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The Impact of the European Enlargement and Common Agricultural Policy Reforms on Agricultural Markets: Much Ado about Nothing?

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Abstract

Following a historical agreement on the EU enlargement, 10 new member states (NMS) acceded to the European Union on May 1, 2004. Although the European Union has expanded its membership in the past, this enlargement is unique in terms of its scope and diversity of the countries, area, and population involved. Thus, the effects of the EU enlargement on current and future member countries and on world commodity markets require careful consideration as the European Union is a major player in these markets. We analyze the effects of the Common Agricultural Policy (CAP) reform and enlargement on the EU-15, the NMS, and world agricultural markets. We compare three 10-year comprehensive agricultural outlook scenarios. In a “pre-enlargement” scenario, all pre-enlargement policies of the EU-15 are held in place and the 10 NMS maintain their independent economic policies and older technologies as if nothing happens. The second scenario considers the CAP reform in the EU-15. The third scenario is the 2004 Food and Agricultural Policy Research Institute (FAPRI) baseline projection, which incorporates both the CAP reforms and accession of the 10 NMS with the associated domestic and trade policy reforms and some convergence in technology within the EU-25.

With prices in most commodities in the acceding countries historically below EU-15 prices, accession leads to a moderate decrease in the EU-15 prices, whereas for the 10 NMS, domestic prices of many commodities increase substantially. Holding income levels constant, consumption levels of agricultural products in these countries decrease in most instances because of higher food prices, while production levels rise. The impact of the two reforms on world markets is moderate to negligible. The CAP reform has a moderate impact on the EU-15.

Keywords: CAP reform, Common Agricultural Policy, EU enlargement, European agriculture, New Member States.

THE IMPACT OF THE EUROPEAN ENLARGEMENT AND COMMON AGRICULTURAL POLICY REFORMS ON AGRICULTURAL MARKETS: MUCH ADO ABOUT NOTHING?

Introduction

Following a historical agreement on the EU enlargement, 10 new member states (NMS) (Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia) acceded to the European Union on May 1, 2004. Although the European Union has accepted new countries in the past, this enlargement is without precedent in terms of its scope and diversity of the number of countries, area, population, and large rural sector. Thus, the effects of the EU enlargement on current and future member countries and on world commodity markets require careful consideration as the European Union is a major player in these markets. This analysis is challenging because of the heavily protected nature of the agricultural sector in the EU-15 through the Common Agricultural Policy (CAP) and the importance of the agricultural sectors in the candidate countries. Implementation of the CAP in the NMS will be concluded after a transition period. However, more than half of the funds to support agricultural policy will have to come from non-CAP funds. The NMS have the opportunity to make “top-up” payments (supplemental payments) of 30 percent of the EU-15 level over and above the basic CAP support levels. Aid payments in the EU-15 and the 10 new countries will be aligned by 2010. The agreement also sets other policy parameters (e.g., milk and sugar production quotas for milk and sugar) in the NMS.

This study analyzes the effects of the latest CAP reforms and enlargement on the EU-15, acceding countries, and world agricultural markets. It compares three 10-year comprehensive agricultural outlooks scenarios. In a “pre-enlargement” reference scenario, all pre-enlargement policies of the EU-15 are held in place and the 10 NMS maintain their independent economic policies and older technologies as if nothing happens. The second scenario considers the midterm review CAP reform in the former

EU-15. The third scenario is the 2004 Food and Agricultural Policy Research Institute (FAPRI) baseline projection, which incorporates both the CAP reforms and the accession of the 10 NMS with the associated domestic and trade policy reforms and some convergence in technology within the EU-25. We utilize the EU module of the FAPRI model to simulate and analyze the effects of the EU enlargement on production, consumption, and trade of the enlarged European Union and on major players in world agricultural markets. The model is a partial equilibrium model of world agricultural markets, including important producer and consumer countries in the world livestock and products, dairy, grains, oilseeds and products, cotton, and sugar markets. Countries' commodity sectors are modeled with structural equations, which incorporate all important policy parameters. We focus on the impacts of these policy changes (CAP reform and enlargement) on production, consumption, and trade.

Our analysis contributes to the recent literature analyzing the integration of new countries into the common European market and the recent series of CAP reforms (Ackrill 2003; Bouamra-Mechemache and Requillart 2004; Fuller et al. 1999, 2002; Matthew 2002; Nahuis 2004; Schrader 2002; among others). Several of these studies looked at specific cases of the candidate countries and/or made early assumptions about agricultural policy reforms in the new member countries. In this paper, we implement the actually agreed-upon framework between the EU-15 and all 10 new member countries and include the latest 2004 midterm CAP reforms. Therefore, we provide an encompassing assessment of these most recent changes with updated estimates of their potential impacts on agricultural markets in the original EU-15, the NMS, and world markets.

The overall impact of these reforms outside of the European Union is small, hence our title. These two important reforms deemed historical are mainly a European matter. Even within the European Union, the impact of the combined reforms is relatively modest in production and consumption except in dairy and sugar markets. Trade effects within the European Union are significant but not as devastating as one might expect. There are two major reasons why the impacts are limited. First, the reallocation of resources is mostly within the enlarged European Union. Countries had been preparing for these foreseeable reforms through preferential trade agreements such as the Central European Free Trade Agreement (CEFTA), giving preferential duties to CEFTA members.

Trade between the EU-15 and Central and Eastern European Countries (CEECs) is governed by the Europe Agreement, with the intent of gradually integrating the CEECs into the EU single market. The only potential substantial surprise would have been for the third countries that have significant trade with the acceding countries. Second, the 2003 CAP reform is the most recent of a series of fundamental reforms initiated 12 years ago, and the incremental effect of this latest policy change is moderate, although the impact of the whole set of reforms since 1992 has certainly been marked. The change in NMS production and consumption is more pronounced since the accession is the first major step into the CAP mode.

The results of our analysis suggest several pointers. World markets are little affected by either reform. Agricultural markets in the EU-15 are also marginally affected with a few qualifiers. The major changes occur in the NMS through major changes in grain, meat, and dairy prices and changes in production/marketing quotas in dairy and sugar. The impacts on intra-EU-25 trade are driven by changes in production and consumption, rather than by the lowering of intra-EU-25 protection, which was already low. However, trade of the EU-25 with third countries suffers, as the 10 NMS align their duties to the generally higher duties of the EU-15.

Policy Changes and Scenarios

A reference baseline is constructed as a business-as-usual scenario (scenario 1), with pre-2004 policies extended in the EU-15, following the Berlin Accord and the candidate countries remaining separated from the European Union. This somewhat contrived scenario is necessary to provide a reference trajectory to estimate the effects of policy reforms later on. Then, our analysis incorporates the major policy changes associated with the 2003 CAP reform that came out of the midterm review (scenario 2). The 2004 enlargement and the accession of the 10 countries (Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia) is then the third scenario and considers associated policy changes in these countries during an implementation period to converge to fully vested CAP recipients (scenario 3).

Common Agricultural Policy Reform

Reform implementation started in 2004. The essence of the CAP reform is the far-sighted aim of complying with future WTO commitments likely to emerge from the Doha Round of the World Trade Organization (WTO) negotiations and to induce marginal incentives driven by market forces rather than by farm programs. Sugar and dairy are the notable exceptions to this trend. This aim of the recent CAP reform means furthering the decoupling of farm support from production decisions initiated in the 1992 reform and lowering price policy incentives linked to production decisions. Decoupling, when fully implemented, will take the form of a Single Farm Payment (SFP), must be fully in place by 2007, and is likely to satisfy green-box criteria. Since limited coupled elements may be maintained to avoid abandonment of production and because the SFP creates wealth effects, we assume that the SFP has a small supply-inducing effect. The CAP reform also includes commodity-specific measures, especially in dairy. Price cuts occur in the milk sector, as will be further discussed. There is also a reduction of the monthly increments in the cereals sector by one-half, but the current intervention price will be maintained.

Other reforms affect rice, durum wheat, and other commodities not covered by the FAPRI (Food and Agricultural Policy Research Institute) baseline. The current intervention price for cereals is maintained, with the exception of rice, for which the price is cut nearly by one-half. Rye is excluded from the intervention system. The supplement for durum wheat will progressively decrease to €285/ha by 2006 and will be included in the SFP.

Regarding decoupling, member states are expected to implement CAP reform in different ways, therefore resulting in different degrees of decoupling. Because we use an aggregate EU-15 model, we assume partial decoupling for the aggregate European Union phased in between 2005 and 2007. The SFP must be introduced by 2007. Modulation (reduction in direct payments for large farms) rates are set at 3 percent for 2005, 4 percent for 2006, and 5 percent after that. In the EU-15, set-aside is set to 5 percent for 2004 and 10 percent for 2005 and onward. There are reductions in intervention prices. The intervention price for butter is reduced by 25 percent over four years, and the skimmed milk powder price faces a 15 percent reduction over three years. For grains, current intervention prices are maintained. Durum wheat aid is reduced to €313/mt in 2004, €291/mt in 2005, and then €285/mt from 2006 on. Rye intervention is eliminated.

Dairy quotas grow anemically in the EU-15, from 118.953 mmt in 2004 to 120.505 mmt in 2009, and then they are assumed to stay at that level until 2013/14.

Accession

Accession of the NMS took place in May 2004, with policy changes being phased in over time. In general, CAP policies are adopted by the NMS but with some variations to accommodate accession. In the NMS, a single area payment reform begins at the time of entry. There is no financial modulation until support reaches 100 percent, which occurs in 2013 (see Table 1). There are no top-up payments after 2008. Decoupling in the NMS is implemented following the simplified area payment in 2004 and then is switched to the SFP in 2007. There are new direct payments for the NMS: they can provide top-up payments using national finances or funds for rural development given by the European Union until 2006. The assumed top-up payments are shown in Table 1.

Set-aside in the NMS starts in 2007 and remains at 10 percent. Dairy production quotas in the NMS are set as shown in Table 2. Poland is the largest dairy producer, followed by the Czech Republic, Hungary, and Lithuania.

The trade policy regime of the NMS is changed. External duty rates of the NMS are harmonized with the EU-15. Internal rates are set at zero. Price convergence between the EU-15 and EU NMS is assumed to take three to four years, mimicking the decrease of transaction cost with integration and a quality upgrade in the NMS. Table 3 summarizes the important policy parameters.

The FAPRI International Model

The modeling system approach links a system of submodels organized by commodity and connected by intermarket linkages through final and derived demands. Each commodity model is organized by country and covers countries that are major producers, consumers, or trading forces in that market. The models are non-spatial, multi-market models that cover most temperate agricultural products (major grains, oilseeds and products, livestock and products, poultry and products, sugar, and cotton). The models solve for a world equilibrium price by setting world excess demand equal to zero. The world price feeds back into each country model via price transmission equations and determines the local supply, demand, and trade. The following identity is satisfied for

TABLE 1. EU payments and top-up payments in the New Member States

Payments	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	<i>(Percent)</i>									
Top-up	20	27	22	17	7	0	0	0	0	0
EU payments	25	30	35	40	50	60	70	80	90	100
Total	45	57	57	57	57	60	70	80	90	100

TABLE 2. Calendar-year dairy quota allocations for the EU-15 and New Member States

Countries	2004	2005	2006	2007	2008	2009
	<i>(Million Metric Tons)</i>					
Cyprus	0.145	0.145	0.145	0.145	0.145	0.145
Czech Republic	2.682	2.682	2.682	2.738	2.738	2.738
Estonia	0.624	0.624	0.624	0.646	0.646	0.646
Hungary	1.947	1.947	1.947	1.990	1.990	1.990
Latvia	0.695	0.695	0.695	0.729	0.729	0.729
Lithuania	1.647	1.647	1.647	1.705	1.705	1.705
Malta	0.049	0.049	0.049	0.049	0.049	0.049
Poland	8.964	8.964	8.964	9.380	9.380	9.380
Slovakia	1.013	1.013	1.013	1.041	1.041	1.041
Slovenia	0.560	0.560	0.560	0.577	0.577	0.577

each country/region and the world: Beginning Stock + Production + Imports = Ending Stock + Consumption + Exports. The FAPRI modeling system assumes that the existing agricultural and trade policy variables will remain unchanged in the outlook period unless these changes are written law, such as WTO commitments to decrease tariffs until 2000 for developed WTO members. Macroeconomic variables, such as gross domestic product, population, and exchange rates, are exogenous variables that drive the projections of the model.

The data sources included in the model are the USDA-FAS (Foreign Agricultural Service) Production, Supply, and Distribution (PS&D) data set. Additional data for area, yield, sugarcane, and sugar beet production are gathered from the Food and Agricultural Organization (FAO) of the United Nations. The International Monetary Funds' (IMF)

TABLE 3. Summary of EU Common Agricultural Policy reform and enlargement

Policy	2004	2005	2006	2007	2008
Decoupling (%) ^a					
Livestock	0	23	47	70	70
Crops and dairy	0	33	67	100	100
Modulation (%)	0	3	4	5	5
Set-aside (%)					
EU-15	5	10	10	10	10
EU NMS	0	0	0	10	10
Dairy quota (mmt)					
EU-15	118.95	119.04	119.30	119.78	120.26
EU NMS	18.33	18.33	18.37	19.00	19.00
Intervention price and premium					
Durum aid (euros/mt)	313.00	291.00	285.00	285.00	285.00
Butter (euros/mt) ^b	316.72	293.84	270.98	252.96	246.39
NFD (euros/mt) ^b	200.38	190.61	180.33	176.69	174.69
Top-up payments (%)	20	27	22	17	7

^a A modest crop response to the SFP is assumed because of wealth effects.

^b Calendar-average prices of marketing-year prices.

International Financial Statistics (IFS) provide historical macroeconomic data, whereas Global Insight provides a macro forecast for the outlook part of the model. We use USDA attaché reports, and other sources (WTO, World Bank's WITS database) for commodity prices and policy information.

Parameters in the model such as price and income responses are either directly estimated, surveyed from the literature, or obtained from consensus of expert opinions. Details, including parameter values, are provided on the FAPRI Web site (FAPRI 2004a,b).

The grain module of the FAPRI international model covers all major feed and food grains (corn, rice, wheat, and other coarse grains). It has links to other models in the FAPRI framework, such as the cotton, dairy, livestock, oilseeds, and sugar models. The grains model interacts with the dairy and livestock models that provide information on feed demand in the countries, and with oilseeds models that provide information on the relative profitability and area harvested for the competing crops. Each country submodel consists of at least one commodity depending on the relative importance of the commod-

ity and the relative importance of the country in the world markets as a supplier or a buyer. Grain production is divided into yield and area equations, while consumption is divided into feed and non-feed use. Agricultural and trade policies in each country are included in the model to the extent that they affect the supply and demand decisions of the economic agents. Examples of these include taxes on exports and imports, tariffs, tariff rate quotas, export subsidies, intervention prices, and set-aside rates.

