

MARKET ACCESS & INTERNATIONAL TRADE IN IRISH MEAT

Bord Bia – Meat Prospects Seminar

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Agri-food is a key sector in the Irish Economy



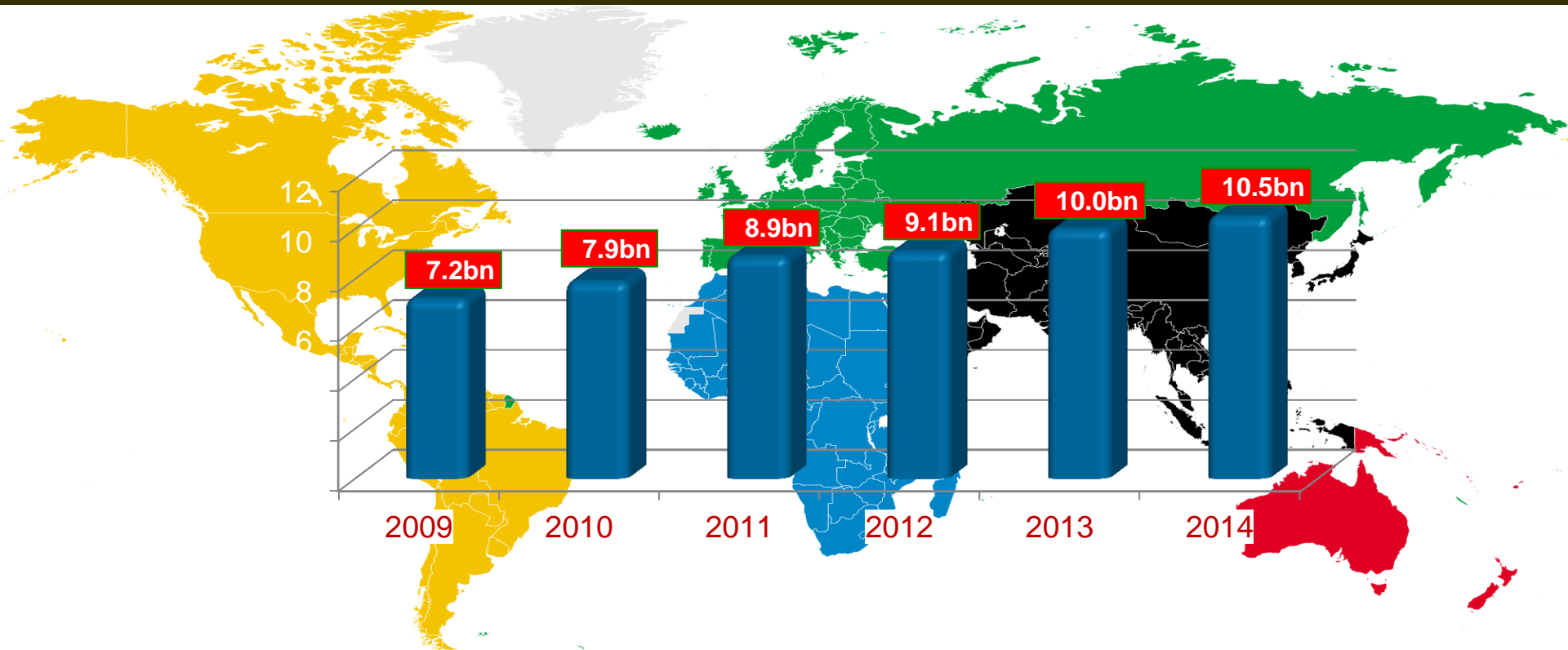
7.2% of Ireland's GDP

8.4% of employment

12.7% of merchandise
exports

Irish Agri-Food Exports 2009-2015

Food Harvest 2020



Food Wise 2025

#FoodWise2025 Strategy

Increase the value of agri food exports by 85% to €19 billion

Increase value added to the sector by 70% to €13 billion

Increase the value of primary production by 65% to €10 billion

Deliver a further 23,000 jobs in the agri food sector by 2025



Department of
**Agriculture,
Food and the Marine**
An Roinn
**Talmhaíochta,
Bia agus Mara**

Context & Background

- ❑ 2016 Economic Forecasts - ESRI
 - Economic growth (GDP) 4.8%
 - Unemployment 7.9%
 - Private Consumer Expenditure €96.7 bn (up €4.4 bn)
 - Exports of Goods & Services €290.9 bn (up €12.3 bn)
- ❑ Risks and opportunities:
 - ❑ Performance of key emerging economies
 - ❑ Chinese economic performance
 - ❑ Geopolitical problems e.g. Russian ban, North African instability
 - ❑ Offensive and defensive interests in TTIP/Mercosur
 - ❑ Post COP-21 negotiations at EU level
 - ❑ Brexit?

Markets Opened in 2015

Beef	Sheepmeat	Pigmeat	Cooked Meats
USA	Philippines	South Africa	Various new markets
Canada	Iran	Maldives	
Iran (re-opened)	Oman	Philippines (negotiated extension)	
Philippines (negotiated extension)	Philippines (negotiated extension)		
Oman			
Maldives			

Example of Value of New Markets: Beef Exports to Philippines of €11m in 2015 up to end Q3

Ongoing Market Access work for 2016

- ❑ Quarterly Market Access Meetings between DAFM, MII & Bord Bia
- ❑ Ongoing contacts with European Commission, DFA, Embassies abroad, network of agricultural attachés, MII & Bord Bia etc.
- ❑ Incoming Inspection Visits to be co-ordinated and managed
- ❑ Current priorities:
 - Incoming Beef Inspection visits from Jan-April from China, Israel, Egypt and Saudi Arabia
 - Progress beef and/or sheep access negotiations with Korea, Vietnam, Thailand and Mexico
 - Advance pigmeat discussions with Mexico

China – a key and growing market



Chinese Premier Li Keqiang visiting an Irish farm with Agriculture Minister Simon Coveney (May 2015)

Agri food exports to China
2014: **€650 million**

Pigmeat Exports: **€164m since access in 2012.**
Successive Year on year increases.

