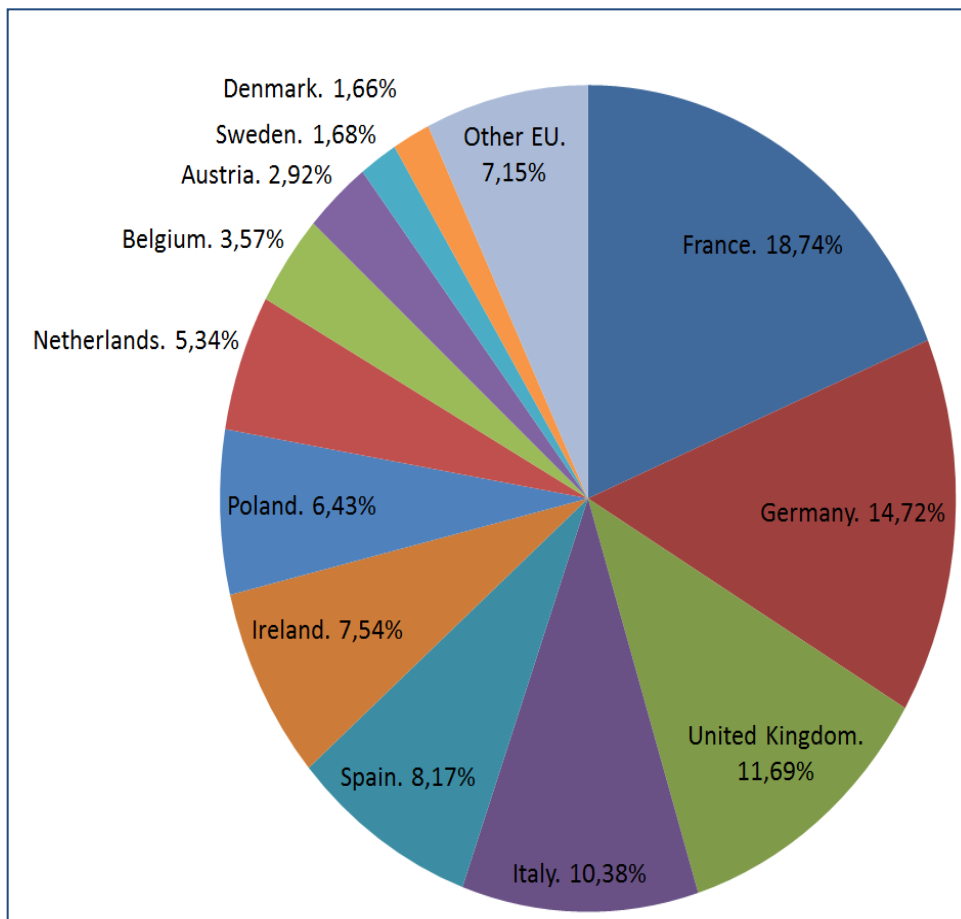
(Thousand tons of carcass equivalent, 2000 to 2016)



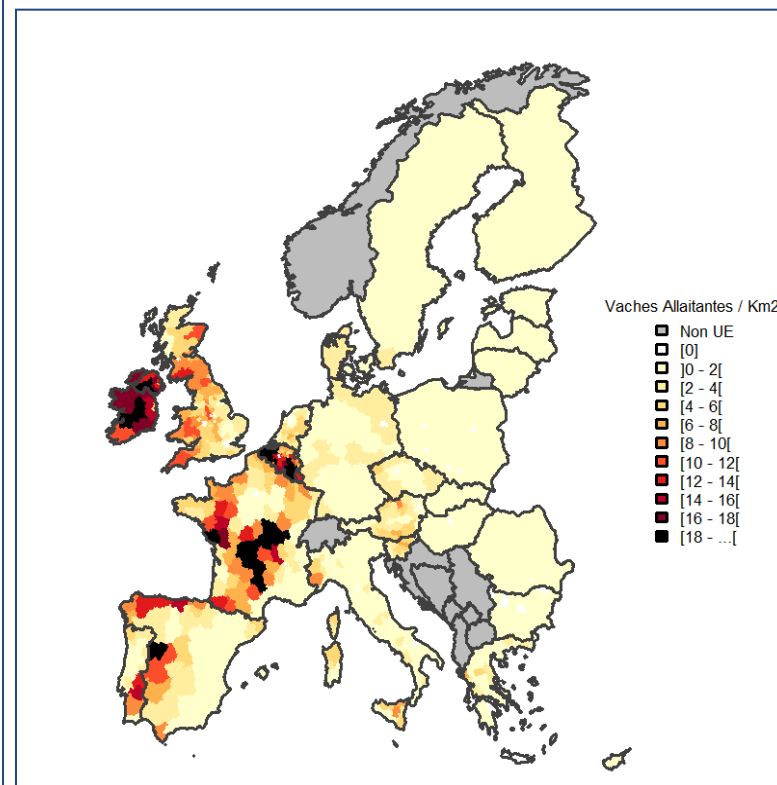
Eurostat - COMEXT / INRA, SMART-LERECO

EU beef meat production according to member states

% of EU-28



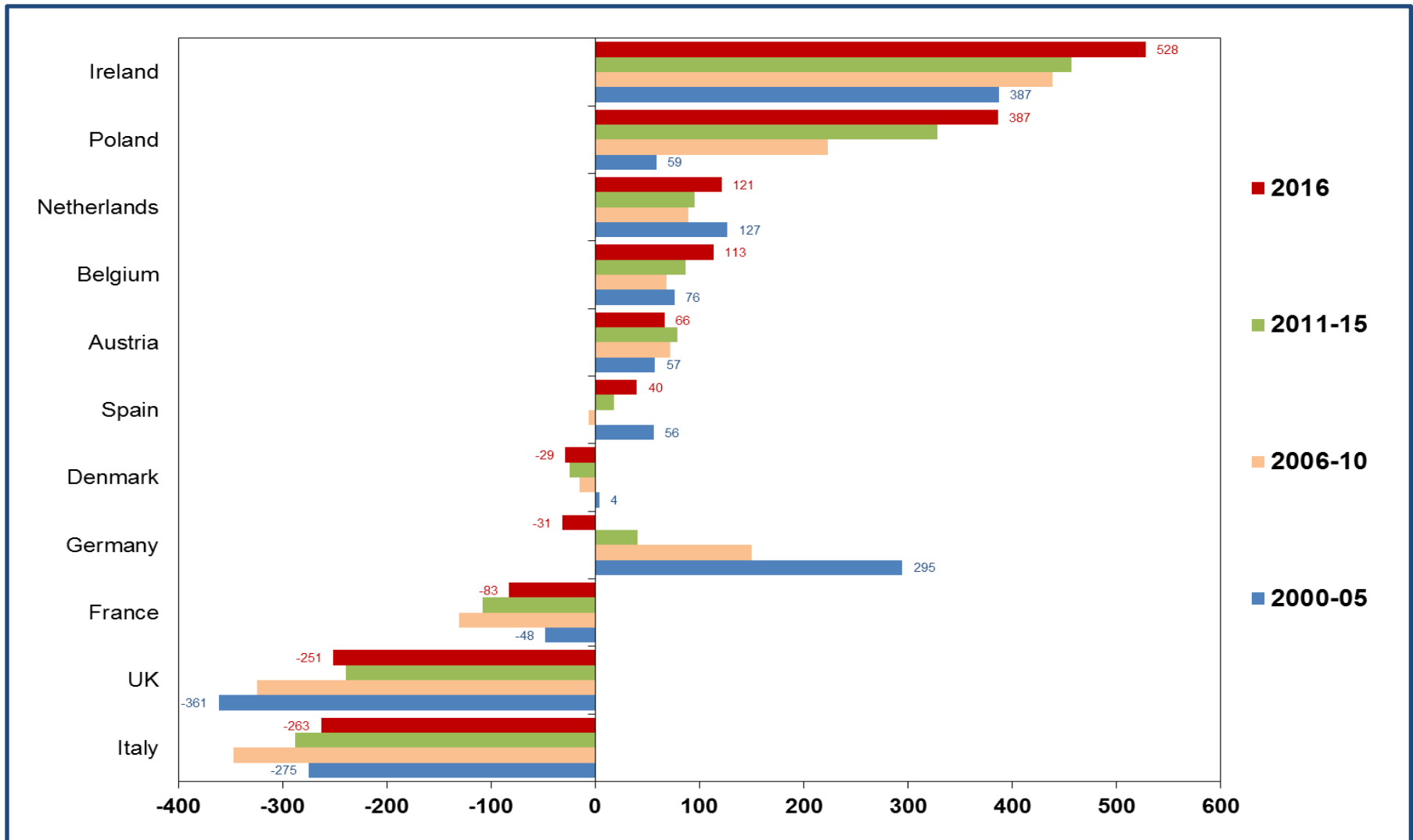
Suckler cows / KM2



Eurostat

Trade balance* for beef meat in some EU member states

(Thousand tons of carcass equivalent, 2000 to 2016)