The oilseed component of the model treats each respective seed, meal, and oil as a homogeneous commodity. Depending on data availability, domestic prices in the oilseed model can be farm, wholesale, or port prices. Consumer and producer prices are differentially specified only in countries that have a deficiency type of producer support or differentiated taxation. This general structure is slightly modified to accommodate policy interventions other than price distortions, such as quantitative restrictions on area, supply, or trade flows.

The general structure of each country oilseed submodel includes behavioral equations for area harvested, yield, and production of oilseeds on the supply side, and crush, seed, food, and other consumption as well as ending stocks on the demand side. Planted area is a function of expected prices (a convex combination of lagged and current) and a trend. Yield is a function of prices, area expansion, and a trend. Production is equal to the product of planted area and yield. Ending stocks are a function of current prices.

The crush demand is driven by the oil demand and/or by meal demand. Given the joint product of oil and meal and the positive economic value attached to meal, the derived demand from crushing reflects both oil and meal. The derived demand for crush oilseeds is driven by the crush margin. The crush equation constitutes the price and quantity links between the seeds and products markets. We make the usual assumption of fixed proportion in the technology of meal and oil production and price-taking assumptions in oilseed crushing to describe the crushing cost. As the margin increases, the demand for crush seeds increases. A change in the crush demand affects seed demand and products supply simultaneously. Prices adapt accordingly to re-establish equilibrium.

The oil and meal supplies are a function of the crush. Total demand is the sum of consumption, ending stocks, and exports. Imports and exports are not explicitly modeled. Net trade is the difference between total supply and demand. Vegetable oil demand is a

final demand coming from the consumer. Per capita oil demand is modeled as a function of the real consumer price of the oil, the prices of competing substitute oils, and real income per capita. Total demand is just the product of population and per capita consumption. Meal demand is derived from livestock production and is an output-constant demand, which is a function of livestock numbers (as measured by aggregate livestock animal units), the price of meal, and the price of other feed products. We assume trade in seeds, oil, and meal is an excess demand/supply and provides closure in the markets.

The structure of the international livestock and poultry models incorporates the biological processes involved in livestock and meat production via investment, production, and consumption decisions of significant economic agents. The demand side is driven by relevant prices, income, and population, while the supply side is driven by relevant prices, cost of production, and technology. The specification of the model first includes a clear differentiation of stock (animal inventory) and flow (slaughter) variables. Second, except for the breeding herd, all stock variables are derived in an accounting identity from the changes in the flow variables. Third, flow variables are generally the only ones with behavioral specification representing economic decisions of significant agents in the sector. Fourth, flow variables are specified in terms of rates rather than levels. Rates normally give a more stable behavior to the model compared with levels and lend easily to comparison across countries and time periods. Finally, price determination in individual country submodels is specified as either price transmission from the world price or market clearing when there are significant restrictions in trade flow, such as the case of the quantitative quota of broilers in Russia. The entire model solves with a market-clearing world price that balances world trade and equates supply and demand in individual countries. The model captures policy instruments that influence the incentives faced by economic agents. This includes domestic and border policies.

For most country and regional aggregates, the international dairy model contains equations for five commodities: milk, butter, cheese, nonfat dry milk (NFD), and whole milk powder (WMP). Key price and quantity variables are passed between the dairy model and the other FAPRI commodity models to accommodate intercommodity interactions. For example, feed prices are passed from the grain model and oilseed models to the dairy model to account for feed-cost impacts on the cattle inventories and milk yields.

Likewise, dairy cow numbers are passed to the grain and oilseed models to account for output scale in output-constant derived demand for feed. The dairy model solves for equilibrium in international markets for the four derived products, and a domestic equilibrium for fluid milk is maintained at all times.

Consumer demands for dairy products are modeled by a set of independent, per capita demand equations that include own-price and real income variables. Butter demand in some countries also includes vegetable oil prices to proxy prices of substitute goods. Urban and rural demands are modeled separately only in the China module. All other modules contain a single representative consumer demand. Per capita demand is multiplied by population to compute total food demand. Stock demands are determined by independent demand equations in some countries. These equations typically depend on domestic market prices, support prices, and some measure of available supply. In most cases, stock demands are exogenous. The choice between endogenous and exogenous specifications depends on the historical significance of the particular demand in the total demand for the commodity and on the quality of the available data. For example, data is not available for many Eastern European and Asian countries, so stocks are exogenously set to zero.

Milk production is determined by dairy cow inventories and the average milk yield per cow. Dairy cow inventories depend on lagged inventories, milk prices, feed prices, and milk marketing quotas where applicable. Milk yields are largely driven by a time trend, but milk and feed prices enter into the yield equation in several countries. Total fluid milk demand and feed use are subtracted from milk production and the remainder is designated as factory milk. The factory milk is divided among competing product uses. Soft and fresh products (other than fluid milk) are modeled as “other milk consumption.” The equation for other consumption depends on the milk price and real income. Factory milk for cheese, NFD, and WMP is typically modeled by an equation that depends on the relative milk-equivalent value of cheese, NFD, and butter. In most modules, only two of the three products are modeled by behavioral equations, and the third commodity is determined by an identity that maintains a balance between total milk production and use. When all three commodities are modeled by behavioral equations, other milk consumption is the market-clearing identity. Butter is treated as a by-product derived from produc-

tion of other dairy products. Consequently, butter production depends on milk used for cheese, NFD, and fluid milk.

The international sugar model specifies only raw sugar production, use, and trade between countries/regions and does not disaggregate refined trade from raw trade. Consequently, there is no categorization between importers as refiners or toll refiners because the countries that specialize in that role are well known and stable over time. The general structure of the country submodel includes behavioral equations for area harvested, yield, production for sugar beet and sugar cane on the supply side, and per capita consumption and ending stocks for raw sugar on the demand side. Using price transmission equations, the domestic price of each country or region is linked with a representative world price (Caribbean FOB price) through exchange rates and other price policy wedges, such as tariffs, and transfer-service margins. Planted area is modeled as a function of lagged planted area, the expected (convex combination of lagged and current) cane or beet sugar price and expected prices of alternative crops, and a trend. Yield is modeled as a function of lagged yield and a trend. Production is the product of planted area and yield. Total sugar production is obtained by converting beet and cane production into raw sugar equivalent.

Sugar consumption per capita is determined by the real consumer price of raw sugar and income per capita. Total demand is the product of per capita consumption and population. Inventory demand is a function of lagged ending stock, sugar consumption, and the real consumer price of raw sugar. In many countries, the beet or cane prices are set by policy and can be treated as being predetermined. Some countries lack information on the agricultural price of raw sugar, so the real consumer price is used instead of the agricultural prices in the specification of the acreage response. In some countries, yield improvements are captured by a time trend. The interaction with other components of the FAPRI commodity models is limited to cross-price effects in supply (wheat, rice, and soybeans). FAPRI (2004b) provides further information on all the submodels described in the previous section.

Impact of the Common Agricultural Policy Reform

This section first describes the shock introduced by the EU CAP Reform and then moves on to more specific effects by commodity and country block. The impacts of the CAP reform scenario on production, consumption, trade, and prices for the EU-15, NMS aggregate, and total EU-25 are shown in Tables 4-8. The tables also show the impact on world trade and prices. Since sugar was not affected by the 2003 CAP reform, we do not report on that market. For each scenario, the tables report the averages of the 10 annual levels, difference in levels, and percentage change in levels. Detailed tables showing annual results and for individual countries are in the Appendix. We structure the presentation by discussing results pertaining to production, final consumption, and then trade for the whole set of commodities.

In production, there is a primary supply shock in the beef sector by virtue of the decoupling of payments reducing cow numbers and beef production and raising the beef price. The significant policy changes in the cattle/beef sectors induce the following

TABLE 4. Impact of policy reforms on net world trade (10-year average)

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Wheat	100,200	100,194	0.00	99,624	-0.55
Corn	84,764	84,779	0.02	84,606	-0.20
Rice	29,742	29,852	0.31	29,852	0.00
Soybeans	78,404	78,405	0.00	78,440	0.04
Soybean meal	53,646	53,652	0.01	53,688	0.06
Soybean oil	10,700	10,700	0.00	10,713	0.10
Rapeseed	6,580	6,585	0.07	6,594	0.17
Rapeseed meal	2,609	2,608	-0.04	2,596	-0.37
Rapeseed oil	1,103	1,103	0.05	1,109	0.39
Sugar	37,774	37,774	0.00	37,839	0.16
Beef	5,097	5,106	0.16	5,104	-0.02
Pork	3,537	3,536	-0.02	3,529	-0.21
Poultry	5,477	5,479	0.03	5,468	-0.18
Butter	705	696	-1.20	713	2.44
Cheese	977	975	-0.20	973	-0.15
NFD	1,115	1,114	-0.05	1,110	-0.34
WMP	1,503	1,504	0.09	1,495	-0.61

Note: World net trade is the sum of all positive exports and negative import flows.

TABLE 5. Price effects of CAP reform and EU enlargement

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
EU-15 Prices					
Wheat	114.35	115.09	0.65	114.08	-0.88
Corn	124.16	124.21	0.03	123.22	-0.80
Rice	236.06	243.09	2.98	243.09	0.00
Soybeans	186.63	186.78	0.08	186.28	-0.27
Soybean meal	154.37	154.54	0.11	154.51	-0.02
Soybean oil	379.70	379.74	0.01	378.31	-0.38
Rapeseed	192.33	192.88	0.29	192.35	-0.23
Rapeseed meal	112.68	112.92	0.22	112.77	-0.13
Rapeseed oil	387.67	388.30	0.17	387.03	-0.30
Sugar	631.90	631.90	0.00	631.90	0.00
Beef	212.71	218.74	2.87	218.66	-0.04
Pork	127.84	128.58	0.59	127.89	-0.54
Poultry	118.58	118.93	0.29	118.29	-0.54
Butter	289.12	279.78	-3.21	283.72	1.40
Cheese	385.56	384.01	-0.38	390.12	1.59
NFD	189.68	191.75	1.17	195.52	1.97
WMP	223.73	222.78	-0.39	226.21	1.53
World Prices					
Wheat	142.04	142.14	0.08	142.01	-0.36
Corn	106.53	106.59	0.06	106.05	-1.07
Rice	290.86	291.40	0.20	292.85	0.00
Soybeans	218.88	219.02	0.08	210.86	-0.28
Soybean meal	207.95	208.13	0.11	203.68	-0.02
Soybean oil	481.92	481.98	0.01	461.62	-0.39
Rapeseed	258.76	259.43	0.29	251.40	-0.23
Rapeseed meal	152.49	152.78	0.22	147.60	-0.13
Rapeseed oil	522.76	523.53	0.17	505.54	-0.30
Sugar	170.66	170.66	0.00	174.25	2.03
Beef	1,715.97	1,717.62	0.11	1,681.74	-0.20
Pork	915.63	916.30	0.08	917.06	-0.29
Poultry	1,336.55	1,337.24	0.06	1,331.64	-0.31
Butter	1,576.89	1,592.13	1.11	1,653.52	1.50
Cheese	2,032.36	2,034.84	0.16	2,132.65	3.21
NFD	1,753.45	1,749.23	-0.29	1,815.57	3.10
WMP	1,788.71	1,788.11	-0.04	1,822.86	1.19

TABLE 6. CAP reform and enlargement effects on EU-15 production, consumption, and trade

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Production					
Wheat	105,197	104,876	-0.30	104,760	-0.11
Corn	39,054	38,926	-0.33	38,896	-0.08
Rice	1,741	1,573	-9.64	1,573	0.00
Soybeans	775	770	-0.74	770	0.00
Soybean meal	14,207	14,207	0.00	14,211	0.03
Soybean oil	3,172	3,172	0.00	3,173	0.03
Rapeseed	9,377	9,356	-0.22	9,344	-0.12
Rapeseed meal	5,492	5,492	-0.02	5,490	-0.03
Rapeseed oil	3,826	3,826	-0.02	3,824	-0.03
Sugar	16,614	16,614	0.00	16,614	0.00
Beef	7,226	7,143	-1.17	7,138	-0.07
Pork	18,281	18,303	0.12	18,285	-0.10
Poultry	6,015	6,029	0.23	6,000	-0.47
Butter	1,753	1,747	-0.33	1,750	0.21
Cheese	7,579	7,583	0.05	7,583	0.00
NFD	972	967	-0.45	970	0.26
WMP	707	709	0.31	708	-0.21
Consumption					
Wheat	96,544	96,328	-0.22	96,237	-0.09
Corn	42,312	42,194	-0.28	42,193	0.00
Rice	2,498	2,543	1.82	2,543	0.00
Soybeans	1,774	1,774	-0.03	1,769	-0.30
Soybean meal	34,523	34,531	0.02	34,493	-0.11
Soybean oil	2,411	2,411	0.00	2,413	0.06
Rapeseed	493	492	-0.24	491	-0.07
Rapeseed meal	5,823	5,819	-0.08	5,810	-0.14
Rapeseed oil	3,638	3,637	-0.03	3,638	0.04
Sugar	14,569	14,569	0.00	14,569	0.00
Beef	7,457	7,388	-0.94	7,385	-0.04
Pork	17,323	17,349	0.15	17,356	0.04
Poultry	5,832	5,848	0.27	5,856	0.13
Butter	1,646	1,658	0.74	1,654	-0.27
Cheese	7,259	7,262	0.05	7,250	-0.17
NFD	904	900	-0.33	898	-0.32
WMP	243	243	0.08	242	-0.29

TABLE 6. Continued

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Trade					
Wheat	8,295	8,264	-0.34	8,228	-0.43
Corn	-3,500	-3,499	-0.03	-3,513	0.40
Rice	-730	-988	43.89	-988	0.00
Soybeans	-18,734	-18,737	0.02	-18,744	0.03
Soybean meal	-20,342	-20,349	0.03	-20,307	-0.21
Soybean oil	760	760	0.00	759	-0.08
Rapeseed	-504	-522	3.32	-530	-6.29
Rapeseed meal	-336	-333	-1.06	-326	-2.03
Rapeseed oil	182	183	0.38	180	-1.56
Sugar	2,075	2,075	0.00	2,075	0.00
Beef	-227	-241	5.58	-244	1.23
Pork	957	953	-0.42	929	-2.54
Poultry	183	180	-1.24	144	-20.74
Butter	126	115	-9.67	123	7.88
Cheese	319	319	0.11	332	3.98
NFD	84	82	-2.41	88	11.00
WMP	464	466	0.44	465	-0.16

TABLE 7. CAP reform and enlargement effects on NMS production, consumption, and trade

