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Report Name: Green Deal Strategies for the EU Agri-Food Sector Present a Politically Ambitious Policy Roadmap

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Prepared By: Jennifer Lappin and Sophie Bolla

Approved By: Bruce Zanin

Report Highlights:

On May 20, 2020, the European Commission announced both the Farm to Fork (F2F) Strategy and the EU Biodiversity Strategy for 2030 as roadmaps for enhancing food and agricultural sustainability by 2030 under the EU Green Deal. The Strategies mark the beginning of a multi-step legislative development process that aims to fundamentally change the way EU agriculture operates and food is produced for, and provided to, EU consumers. The Strategies will need to be converted into legislative proposals with The European Parliament and Member States shaping and amending these proposals as part of the EU legislative process. Legislative negotiations between EU institutions typically take several years to complete.

EU Green Deal Ambitions for the Agri-Food Sector

On May 20, 2020, the European Commission Executive Vice President for the Green Deal, Frans Timmermans, alongside Health Commissioner Stella Kyriakides and Environment Commissioner Virginijus Sinkevičius, announced the publication of the [Farm to Fork Strategy](#) (F2F) and [EU Biodiversity Strategy for 2030](#). These two Strategies are roadmaps that will guide EU legislative initiatives and policy making for the duration of Commission President Ursula von der Leyen’s tenure (2019- 2024). Ursula von der Leyen has prioritized her Presidency around greening and transforming the EU economy to become carbon neutral by 2050 through the politically ambitious “[EU Green Deal](#).” Throughout 2020, the European Commission is publishing many sectoral strategies that lay out a vision with proposed measures to achieve that goal. The F2F and Biodiversity Strategies aim to support the Green Deal by fundamentally changing the way agriculture operates and how food is produced for, and provided to, EU consumers.

The announcement of the two Strategies marks the beginning of a multi-year legislative development and negotiation process which includes the EU co-legislators: the European Parliament and the Council (EU Members States), as well as citizens, businesses and non-governmental organization stakeholders. In the coming months and years, the Commission will work to convert the objectives of the Strategies into legislative proposals. The European Parliament and the Council will shape and amend these legislative proposals as part of the EU legislative process before they can become EU law. The F2F and Biodiversity Strategies’ proposals on pesticides will also be supported through non-legislative actions, such as guidance documents and enhanced implementation of existing regulations, as outlined in the [“REFIT” report](#) the Commission also released on May 20.

Key aspects of the two Strategies include: reducing pesticide use, a variety of new labeling initiatives, increasing organic production and marketing, supports to domestic production of plant protein for animal feed and meat-consumption substitution, animal welfare initiatives, and strengthening efforts to combat global deforestation. See Table 1 for a listing of all agri-food initiatives in both Strategies.

In laying out the Commission’s agri-food legislative priorities for the next five years, [the Commission also released a complementary report](#) highlighting how the EU’s primary agriculture and rural development legislation – the Common Agricultural Policy (CAP) – can support the F2F and Biodiversity Strategies. The current CAP 2014-2020 represents just under 40 percent of the total EU budget, and there is ongoing debate over reforming the next CAP. The financing of green measures and the links between the CAP and the F2F and Biodiversity Strategies are top issues to be discussed in negotiations with the European Parliament and the Council.

The Farm to Fork Strategy

The F2F Strategy highlights 27 actions aimed to transform the way EU food is produced, processed, transported, presented, and sold. The full Strategy can be found [here](#). The Commission identified these actions to further the Green Deal goals, reducing greenhouse gas emissions and pursuing economic growth decoupled from resource use. The F2F Strategy seeks to position the EU’s food systems on a

more sustainable path.¹ At the production level, the Commission proposes actions to reduce the overall use and risk of chemical pesticides by 50 percent by 2030 as well as the reduction of the use of fertilizers by at least 20 percent, and sales of antimicrobials used for farm animals and aquaculture to be reduced by 50 percent. Additionally, the Commission set a goal that 25 percent of agricultural lands should be used for organic farming, up from 8 percent currently. For additional information on Green Deal pesticide use reduction proposals including improved collection of pesticide use statistics and proposed revision of existing pesticide legislation, see GAIN report: *Pesticides Initiatives in the EU Farm to Fork Strategy*.