(*) Intra-EU and extra-EU

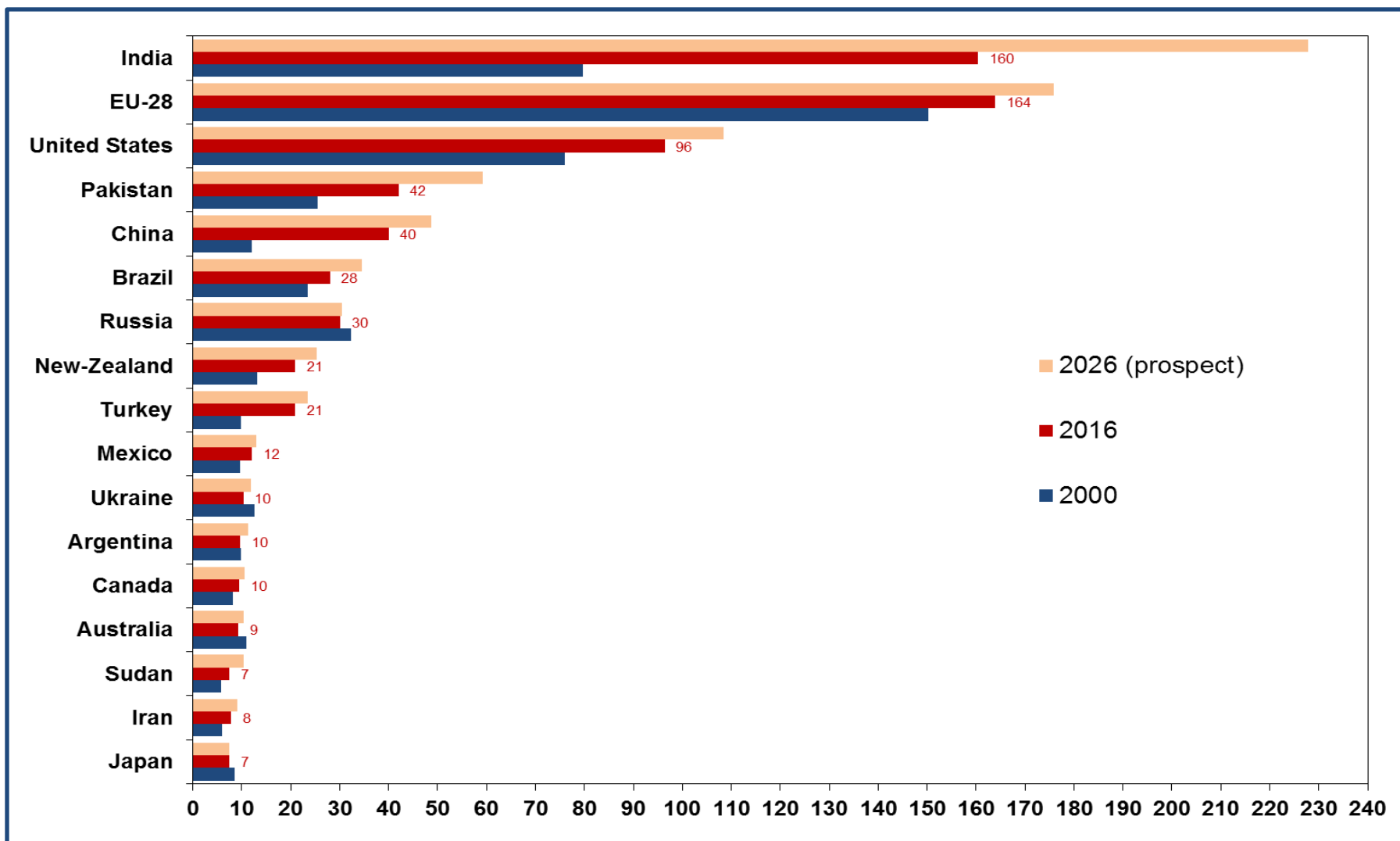
Eurostat - COMEXT / INRA, SMART-LERECO

2-4- Dairy sector in the EU



World dairy production: main countries

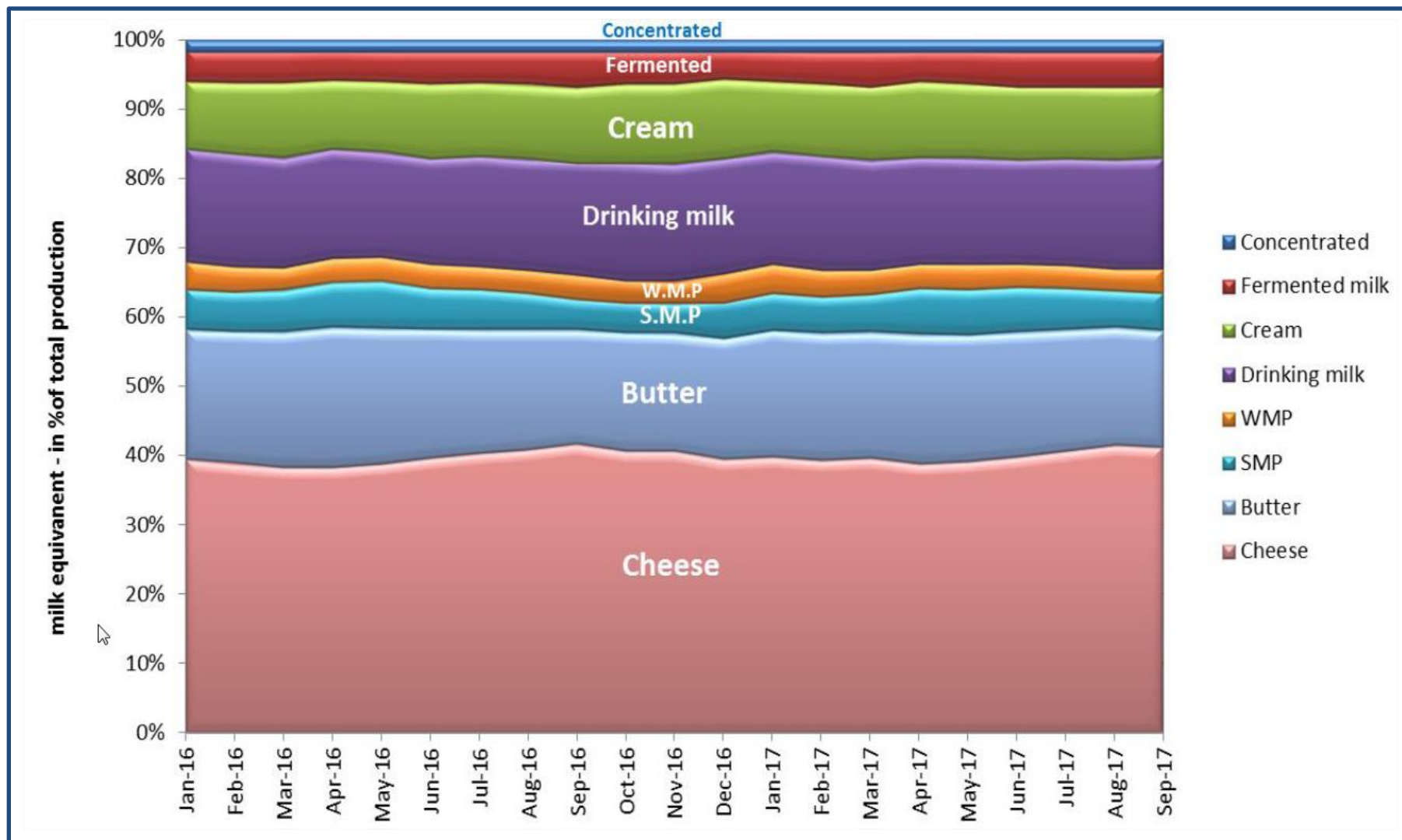
(Million tons, 2000, 2016 and prospect 2026)



OECD-FAO agricultural outlook 2017-2026

Production of dairy products in the EU

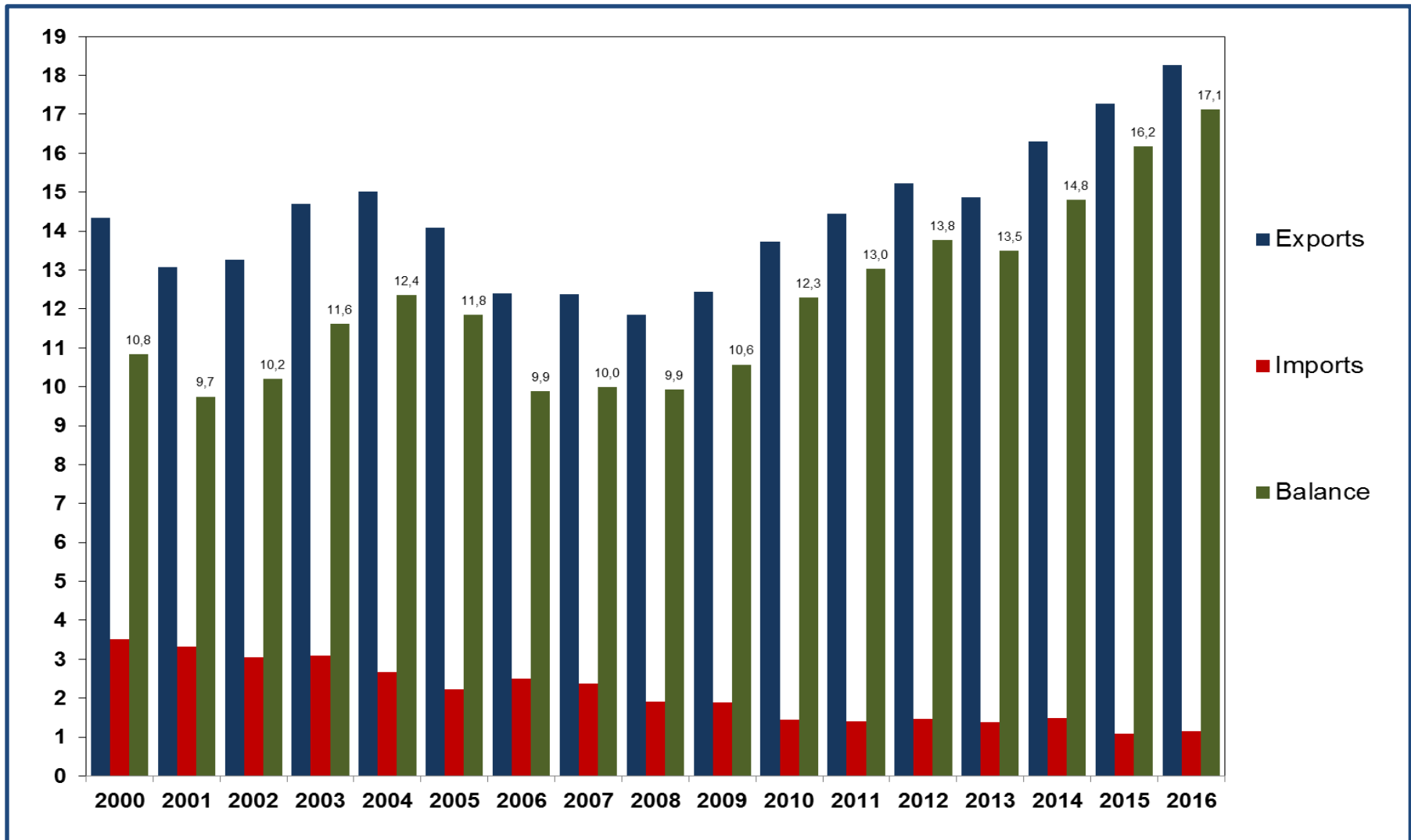
(% du total milk equivalent)