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Production					
Wheat	20,465	20,468	0.02	20,420	-0.21
Corn	8,991	8,991	0.00	11,197	24.65
Rice	10	10	0.02	10	0.00
Soybeans	58	58	0.00	62	7.92
Soybean meal	53	53	0.00	53	0.01
Soybean oil	9	9	0.00	9	0.01
Rapeseed	2,137	2,138	0.05	2,161	1.14
Rapeseed meal	1,013	1,012	-0.02	1,022	0.92
Rapeseed oil	683	683	-0.02	689	0.92
Sugar	3,651	3,651	0.00	3,378	-7.40
Beef	804	804	0.00	781	-2.73
Pork	3,479	3,475	-0.12	3,514	1.10
Poultry	1,334	1,332	-0.16	1,384	3.91
Butter	313	314	0.15	299	-4.48

TABLE 7. Continued

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Cheese	607	610	0.43	561	-8.11
NFD	288	289	0.22	260	-9.93
WMP	78	79	0.24	74	-5.38
Consumption					
Wheat	19,343	19,337	-0.03	19,388	0.29
Corn	9,011	9,004	-0.09	8,595	-4.46
Rice	416	416	-0.08	416	0.00
Soybeans	91	91	0.00	87	-5.81
Soybean meal	3,912	3,911	-0.02	4,035	3.19
Soybean oil	280	280	0.00	282	0.76
Rapeseed	-322	-323	0.40	-331	2.66
Rapeseed meal	562	562	-0.07	571	1.59
Rapeseed oil	658	658	-0.03	656	-0.30
Sugar	3,657	3,657	0.00	3,627	-0.81
Beef	682	682	-0.01	663	-2.75
Pork	3,325	3,324	-0.01	3,334	0.30
Poultry	1,375	1,375	0.00	1,371	-0.25
Butter	278	278	-0.05	275	-1.15
Cheese	568	568	-0.01	558	-1.72
NFD	153	153	0.02	151	-1.28
WMP	45	45	0.03	42	-5.64
Trade					
Wheat	1,023	1,033	1.00	951	-12.32
Corn	-55	-47	-3.43	2,594	-1,109.39
Rice	-406	-405	-0.08	-405	0.00
Soybeans	-86	-86	-0.01	-87	0.69
Soybean meal	-3,865	-3,865	-0.02	-3,989	3.24
Soybean oil	-271	-271	0.00	-274	0.78
Rapeseed	322	323	0.40	330	2.68
Rapeseed meal	449	449	0.05	449	0.11
Rapeseed oil	24	24	0.51	32	36.35
Sugar	1	1	-0.28	-235	446.82
Beef	122	122	0.02	118	-0.98
Pork	157	154	-2.82	182	20.46
Poultry	-41	-43	3.43	13	-43.54
Butter	35	36	1.80	23	-36.89
Cheese	40	42	15.10	2	-161.24
NFD	135	136	0.44	109	-20.00
WMP	34	34	0.56	32	-5.48

TABLE 8. CAP reform and enlargement effects on EU-25 production, consumption, and trade

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Production					
Wheat	125,661	125,344	-0.25	125,180	-0.13
Corn	48,046	47,917	-0.27	50,093	4.54
Rice	1,751	1,583	-9.59	1,583	0.00
Soybeans	833	827	-0.69	832	0.55
Soybean meal	14,259	14,260	0.00	14,264	0.03
Soybean oil	3,181	3,181	0.00	3,182	0.03
Rapeseed	11,513	11,493	-0.17	11,505	0.10
Rapeseed meal	6,505	6,504	-0.02	6,511	0.12
Rapeseed oil	4,509	4,508	-0.02	4,513	0.11
Sugar	20,266	20,266	0.00	19,993	-1.36
Beef	8,030	7,946	-1.05	7,918	-0.36
Pork	21,760	21,778	0.08	21,799	0.10
Poultry	7,349	7,361	0.16	7,384	0.32
Butter	2,066	2,060	-0.26	2,050	-0.52
Cheese	8,187	8,193	0.08	8,144	-0.60
NFD	1,260	1,256	-0.30	1,230	-2.13
WMP	785	788	0.30	782	-0.73
Consumption					
Wheat	115,887	115,665	-0.19	115,625	-0.03
Corn	51,324	51,198	-0.24	50,788	-0.79
Rice	2,914	2,959	1.55	2,959	0.00
Soybeans	18,759	18,765	0.03	18,760	-0.02
Soybean meal	38,435	38,442	0.02	38,528	0.22
Soybean oil	2,691	2,692	0.00	2,695	0.14
Rapeseed	172	189	-11.98	189	-180.02
Rapeseed meal	6,386	6,381	-0.07	6,381	0.01
Rapeseed oil	4,297	4,295	-0.03	4,295	-0.01
Sugar	18,226	18,226	0.00	18,196	-0.17
Beef	8,139	8,070	-0.86	8,048	-0.27
Pork	20,648	20,674	0.12	20,690	0.08
Poultry	7,207	7,223	0.22	7,228	0.06
Butter	1,924	1,936	0.63	1,929	-0.40
Cheese	7,826	7,830	0.04	7,808	-0.28
NFD	1,057	1,054	-0.28	1,049	-0.46
WMP	288	288	0.07	285	-1.10
Trade					
Wheat	9,319	9,297	-0.20	9,179	-1.04
Corn	-3,555	-3,546	-0.20	-919	-72.09
Rice	-1,136	-1,393	25.66	-1,393	0.00
Soybeans	-18,820	-18,824	0.02	-18,830	0.03

TABLE 8. Continued

	Baseline (tmt)	CAP Reform Level (tmt)	Impact of CAP Reform (percent)	Enlargement and CAP Reform Level (tmt)	Impact of Enlargement (percent)
Soybean meal	-24,208	-24,214	0.02	-24,296	0.34
Soybean oil	488	488	0.00	485	-0.56
Rapeseed	-182	-199	15.45	-200	-33.27
Rapeseed meal	112	116	3.47	123	-1.89
Rapeseed oil	206	207	0.39	213	2.88
Sugar	2,076	2,076	0.00	1,840	-16.81
Beef	-106	-120	12.96	-126	3.92
Pork	1,112	1,112	0.00	1,112	0.00
Poultry	142	137	-3.35	157	16.04
Butter	161	150	-7.04	146	-3.45
Cheese	359	362	0.80	334	-7.90
NFD	219	218	-0.58	197	-10.24
WMP	498	500	0.44	497	-0.51

impacts. Decoupling lowers beef cow numbers by 5 percent; beef production declines by nearly 3 percent in 2013. Limited supply pushes price up by about 3 percent. There is a secondary shock in pork and poultry by substitution effects in demand; higher beef prices shift demand away from beef to favor pork and poultry, raising the price and production of pork and poultry. These effects are moderate, as shown in Tables 6-8. The EU CAP reform deepens ongoing reductions in the butter intervention price and starts them in 2004. These changes have the biggest impacts on the EU dairy market. They shift the allocation of milk in processed products away from butter and NFD and toward cheese, eventually pooling cheese slightly down, especially in early years of the outlook. The EU butter price declines an average of 3.5 percent, with price declines of as much as 5.3 percent in the first five years following adoption of the reforms. Butter prices remain 1 to 2 percent below the Agenda 2000 levels in the long run, and butter stocks average 81 tmt lower. In 2013, EU butter stocks are 31 tmt, and NFD stocks are 24 tmt.

These changes in supply conditions for the livestock and dairy sectors affect their derived demand for feed. The grains and oilseed sectors also face primary supply shocks by way of decoupling and reduction of support prices. Specifically for grains, the CAP reform includes the further decoupling of payments from production, a gradual decrease in the durum wheat aid, the abolition of the intervention price for rye, and a steep decrease in the intervention price for rice. For oilseed markets, the reform implies the

transformation of coupled area payments into decoupled SFPs over a period of three years. Payments are increasingly modulated over time because of payment limits for large farms. These changes lower grain and oilseed areas and production and raise market prices, especially for rice production, which decreases by nearly 10 percent. Secondary demand shocks arise in feed demand because of lower beef cattle numbers, as explained previously. This lower feed demand from cattle is moderated by higher production of pork and poultry and resulting feed use in these sectors. In the dairy sector, there is a direct supply shock through lower butter intervention prices as explained previously and decoupling, which reduces dairy cow numbers despite the slightly higher dairy quota.

Non-feed use of grains does not decrease as much as feed use. Because of the decrease in production, we see a decrease in net exports of the EU-15. Non-feed use of corn is higher in the latter part of the outlook period because of lower corn prices but not by enough to override the effect of lower feed use. Net imports of corn are higher in the first five years because of lower production and then lower in the outer years because of lower feed demand. Non-feed use of barley in the outer years increases slightly as consumers switch from wheat to barley, which experiences a much higher price increase but not enough to offset the production decrease. Net barley exports decrease. Rice consumption increases by a little less than 2 percent, inducing an increase in net imports by about 250 tmt. CAP reform has virtually no impact on vegetable oil consumption in the EU-15, given that prices change little. A higher EU beef price reduces consumption by about 1 percent, inducing an increase in net imports by about 5.6 percent. In the rest of the world the impact is small to negligible. For example, U.S. exports grow by less than 1 percent. The higher beef price expands pork and poultry consumption through substitution for cheaper meat, but this effect is small. The implications for the pork and poultry markets as a whole are virtually negligible.

In the rest of the world, world prices for grains and oilseeds and products are slightly higher because of lower production and lower net exports from or greater net imports to the EU-15. All these average world price effects are less than 1 percent. The world butter price is a bit more sensitive, with the world butter price increasing by 1.1 percent on average. Milk powder prices decrease slightly with the CAP reform, as higher butter production in the rest of the world creates higher NFD production. U.S. exports of wheat

fill the gap left by lower EU-15 exports. Net U.S. exports of corn are also higher but only in the first half of the outlook period, meeting the higher demand generated by the EU-15. After that, net corn exports are lower because of higher feed demand at home. The world market prices of sunflower and rapeseed oils increase to a lesser extent, while the soybean oil price remains unchanged. Soybean price changes are nearly negligible because production is insignificant in the European Union. The soybean meal price remains nearly constant until 2007/08, as animal numbers fall and prices of grains and other meals rise, offsetting each other. From 2008/09 on, the swine and poultry sectors and soybean meal price increase. Sunflower and rapeseed meal prices increase for similar reasons and also because of decreases in production. Vegetable oil prices are the least affected by the CAP reform, as expected. Because of the fixed proportion technology in oil production, the movements in the sunflower and rapeseed markets impact the supply and price of oil under constant demand conditions.

Soybean imports increase slightly. Soybean meal imports increase because of the increase in consumption and unchanged domestic production. Soybean oil trade does not change. Sunflower seed imports go up, because domestic production falls more than consumption. Sunflower meal imports decrease first and increase later, following the consumption pattern. Rapeseed imports show a strong change. Production falls more than consumption, creating an import demand. Rapeseed meal imports fall because of the reduced consumption. An exportable surplus of rapeseed oil is created by the CAP reform through a domestic price increase. This export increase results from a relatively larger decrease in consumption relative to production.

Impact of the Enlargement

As shown in Tables 4-8, with quota limits acting as the more binding constraint, the supply of dairy and sugar contracts in the NMS as the quota is imposed, even with increases in their prices. World and EU-15 prices increase as a result. The marketing quotas associated with enlargement restrict the growth in milk production in the NMS, resulting in a 12 percent (2.8 mmt) decline in milk production by 2013. Even at these reduced production levels, total milk output remains nearly 12 percent above the total marketing quota for the NMS (compared to about 2 percent for the EU-15), reflecting

continued relatively high on-farm use in some countries. The bulk of the change in milk production is accomplished through declines in dairy cow inventories. Changes in Poland account for nearly three-quarters of the decline in NMS milk production, with the Baltic States accounting for the bulk of the remaining change. Sugar production in the NMS declines by an average of 7 percent because of the introduction of the production quota.

In contrast to milk and sugar, the supply of grains (especially corn), oilseeds, poultry, and pork expands in the NMS, pushing down EU-15 prices and eventually world prices because of larger excess supply or decreased excess demand. This is caused by the increase in prices faced by the NMS and the introduction of compensatory payments for some commodities, although set-aside requirements constrain supply starting in 2008. The notable exceptions to this expansion are wheat and barley in Poland. This increase in prices for the NMS is large, with corn prices increasing by 37 percent in Poland and by 44 percent in Hungary and the wheat price increasing by 33 percent in the Czech Republic, for example.

Since dairy is dominant in the NMS, the imposition of the binding dairy quota eventually reduces beef production after the initial culling and despite the higher beef price, creating an excess demand for beef in the world. Poultry, and to a lesser extent pork, production expands in the NMS. This is moderated by substitution away from beef consumption in the rest of the world with declines in pork and poultry prices, although these remain moderate. Higher prices of pork and poultry in the NMS increase production and reduce consumption, creating an excess supply in the world. These changes are moderated by higher feed crop prices in some countries.

The changes just described are the largest effects arising in the NMS from the enlargement. Other factors also influence the impact, such as changes in the set-aside policy in the NMS inducing a reduction in supply, yield growth assumptions, relative price movements of commodities and their substitution ramifications both on the demand and supply sides, and feed use and animal number interactions. As a result of lower prices, production of wheat, corn, and barley commodities in the EU-15 decrease slightly in the outer years. There are moderate changes in the oilseed sectors.

Before enlargement, the domestic prices for sunflower seeds, meal, and oil in the NMS were 4 percent below the EU level. Upon accession this difference is phased out over three

years. The domestic price of sunflower seeds decreases in the first year, along with the world price, as production responds strongly to the decoupled area payments. But the domestic price only converges partially to the EU level. In the following years, as domestic prices get closer to the EU price, this convergence effect becomes dominant and NMS prices rise. After 2007/08 the domestic price increases along with the world price. The domestic price increase is the sum of the world price increase and price convergence. Domestic prices of sunflower meal and oils increase throughout the entire outlook period because they rise to the EU level. All these price changes remain extremely modest. The story is similar for the rapeseed complex in the NMS but with effects of even smaller magnitude.

The crush margins for sunflowers and rapeseed increase during the entire outlook period relative to the baseline, leading to an expansion in sunflower and rapeseed oil and meal production. The production expansion is larger in the first three years as domestic prices approach EU levels. The expansion then tapers in the later years. The NMS produce and use little soybean compared to the EU-15; the small changes arising in the NMS are dwarfed by the unchanged market situation in the EU-15, and the aggregate picture of the EU-25 reflects the status quo in the EU-15 with its large soybean imports.