Executive Vice President Timmermans announced the F2F Strategy as a new approach to how the EU ensures food security “while sustainably producing and treating food, how much pesticides we use and how much pollution we cause by the overuse of fertilizers.” In its F2F policy roadmap, the Commission also proposes to increase animal welfare in farming during animal transport and at the slaughterhouse. Further along the food chain, the Commission aims to empower consumers to make informed, healthy, and sustainable food choices. Alongside Timmermans, Health Commissioner Kyriakides commented that F2F is a “health and prevention strategy against further crises” that will reverse “the rise in obesity rates and change of consumption patterns across the EU” suggesting that it is “critical – for the health of our citizens and continent but also for our resilience to pandemics.” To tackle the health issue, the Commission proposed new labeling requirements on food products such as mandatory front of pack nutrition labeling. For a detailed accounting of the various labeling initiatives proposed, please see GAIN report: *Food Labeling Initiatives in the EU Farm to Fork Strategy*.

Biodiversity Strategy

The [EU Biodiversity Strategy](#) provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The two main pesticide reduction initiatives presented in F2F are emphasized in the Biodiversity Strategy and complemented by the Biodiversity Strategy’s pledge to review and possibly revise the EU [2018 Pollinators Initiative](#). The Biodiversity Strategy also aims for further soil and nature conservation by setting aside a minimum of 10 percent of the existing agricultural area into higher biodiversity landscape features, such as buffer strips and rotational and non-rotational fallow land. The Commission’s proposed conservation measure is nested within the over-arching target of the Biodiversity Strategy to protect 30 percent of all EU land.

A Peek Ahead

As noted above, the Commission has yet to publish legislative proposals but most are expected in 2022 and 2023; see Table 1. Feedback on the F2F and Biodiversity Strategies will likely lead to the Commission launching impact assessments for measures that are expected to have significant economic, social or environmental impacts, prior to the drafting of new legislation. The EU legislative process has many research and consultative steps, along with intensive deliberation and negotiation

¹ In its introduction to the F2F Strategy, the European Commission’s Health and Food Safety Directorate General, [explains sustainable food systems](#) as having the following characteristics: “have a neutral or positive environmental impact, help to mitigate climate change and adapt to its impacts, reverse the loss of biodiversity, ensure food security, nutrition and public health, make sure that everyone has access to sufficient, safe, nutritious, sustainable food and preserving affordability of food while generating fairer economic returns, fostering competitiveness of the EU supply sector and promoting fair trade.” A longer explanation is found in Section 2 of the Strategy.

among the Commission’s co-legislators- the European Parliament and the Council. Notably, the lack of comprehensive baseline data to support many of the numerical targets proposed in the Strategies could complicate the process. Thus, entry into force of the Commission’s proposed measures—if they are to be adopted at all— are not likely until the end of the Commission’s term in 2024 or thereafter. More information on this multi-step process and timing can be found at the end of this report.

Stakeholder reactions

At the May 20 announcement, Timmermans commented that these Strategies “are not about telling people what to do” rather they “are about telling people how they can make their choices better informed” to give them “what they deserve: more sustainable food, better information” suggesting that better “informed citizens are stronger citizens, creating a stronger society.” Several F2F initiatives involve informing consumers through new mandatory labeling. Despite Commissioner Timmerman’s declaration, many agri-food stakeholders expressed concern over the prescriptive approach, impacts on farm productivity, and policy performance targets for farming-resource inputs- crop protection products and fertilizer usage.

Reacting to the publication of the two Strategies: **COPA-COGECA**, the organization representing EU farmers and cooperatives, [warned](#) the Commission against endangering strategic EU interests in food security, agricultural competitiveness, and farming income. They noted that European farmers “need alternatives to enable them to reach the ambitious targets without destroying their livelihoods.”