Making China Ireland's third biggest individual country market

China – beef access



- ❑ Ireland first and only EU MS to have beef ban lifted
- ❑ AQSIQ Inspection/Audit expected shortly
- ❑ Next step is protocol and certificate to be agreed with Chinese authorities. Already submitted by DAFM
- ❑ Subsequent CNCA plant-specific inspection visit will be required

USA – Beef Access



- ❑ First **and only** EU Member State to get USDA FSIS approval
- ❑ Six Irish plants approved to date
- ❑ Exports of approx some €11 million in from Feb-Dec 2015
- ❑ 2 Trade Missions to USA in 2015 (February & September)
- ❑ Beef Intended for Grinding is next step –
DAFM and USDA.



USA – Sheep Access



- ❑ Fast track procedure (DG Santé & USDA)
- ❑ Letter of interest from Ireland to USDA was sent by December 1st
- ❑ Next step requires US lifting of TSE ban
- ❑ DAFM submission of SRT

Russian Federation



- ❑ ASF Ban on Pigmeat from the EU – January 2014
- ❑ Audit of Ireland – May 2014
- ❑ Ban on EU export of beef trimmings – June 2014
- ❑ Russian Presidential Ban – August 2014
 - One year initially and extended for a further year (August 2016)
- ❑ What is affected
 - All EU Member States, US, Norway, Canada, Australia
 - Live animals (except pedigree animals), beef, pork, poultry, seafood, dairy products (except product for infant formula, casein and lactose free products), vegetables and fruits
- ❑ Recent correspondence between Commission & Russia
- ❑ EU- Ukraine Trade Deal (01 Jan 2016)

Live Exports



- ❑ Two walk on walk off ships currently approved (MV Express 1 & MV Atlantic) and 1 ship recent inspection (Amira Lola, formerly known as Star Viking)
- ❑ Three ro-ro ferries approved for carriage of livestock trucks:
 - Stena Europe (Rosslare-Fishguard)
 - Stena Horizon (Rosslare Cherbourg)
 - Irish Ferries Episilon (Dublin Cherbourg)

Third Country Live Cattle Certificates

❑ Breeding/production/fattening/
slaughter

- Albania
- Kazakhstan
- Lebanon
- Libya
- Morocco
- Russia
- Ukraine
- Tunisia
- Negotiations progressing with Turkey



Third Country Sheep Certificates



❑ New sheep certificates agreed in 2013

❑ Libya

❑ Singapore

International Trade Negotiations



MC10
NAIROBI
2015

WTO



☐ Mini Package

☐ At recent MC10 in December 2015 agreement was reached to phase out subsidies on agricultural exports.

☐ Should create a level playing field for Irish and EU Farmers.

☐ Least Developed Countries will benefit from the agreement



TTIP



- ❑ 11 Rounds so far have taken place.
- ❑ Ireland has both offensive and defensive interests
- ❑ 64,000t “other Countries” quota – 80% filled in 2015
- ❑ A number of key issues-GMO, Hormone treated beef-all have arisen.



CETA



- ❑ Already secured access for pigmeat and sheepmeat – Exports of €5m since Jan 2014
- ❑ Agreement achieved September 2014.
- ❑ 99% of all Tariff lines removed.
- ❑ Sizeable new market opportunities, particularly in Services & Investment.
- ❑ Still at “Legal Scrubbing” phase.
- ❑ Beef exports for primal cuts to commence in Q1





Mercosur



- ❑ Re-launched in May 2010
- ❑ Potential revival of EU- Mercosur trade negotiations give rise to concerns from an Irish perspective in relation to agriculture.

Bilateral Trade Negotiations

- ☐ Vietnam
- ☐ Japan
- ☐ Thailand
- ☐ India
- ☐ Singapore



Vietnam



- ❑ Negotiations on EU-Vietnam FTA commenced in June 2012
- ❑ Provisional agreement announced July 2015.
- ❑ Full dismantling of 99% of tariff lines.
- ❑ Legal review to commence early 2016.
- ❑ Agreement in force expected in 2018.



Japan



- ❑ Negotiations commenced in Nov 2012.
- ❑ Any concessions agreed between Japan & US (TPP) should form benchmark for agreement between EU and Japan.
- ❑ Japan has potential for imports
- ❑ Possible agreement for first half 2016.



Thailand



- ❑ FTA negotiations launched in February 2013.
- ❑ Important potential market for Ireland
- ❑ Ireland is seeking a reduction in tariff for a wide range of meat products.
- ❑ Political situation in Thailand has meant little progress occurred in 2014.



India



- ❑ FTA Negotiations launched June 2007.
- ❑ Key offensive interests for Ireland and Beverages and Dairy products but opportunities for meat sector .
- ❑ 12 full rounds but no progress has been achieved this year.
- ❑ Negotiations centred on Market Access for goods



India contd.



- ❑ However Market access is currently very difficult due to quota restrictions, high tariff and NTB's particularly in relation to dairy and beverages.
- ❑ However the present Indian Government is pro trade and may mean more focus on concluding an FTA



Singapore



- ❑ Negotiations on FTA with EU completed on the 17 October 2015.
- ❑ FTA entered “Legal scrubbing Phase”.
- ❑ Agreement on hold until ECJ decision on EU competency to conclude an agreement alone.
- ❑ Decision could have implications for Future FTA's

Questions

- ❑ Thank You
- ❑ Any Questions
- ❑ More info: <http://www.agriculture.gov.ie>