Food uses of wheat and corn are slightly higher in the outlook period because of lower prices. However, the food use of barley falls in the outer years despite a price decline. This is because the prices of wheat and corn decrease more relative to barley, and consumers switch to wheat and corn in the later years. Feed use of wheat decreases throughout the outlook period, whereas feed use of corn and barley decrease starting in 2008. The reason for lower feed use despite decreasing prices is the lower demand reflected as fewer animals are raised. The decrease in feed demand outweighs the increase in food demand. Net exports of wheat decrease throughout the outlook period as production decreases more than demand. Corn net imports increase because of lower domestic supply as well. For barley, net exports are lower in the beginning of the period and start increasing after 2008. Despite falling prices, barley consumption falls because the relative decrease is higher for wheat and corn prices. This leaves excess supply to be exported, although production of barley falls over the outlook period. With higher dairy product prices, EU-15 consumption of all dairy products declines slightly.

The enlargement causes a shift in consumption sourcing, from domestically produced rapeseed and sunflower oil to imported soybean oil. This change is driven by the soybean oil tariff reduction and price convergence for sunflower and rapeseed oil toward EU levels. Trade flows between the EU-15 and the NMS are more stable than are those between the NMS and the rest of the world outside the EU-25 because they were close to integration before accession. Exports of sunflowers and rapeseed, both important export commodities, move along with production, increasing first and then falling in the outer years. Exports of the respective meals increase after dipping in the early years. Imports of soybean meal and oil expand relative to the baseline. Sunflower oil imports fall and rapeseed oil exports increase. Finally, the consumption of sugar in the NMS decreases by about 1 percent, because the domestic price of sugar increases substantially as a result of the intervention price.

All world price changes are either small or negligible. The only significant changes occur in dairy, with increasing world prices driven by the reduced supplies in the EU-25 and a decrease in the world corn price driven by the excess supply of the EU-25. The world price and trade in all meats decrease with the EU enlargement. This is mostly driven by the increase in prices in the NMS either reducing excess demand or expanding excess supply. The NMS are net beef exporters. They increase their exports in the first two years with dairy cow culling. Then the NMS reduce their exports in the rest of the period, as fewer dairy cows are kept because of the binding quota. In the earlier period, the EU-15's net imports from the NMS increase. Price declines are largest in the first two years. In the second half of the projection period, production declines because of lower dairy cow numbers, pushing world prices up and reducing consumption.

In the EU pork and poultry sectors, higher domestic prices in most of the NMS boost supplies. Their increased supplies either end up in the EU-15 or reduce their imports from the EU-15 if they are net importers (e.g., Czech Republic). These additional supplies reduce the EU pork and poultry price by a larger magnitude than the reduction in feed grain prices. Lower pork prices reduce production and expand consumption, resulting in lower net exports from the EU-15.

As shown in Table 9, joining the NMS markets to the EU-15 causes dairy prices to rise in the NMS, with significant decreases in production by policy design and in consumption as a result of the higher prices. Price gaps between the NMS and EU-15 vary widely by product

and country, but the biggest impacts are in fluid milk prices. Fluid milk consumption in the NMS declines by about 8 percent, accounting for roughly 34 percent of the total decline in fluid milk use. Smaller quantities of milk for processing are reflected in reduced dairy product exports from the NMS. The NMS, as a block, switch from a net exporting position to a net importing position in both commodities. The production changes in the NMS have a significant influence on the trade flows of dairy products between the old and new EU members. Before enlargement, the EU-15 was a net importer of all dairy products from the NMS. The changes in the total EU-25 market supplies result in a 1 to 2 percent increase in domestic prices, with NFD and butter prices experiencing the largest changes. Dairy product net exports from the EU-25 decline following enlargement. These lower supplies to international markets boost international cheese and NFD prices by an average of 3 percent and butter and WMP prices by a little more than 1 percent. Australia, New Zealand, and Argentina are the primary beneficiaries from increased export opportunities following enlargement.

EU-15 net exports of butter, cheese, and NFD increase 4 to 11 percent relative to the baseline, but the majority of that growth is with the NMS. Taken together, EU-15 dairy exports to the rest of the world decrease.

The impact of EU enlargement is small on the world sugar market. The EU-25, through the NMS, decreases its exports of sugar to the rest of the world, and world prices increase by a modest 2 percent.

TABLE 9. Pre-accession price differentials in New Member States and average price changes (percent)

Country	Milk	Butter	Cheese	NFD	WMP
Czech Republic					
Pre-accession price wedge	-25	-35	-25	-25	-25
Price change	10.7	19.4	25.4	19.0	13.9
Hungary					
Pre-accession price wedge	-15	-35	-15	-15	-15
Price change	5.4	22.2	10.4	16.5	5.9
Poland					
Pre-accession price wedge	-45	-15	-10	-15	-15
Price change	39.0	-1.6	4.8	21.1	7.2
EU 15					
Pre-accession price wedge					
Price change	1.5	1.7	1.6	1.8	1.6
World price change		1.3	3.2	3.4	1.4

Conclusions

We analyzed the effects of the mid-term CAP reform and enlargement to 10 NMS on the EU-15, the NMS, and world agricultural markets. We compared three 10-year comprehensive agricultural outlooks scenarios: a “pre-enlargement” scenario, a CAP reform scenario, and the accession of the 10 NMS with the associated domestic and trade policy reforms and some convergence in technology within the EU-25.

A qualified “much ado about nothing” applies for the two policy reforms depending on where one looks for impacts. Both reforms have little impact on world markets, and the reforms are essentially a European matter. The CAP reform’s impact on the EU-15 has a limited impact as well, except in the beef and rice sectors. However, there are big impacts induced by the enlargement within the enlarged European Union, especially on the acceding countries, through policy and resulting price changes, especially in dairy, sugar, and corn markets.

The accession and associated policy reforms have a large impact first on the NMS for commodities falling under supply control, such as dairy and sugar. The supply contraction in these sectors causes corresponding increases in prices. Dairy quotas in the NMS have some important repercussions for the beef market, first by increasing supply with the culling of the dairy herd and then by reducing the supply of beef. Second, new policies in the NMS induce grain prices to increase substantially in most of the NMS, increasing the cost of meat products and reducing grain use. The impact on EU-15 agriculture of the enlargement is moderate for most crops.

We also reported the interesting dynamics of the NMS set-aside commencement in 2007, dairy adjustments and herd culling in the NMS, and meat production and exports in the NMS. Intra-trade effects on enlargement are significant, although typically the trade flows involved are small in the baseline. These effects are caused by changes in consumption and production rather than by changes in the intra-protection structure.

The new prices faced by consumers and producers in the NMS are the major cause of this reallocation. In general, consumers in the NMS pay more for their food after accession. Tariff changes are moderate. There are some changes in trade in the NMS because of major domestic changes such as in beef trade. However, since the NMS have little influence on world markets, the large effects in their individual trade flows do not

translate into significant world market price effects. Argentina is the only country “gaining” significant market share in some dairy markets with the enlargement reforms.

Appendix

Annual Results of Common Agricultural Policy Reform by Individual Country

A.1. Impacts of EU Enlargement and CAP Reform on EU Wheat

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Area Harvested												
	(Thousand Hectares)											
Enlargement and CAP Reform	16,930	17,817	17,480	17,695	17,671	17,704	17,696	17,717	17,647	17,671	17,617	17,672
CAP Reform	16,930	17,817	17,478	17,696	17,686	17,717	17,751	17,730	17,676	17,684	17,664	17,690
Enlargement and CAP Reform	16,930	17,782	17,482	17,751	17,734	17,776	17,806	17,805	17,757	17,784	17,766	17,744
Impact of Enlargement (%)	0.00	0.00	0.01	-0.01	-0.09	-0.07	-0.31	-0.08	-0.17	-0.08	-0.27	-0.11
Impact of CAP Reform (%)	0.00	0.20	-0.02	-0.31	-0.27	-0.33	-0.31	-0.42	-0.45	-0.56	-0.57	-0.30
Yield												
	(Metric Tons per Hectare)											
Enlargement and CAP Reform	5.38	5.77	5.80	5.83	5.86	5.91	5.95	5.99	6.03	6.05	6.09	5.93
CAP Reform	5.38	5.77	5.80	5.83	5.86	5.91	5.95	5.99	6.03	6.05	6.09	5.93
Baseline	5.38	5.77	5.80	5.83	5.86	5.91	5.95	5.99	6.03	6.05	6.09	5.93
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	-0.01	0.00	0.00	0.00	-0.01	-0.01	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Production												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	91,000	102,788	101,313	103,192	103,523	104,707	105,309	106,066	106,465	106,979	107,258	104,760
CAP Reform	91,000	102,791	101,305	103,205	103,614	104,791	105,636	106,150	106,642	107,069	107,553	104,876
Baseline	91,000	102,587	101,323	103,519	103,890	105,134	105,958	106,591	107,126	107,671	108,168	105,197
Impact of Enlargement (%)	0.00	0.00	0.01	-0.01	-0.09	-0.08	-0.31	-0.08	-0.17	-0.08	-0.27	-0.11
Impact of CAP Reform (%)	0.00	0.20	-0.02	-0.30	-0.27	-0.33	-0.30	-0.41	-0.45	-0.56	-0.57	-0.30
Beginning Stocks												
Enlargement and CAP Reform	13,401	7,901	8,722	8,739	9,148	9,300	9,499	9,652	9,951	10,309	10,566	9,379
CAP Reform	13,401	7,901	8,691	8,676	9,049	9,234	9,353	9,617	9,824	10,196	10,375	9,292
Baseline	13,401	7,901	8,685	8,721	9,235	9,512	9,666	9,967	10,270	10,750	11,050	9,576
Impact of Enlargement (%)	0.00	0.00	0.35	0.73	1.09	0.71	1.56	0.36	1.29	1.10	1.84	0.90
Impact of CAP Reform (%)	0.00	0.00	0.07	-0.51	-2.02	-2.92	-3.24	-3.51	-4.34	-5.15	-6.11	-2.77
Domestic Supply												
Enlargement and CAP Reform	104,401	110,689	110,036	111,932	112,671	114,007	114,807	115,718	116,416	117,288	117,825	114,139
CAP Reform	104,401	110,692	109,997	111,881	112,663	114,026	114,989	115,767	116,467	117,265	117,928	114,167
Baseline	104,401	110,488	110,008	112,241	113,125	114,646	115,624	116,558	117,396	118,421	119,218	114,772
Impact of Enlargement (%)	0.00	0.00	0.04	0.05	0.01	-0.02	-0.16	-0.04	-0.04	0.02	-0.09	-0.02
Impact of CAP Reform (%)	0.00	0.18	-0.01	-0.32	-0.41	-0.54	-0.55	-0.68	-0.79	-0.98	-1.08	-0.52
Feed Use												
Enlargement and CAP Reform	49,000	49,696	49,552	49,872	50,034	50,317	50,530	50,802	50,993	51,293	51,559	50,465
CAP Reform	49,000	49,707	49,557	49,927	50,087	50,557	50,698	50,989	51,060	51,498	51,714	50,579
Baseline	49,000	49,606	49,537	49,994	50,213	50,779	50,925	51,262	51,368	51,894	52,144	50,772
Impact of Enlargement (%)	0.00	-0.02	-0.01	-0.11	-0.11	-0.48	-0.33	-0.37	-0.13	-0.40	-0.30	-0.23
Impact of CAP Reform (%)	0.00	0.20	0.04	-0.14	-0.25	-0.44	-0.45	-0.53	-0.60	-0.76	-0.83	-0.37
Consumption												
Enlargement and CAP Reform	94,500	95,065	95,062	95,522	95,721	96,120	96,327	96,751	96,904	97,322	97,576	96,237
CAP Reform	94,500	95,055	95,054	95,558	95,769	96,282	96,489	96,924	96,960	97,474	97,719	96,328
Baseline	94,500	94,921	95,024	95,649	95,924	96,555	96,747	97,219	97,298	97,909	98,196	96,544
Impact of Enlargement (%)	0.00	0.01	0.01	-0.04	-0.05	-0.17	-0.17	-0.18	-0.06	-0.16	-0.15	-0.09
Impact of CAP Reform (%)	0.00	0.14	0.03	-0.09	-0.16	-0.28	-0.27	-0.30	-0.35	-0.44	-0.49	-0.22
Domestic Use												
Enlargement and CAP Reform	102,401	103,787	103,801	104,669	105,021	105,619	105,979	106,703	107,213	107,889	108,426	105,911
CAP Reform	102,401	103,747	103,731	104,607	105,003	105,635	106,106	106,748	107,156	107,849	108,448	105,903
Baseline	102,401	103,606	103,746	104,884	105,437	106,221	106,714	107,489	108,048	108,959	109,667	106,477
Impact of Enlargement (%)	0.00	0.04	0.07	0.06	0.02	-0.01	-0.12	-0.04	0.05	0.04	-0.02	0.01
Impact of CAP Reform (%)	0.00	0.14	-0.01	-0.26	-0.41	-0.55	-0.57	-0.69	-0.83	-1.02	-1.11	-0.53
Ending Stocks												
Enlargement and CAP Reform	7,901	8,722	8,739	9,148	9,300	9,499	9,652	9,951	10,309	10,566	10,850	9,674
CAP Reform	7,901	8,691	8,676	9,049	9,234	9,353	9,617	9,824	10,196	10,375	10,729	9,575
Baseline	7,901	8,685	8,721	9,235	9,512	9,666	9,967	10,270	10,750	11,050	11,472	9,933
Impact of Enlargement (%)	0.00	0.35	0.73	1.09	0.71	1.56	0.36	1.29	1.10	1.84	1.13	1.02
Impact of CAP Reform (%)	0.00	0.07	-0.51	-2.02	-2.92	-3.24	-3.51	-4.34	-5.15	-6.11	-6.47	-3.42
Net Trade												
Enlargement and CAP Reform	2,000	6,902	6,235	7,263	7,650	8,388	8,828	9,015	9,203	9,399	9,399	8,228
CAP Reform	2,000	6,945	6,266	7,275	7,659	8,391	8,883	9,019	9,310	9,416	9,480	8,264
Baseline	2,000	6,882	6,262	7,357	7,688	8,425	8,910	9,069	9,348	9,462	9,551	8,295
Impact of Enlargement (%)	0.00	-0.62	-0.50	-0.17	-0.13	-0.03	-0.62	-0.04	-1.15	-0.18	-0.86	-0.43
Impact of CAP Reform (%)	0.00	0.91	0.06	-1.12	-0.37	-0.40	-0.31	-0.55	-0.40	-0.49	-0.74	-0.34