FoodDrinkEurope, the umbrella organization representing the food and beverage industries in the EU, [supported](#) the ambition of the Commission “to become the gold standard for environmental, social, and economic sustainability” but was critical of some measures such as mandatory front of pack nutritional labeling. **The European Crop Protection Association** [acknowledged](#) the calls for pesticide reduction but stressed that any targets have to be science based. One common demand from all three organizations was the need for thorough impact assessments on the various proposals to assess whether the objectives and targets would actually achieve expectations.

The European Parliament’s Agriculture and Rural Development (AGRI) Committee and Environment, Heath and Food Safety Committee (ENVI) also reacted. The **AGRI Committee** [underlined](#) that the Farm to Fork Strategy must build on the lessons learned from the COVID-19 crisis and give farmers the support they need to guarantee food security all across the EU. Chair of the AGRI Committee Norbert Lins commented that F2F “can only be successful if there is a balance between the Farm and the Fork” emphasizing that the “voices of farmers must be heard” and “without their input, the Strategy will not work.” The **ENVI Committee** Chair, Pascal Canfin, [urged](#) taking these Strategies from paper into practice, stating that the “chapters of the European Green Deal on agriculture and nature are good” but must be “transformed into EU legislation” and that new commitments will need to be incorporated into the planned reforms of the EU Common Agricultural Policy, “the tool for implementing these ambitions.”

International Ambitions

In addition to outlining goals within the EU, the F2F and Biodiversity Strategies also outline the EU's global aspirations for these Strategies. They aspire to set the global standard of sustainability and facilitate the global transition to a more sustainable agri-food system. The F2F Strategy states that the

EU will pursue "Green Alliances" on sustainable food systems in bilateral, regional, and multilateral fora. The EU will look to use its trade policy to support this goal, working to ensure sustainability chapters are present in all of their bilateral trade agreements. They will also work to "obtain ambitious commitments from third countries in key areas such as animal welfare, the use of pesticides and the fight against antimicrobial resistance." In addition, the Strategy outlines EU aims to "promote international standards in the relevant international bodies and encourage the production of agri-food products complying with high safety and sustainability standards." Under the Biodiversity Strategy, the EU also aspires to lead efforts in a coalition of third countries to establish a global framework on biodiversity. The Biodiversity Strategy also reiterates the aim of using trade policy to ensure biodiversity as part of all future EU trade agreements.

Next Steps in the EU Legislative Process

The announcement of the F2F and Biodiversity Strategies is the first step in a lengthy and politically complicated legislative process. For many of the nearly 40 proposed food and agriculture policy initiatives in both Strategies, the Commission will be asked to conduct impact assessments that can inform but also delay the publication of the draft legislative proposals.

The Commission carries out [impact assessments](#) for policy initiatives expected to have significant economic, social or environmental impacts. The Commission announces the launch of these assessments to the public first with an inception impact assessment report that states the objectives of the forthcoming impact assessment as well as the timeline for completion. Stakeholders are invited to [comment on the inception report](#). Once the actual impact assessment is underway, the Commission seeks additional input through public consultations and expert group meetings. Upon completion of the impact assessment, the Commission publishes the findings along with its draft legislation.

If the draft is a new legislative proposal, it will be sent to the two EU co-legislators: the European Parliament and the Council. Then the amendment process and negotiations among institutions begins. From draft legislation to publication in *The Official Journal of the European Union*, the EU legislative process typically takes about 18 months; however, timelines vary greatly depending on the sensitivities and urgencies of the topic. If the policy initiative is a non-framework legislation proposal, it will follow different procedures. Any implementing or delegated act proposals follow the EU comitology rules, with limited input from the Parliament and Council, and move more expeditiously than framework legislation. For other proposals, such as guidance documents or enhanced implementation of existing regulations, the Commission has sole authority and can act without co-legislator input. For more information about the EU legislative process, please see GAIN Report "[How the European Union Works](#)."