DGAGRI

EU trade in dairy products

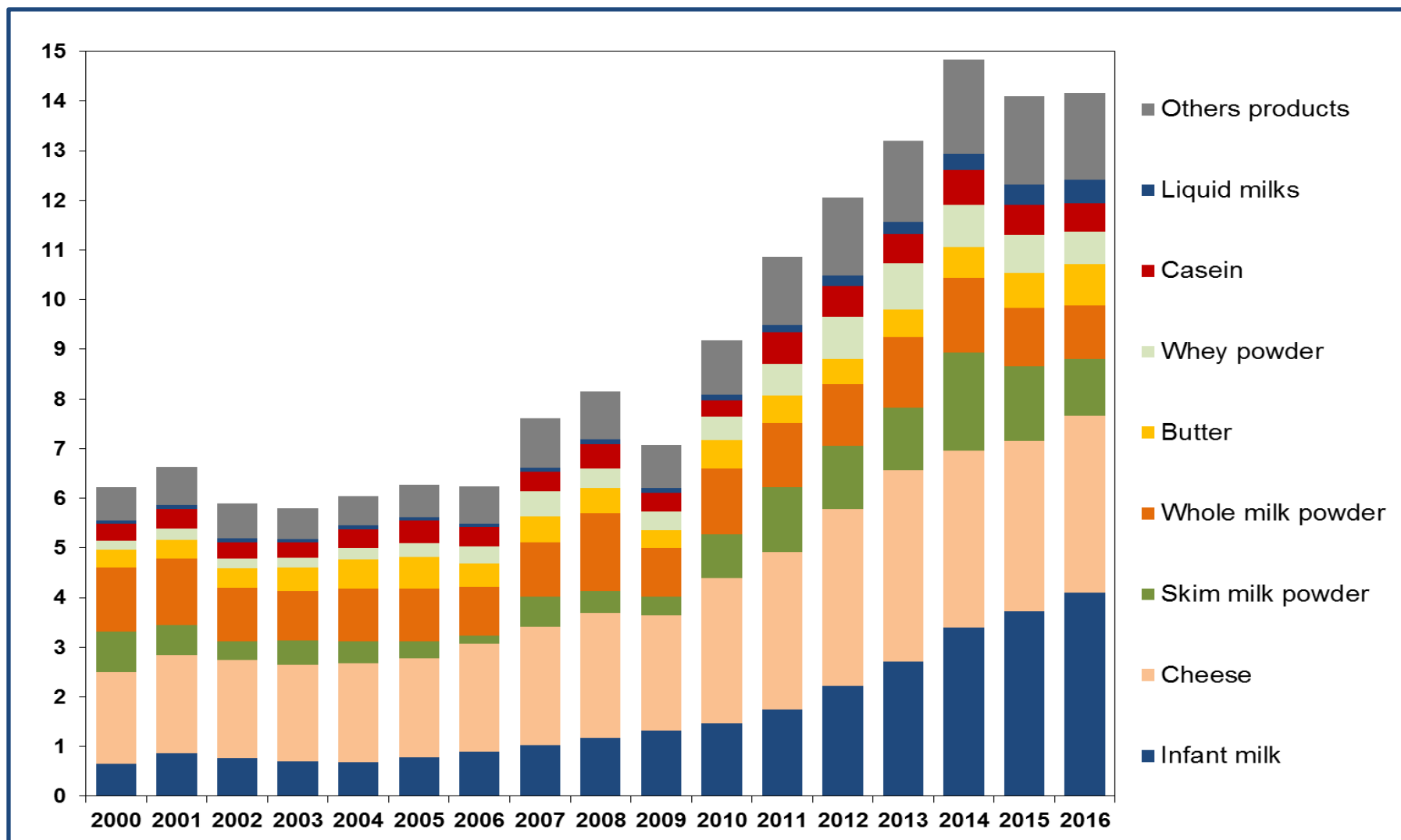
(Million tons of milk equivalent, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU exports of dairy products

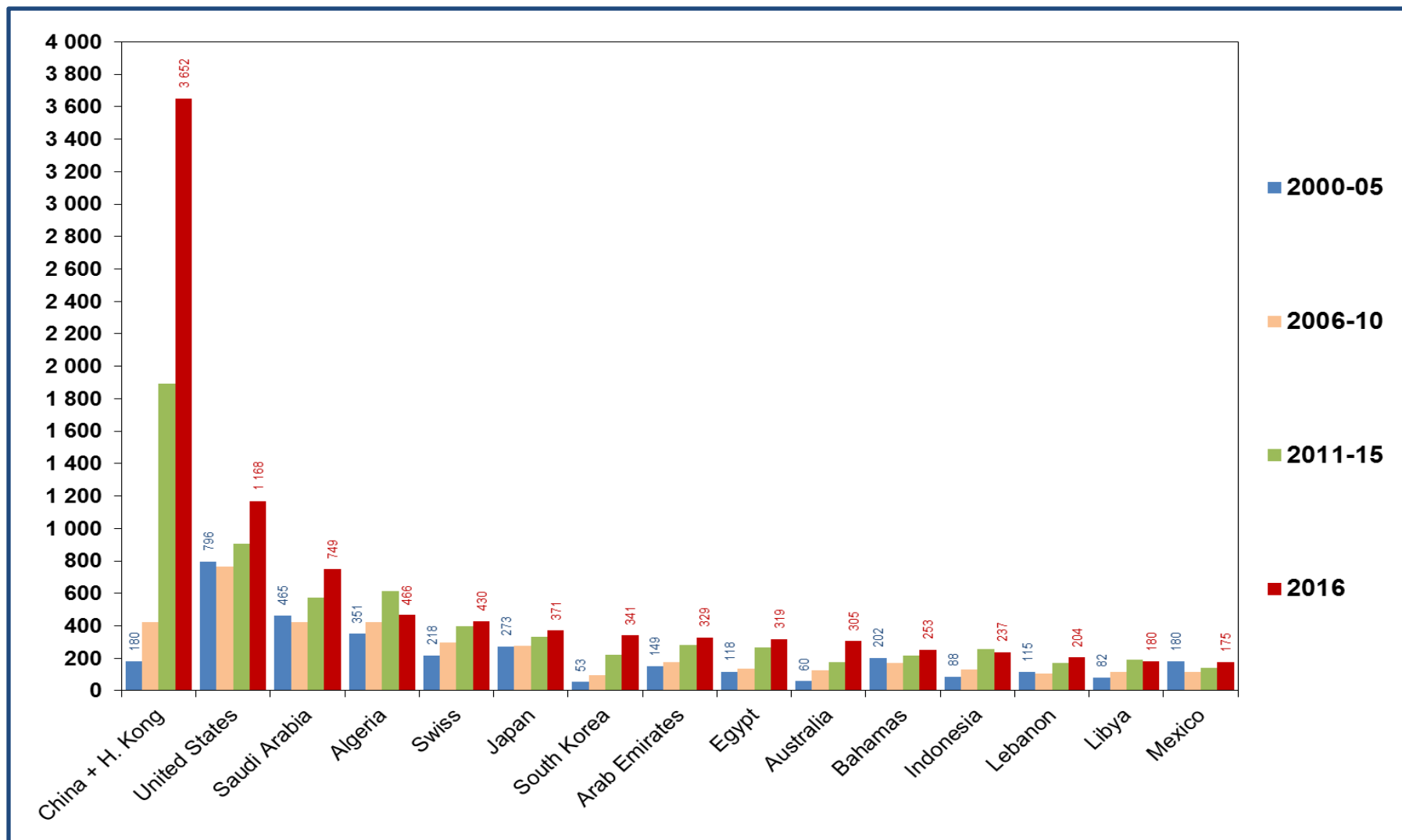
(Billion current euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