A.2. Impacts of EU Enlargement and CAP Reform on EU Corn

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Area Harvested	(Thousand Hectares)											
Enlargement and CAP Reform	4,135	4,228	4,124	4,174	4,169	4,173	4,164	4,141	4,161	4,139	4,159	4,163
CAP Reform	4,135	4,228	4,124	4,173	4,170	4,176	4,166	4,151	4,165	4,149	4,160	4,166
Baseline	4,135	4,241	4,128	4,177	4,175	4,190	4,184	4,169	4,184	4,169	4,183	4,180
Impact of Enlargement (%)	0.00	0.00	0.00	0.02	-0.04	-0.06	-0.05	-0.23	-0.08	-0.24	-0.02	-0.07
Impact of CAP Reform (%)	0.00	-0.29	-0.08	-0.07	-0.12	-0.35	-0.43	-0.44	-0.45	-0.48	-0.55	-0.33
Yield	(Metric Tons per Hectare)											
Enlargement and CAP Reform	7.38	9.10	9.16	9.21	9.26	9.32	9.37	9.42	9.48	9.53	9.58	9.34
CAP Reform	7.38	9.10	9.16	9.21	9.26	9.32	9.37	9.42	9.48	9.53	9.59	9.34
Baseline	7.38	9.10	9.16	9.21	9.26	9.32	9.37	9.42	9.48	9.53	9.59	9.34
Impact of Enlargement (%)	0.00	0.00	-0.01	-0.01	0.00	0.00	-0.01	0.00	-0.01	0.00	-0.01	-0.01
Impact of CAP Reform (%)	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	30,500	38,467	37,761	38,438	38,614	38,880	39,015	39,031	39,439	39,455	39,863	38,896
CAP Reform	30,500	38,468	37,761	38,435	38,631	38,903	39,037	39,121	39,473	39,550	39,877	38,926
Baseline	30,500	38,578	37,790	38,462	38,680	39,042	39,205	39,294	39,653	39,742	40,099	39,054
Impact of Enlargement (%)	0.00	0.00	0.00	0.01	-0.04	-0.06	-0.06	-0.23	-0.09	-0.24	-0.03	-0.08
Impact of CAP Reform (%)	0.00	-0.28	-0.08	-0.07	-0.13	-0.36	-0.43	-0.44	-0.45	-0.48	-0.55	-0.33
Beginning Stocks												
Enlargement and CAP Reform	5,081	2,281	3,878	3,808	3,959	3,998	4,071	4,115	4,166	4,229	4,295	3,880
CAP Reform	5,081	2,281	3,899	3,830	3,993	4,046	4,113	4,179	4,274	4,332	4,437	3,938
Baseline	5,081	2,281	3,908	3,826	3,966	4,041	4,181	4,315	4,424	4,483	4,564	3,999
Impact of Enlargement (%)	0.00	0.00	-0.52	-0.58	-0.85	-1.20	-1.03	-1.54	-2.54	-2.37	-3.20	-1.38
Impact of CAP Reform (%)	0.00	0.00	-0.24	0.09	0.68	0.14	-1.62	-3.13	-3.39	-3.38	-2.78	-1.36
Domestic Supply												
Enlargement and CAP Reform	35,581	40,748	41,639	42,246	42,573	42,878	43,086	43,146	43,604	43,684	44,158	42,776
CAP Reform	35,581	40,749	41,660	42,265	42,624	42,950	43,151	43,301	43,747	43,881	44,314	42,864
Baseline	35,581	40,859	41,698	42,288	42,645	43,083	43,386	43,608	44,077	44,225	44,663	43,053
Impact of Enlargement (%)	0.00	0.00	-0.05	-0.04	-0.12	-0.17	-0.15	-0.36	-0.33	-0.45	-0.35	-0.20
Impact of CAP Reform (%)	0.00	-0.27	-0.09	-0.06	-0.05	-0.31	-0.54	-0.71	-0.75	-0.78	-0.78	-0.43
Feed Use												
Enlargement and CAP Reform	27,600	30,247	31,294	31,673	31,936	32,161	32,254	32,287	32,568	32,570	32,721	31,971
CAP Reform	27,600	30,212	31,282	31,646	31,923	32,230	32,263	32,320	32,594	32,608	32,738	31,982
Baseline	27,600	30,258	31,301	31,686	31,964	32,313	32,391	32,501	32,798	32,846	32,994	32,105
Impact of Enlargement (%)	0.00	0.12	0.04	0.08	0.04	-0.21	-0.03	-0.10	-0.08	-0.12	-0.05	-0.03
Impact of CAP Reform (%)	0.00	-0.15	-0.06	-0.13	-0.13	-0.26	-0.40	-0.56	-0.62	-0.72	-0.78	-0.38
Consumption												
Enlargement and CAP Reform	37,200	40,187	41,233	41,699	42,026	42,330	42,526	42,591	42,987	43,035	43,312	42,193
CAP Reform	37,200	40,150	41,218	41,670	42,007	42,352	42,526	42,619	43,007	43,070	43,325	42,194
Baseline	37,200	40,222	41,252	41,716	42,034	42,417	42,639	42,785	43,197	43,293	43,568	42,312
Impact of Enlargement (%)	0.00	0.09	0.04	0.07	0.05	-0.05	0.00	-0.07	-0.05	-0.08	-0.03	0.00
Impact of CAP Reform (%)	0.00	-0.18	-0.08	-0.11	-0.06	-0.15	-0.26	-0.39	-0.44	-0.51	-0.56	-0.28
Domestic Use												
Enlargement and CAP Reform	39,481	44,065	45,041	45,657	46,024	46,401	46,641	46,757	47,216	47,330	47,759	46,289
CAP Reform	39,481	44,048	45,048	45,662	46,053	46,465	46,706	46,893	47,339	47,508	47,906	46,363
Baseline	39,481	44,130	45,079	45,682	46,075	46,598	46,954	47,210	47,680	47,858	48,270	46,554
Impact of Enlargement (%)	0.00	0.04	-0.02	-0.01	-0.06	-0.14	-0.14	-0.29	-0.26	-0.37	-0.31	-0.16
Impact of CAP Reform (%)	0.00	-0.18	-0.07	-0.04	-0.05	-0.29	-0.53	-0.67	-0.72	-0.73	-0.75	-0.40
Ending Stocks												
Enlargement and CAP Reform	2,281	3,878	3,808	3,959	3,998	4,071	4,115	4,166	4,229	4,295	4,446	4,096
CAP Reform	2,281	3,899	3,830	3,993	4,046	4,113	4,179	4,274	4,332	4,437	4,581	4,169
Baseline	2,281	3,908	3,826	3,966	4,041	4,181	4,315	4,424	4,483	4,564	4,702	4,241
Impact of Enlargement (%)	0.00	-0.52	-0.58	-0.85	-1.20	-1.03	-1.54	-2.54	-2.37	-3.20	-2.95	-1.68
Impact of CAP Reform (%)	0.00	-0.24	0.09	0.68	0.14	-1.62	-3.13	-3.39	-3.38	-2.78	-2.57	-1.62
Net Trade												
Enlargement and CAP Reform	-3,900	-3,318	-3,401	-3,411	-3,451	-3,523	-3,555	-3,611	-3,612	-3,646	-3,600	-3,513
CAP Reform	-3,900	-3,299	-3,388	-3,397	-3,430	-3,515	-3,555	-3,592	-3,592	-3,627	-3,592	-3,499
Baseline	-3,900	-3,271	-3,380	-3,394	-3,429	-3,515	-3,567	-3,601	-3,603	-3,633	-3,607	-3,500
Impact of Enlargement (%)	0.00	0.57	0.39	0.41	0.61	0.22	-0.01	0.52	0.56	0.55	0.23	0.40
Impact of CAP Reform (%)	0.00	0.86	0.23	0.10	0.01	0.01	-0.35	-0.24	-0.31	-0.17	-0.41	-0.03

A.3. Impacts of EU Enlargement and CAP Reform on EU Barley

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Area Harvested												
	(Thousand Hectares)											
Enlargement and CAP Reform	10,575	11,028	10,928	10,915	10,876	10,915	10,905	10,915	10,906	10,912	10,915	10,922
CAP Reform	10,575	11,028	10,928	10,918	10,889	10,920	10,920	10,917	10,916	10,915	10,924	10,928
Baseline	10,575	11,051	10,937	10,941	10,907	10,950	10,957	10,963	10,967	10,973	10,993	10,964
Impact of Enlargement (%)	0.00	0.00	0.01	-0.03	-0.13	-0.04	-0.13	-0.02	-0.09	-0.03	-0.08	-0.06
Impact of CAP Reform (%)	0.00	-0.20	-0.08	-0.21	-0.16	-0.27	-0.34	-0.42	-0.47	-0.53	-0.63	-0.33
Yield												
	(Metric Tons per Hectare)											
Enlargement and CAP Reform	4.43	4.61	4.62	4.66	4.70	4.73	4.77	4.81	4.85	4.89	4.93	4.76
CAP Reform	4.43	4.62	4.62	4.66	4.70	4.73	4.77	4.81	4.85	4.89	4.93	4.76
Baseline	4.43	4.61	4.62	4.66	4.70	4.73	4.77	4.81	4.85	4.89	4.93	4.76
Impact of Enlargement (%)	0.00	0.00	-0.01	-0.01	0.00	-0.01	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.01	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Production												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	46,800	50,895	50,480	50,827	51,069	51,672	52,045	52,506	52,884	53,331	53,757	51,947
CAP Reform	46,800	50,897	50,481	50,848	51,135	51,698	52,115	52,519	52,930	53,346	53,804	51,977
Baseline	46,800	50,996	50,521	50,952	51,217	51,838	52,289	52,737	53,178	53,628	54,141	52,150
Impact of Enlargement (%)	0.00	0.00	0.00	-0.04	-0.13	-0.05	-0.13	-0.02	-0.09	-0.03	-0.09	-0.06
Impact of CAP Reform (%)	0.00	-0.19	-0.08	-0.20	-0.16	-0.27	-0.33	-0.41	-0.47	-0.53	-0.62	-0.33
Beginning Stocks												
Enlargement and CAP Reform	7,569	4,119	5,339	5,801	6,020	6,075	6,149	6,216	6,272	6,307	6,353	5,865
CAP Reform	7,569	4,119	5,318	5,760	5,960	6,070	6,120	6,216	6,271	6,312	6,357	5,850
Baseline	7,569	4,119	5,352	5,797	6,024	6,110	6,165	6,255	6,306	6,327	6,364	5,882
Impact of Enlargement (%)	0.00	0.00	0.40	0.70	1.01	0.08	0.47	0.00	0.01	-0.07	-0.05	0.25
Impact of CAP Reform (%)	0.00	0.00	-0.64	-0.63	-1.06	-0.65	-0.73	-0.62	-0.55	-0.25	-0.12	-0.53
Domestic Supply												
Enlargement and CAP Reform	54,369	55,014	55,819	56,628	57,089	57,747	58,194	58,722	59,155	59,638	60,110	57,812
CAP Reform	54,369	55,016	55,799	56,609	57,094	57,768	58,235	58,735	59,201	59,658	60,160	57,828
Baseline	54,369	55,115	55,874	56,749	57,240	57,948	58,454	58,992	59,483	59,955	60,506	58,032
Impact of Enlargement (%)	0.00	0.00	0.04	0.03	-0.01	-0.04	-0.07	-0.02	-0.08	-0.03	-0.08	-0.03
Impact of CAP Reform (%)	0.00	-0.18	-0.13	-0.25	-0.25	-0.31	-0.37	-0.44	-0.47	-0.50	-0.57	-0.35
Feed Use												
Enlargement and CAP Reform	34,500	33,611	33,489	33,680	33,654	33,841	33,857	33,954	34,026	34,098	34,219	33,843
CAP Reform	34,500	33,581	33,393	33,576	33,657	33,917	33,918	33,979	34,087	34,175	34,275	33,856
Baseline	34,500	33,619	33,420	33,636	33,755	34,053	34,096	34,202	34,347	34,457	34,584	34,017
Impact of Enlargement (%)	0.00	0.09	0.29	0.31	-0.01	-0.22	-0.18	-0.07	-0.18	-0.22	-0.16	-0.04
Impact of CAP Reform (%)	0.00	-0.11	-0.08	-0.18	-0.29	-0.40	-0.52	-0.65	-0.76	-0.82	-0.89	-0.47
Consumption												
Enlargement and CAP Reform	48,100	47,235	47,188	47,496	47,542	47,812	47,916	48,093	48,256	48,399	48,619	47,856
CAP Reform	48,100	47,206	47,074	47,376	47,550	47,895	47,985	48,133	48,324	48,495	48,699	47,874
Baseline	48,100	47,265	47,109	47,445	47,648	48,027	48,159	48,353	48,584	48,775	49,007	48,037
Impact of Enlargement (%)	0.00	0.06	0.24	0.25	-0.02	-0.17	-0.14	-0.08	-0.14	-0.20	-0.17	-0.04
Impact of CAP Reform (%)	0.00	-0.12	-0.07	-0.15	-0.21	-0.28	-0.36	-0.46	-0.54	-0.57	-0.63	-0.34
Domestic Use												
Enlargement and CAP Reform	52,219	52,574	52,988	53,516	53,616	53,961	54,132	54,365	54,563	54,752	55,079	53,955
CAP Reform	52,219	52,524	52,834	53,336	53,620	54,015	54,200	54,404	54,635	54,852	55,159	53,958
Baseline	52,219	52,617	52,906	53,469	53,757	54,192	54,414	54,659	54,911	55,140	55,497	54,156
Impact of Enlargement (%)	0.00	0.10	0.29	0.34	-0.01	-0.10	-0.13	-0.07	-0.13	-0.18	-0.15	0.00
Impact of CAP Reform (%)	0.00	-0.18	-0.14	-0.25	-0.26	-0.33	-0.39	-0.47	-0.50	-0.52	-0.61	-0.36
Ending Stocks												
Enlargement and CAP Reform	4,119	5,339	5,801	6,020	6,075	6,149	6,216	6,272	6,307	6,353	6,460	6,099
CAP Reform	4,119	5,318	5,760	5,960	6,070	6,120	6,216	6,271	6,312	6,357	6,460	6,084
Baseline	4,119	5,352	5,797	6,024	6,110	6,165	6,255	6,306	6,327	6,364	6,490	6,119
Impact of Enlargement (%)	0.00	0.40	0.70	1.01	0.08	0.47	0.00	0.01	-0.07	-0.05	0.01	0.25
Impact of CAP Reform (%)	0.00	-0.64	-0.63	-1.06	-0.65	-0.73	-0.62	-0.55	-0.25	-0.12	-0.46	-0.57
Net Trade												
Enlargement and CAP Reform	2,150	2,440	2,830	3,111	3,472	3,786	4,062	4,357	4,592	4,886	5,031	3,857
CAP Reform	2,150	2,492	2,965	3,273	3,475	3,753	4,035	4,331	4,566	4,806	5,001	3,870
Baseline	2,150	2,498	2,967	3,280	3,483	3,756	4,041	4,333	4,572	4,816	5,009	3,875
Impact of Enlargement (%)	0.00	-2.10	-4.53	-4.95	-0.07	0.88	0.68	0.61	0.57	1.66	0.60	-0.66
Impact of CAP Reform (%)	0.00	-0.24	-0.10	-0.20	-0.23	-0.07	-0.14	-0.06	-0.14	-0.20	-0.14	-0.15

