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**Brexit**

Following the UK withdrawal from the EU, both parties have been preparing to start negotiations on the future relationship. The EU-27 has adopted its negotiating directives and the UK has published its approach to negotiations. They have also agreed the terms of reference for the negotiations so the first round has started on the 3rd of March in Brussels. Negotiating rounds will be happening every two to three weeks. Annex B to the Terms of Reference includes the schedule for the negotiating rounds up to mid-May 2020. Eleven negotiating groups, focusing on specific topics, have been established. The major disagreements concern the level playing field, the cooperation on law and justice, the governance of the future agreement and fisheries. While both parties have said they want to reach a comprehensive agreement, the goal is a Free Trade Agreement so once the transition period expires, the EU and the UK will have two separate markets instead of one single market and businesses need to be aware of and adapt now to the changes ahead (i.e. rules of origin and customs formalities will apply; access to the EU market will be subject to certification, market authorisation and supervision activities; there will be no harmonisation or mutual recognition of rules, and goods entering the Union will, for example, be subject to regulatory checks).

**EU Farm to Fork Strategy**

There has been a further leak of the Farm to Fork Strategy the European Commission (EC) is working on. According to the latest draft, the Strategy will envisage five key targets: reduction of the use and risk of synthetic chemical pesticides by a certain percentage between 2017 and 2030; increasing of the EU's land area dedicated to organic farming; reducing antimicrobial products for farmed animals; cutting fertilisers; reversing the rise in overweight and obesity rates across the EU by 2030. Other key objectives would be to reduce the carbon footprint, water pollution and methane emissions of livestock farming through the promotion of innovative feed additives and to promote a shift from animal-based to a plant-based diet supported by the production and use of sustainable novel sources of protein, like algae or insects. The EC proposal will be published at the end of March 2020.

**EU Climate Law**

The EC has just published a proposal to enshrine in legislation the EU's political commitment to be climate neutral by 2050. In addition to the legally binding target of net zero greenhouse gas emissions by 2050, the EU Climate Law includes measures to keep track of progress and adjust EU actions accordingly. At the same time, the EC has launched a public consultation on a new European Climate Pact, a broad initiative to give citizens and stakeholders a voice and role in designing new climate actions, sharing information, launching grass root activities and showcasing solutions. The public consultation will be open for 12 weeks until the 27th May.

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### Statistics on global organic farming

In 2018, organic farmland increased by 2 million hectares and retail sales continued to grow, as shown by the annual survey on organic farming worldwide published by the Research Institute of Organic Agriculture and IFOAM – Organics International. The global organic market has passed the 100 billion US dollar mark (€97 billion), with the US being the leading market (€40.6 billion) followed by Germany (€10.9 billion) and France (€9.1 billion). However, Danish and Swiss consumers are the ones spending most on organic food (€312 per capita) and Denmark has the highest organic market share (11.5%). According to the study, in 2018 there were 2.8 million organic producers in the World, with India being the country with the highest number of producers (1,149,000). The organic area has also grown to a total of 71.5 million hectares (2.9% more than in 2017). Australia has the largest organic agricultural area (35.7 million hectares), followed by Argentina and China. Globally, 1.5% of farmland is organic.

### Pork production and nitrate pollution

A recent study by the German Institute for Economic Research has linked agriculture and particularly animal fattening with groundwater pollution. Using new data, it empirically analyses the relationship between agricultural land use and nitrate pollution as well as nitrate pollution and local water prices to reach economic and environmental policy conclusions. It is the first systematic study of the relationship between land use and nitrate pollution of groundwater in Germany and it finds out that higher pig density is associated with higher concentrations of nitrate in the groundwater, while no statistically significant correlation is found for between the density of cattle or sheep and nitrate levels. Intensive pig farming was also in the news this month following a couple of tweets from the current EU Commissioner for Agriculture, Janusz Wojciechowski stressing the need to “address the problem of intensive pig farming in some EU countries, because agriculture has to be sustainable”. The EC has clarified these tweets are to be regarded as the Commissioner’s personal opinion on a matter “particularly dear to him”.

### Progress on AMR Action Plan

The European Commission has published its fourth progress report on the implementation of the European One Health Action Plan against Antimicrobial Resistance (AMR) showing that “substantial progress” has been made since the last progress report (published in mid-2019). Cooperation and coordination on AMR were enhanced through meetings of the AMR One Health Network and the Health Security Committee. In addition, the One Health Network has organised visits to Member States to support the implementation of national action plans. Other milestones include the publication of two overview reports respectively on measures to tackle AMR through the prudent use of antimicrobials in animals and on a series of audits carried out in 2017 and 2018 in order to evaluate the monitoring and reporting of AMR in zoonotic and commensal bacteria in certain food-producing animal populations and food.

### EU Trade

This month marked the first anniversary of the entry into force of the EU-Japan Economic Partnership Agreement (EPA). In the first ten months, EU exports to Japan went up by 6.6% compared to the same period the year before. This outperforms the growth in the past three years, which averaged 4.7%. Japanese exports to Europe grew by 6.3% in the same period. In particular, meat export increased by 12%, with a 12.6% increase for pork, and a 221% increase for frozen beef exports. Dairy exports were up by 10.4% (including a 47% increase in butter exports). Besides that, the EU-Vietnam trade agreement, the “most modern and ambitious agreement ever concluded between the EU and a developing country”, was approved by the European Parliament. Once Council formally concludes the trade agreement and the parties notify each other that their procedures are closed, it can enter into force.