EU exports in dairy products: 15 main customers

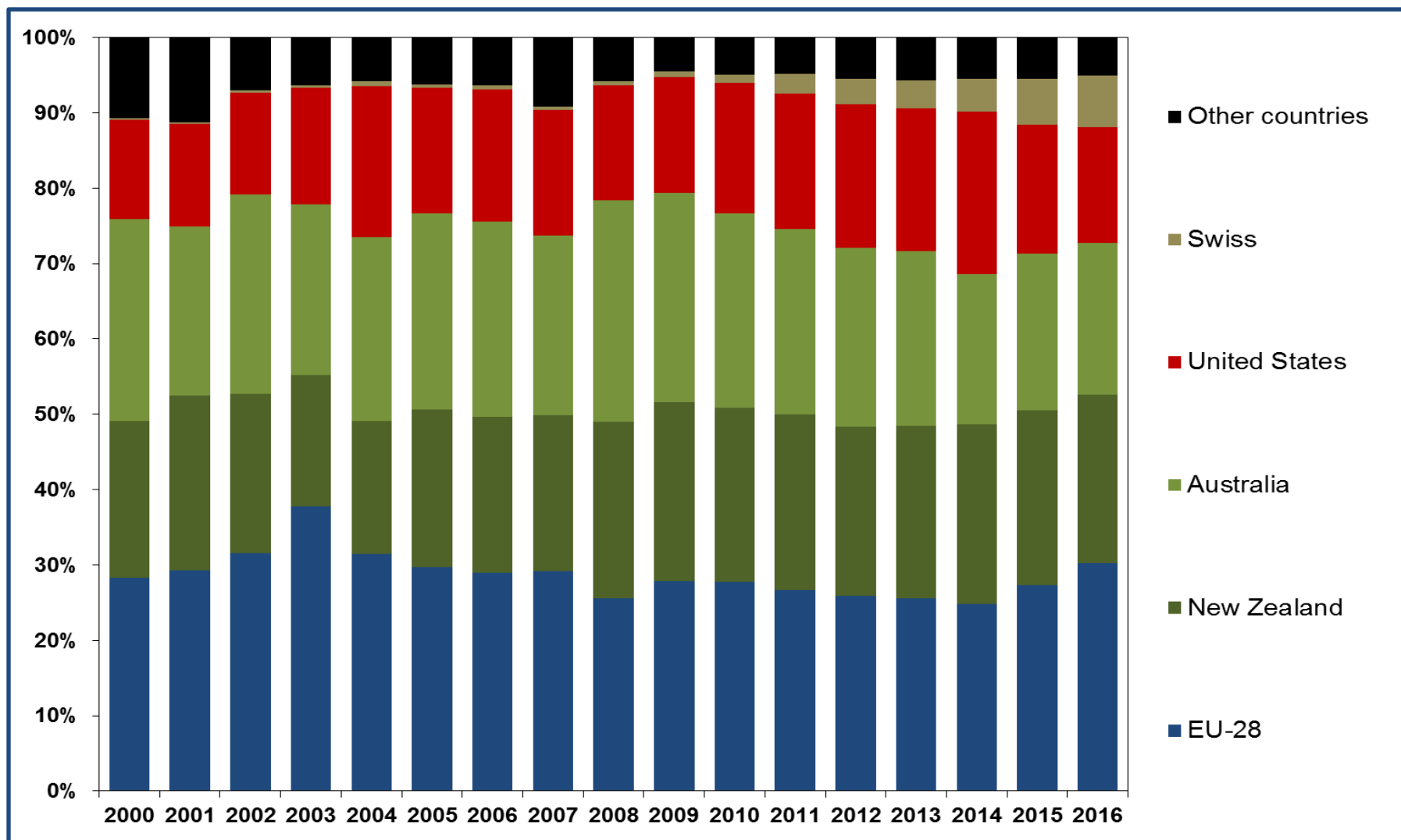
(Billion current million euros, 2000 to 2016)



Eurostat - COMEXT / INRA, SMART-LERECO

Japan imports of dairy products: main suppliers

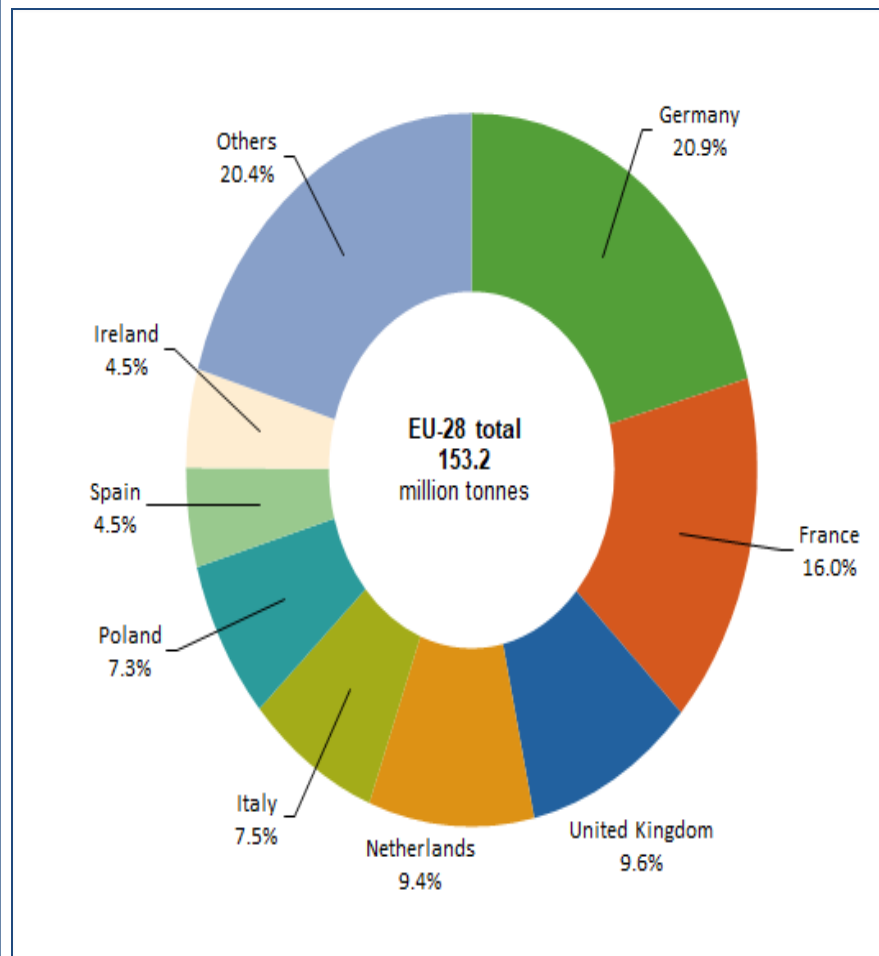
(% of the total import, 2000 to 2016)



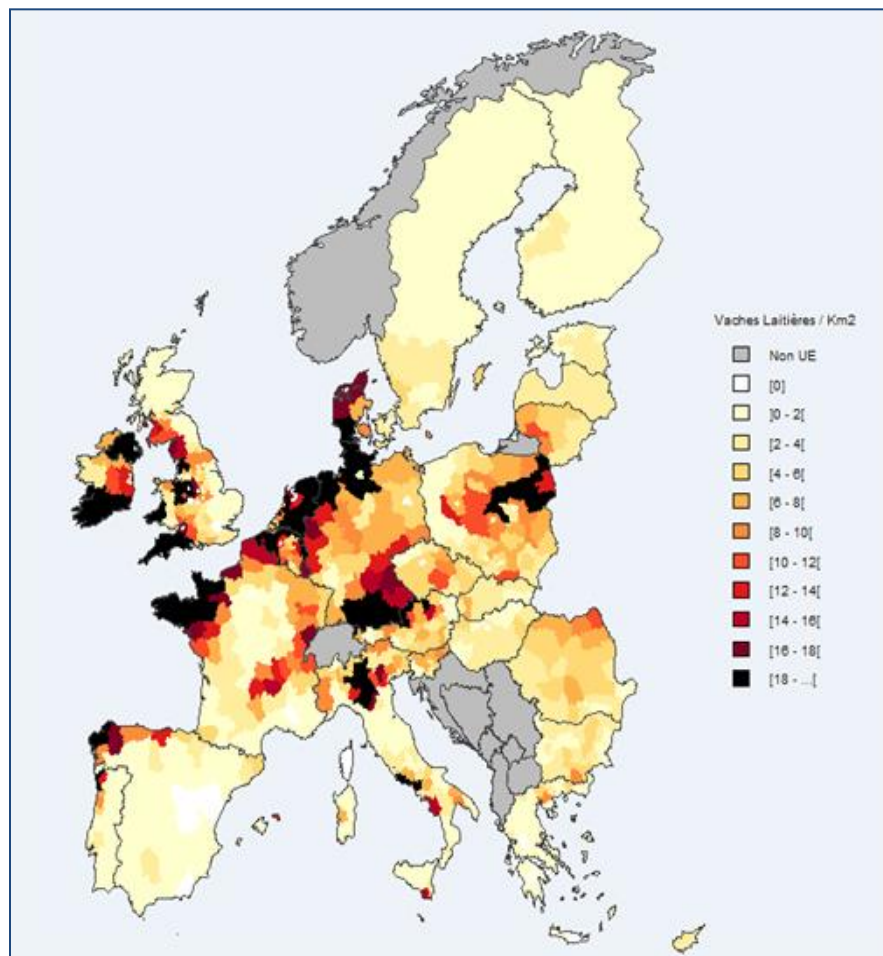
Eurostat - COMTRADE / INRA, SMART-LERECO

EU dairy production according to Member states

% of EU-28 Milk production (2016)