A.4. Impacts of EU Enlargement and CAP Reform on EU Rice

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Area Harvested												
	(Thousand Hectares)											
Enlargement and CAP Reform	405	377	362	369	365	360	354	351	350	349	348	359
CAP Reform	405	377	362	369	365	360	354	351	350	349	348	359
Baseline	405	414	406	403	403	400	390	384	384	381	382	395
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	-8.87	-10.79	-8.48	-9.22	-9.88	-9.16	-8.57	-8.89	-8.51	-8.89	-9.13
Yield												
	(Metric Tons per Hectare)											
Enlargement and CAP Reform	4.12	4.31	4.33	4.34	4.37	4.38	4.39	4.41	4.43	4.45	4.46	4.39
CAP Reform	4.12	4.31	4.33	4.34	4.37	4.38	4.39	4.41	4.43	4.45	4.46	4.39
Baseline	4.12	4.32	4.34	4.37	4.39	4.41	4.42	4.44	4.46	4.48	4.50	4.41
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	-0.24	-0.39	-0.49	-0.46	-0.60	-0.63	-0.59	-0.73	-0.70	-0.87	-0.57
Production												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	1,670	1,626	1,569	1,601	1,596	1,579	1,558	1,550	1,550	1,551	1,552	1,573
CAP Reform	1,670	1,626	1,569	1,601	1,596	1,579	1,558	1,550	1,550	1,551	1,552	1,573
Baseline	1,670	1,788	1,765	1,758	1,766	1,762	1,726	1,706	1,714	1,707	1,718	1,741
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	-9.08	-11.13	-8.93	-9.64	-10.42	-9.73	-9.11	-9.56	-9.15	-9.68	-9.64
Beginning Stocks												
Enlargement and CAP Reform	893	933	1,075	1,123	1,125	1,157	1,204	1,209	1,192	1,172	1,152	1,134
CAP Reform	893	933	1,075	1,123	1,125	1,157	1,204	1,209	1,192	1,172	1,152	1,134
Baseline	893	933	831	760	689	653	704	728	707	708	683	740
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	29.47	47.74	63.40	77.13	70.95	66.07	68.73	65.48	68.58	55.76
Domestic Supply												
Enlargement and CAP Reform	2,563	2,559	2,644	2,724	2,721	2,736	2,761	2,759	2,743	2,723	2,703	2,707
CAP Reform	2,563	2,559	2,644	2,724	2,721	2,736	2,761	2,759	2,743	2,723	2,703	2,707
Baseline	2,563	2,721	2,596	2,518	2,455	2,416	2,430	2,434	2,421	2,415	2,401	2,481
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	-5.97	1.86	8.18	10.86	13.25	13.65	13.37	13.30	12.74	12.58	9.38
Consumption												
Enlargement and CAP Reform	2,230	2,273	2,316	2,342	2,489	2,608	2,645	2,661	2,680	2,700	2,719	2,543
CAP Reform	2,230	2,273	2,316	2,342	2,489	2,608	2,645	2,661	2,680	2,700	2,719	2,543
Baseline	2,230	2,265	2,271	2,304	2,406	2,528	2,596	2,612	2,643	2,660	2,693	2,498
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.35	1.99	1.63	3.47	3.16	1.88	1.89	1.40	1.49	0.96	1.82
Domestic Use												
Enlargement and CAP Reform	3,163	3,348	3,439	3,468	3,646	3,811	3,853	3,853	3,852	3,851	3,827	3,695
CAP Reform	3,163	3,348	3,439	3,468	3,646	3,811	3,853	3,853	3,852	3,851	3,827	3,695
Baseline	3,163	3,096	3,031	2,993	3,059	3,232	3,324	3,318	3,351	3,343	3,358	3,211
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	8.16	13.47	15.85	19.20	17.93	15.93	16.13	14.95	15.20	13.97	15.08
Ending Stocks												
Enlargement and CAP Reform	933	1,075	1,123	1,125	1,157	1,204	1,209	1,192	1,172	1,152	1,108	1,152
CAP Reform	933	1,075	1,123	1,125	1,157	1,204	1,209	1,192	1,172	1,152	1,108	1,152
Baseline	933	831	760	689	653	704	728	707	708	683	665	713
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	29.47	47.74	63.40	77.13	70.95	66.07	68.73	65.48	68.58	66.70	62.42
Net Trade												
Enlargement and CAP Reform	-600	-790	-795	-743	-925	-1,076	-1,092	-1,094	-1,109	-1,128	-1,124	-988
CAP Reform	-600	-790	-795	-743	-925	-1,076	-1,092	-1,094	-1,109	-1,128	-1,124	-988
Baseline	-600	-375	-435	-475	-604	-816	-894	-885	-930	-928	-957	-730
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	110.74	82.67	56.51	53.09	31.76	22.14	23.70	19.25	21.60	17.46	43.89

A.6. Impacts of EU Enlargement and CAP Reform on EU Soybean Meal

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	13,910	13,830	13,996	14,044	14,118	14,175	14,235	14,304	14,376	14,470	14,564	14,211
CAP Reform	13,910	13,831	13,996	14,040	14,109	14,168	14,229	14,299	14,372	14,465	14,559	14,207
Baseline	13,910	13,831	13,996	14,040	14,110	14,168	14,229	14,298	14,371	14,464	14,558	14,207
Impact of Enlargement (%)	0.00	-0.01	0.00	0.03	0.06	0.04	0.04	0.04	0.03	0.04	0.03	0.03
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.01	0.01	0.00
Beginning Stocks												
Enlargement and CAP Reform	606	583	749	785	788	794	800	811	821	830	833	779
CAP Reform	606	583	749	785	787	793	801	811	821	830	833	779
Baseline	606	583	749	785	787	793	801	812	822	831	834	780
Impact of Enlargement (%)	0.00	0.00	0.00	0.06	0.20	0.03	-0.04	-0.06	-0.04	-0.05	-0.01	0.01
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	-0.01	-0.04	-0.06	-0.08	-0.07	-0.08	-0.03
Domestic Supply												
Enlargement and CAP Reform	14,516	14,413	14,745	14,829	14,906	14,968	15,035	15,115	15,197	15,300	15,397	14,991
CAP Reform	14,516	14,414	14,745	14,825	14,896	14,962	15,030	15,111	15,193	15,296	15,392	14,986
Baseline	14,516	14,414	14,746	14,825	14,896	14,961	15,030	15,110	15,192	15,295	15,392	14,986
Impact of Enlargement (%)	0.00	-0.01	0.00	0.03	0.07	0.04	0.04	0.03	0.03	0.03	0.03	0.03
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Consumption												
Enlargement and CAP Reform	32,517	32,833	33,536	33,859	34,224	34,458	34,770	35,061	35,274	35,413	35,504	34,493
CAP Reform	32,517	32,871	33,569	33,891	34,238	34,504	34,813	35,105	35,316	35,457	35,546	34,531
Baseline	32,517	32,875	33,581	33,907	34,252	34,499	34,796	35,081	35,295	35,432	35,514	34,523
Impact of Enlargement (%)	0.00	-0.12	-0.10	-0.10	-0.04	-0.13	-0.12	-0.13	-0.12	-0.12	-0.12	-0.11
Impact of CAP Reform (%)	0.00	-0.01	-0.04	-0.05	-0.04	0.01	0.05	0.07	0.06	0.07	0.09	0.02
Ending Stocks												
Enlargement and CAP Reform	583	749	785	788	794	800	811	821	830	833	836	805
CAP Reform	583	749	785	787	793	801	811	821	830	833	836	805
Baseline	583	749	785	787	793	801	812	822	831	834	837	805
Impact of Enlargement (%)	0.00	0.00	0.06	0.20	0.03	-0.04	-0.06	-0.04	-0.05	-0.01	0.01	0.01
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	-0.01	-0.04	-0.06	-0.08	-0.07	-0.08	-0.08	-0.04
Domestic Use												
Enlargement and CAP Reform	33,100	33,582	34,322	34,647	35,018	35,259	35,580	35,881	36,104	36,246	36,340	35,298
CAP Reform	33,100	33,621	34,354	34,678	35,031	35,305	35,624	35,926	36,146	36,290	36,383	35,336
Baseline	33,100	33,624	34,366	34,694	35,046	35,300	35,608	35,903	36,126	36,266	36,351	35,328
Impact of Enlargement (%)	0.00	-0.11	-0.09	-0.09	-0.04	-0.13	-0.12	-0.12	-0.12	-0.12	-0.12	-0.11
Impact of CAP Reform (%)	0.00	-0.01	-0.03	-0.04	-0.04	0.01	0.05	0.06	0.06	0.07	0.09	0.02
Net Trade												
Enlargement and CAP Reform	-18,584	-19,169	-19,576	-19,818	-20,112	-20,290	-20,545	-20,766	-20,907	-20,946	-20,943	-20,307
CAP Reform	-18,584	-19,207	-19,608	-19,853	-20,135	-20,343	-20,594	-20,815	-20,954	-20,994	-20,991	-20,349
Baseline	-18,584	-19,210	-19,620	-19,868	-20,150	-20,339	-20,578	-20,793	-20,934	-20,971	-20,959	-20,342
Impact of Enlargement (%)	0.00	-0.20	-0.16	-0.18	-0.12	-0.26	-0.24	-0.24	-0.22	-0.23	-0.23	-0.21
Impact of CAP Reform (%)	0.00	-0.02	-0.06	-0.08	-0.07	0.02	0.08	0.11	0.10	0.11	0.15	0.03

A.7. Impacts of EU Enlargement and CAP Reform on EU Soybean Oil

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	3,106	3,088	3,125	3,136	3,152	3,165	3,179	3,194	3,210	3,231	3,252	3,173
CAP Reform	3,106	3,088	3,125	3,135	3,151	3,164	3,177	3,193	3,209	3,230	3,251	3,172
Baseline	3,106	3,088	3,125	3,135	3,151	3,164	3,177	3,193	3,209	3,230	3,251	3,172
Impact of Enlargement (%)	0.00	-0.01	0.00	0.03	0.06	0.04	0.04	0.04	0.03	0.04	0.03	0.03
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.01	0.01	0.00
Beginning Stocks												
Enlargement and CAP Reform	149	167	172	174	175	176	177	178	178	179	179	176
CAP Reform	149	167	172	174	175	176	177	177	178	179	179	175
Baseline	149	167	172	174	175	176	177	177	178	179	179	175
Impact of Enlargement (%)	0.00	0.00	0.02	0.02	0.05	0.06	0.05	0.04	0.04	0.03	0.04	0.03
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	-0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Domestic Supply												
Enlargement and CAP Reform	3,255	3,255	3,297	3,310	3,328	3,341	3,355	3,372	3,388	3,410	3,431	3,349
CAP Reform	3,255	3,255	3,297	3,309	3,326	3,340	3,354	3,370	3,387	3,409	3,430	3,348
Baseline	3,255	3,255	3,297	3,310	3,326	3,340	3,354	3,370	3,387	3,408	3,430	3,348
Impact of Enlargement (%)	0.00	-0.01	0.00	0.03	0.06	0.05	0.04	0.04	0.03	0.04	0.03	0.03
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.01	0.01	0.00
Consumption												
Enlargement and CAP Reform	2,158	2,271	2,334	2,361	2,388	2,411	2,432	2,452	2,471	2,493	2,516	2,413
CAP Reform	2,158	2,272	2,334	2,359	2,385	2,409	2,430	2,450	2,469	2,491	2,514	2,411
Baseline	2,158	2,272	2,334	2,359	2,385	2,409	2,430	2,450	2,469	2,491	2,514	2,411
Impact of Enlargement (%)	0.00	-0.02	0.00	0.06	0.13	0.09	0.08	0.08	0.07	0.07	0.08	0.06
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.00	0.01	0.00	0.00
Ending Stocks												
Enlargement and CAP Reform	167	172	174	175	176	177	178	178	179	179	180	177
CAP Reform	167	172	174	175	176	177	177	178	179	179	180	177
Baseline	167	172	174	175	176	177	177	178	179	179	180	177
Impact of Enlargement (%)	0.00	0.02	0.02	0.05	0.06	0.05	0.04	0.04	0.03	0.04	0.04	0.04
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Domestic Use												
Enlargement and CAP Reform	2,325	2,443	2,509	2,536	2,564	2,588	2,610	2,630	2,650	2,673	2,697	2,590
CAP Reform	2,325	2,444	2,508	2,534	2,561	2,585	2,608	2,628	2,648	2,671	2,695	2,588
Baseline	2,325	2,444	2,508	2,535	2,561	2,585	2,608	2,628	2,648	2,671	2,694	2,588
Impact of Enlargement (%)	0.00	-0.02	0.00	0.06	0.13	0.09	0.07	0.07	0.07	0.07	0.08	0.06
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.00	0.01	0.00	0.00
Net Trade												
Enlargement and CAP Reform	930	812	789	774	764	754	746	742	738	737	735	759
CAP Reform	930	812	789	775	765	754	746	743	739	738	736	760
Baseline	930	812	789	775	765	754	746	743	739	738	736	760
Impact of Enlargement (%)	0.00	0.03	-0.01	-0.09	-0.15	-0.11	-0.08	-0.09	-0.10	-0.09	-0.12	-0.08
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.01	0.00	0.01	0.00	0.01	0.01	0.01	0.01	0.00

