Colleagues,

As a follow-up to the invitation circulated in early July, this note provides specific information regarding the fifth OECD Food Chain Analysis Network (FCAN) meeting scheduled for 30-31 October 2013 at the OECD Conference Centre in Paris addressing *Competition along the Food Chain.* The aim of the meeting is to provide a better understanding of how value is created and distributed along modern food chains, including various aspects of price formation.

A request was made at the 2010 OECD Agriculture Ministerial that the OECD contribute to a better understanding of the opportunities, challenges and appropriate policy responses facing an evolving food chain. The OECD Committee for Agriculture established a Food Chain Analysis Network in 2011 which includes as members, government officials, international organisations, industry stakeholders, consumers, academic experts and NGOs, to provide a broad platform for dialogue on emerging issues. The subsequent programmes of work, 2011-12 and 2013-14, of the Committee for Agriculture have included meetings of the Food Chain Analysis Network.

For security reasons, all participants must register for this event. The reserved room capacity is limited to about 100 delegates, so early registration is encouraged but every effort will be made to include representatives from all stages of the food chain, from input suppliers to final consumers. Member country delegates can register through the CMS system. Other members of the network wishing to participate should contact Christine Cameron (christine.cameron@oecd.org).

A summary note of the event will be provided to all participants and eventually submitted to the OECD Committee for Agriculture. While there will be no attempt to arrive at consensus opinions, it is envisaged that the material presented and subsequent discussions will provide observations on food chain issues, activities and experiences of relevance for agricultural policy makers.

In the afternoon of 31 October, the 119th OECD Competition Committee will hold a Roundtable on Competition Issues in the Food Chain Industry. FCAN participants are invited to attend the roundtable. Government delegates to FCAN should contact their national delegation to the OECD Competition Committee if they plan to actively participate to the roundtable. Industry representatives should coordinate their participation through BIAC. Academics and other FCAN participants should contact the Roundtable organiser Patricia Heriard-Dubreuil directly (patricia.heriard-dubreuil@oecd.org).

For more information, please contact Céline Giner (celine.giner@oecd.org) or Wayne Jones (wayne.jones@oecd.org).

You can also find the agenda and relevant information and background documents on the network website: http://www.oecd.org/site/agrfcn/.



The meeting will attempt to provide an overview of key elements determining the distribution of value along the modern food chain, including price formation and their relationship to classic competition issues. It asks: how can agents capture their fair share of value while promoting efficiency and transparency in the food system?

Wednesday 30 October 2013

Registration and Welcome
09.30-10.15

- ***Wayne Jones**, Head of the Agro-Food Trade and Markets Division, OECD*

Session I: Setting the Scene
10.15-12.30

***Chair: Céline Giner,** OECD*

Agri-food systems have undergone major changes in behaviour and structure over the past several decades. Agricultural production must now meet more stringent quality and safety norms with standards that are often imposed by downstream players. Market power and competition policy in modern agri-food systems continues to be an important issue world-wide and understanding the complex welfare effects of the growth in market concentration is necessary if policy and market strategies over the medium term are to ensure a transparent and efficient food system. This session will set the scene by identifying some of the most important changes and the challenges these present to governments and the food chain.

- Globalisation and Competition in Agri-food Markets
  - ***Johan Swinnen**, K.U. Leuven*

- Panel session I: **Competition between Food Chain Participants**
  - ***Deborah Cawood**, Chief Food Chain Adviser, National Farmers Union – UK*
  - ***Roxane Feller**, Director Economic Affairs, FoodDrinkEurope*
  - ***Javier Berasategi**, Competition Lawyer in Brussels, former President of the Basque Country Competition Authority*

12:30-14:30 Lunch

Session II: Competition and Value Creation along the Food Chain
14.30-18.00

***Chair: Linda Fulponi**, ex-OECD*

Interactions between participants along the food chain have become more complex with globalised and concentrated markets. This session identifies new avenues of value creation along the chain through rising norms and standards and new mechanisms determining its distribution among players in the chain. A panel session will be devoted to examining farmers' cooperatives as a means of constituting countervailing market power to better capture their share of value along the chain.

- Private standards – what are they good for?
  - ***Eric Giraud-Heraud**, INRA/Ecole Polytechnique*
  - ***Ruben Hoffman**, Swedish University of Agricultural Sciences*

- Marketing boards and concentration along value chains in Canada
  - ***Bruno Larue**, U. Laval*

15.30-16.00 Coffee break

- Panel Session II: **Can Farmers' Cooperatives Provide Countervailing Power and Improve their Share of Value along the Chain?**
  - ***Krijn Poppe**, Senior Economist and Research Manager, LEI*
  - ***Gianluca Verasani**, Director, Legacoop Modena*
  - ***Paulo Gouveia**, Director, Copa-Cogeca*
  - ***Francis Reid**, Policy & Advocacy Manager, Fonterra*

Thursday 31 October 2013

Session III: Competition and Value Distribution along the Food Chain
09.30-13.00

***Chair: John Davies**, Head of the Competition Division, OECD*

This session will focus on the interactions between actors along the chain from producer to consumer. How do the various actors along the food chain influence prices? What is the role for government? (Note: The role of government will be pursued in the OECD Competition Committee's Roundtable on Competition Issues in the Food Chain Industry to follow in the afternoon.)

- Retail Food Price Formation in the US
  - ***Richard Volpe**, Economist, ERS*

- Price Formation and Price Transmission in the EU
  - ***Steve McCorriston**, University of Exeter*

10.30-11.00 Coffee break

- Panel Session III: **Price Formation: Stakeholder Views**
  - ***Horacio González Alemán**, Director General*, Federación Española de Industrias de la Alimentación y Bebidas(FIAB)
  - ***Dennis Kredler**, European Retail Round Table(ERRT)*
  - ***Jérôme Bedier**, Secretary General, Carrefour*

- Concluding Remarks
  - ***Wayne Jones**, Head of the Agro-Food Trade and Markets Division, OECD*

13:00-14.30 Lunch

Roundtable on Competition Issues in the Food Chain Industry
119h Meeting of the OECD Competition Committee
14.30-17.45