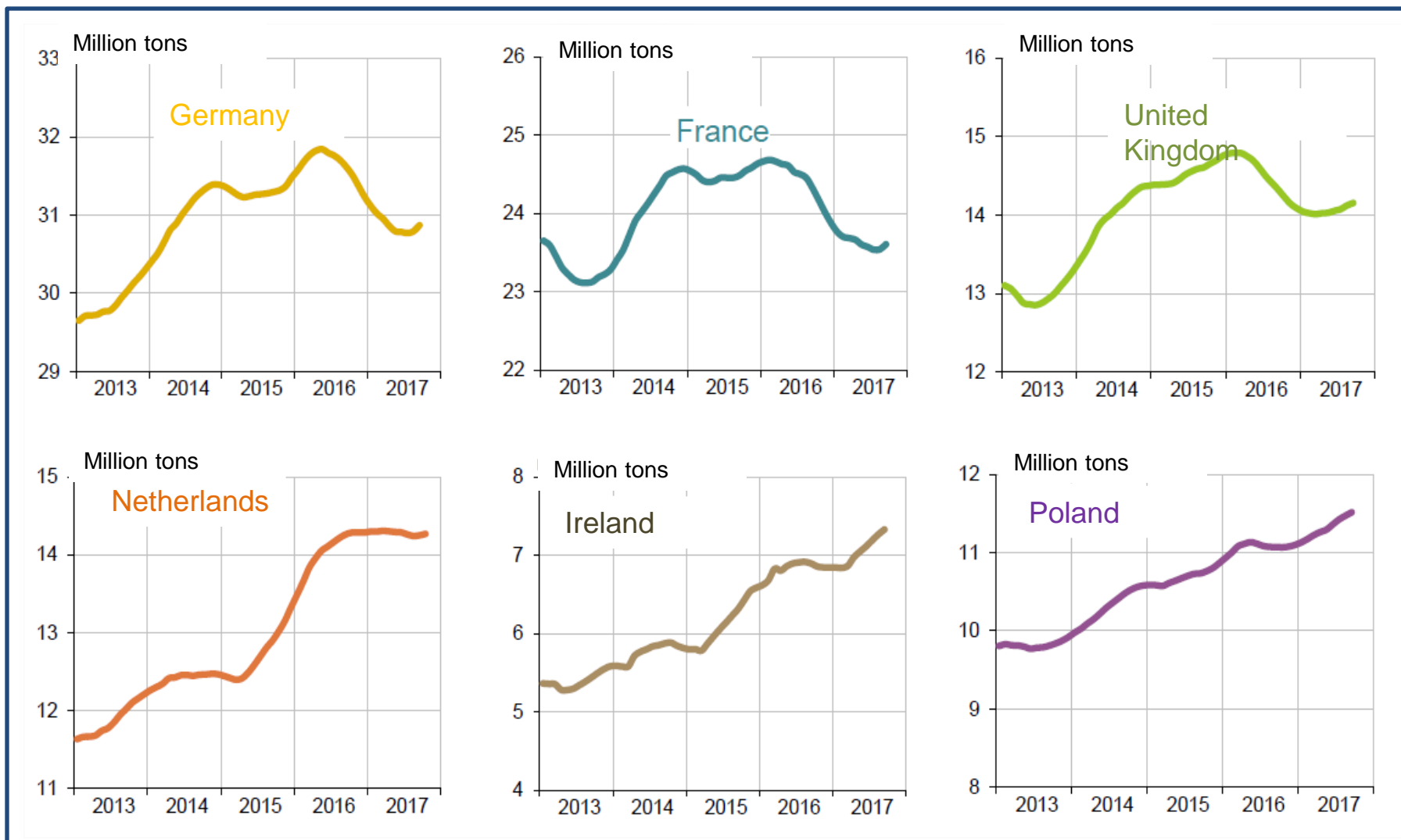
Dairy cows / KM2



Eurostat

Milk collection in several EU countries

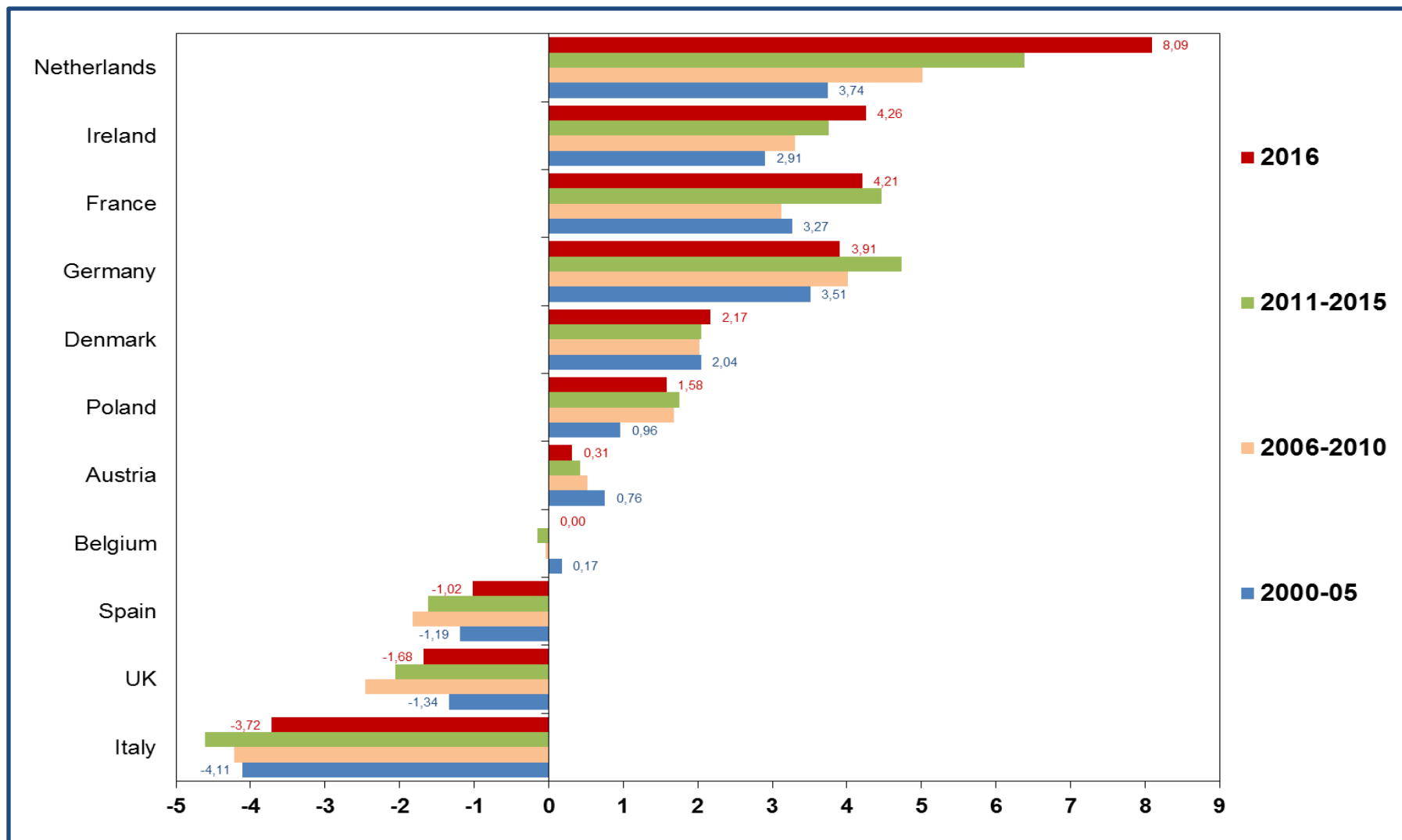
(Millions of tons, 2013 to 2017)



CNIEL from ZMB, FAM, DairyCo, CLAL, Eurostat

Trade balance* for milk in some EU member states

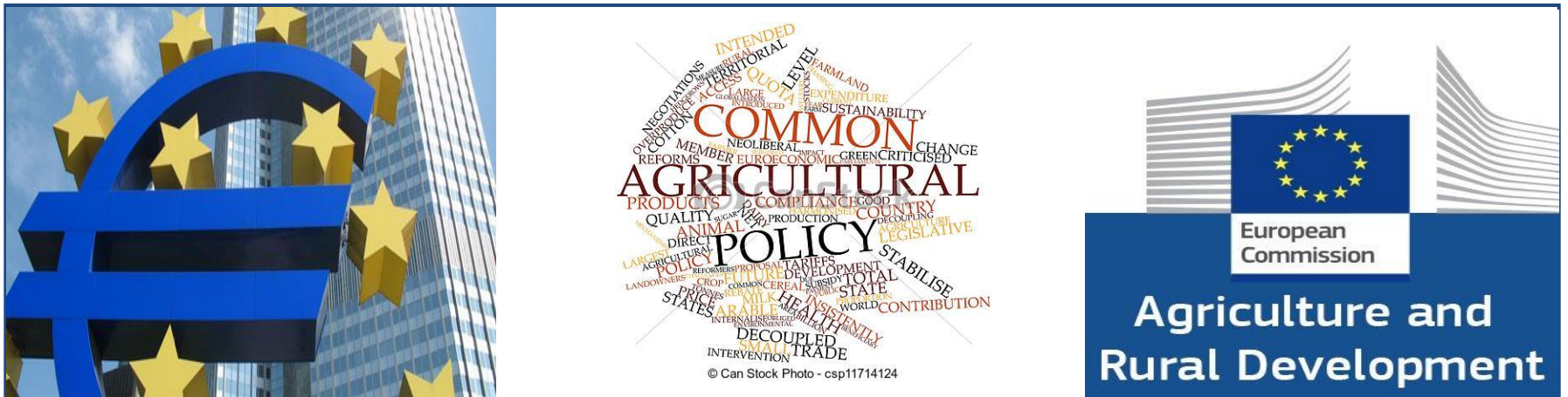
(Million tons of milk equivalent, 2000 to 2016)



(*) Intra-EU and extra-EU

Eurostat - COMEXT / INRA, SMART-LERECO

3- The Common Agricultural Policy (CAP)



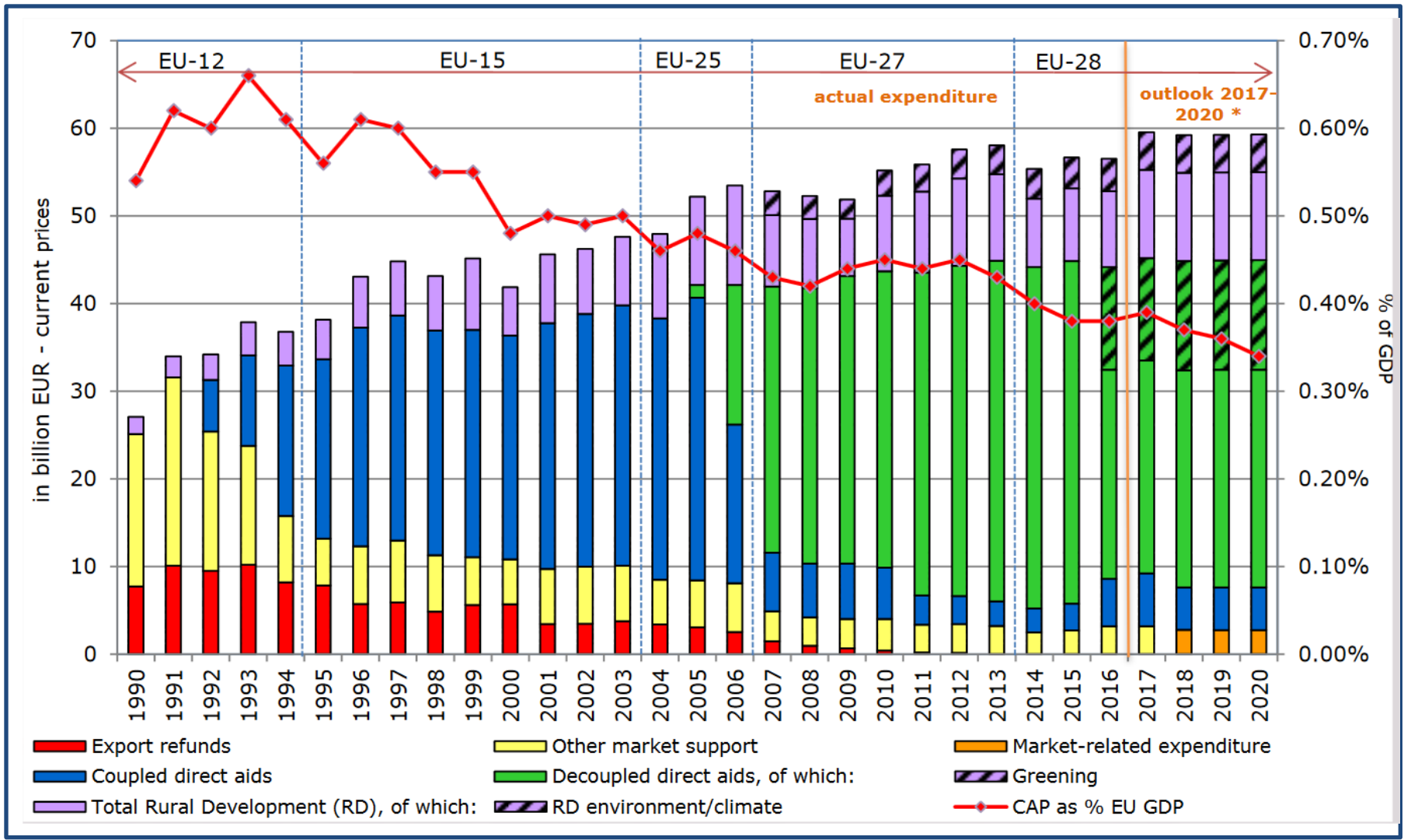
3-1- The previous CAP reforms and subsidies to EU farmers