A.8. Impacts of EU Enlargement and CAP Reform on EU Rapeseed

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Area Harvested	(Thousand Hectares)											
Enlargement and CAP Reform	3,185	3,196	3,059	2,920	2,942	2,916	2,930	2,925	2,928	2,927	2,922	2,967
CAP Reform	3,185	3,196	3,056	2,926	2,940	2,920	2,933	2,927	2,933	2,936	2,935	2,970
Baseline	3,185	3,196	3,061	2,931	2,948	2,927	2,942	2,934	2,942	2,944	2,943	2,977
Impact of Enlargement (%)	0.00	0.00	0.11	-0.20	0.06	-0.12	-0.08	-0.07	-0.17	-0.30	-0.44	-0.12
Impact of CAP Reform (%)	0.00	0.00	-0.17	-0.18	-0.25	-0.23	-0.33	-0.26	-0.29	-0.27	-0.26	-0.22
Yield	(Metric Tons per Hectare)											
Enlargement and CAP Reform	2.97	3.04	3.06	3.09	3.11	3.14	3.16	3.19	3.21	3.24	3.26	3.15
CAP Reform	2.97	3.04	3.06	3.09	3.11	3.14	3.16	3.19	3.21	3.24	3.26	3.15
Baseline	2.97	3.04	3.06	3.09	3.11	3.14	3.16	3.19	3.21	3.24	3.26	3.15
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	9,460	9,712	9,372	9,018	9,161	9,154	9,271	9,326	9,411	9,479	9,537	9,344
CAP Reform	9,460	9,712	9,362	9,037	9,155	9,165	9,278	9,333	9,427	9,508	9,580	9,356
Baseline	9,460	9,712	9,378	9,053	9,179	9,187	9,309	9,357	9,454	9,533	9,604	9,377
Impact of Enlargement (%)	0.00	0.00	0.11	-0.20	0.06	-0.12	-0.08	-0.07	-0.17	-0.30	-0.44	-0.12
Impact of CAP Reform (%)	0.00	0.00	-0.17	-0.18	-0.25	-0.23	-0.33	-0.26	-0.29	-0.27	-0.26	-0.22
Beginning Stocks												
Enlargement and CAP Reform	298	163	216	235	234	242	242	247	251	255	258	234
CAP Reform	298	163	212	231	230	243	243	248	251	255	259	234
Baseline	298	163	212	232	231	244	244	249	252	256	260	234
Impact of Enlargement (%)	0.00	0.00	2.04	1.64	1.67	-0.31	-0.27	-0.27	-0.26	-0.28	-0.26	0.37
Impact of CAP Reform (%)	0.00	0.00	0.01	-0.28	-0.35	-0.28	-0.30	-0.31	-0.31	-0.24	-0.36	-0.24
Domestic Supply												
Enlargement and CAP Reform	9,758	9,875	9,588	9,253	9,395	9,396	9,513	9,574	9,662	9,733	9,796	9,578
CAP Reform	9,758	9,875	9,574	9,268	9,386	9,408	9,522	9,580	9,678	9,763	9,839	9,589
Baseline	9,758	9,875	9,590	9,285	9,410	9,430	9,553	9,605	9,706	9,790	9,864	9,611
Impact of Enlargement (%)	0.00	0.00	0.15	-0.16	0.10	-0.12	-0.09	-0.07	-0.17	-0.30	-0.44	-0.11
Impact of CAP Reform (%)	0.00	0.00	-0.17	-0.19	-0.26	-0.24	-0.33	-0.26	-0.29	-0.27	-0.26	-0.23
Crush												
Enlargement and CAP Reform	8,921	9,139	9,164	9,190	9,293	9,328	9,396	9,455	9,518	9,589	9,657	9,373
CAP Reform	8,921	9,130	9,157	9,185	9,301	9,336	9,404	9,462	9,526	9,596	9,665	9,376
Baseline	8,921	9,130	9,159	9,187	9,303	9,337	9,406	9,463	9,527	9,598	9,666	9,378
Impact of Enlargement (%)	0.00	0.10	0.08	0.06	-0.09	-0.08	-0.08	-0.08	-0.08	-0.08	-0.09	-0.03
Impact of CAP Reform (%)	0.00	0.00	-0.02	-0.03	-0.02	-0.01	-0.02	-0.01	-0.02	-0.02	-0.01	-0.02
Other Use												
Enlargement and CAP Reform	490	514	501	480	487	483	487	488	490	491	492	491
CAP Reform	490	513	500	480	487	484	488	488	491	493	494	492
Baseline	490	513	501	481	488	485	489	489	492	494	495	493
Impact of Enlargement (%)	0.00	0.21	0.29	0.02	0.02	-0.14	-0.11	-0.09	-0.19	-0.31	-0.43	-0.07
Impact of CAP Reform (%)	0.00	0.00	-0.19	-0.21	-0.27	-0.25	-0.34	-0.27	-0.29	-0.29	-0.25	-0.24
Ending Stocks												
Enlargement and CAP Reform	163	216	235	234	242	242	247	251	255	258	262	244
CAP Reform	163	212	231	230	243	243	248	251	255	259	262	244
Baseline	163	212	232	231	244	244	249	252	256	260	263	244
Impact of Enlargement (%)	0.00	2.04	1.64	1.67	-0.31	-0.27	-0.27	-0.26	-0.28	-0.26	-0.26	0.34
Impact of CAP Reform (%)	0.00	0.01	-0.28	-0.35	-0.28	-0.30	-0.31	-0.31	-0.24	-0.36	-0.18	-0.26
Domestic Use												
Enlargement and CAP Reform	9,574	9,869	9,900	9,904	10,022	10,054	10,131	10,193	10,263	10,338	10,410	10,108
CAP Reform	9,574	9,855	9,887	9,895	10,031	10,063	10,139	10,201	10,272	10,348	10,421	10,111
Baseline	9,574	9,855	9,891	9,899	10,035	10,066	10,144	10,205	10,276	10,352	10,424	10,115
Impact of Enlargement (%)	0.00	0.15	0.13	0.10	-0.09	-0.09	-0.08	-0.08	-0.09	-0.09	-0.11	-0.03
Impact of CAP Reform (%)	0.00	0.00	-0.04	-0.04	-0.04	-0.03	-0.04	-0.03	-0.03	-0.04	-0.02	-0.03
Net Trade												
Enlargement and CAP Reform	184	5	-312	-651	-627	-657	-617	-619	-601	-605	-615	-530
CAP Reform	184	20	-314	-627	-646	-655	-618	-621	-594	-585	-583	-522
Baseline	184	20	-301	-614	-625	-636	-591	-599	-569	-563	-560	-504
Impact of Enlargement (%)	0.00	-73.60	-0.47	3.86	-2.90	0.44	-0.01	-0.29	1.27	3.40	5.44	-6.29
Impact of CAP Reform (%)	0.00	0.07	4.21	2.14	3.26	2.97	4.53	3.58	4.27	4.00	4.13	3.32

A.9. Impacts of EU Enlargement and CAP Reform on EU Rapeseed Meal

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	5,225	5,353	5,368	5,383	5,443	5,464	5,503	5,538	5,575	5,616	5,656	5,490
CAP Reform	5,225	5,347	5,363	5,379	5,448	5,468	5,508	5,542	5,579	5,621	5,661	5,492
Baseline	5,225	5,347	5,364	5,381	5,449	5,469	5,509	5,543	5,580	5,622	5,661	5,492
Impact of Enlargement (%)	0.00	0.10	0.08	0.06	-0.09	-0.08	-0.08	-0.08	-0.08	-0.08	-0.09	-0.03
Impact of CAP Reform (%)	0.00	0.00	-0.02	-0.03	-0.02	-0.01	-0.02	-0.01	-0.02	-0.02	-0.01	-0.02
Beginning Stocks												
Enlargement and CAP Reform	100	104	146	152	149	150	151	153	155	158	159	148
CAP Reform	100	104	145	151	148	151	151	153	156	158	159	148
Baseline	100	104	145	151	148	151	151	154	156	158	159	148
Impact of Enlargement (%)	0.00	0.00	0.68	0.63	0.64	-0.19	-0.16	-0.15	-0.14	-0.17	-0.13	0.10
Impact of CAP Reform (%)	0.00	0.00	0.01	-0.07	-0.09	-0.08	-0.14	-0.12	-0.15	-0.10	-0.18	-0.09
Domestic Supply												
Enlargement and CAP Reform	5,325	5,457	5,513	5,535	5,592	5,614	5,654	5,691	5,730	5,774	5,815	5,637
CAP Reform	5,325	5,451	5,508	5,530	5,596	5,619	5,659	5,695	5,735	5,778	5,820	5,639
Baseline	5,325	5,451	5,509	5,532	5,597	5,620	5,660	5,696	5,736	5,780	5,820	5,640
Impact of Enlargement (%)	0.00	0.10	0.10	0.08	-0.07	-0.08	-0.08	-0.08	-0.08	-0.08	-0.09	-0.03
Impact of CAP Reform (%)	0.00	0.00	-0.02	-0.03	-0.02	-0.02	-0.03	-0.02	-0.02	-0.02	-0.01	-0.02
Consumption												
Enlargement and CAP Reform	5,579	5,712	5,701	5,685	5,747	5,766	5,818	5,869	5,908	5,940	5,959	5,810
CAP Reform	5,579	5,699	5,689	5,678	5,756	5,778	5,835	5,885	5,929	5,958	5,982	5,819
Baseline	5,579	5,699	5,693	5,683	5,760	5,780	5,842	5,889	5,936	5,962	5,988	5,823
Impact of Enlargement (%)	0.00	0.23	0.20	0.12	-0.16	-0.20	-0.31	-0.28	-0.35	-0.29	-0.39	-0.14
Impact of CAP Reform (%)	0.00	0.00	-0.07	-0.09	-0.08	-0.03	-0.11	-0.07	-0.12	-0.08	-0.09	-0.08
Ending Stocks												
Enlargement and CAP Reform	104	146	152	149	150	151	153	155	158	159	160	153
CAP Reform	104	145	151	148	151	151	153	156	158	159	160	153
Baseline	104	145	151	148	151	151	154	156	158	159	160	153
Impact of Enlargement (%)	0.00	0.68	0.63	0.64	-0.19	-0.16	-0.15	-0.14	-0.17	-0.13	-0.13	0.09
Impact of CAP Reform (%)	0.00	0.01	-0.07	-0.09	-0.08	-0.14	-0.12	-0.15	-0.10	-0.18	-0.10	-0.10
Domestic Use												
Enlargement and CAP Reform	5,683	5,858	5,853	5,835	5,897	5,917	5,971	6,024	6,066	6,099	6,118	5,964
CAP Reform	5,683	5,844	5,841	5,827	5,907	5,929	5,989	6,041	6,087	6,116	6,142	5,972
Baseline	5,683	5,844	5,845	5,832	5,911	5,931	5,996	6,045	6,094	6,121	6,148	5,977
Impact of Enlargement (%)	0.00	0.25	0.21	0.14	-0.16	-0.20	-0.30	-0.28	-0.35	-0.29	-0.38	-0.14
Impact of CAP Reform (%)	0.00	0.00	-0.07	-0.09	-0.08	-0.04	-0.11	-0.07	-0.12	-0.08	-0.09	-0.08
Net Trade												
Enlargement and CAP Reform	-358	-401	-340	-300	-305	-303	-316	-333	-336	-325	-304	-326
CAP Reform	-358	-392	-333	-296	-311	-310	-330	-345	-352	-338	-322	-333
Baseline	-358	-392	-336	-300	-314	-312	-335	-349	-358	-342	-327	-336
Impact of Enlargement (%)	0.00	2.32	2.09	1.18	-1.74	-2.36	-4.10	-3.51	-4.69	-3.79	-5.64	-2.03
Impact of CAP Reform (%)	0.00	-0.04	-0.87	-1.20	-1.04	-0.42	-1.62	-1.00	-1.70	-1.15	-1.56	-1.06

A.10. Impacts of EU Enlargement and CAP Reform on EU Rapeseed Oil

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	3,640	3,729	3,739	3,750	3,792	3,806	3,834	3,858	3,884	3,913	3,940	3,824
CAP Reform	3,640	3,725	3,736	3,748	3,795	3,809	3,837	3,861	3,887	3,916	3,944	3,826
Baseline	3,640	3,725	3,737	3,749	3,796	3,810	3,838	3,861	3,887	3,916	3,944	3,826
Impact of Enlargement (%)	0.00	0.10	0.08	0.06	-0.09	-0.08	-0.08	-0.08	-0.08	-0.08	-0.09	-0.03
Impact of CAP Reform (%)	0.00	0.00	-0.02	-0.03	-0.02	-0.01	-0.02	-0.01	-0.02	-0.02	-0.01	-0.02
Beginning Stocks												
Enlargement and CAP Reform	161	124	147	158	161	166	168	171	174	177	180	163
CAP Reform	161	124	146	157	160	166	168	171	174	177	180	162
Baseline	161	124	146	157	161	166	168	171	174	177	180	162
Impact of Enlargement (%)	0.00	0.00	0.67	0.52	0.55	0.03	0.03	0.02	0.02	0.02	0.01	0.18
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.09	-0.12	-0.10	-0.09	-0.09	-0.09	-0.09	-0.10	-0.08
Domestic Supply												
Enlargement and CAP Reform	3,801	3,853	3,886	3,908	3,953	3,972	4,002	4,029	4,058	4,089	4,120	3,987
CAP Reform	3,801	3,849	3,882	3,905	3,956	3,975	4,005	4,032	4,061	4,092	4,123	3,988
Baseline	3,801	3,849	3,883	3,906	3,957	3,976	4,006	4,033	4,061	4,093	4,124	3,989
Impact of Enlargement (%)	0.00	0.10	0.11	0.08	-0.07	-0.08	-0.07	-0.07	-0.08	-0.08	-0.08	-0.02
Impact of CAP Reform (%)	0.00	0.00	-0.02	-0.03	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.01	-0.02
Consumption												
Enlargement and CAP Reform	3,507	3,479	3,489	3,532	3,584	3,618	3,659	3,696	3,736	3,776	3,816	3,638
CAP Reform	3,507	3,479	3,482	3,525	3,585	3,618	3,659	3,696	3,736	3,776	3,816	3,637
Baseline	3,507	3,479	3,483	3,527	3,586	3,619	3,660	3,697	3,738	3,778	3,817	3,638
Impact of Enlargement (%)	0.00	0.00	0.19	0.20	-0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.04
Impact of CAP Reform (%)	0.00	0.00	-0.04	-0.05	-0.04	-0.04	-0.04	-0.04	-0.03	-0.05	-0.02	-0.03
Ending Stocks												
Enlargement and CAP Reform	124	147	158	161	166	168	171	174	177	180	183	168
CAP Reform	124	146	157	160	166	168	171	174	177	180	183	168
Baseline	124	146	157	161	166	168	171	174	177	180	183	168
Impact of Enlargement (%)	0.00	0.67	0.52	0.55	0.03	0.03	0.02	0.02	0.02	0.01	0.03	0.19
Impact of CAP Reform (%)	0.00	0.00	-0.09	-0.12	-0.10	-0.09	-0.09	-0.09	-0.07	-0.10	-0.05	-0.08
Domestic Use												
Enlargement and CAP Reform	3,631	3,625	3,646	3,693	3,750	3,786	3,830	3,870	3,913	3,956	3,999	3,807
CAP Reform	3,631	3,624	3,639	3,686	3,751	3,786	3,830	3,870	3,913	3,956	3,998	3,805
Baseline	3,631	3,624	3,640	3,687	3,752	3,787	3,832	3,871	3,914	3,958	3,999	3,807
Impact of Enlargement (%)	0.00	0.03	0.21	0.21	-0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.04
Impact of CAP Reform (%)	0.00	0.00	-0.04	-0.05	-0.04	-0.04	-0.04	-0.04	-0.03	-0.05	-0.02	-0.04
Net Trade												
Enlargement and CAP Reform	170	228	239	214	203	186	172	159	145	133	121	180
CAP Reform	170	225	243	219	205	189	175	162	148	136	125	183
Baseline	170	225	242	218	205	188	175	161	147	135	125	182
Impact of Enlargement (%)	0.00	1.20	-1.40	-2.12	-1.15	-1.56	-1.65	-1.81	-2.09	-2.18	-2.87	-1.56
Impact of CAP Reform (%)	0.00	-0.01	0.26	0.34	0.31	0.40	0.42	0.53	0.39	0.80	0.33	0.38