Table 1: Listing of all agri-food initiatives in both the F2F and Biodiversity Strategies²

Actions	Timeline
Farm to Fork Strategy	
Proposal for a legislative framework for sustainable food systems	2023
Develop a contingency plan for ensuring food supply and food security	Q4 2021
Adopt recommendations to each Member State addressing the nine specific objectives of the Common Agricultural Policy (CAP), before the draft CAP Strategic Plans are formally submitted	Q4 2020
Proposal for a revision of the Sustainable Use of Pesticides Directive to significantly reduce use and risk and dependency on pesticides and enhance Integrated Pest Management	Q1 2022
Revision of the relevant implementing Regulations under the Plant Protection Products framework to facilitate placing on the market of plant protection products containing biological active substances	Q4 2021
Proposal for a revision of the pesticides statistics Regulation to overcome data gaps and reinforce evidence-based policy making	2023
Evaluation and revision of the existing animal welfare legislation, including on animal transport and slaughter of animals	Q4 2023
Proposal for a revision of the feed additives Regulation to reduce the environmental impact of livestock farming	Q4 2021
Proposal for a revision of the Farm Accountancy Data Network Regulation to transform it into a Farm Sustainability Data Network with a view to contribute to a wide uptake of sustainable farming practices	Q2 2022
Legislative initiatives to enhance cooperation of primary producers to support their position in the food chain and non-legislative initiatives to improve transparency	2021-2022
EU carbon farming initiative	Q3 2021
Initiative to improve the corporate governance framework, including a requirement for the food industry to integrate sustainability into corporate strategies	Q1 2021
Develop an EU code and monitoring framework for responsible business and marketing conduct in the food supply chain	Q2 2021
Launch initiatives to stimulate reformulation of processed food, including the setting of maximum levels for certain nutrients	Q4 2021
Set nutrient profiles to restrict promotion of food high in salt, sugars and/or fat	Q4 2022
Proposal for a revision of EU legislation on Food Contact Materials to improve food safety, ensure citizens' health and reduce the environmental footprint of the sector	Q4 2022

² Please note that not all actions listed in both Strategies are listed in Table 1. For the full list, please see the Farm to Fork Strategy and the Biodiversity Strategy.

Proposal for a revision of EU marketing standards for agricultural, fishery and aquaculture products to ensure the uptake and supply of sustainable products	2021-2022
Enhance coordination to enforce single market rules and tackle Food Fraud, including by considering a reinforced use of OLAF's investigative capacities	2021-2022
Proposal for a harmonized mandatory front-of-pack nutrition labelling to enable consumers to make health conscious food choices	Q4 2022
Proposal to require origin indication for certain products	Q4 2022
Proposal for a sustainable food labelling framework to empower consumers to make sustainable food choices	2024
Review of the EU promotion program for agricultural and food products with a view to enhancing its contribution to sustainable production and consumption	Q4 2020
Review of the EU school scheme legal framework with a view to refocus the scheme on healthy and sustainable food	2023
Proposal for EU-level targets for food waste reduction	2023
Proposal for a revision of EU rules on date marking ('use by' and 'best before' dates)	Q4 2022
Biodiversity Strategy	
Proposal for EU nature restoration targets	2021
Revision of the Sustainable Use of Pesticides Directive and enhance Integrated Pest Management provisions	2022
Review and possible revision of the EU Pollinators initiative	2020
Measures to ensure that Member States' CAP Strategic Plans set explicit national values for relevant targets of the Biodiversity and Farm to Fork Strategies, supported, inter alia, by CAP instruments and implementation of the Habitats Directive	2020
Action Plan for Organic Farming for 2021-2026	2020
Revision of the Thematic Strategy for Soil Protection	2021
Assessment of the EU and global biomass supply and demand and related sustainability	2020
Study on the sustainability of the use of forest biomass for energy production	2020
Operational guidance on the new sustainability criteria on forest biomass for energy	2021
Review of the data on biofuels with high indirect land-use change risk and setting up of a trajectory for their gradual phase out by 2030	2021
Measures to avoid or minimize the placing of products associated with deforestation or forest degradation on the EU market	2021

Attachments:

No Attachments