The collage consists of three distinct visual elements:

- Left Panel:** A celebratory graphic for the 50th anniversary of the CAP. It features a large '50' where the '0' contains icons of a house, a wind turbine, and a farm. To the right, the text reads 'YEARS of Common Agricultural Policy' in green and orange, with 'Ready for the future' below it in green, accompanied by the European Union flag.
- Middle Panel:** A photograph of a vast green agricultural landscape under a clear blue sky. The text 'Historical development of the CAP' is centered over the image in white. A small European Commission logo is visible in the top right corner of this panel.
- Right Panel:** A word cloud where the most prominent words are 'farmers', 'farm', 'CAP', 'subsidies', 'payments', and 'higher'. Other visible words include 'food', 'trade', 'total', 'industrial', 'surpluses', 'innovation', 'countries', 'system', 'support', 'prices', 'export', 'year', 'scale', 'welfare', 'years', 'income', 'scarcity', 'biggest', 'average', 'government', 'commissions', 'benefit', 'production', 'damage', 'EU', 'Environmental', 'Many', 'inequitable', 'resources', and 'direct'.

The structure of CAP expenditure

(Billion current euros, 1990-2020)



European Commission

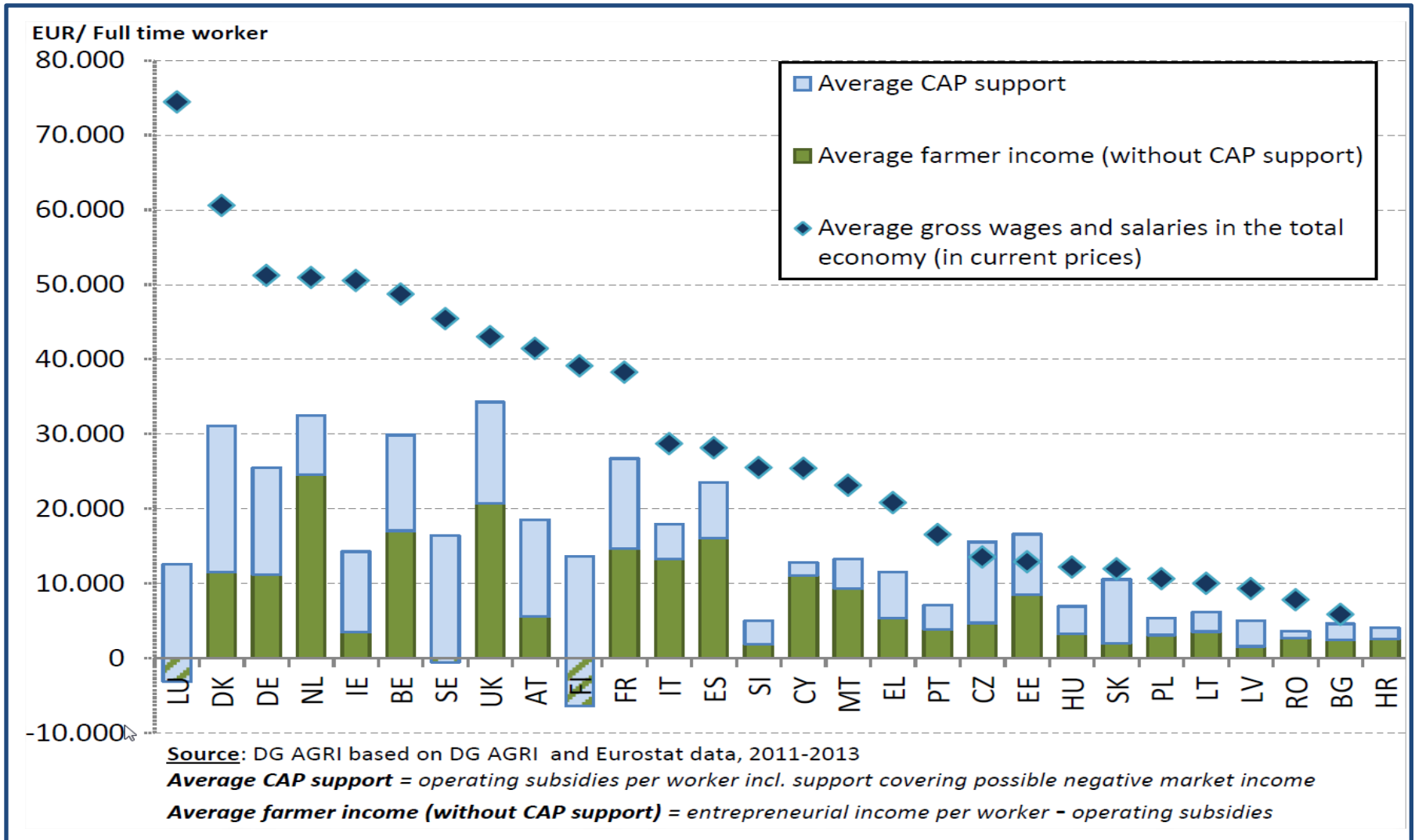


Tokyo, 16th January 2018
V. Chatellier (INRA, UMR SMART-LERECO)



Subsidies and farmers' income in the EU Member states

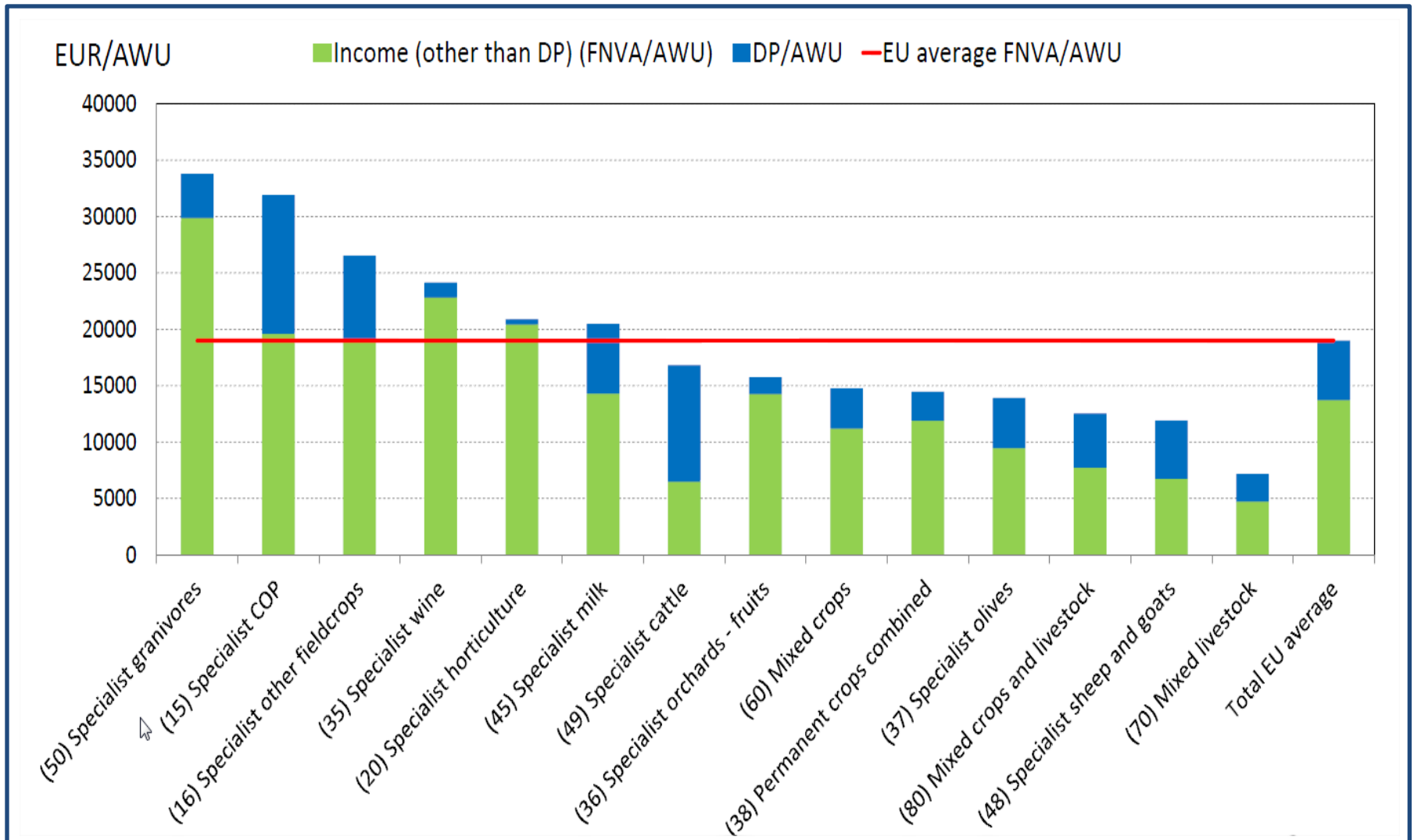
(Euros per full time worker)



DG AGRI based on DG AGRI and Eurostat data, 2011-2013

Income and subsidies in the EU agriculture

(According to type of farming, Euros per full time worker)



DG Agriculture and Rural Development, based on FADN. Income per AWU and DP per ha estimated at 2019 DP levels

Distribution of EU direct support to farms

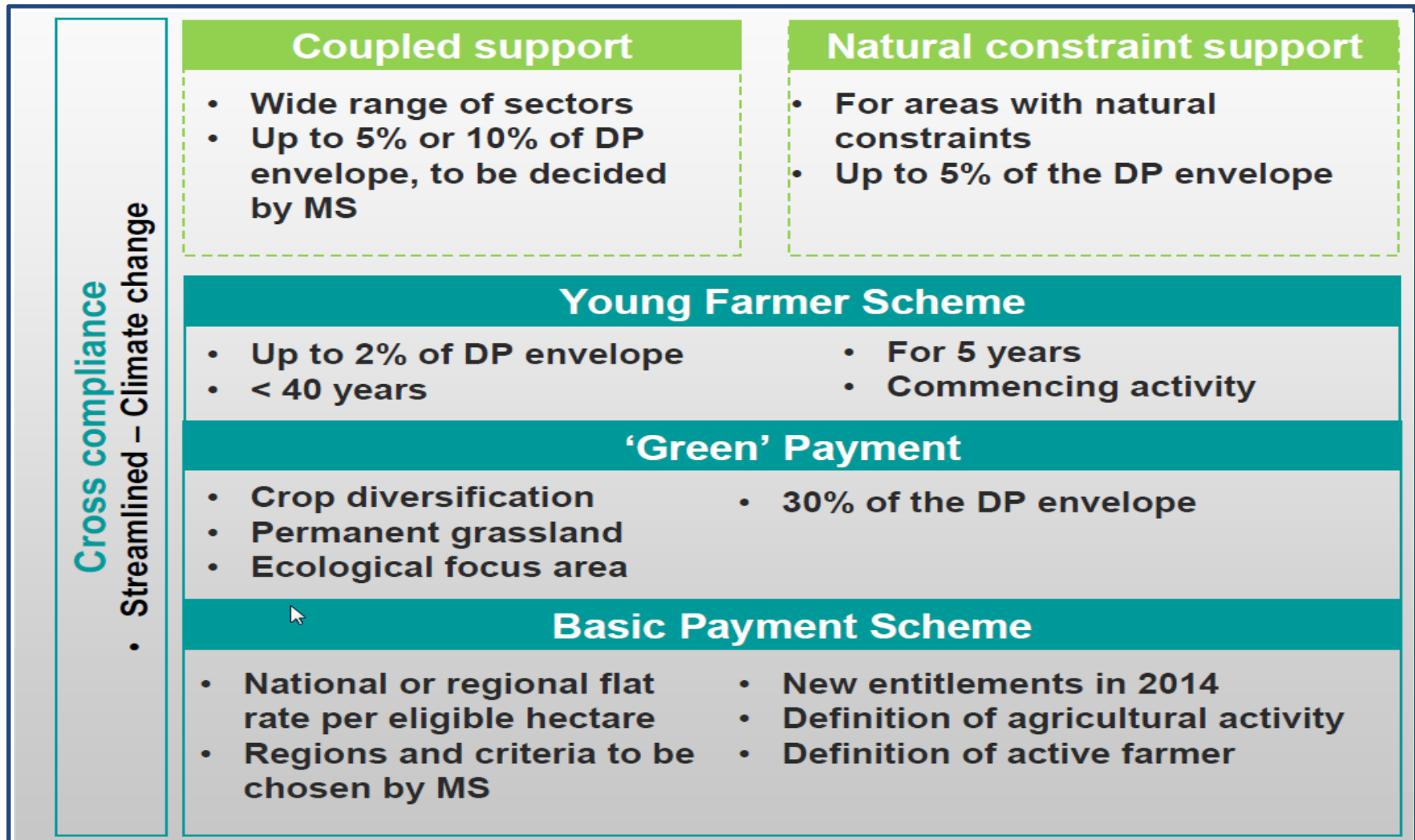
(according to the size of farms)



CATS control data

The new design of direct payments in the EU

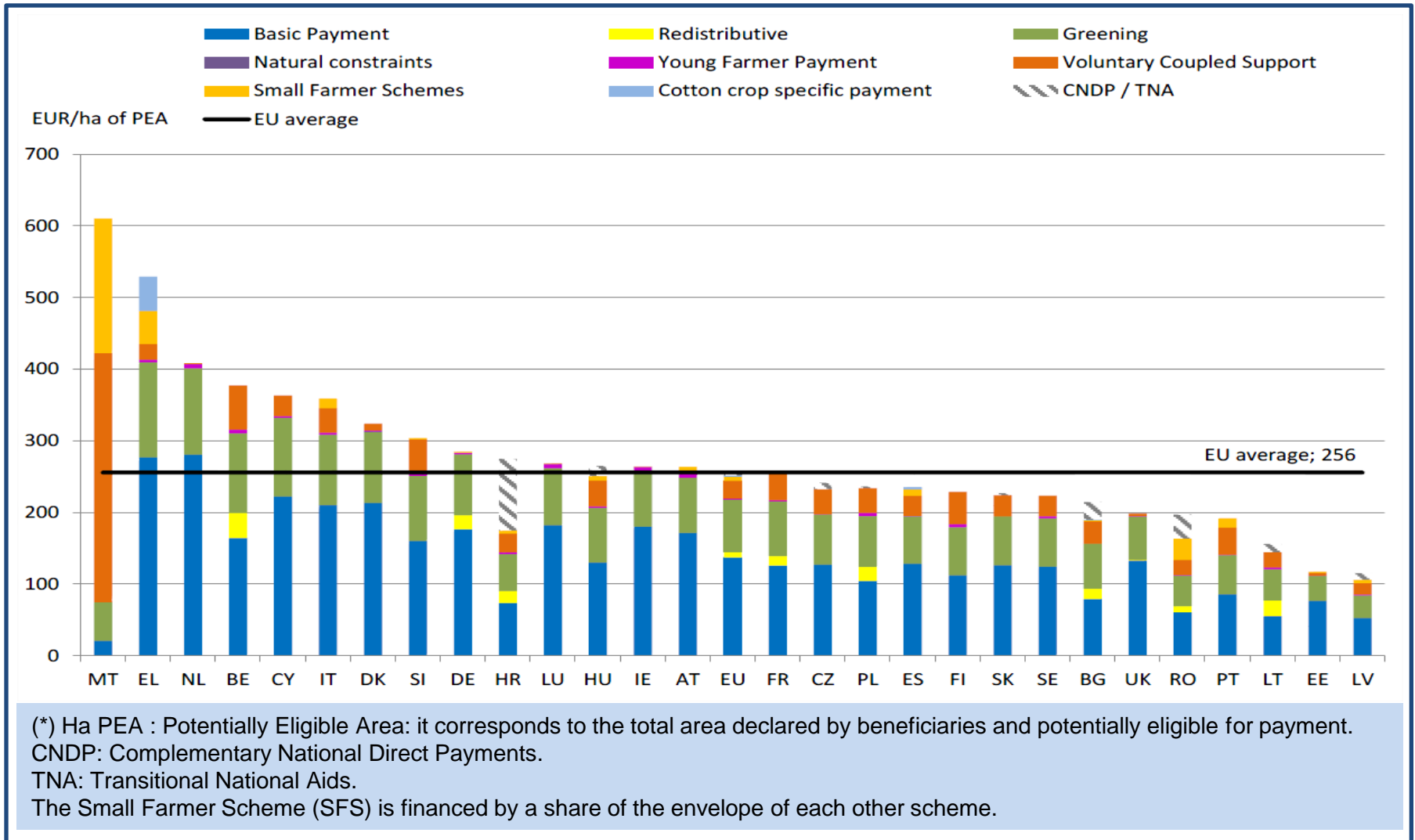
(since 2014)



European Commission

Direct Payments expenditure per ha* by Member State

(Euros per ha of PEA)



*AGREX EU for DP expenditure, MS notifications in ISAMM for CNDP/TNA and MS reports to CATS for PEA

3-2- The future of EU and CAP



A White paper on the future of EU (with 5 scenarios) with five reflection documents (may 2017)



The social dimension of Europe

The reflection paper opens up the debate by offering different ideas, proposals and options for a social dimension of Europe by 2025.



Harnessing globalisation

The reflection paper opens up a vital debate on how the EU can best harness globalisation and respond to its opportunities and challenges.



Deepening of the economic and monetary union

The reflection paper is intended to stimulate the debate on the economic and monetary union and to help reach a shared vision of its future design.



Future of European defence

The reflection paper outlines future scenarios of Europe's defence, contributing to the debate on strengthening the protection of European citizens.



Future of EU finances

The paper presents possibilities and reform options, mapping out opportunities, risks and trade-offs for the future of EU budget.



Webpage: Click [here](#)

European Commission

Three background reports on challenges facing EU agriculture and rural areas (2016)

Climate & environmental

Economic

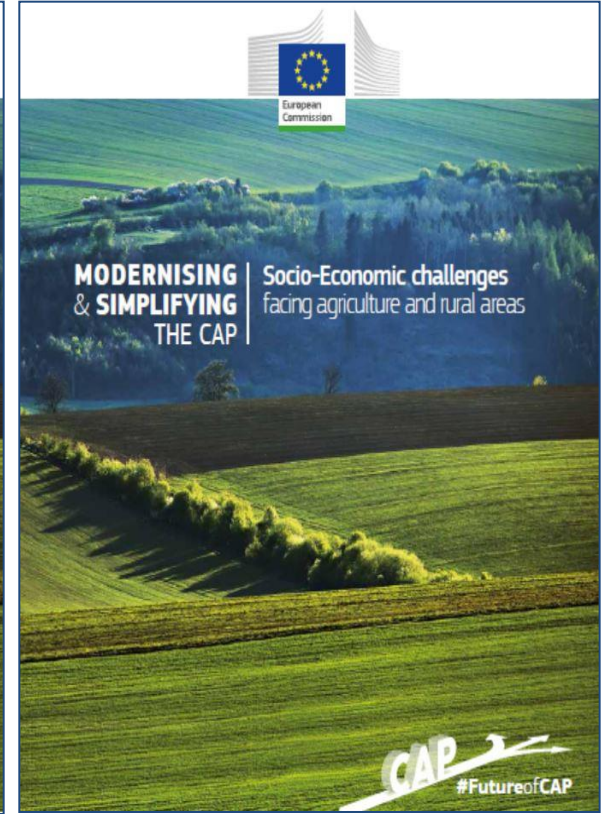
Socio-economic



PDF – Click [Here](#)



PDF – Click [Here](#)



PDF – Click [Here](#)

European Commission - DGAGRI

The Future of food and farming in the EU

(Communication of the Commission - 29 November 2017)



Brussels, 29.11.2017
COM(2017) 713 final

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS

The Future of Food and Farming

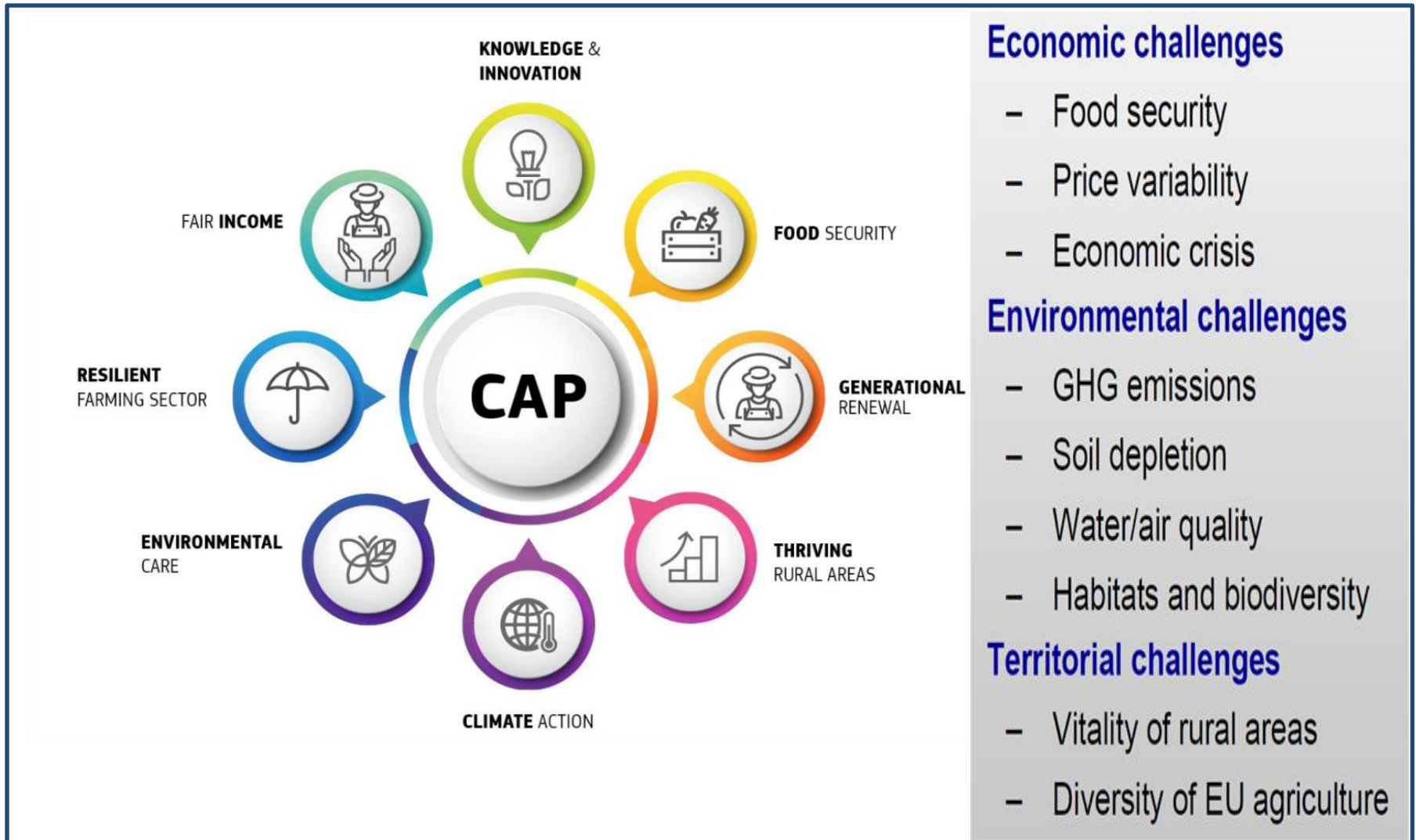
PDF – Click [Here](#)

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European Commission

The Future of food and farming in the EU

(Communication of the Commission - 29 November 2017)



European Commission

Are the principles of the CAP old fashioned?

□ Market unity

- Its means that agricultural products move throughout the EU under conditions similar to those in an internal market, thanks to the abolition of quantitative restrictions to trade (quotas, import monopolies...) and the removal of duties, taxes and measures having equivalent effect.
- With different social, environmental and fiscals standards from one country to another.

□ Community (European) preference

- Its signifies that products of European origin are bought in preference to imported products, in order to protect the common market against low-price imports and fluctuations in world prices.
- With lower intervention prices, lower tariffs, trade agreements...and, now, BREXIT.

□ Financial solidarity

- Its signifies that the Member States are jointly liable as regards the financial consequences of the common agricultural markets policy.
- With a low level of budgetary support in the 13 new (2004) Member states

The post 2020 CAP : six questions^(1/2)

→ What will be the future overall budget of the EU?

- 2014-2020 budget: about 1% of the EU GDP
- The key role of economic growth in the coming years
- The *Brexit* and the rising power of nationalism in some Member states

→ What will be the share of the EU budget allocated to the CAP?

- Agriculture and natural resources: 36% of the budget of the EU in 2020
- Towards new priorities for the EU budget: immigration, army, research, etc.
- How to justify the weight of funds allocated to the CAP?

→ What will be the external/internal pressures on the CAP?

- The potential influence of WTO rules on the orientations of the CAP
- Bilateral agreements and their influence on European trade in agri-food sector
- Political balances between the European Commission, the Parliament and the Council

The post 2020 CAP : six questions^(2/2)

→ How will the CAP funds be distributed among the EU countries?

- France: 19% of the CAP budget in 2017 (for 19% of final agricultural output)
- A difficult debate between Member States: EU-15 versus NEM-13
- Towards a further rise of subsidiarity

→ How many pillars to structure the next CAP?

- An already old structuring choice (Agenda 2000)
- Rural development measures are co-financed by the Member States
- Towards a third pillar on risk management (through a transfer of funds)

→ How to target direct aids?

- More direct payments for small farms / organic farms (link with employment)?
- Share of coupled direct payments *versus* decoupled payments?
- More direct payments for environmental services and disadvantaged areas?

Conclusion



Conclusion

→ Good reason to believe in the future of EU agriculture

- Global demand for food is growing
- The contributions of agriculture diversify (energy, environment, biomaterials, ..)
- Standards, traceability and segmentation will play a more determining role
- Contractualization is getting stronger and companies are concentrating
- UE is able to boost its exports (quality, notoriety, technologies)

→ Main challenges for the future

- Prepare, already, the terms of the future CAP (2020)
- Continue to consider that technology is one of the levers of competitiveness
- Reconcile productivity and environmental performance
- Better distribute the added value between farmers, processors and distributors
- Encourage young people to settle successfully in agriculture
- Better communicate about agriculture and its useful role for our society



Selection of my publications on EU and French agriculture^(1/2)

DELABY L., CHATELLIER V., DUMONT B., HORAN B. (2017).

L'Irlande, un territoire porté par l'élevage laitier dans des conditions de milieu favorable et de marchés incertains.

INRA Productions Animales, 30 (4), 321-332.

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HERCULE J., CHATELLIER V., PIET L., DUMONT B., BENOIT M., DELABY L., DONNARS C., SAVINI I., DUPRAZ P. (2017).

Une typologie pour représenter la diversité des territoires d'élevage en Europe.

INRA Productions Animales, 30 (4), 285-302.

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Le secteur laitier français est-il compétitif face à la concurrence européenne et mondiale ?

A paraître dans Economie Rurale.

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Les échanges de bovins vivants et de viande bovine dans le monde et dans l'UE.

Working Paper SMART-LERECO n°17-06, 53 p.

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CHATELLIER V. (2016).

Le commerce international, européen et français de produits laitiers.

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Rôles, impacts et services issus des élevages en Europe.

Rapport pour les Ministères en charge de l'agriculture et de l'environnement.

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Selection of my publications on EU and French agriculture^(2/2)

CHATELLIER V., MAGDELAINE P. (2015).

La compétitivité de la filière volaille et chair française : entre doutes et espoirs.

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<http://tinyurl.com/kwegfgl>

HOCQUETTE J.F., CHATELLIER V. (2011).

Prospects for the European beef sector over the next 30 years.

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Price volatility, market regulation and risk management: challenges for the future of the CAP.

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Tokyo, 16th January 2018

V. Chatellier (INRA, UMR SMART-LERECO)