A.12. Impacts of EU Enlargement and CAP Reform on EU Sunflower Meal

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	2,200	2,178	2,222	2,225	2,250	2,276	2,307	2,336	2,364	2,390	2,417	2,296
CAP Reform	2,200	2,169	2,215	2,219	2,254	2,279	2,310	2,339	2,366	2,392	2,420	2,296
Baseline	2,200	2,169	2,216	2,220	2,254	2,279	2,310	2,339	2,366	2,392	2,420	2,296
Impact of Enlargement (%)	0.00	0.41	0.31	0.28	-0.18	-0.11	-0.11	-0.10	-0.10	-0.09	-0.09	0.02
Impact of CAP Reform (%)	0.00	0.00	-0.03	-0.05	-0.02	-0.01	0.00	-0.02	0.00	-0.01	0.00	-0.02
Beginning Stocks												
Enlargement and CAP Reform	125	110	167	185	185	189	192	195	199	202	204	183
CAP Reform	125	110	166	184	183	189	192	195	198	202	204	182
Baseline	125	110	166	184	184	189	192	195	199	202	204	183
Impact of Enlargement (%)	0.00	0.00	0.78	0.78	1.00	0.05	0.05	0.03	0.08	0.08	0.16	0.30
Impact of CAP Reform (%)	0.00	0.00	0.03	-0.02	-0.04	-0.03	-0.12	-0.16	-0.22	-0.18	-0.22	-0.10
Domestic Supply												
Enlargement and CAP Reform	2,325	2,288	2,389	2,410	2,435	2,465	2,499	2,532	2,562	2,592	2,622	2,479
CAP Reform	2,325	2,279	2,381	2,403	2,437	2,468	2,501	2,534	2,564	2,594	2,624	2,478
Baseline	2,325	2,279	2,382	2,404	2,438	2,468	2,501	2,535	2,565	2,594	2,624	2,479
Impact of Enlargement (%)	0.00	0.39	0.35	0.32	-0.09	-0.10	-0.10	-0.09	-0.08	-0.08	-0.07	0.04
Impact of CAP Reform (%)	0.00	0.00	-0.03	-0.05	-0.02	-0.01	-0.01	-0.03	-0.02	-0.03	-0.02	-0.02
Consumption												
Enlargement and CAP Reform	3,625	3,623	3,669	3,713	3,744	3,774	3,794	3,818	3,835	3,863	3,882	3,771
CAP Reform	3,625	3,620	3,666	3,710	3,746	3,777	3,796	3,820	3,837	3,865	3,884	3,772
Baseline	3,625	3,620	3,668	3,713	3,747	3,776	3,794	3,818	3,835	3,862	3,881	3,771
Impact of Enlargement (%)	0.00	0.08	0.09	0.08	-0.04	-0.08	-0.06	-0.07	-0.05	-0.06	-0.04	-0.01
Impact of CAP Reform (%)	0.00	-0.02	-0.05	-0.06	-0.03	0.02	0.05	0.05	0.05	0.06	0.07	0.01
Ending Stocks												
Enlargement and CAP Reform	110	167	185	185	189	192	195	199	202	204	206	192
CAP Reform	110	166	184	183	189	192	195	198	202	204	206	192
Baseline	110	166	184	184	189	192	195	199	202	204	206	192
Impact of Enlargement (%)	0.00	0.78	0.78	1.00	0.05	0.05	0.03	0.08	0.08	0.16	0.16	0.32
Impact of CAP Reform (%)	0.00	0.03	-0.02	-0.04	-0.03	-0.12	-0.16	-0.22	-0.18	-0.22	-0.22	-0.12
Domestic Use												
Enlargement and CAP Reform	3,735	3,790	3,855	3,899	3,933	3,966	3,989	4,016	4,037	4,067	4,088	3,964
CAP Reform	3,735	3,785	3,850	3,894	3,935	3,969	3,991	4,018	4,039	4,069	4,090	3,964
Baseline	3,735	3,786	3,852	3,896	3,936	3,968	3,990	4,017	4,037	4,067	4,087	3,964
Impact of Enlargement (%)	0.00	0.11	0.12	0.12	-0.04	-0.07	-0.06	-0.06	-0.04	-0.05	-0.03	0.00
Impact of CAP Reform (%)	0.00	-0.02	-0.04	-0.06	-0.03	0.01	0.04	0.04	0.04	0.04	0.06	0.01
Net Trade												
Enlargement and CAP Reform	-1,410	-1,502	-1,465	-1,488	-1,498	-1,500	-1,490	-1,484	-1,475	-1,475	-1,467	-1,484
CAP Reform	-1,410	-1,507	-1,469	-1,491	-1,497	-1,501	-1,490	-1,485	-1,474	-1,475	-1,466	-1,485
Baseline	-1,410	-1,507	-1,470	-1,492	-1,498	-1,500	-1,488	-1,482	-1,472	-1,472	-1,463	-1,485
Impact of Enlargement (%)	0.00	-0.30	-0.23	-0.19	0.04	-0.04	0.01	-0.01	0.03	0.01	0.04	-0.06
Impact of CAP Reform (%)	0.00	-0.04	-0.07	-0.08	-0.05	0.05	0.12	0.16	0.15	0.17	0.20	0.06

A.13. Impacts of EU Enlargement and CAP Reform on EU Sunflower Oil

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	1,785	1,767	1,803	1,805	1,825	1,847	1,872	1,896	1,918	1,939	1,961	1,863
CAP Reform	1,785	1,760	1,797	1,800	1,829	1,849	1,874	1,898	1,920	1,941	1,963	1,863
Baseline	1,785	1,760	1,798	1,801	1,829	1,849	1,874	1,898	1,920	1,941	1,963	1,863
Impact of Enlargement (%)	0.00	0.41	0.31	0.28	-0.18	-0.11	-0.11	-0.10	-0.10	-0.09	-0.09	0.02
Impact of CAP Reform (%)	0.00	0.00	-0.03	-0.05	-0.02	-0.01	0.00	-0.02	0.00	-0.01	0.00	-0.02
Beginning Stocks												
Enlargement and CAP Reform	215	225	258	271	276	283	288	293	298	302	306	280
CAP Reform	215	225	257	270	275	283	288	293	298	302	307	280
Baseline	215	225	257	270	275	283	288	293	298	302	307	280
Impact of Enlargement (%)	0.00	0.00	0.42	0.39	0.39	0.03	0.01	-0.01	-0.02	-0.03	-0.03	0.12
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.04	-0.06	-0.03	-0.02	-0.01	-0.02	-0.01	-0.02	-0.02
Domestic Supply												
Enlargement and CAP Reform	2,000	1,992	2,061	2,076	2,102	2,130	2,160	2,188	2,215	2,241	2,268	2,143
CAP Reform	2,000	1,985	2,055	2,070	2,104	2,132	2,162	2,190	2,217	2,243	2,270	2,143
Baseline	2,000	1,985	2,055	2,071	2,104	2,132	2,162	2,191	2,217	2,243	2,270	2,143
Impact of Enlargement (%)	0.00	0.36	0.33	0.29	-0.10	-0.09	-0.09	-0.09	-0.09	-0.08	-0.09	0.04
Impact of CAP Reform (%)	0.00	0.00	-0.03	-0.05	-0.03	-0.01	0.00	-0.02	-0.01	-0.01	-0.01	-0.02
Consumption												
Enlargement and CAP Reform	2,210	2,244	2,289	2,320	2,355	2,384	2,414	2,444	2,473	2,500	2,527	2,395
CAP Reform	2,210	2,241	2,286	2,317	2,355	2,385	2,414	2,444	2,473	2,500	2,528	2,394
Baseline	2,210	2,241	2,286	2,317	2,355	2,385	2,414	2,444	2,473	2,500	2,528	2,394
Impact of Enlargement (%)	0.00	0.15	0.14	0.14	-0.01	-0.01	-0.02	-0.02	-0.02	-0.03	-0.03	0.03
Impact of CAP Reform (%)	0.00	0.00	-0.01	-0.02	-0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ending Stocks												
Enlargement and CAP Reform	225	258	271	276	283	288	293	298	302	306	311	289
CAP Reform	225	257	270	275	283	288	293	298	302	307	311	288
Baseline	225	257	270	275	283	288	293	298	302	307	311	288
Impact of Enlargement (%)	0.00	0.42	0.39	0.39	0.03	0.01	-0.01	-0.02	-0.03	-0.03	-0.04	0.11
Impact of CAP Reform (%)	0.00	0.00	-0.04	-0.06	-0.03	-0.02	-0.01	-0.02	-0.01	-0.02	-0.01	-0.02
Domestic Use												
Enlargement and CAP Reform	2,435	2,502	2,560	2,596	2,638	2,672	2,707	2,741	2,775	2,806	2,838	2,683
CAP Reform	2,435	2,498	2,556	2,592	2,638	2,672	2,707	2,742	2,775	2,807	2,839	2,683
Baseline	2,435	2,498	2,556	2,593	2,638	2,673	2,707	2,742	2,776	2,807	2,839	2,683
Impact of Enlargement (%)	0.00	0.18	0.17	0.16	0.00	-0.01	-0.02	-0.02	-0.02	-0.03	-0.03	0.04
Impact of CAP Reform (%)	0.00	0.00	-0.01	-0.02	-0.01	-0.01	0.00	-0.01	0.00	0.00	0.00	-0.01
Net Trade												
Enlargement and CAP Reform	-435	-511	-499	-520	-536	-542	-547	-553	-560	-565	-570	-540
CAP Reform	-435	-513	-501	-522	-534	-540	-546	-551	-558	-564	-569	-540
Baseline	-435	-513	-501	-521	-534	-540	-545	-551	-558	-564	-569	-540
Impact of Enlargement (%)	0.00	-0.53	-0.47	-0.36	0.38	0.32	0.29	0.24	0.21	0.19	0.19	0.05
Impact of CAP Reform (%)	0.00	0.00	0.05	0.10	0.05	0.03	0.01	0.04	0.01	0.03	0.01	0.03

A.15. Impacts of EU Enlargement and CAP Reform on EU New Member States Sugar

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Average
Sugar												
Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	3,395	3,393	3,391	3,392	3,391	3,389	3,383	3,375	3,366	3,355	3,348	3,378
CAP Reform	3,395	3,487	3,520	3,567	3,603	3,638	3,671	3,713	3,742	3,771	3,803	3,651
Baseline	3,395	3,487	3,520	3,567	3,603	3,638	3,671	3,713	3,742	3,771	3,803	3,651
Impact of Enlargement (%)	0	-3	-4	-5	-6	-7	-8	-9	-10	-11	-12	-7.40
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Beginning Stocks												
Enlargement and CAP Reform	772	663	625	605	594	587	579	570	561	552	541	588
CAP Reform	772	663	687	701	707	704	694	669	656	637	618	674
Baseline	772	663	687	701	707	704	694	669	656	637	618	674
Impact of Enlargement (%)	0	0	-9	-14	-16	-17	-17	-15	-15	-13	-12	-12.72
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Domestic Supply												
Enlargement and CAP Reform	4,167	4,056	4,016	3,997	3,985	3,976	3,962	3,946	3,927	3,906	3,889	3,966
CAP Reform	4,167	4,150	4,207	4,268	4,310	4,342	4,365	4,382	4,398	4,408	4,421	4,325
Baseline	4,167	4,150	4,207	4,268	4,310	4,342	4,365	4,382	4,398	4,408	4,421	4,325
Impact of Enlargement (%)	0	-2	-5	-6	-8	-8	-9	-10	-11	-11	-12	-8.25
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Consumption												
Enlargement and CAP Reform	3,434	3,433	3,435	3,439	3,470	3,547	3,618	3,704	3,781	3,874	3,966	3,627
CAP Reform	3,434	3,440	3,452	3,459	3,491	3,570	3,649	3,732	3,839	3,922	4,016	3,657
Baseline	3,434	3,440	3,452	3,459	3,491	3,571	3,649	3,732	3,838	3,922	4,016	3,657
Impact of Enlargement (%)	0	0	0	-1	-1	-1	-1	-1	-2	-1	-1	-0.81
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Ending Stocks												
Enlargement and CAP Reform	663	625	605	594	587	579	570	561	552	541	530	574
CAP Reform	663	687	701	707	704	694	669	656	637	618	599	667
Baseline	663	687	701	707	704	694	669	656	637	618	599	667
Impact of Enlargement (%)	0	-9	-14	-16	-17	-17	-15	-15	-13	-12	-12	-13.88
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Domestic Use												
Enlargement and CAP Reform	4,097	4,057	4,040	4,033	4,057	4,125	4,188	4,265	4,332	4,415	4,496	4,201
CAP Reform	4,097	4,128	4,153	4,166	4,195	4,265	4,318	4,388	4,475	4,540	4,615	4,324
Baseline	4,097	4,128	4,153	4,166	4,195	4,265	4,319	4,388	4,475	4,540	4,614	4,324
Impact of Enlargement (%)	0	-2	-3	-3	-3	-3	-3	-3	-3	-3	-3	-2.85
Impact of CAP Reform (%)	0	0	0	0	0	0	0	0	0	0	0	0.00
Net Trade												
Enlargement and CAP Reform	70	-1	-24	-36	-72	-149	-227	-319	-405	-508	-607	-234.92
CAP Reform	70	22	55	102	115	77	47	-6	-77	-133	-193	0.83
Baseline	70	22	55	102	115	77	47	-7	-77	-133	-193	0.86
Impact of Enlargement (%)	0	-106	-144	-136	-162	-293	-584	4,972	424	283	214	446.82
Impact of CAP Reform (%)	0	0	0	0	0	0	0	-3	0	0	0	-0.28
Prices												
Enlargement and CAP Reform	28.40	29.33	30.02	30.61	30.97	31.20	31.44	31.68	31.92	32.03	32.15	31.14
CAP Reform	18.47	18.54	18.47	18.80	19.81	20.14	22.84	21.90	22.08	22.92	23.51	20.90
Baseline	18.47	18.54	18.47	18.80	19.81	20.14	22.84	21.90	22.08	22.92	23.51	20.90
Impact of Enlargement (%)	53.75	58.18	62.56	62.79	56.33	54.92	37.66	44.66	44.57	39.77	36.77	49.82
Impact of CAP Reform (%)	0.00	-0.01	-0.01	0.01	0.00	0.01	0.01	0.01	-0.03	-0.01	-0.01	0.00

* No impact on the EU-15 due to its isolation from the world sugar market and the exclusion of sugar from the CAP reform.

A.16. Impacts of EU Enlargement on EU Beef

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Ending Beef Cow Inventory	(Thousand Head)											
Enlargement and CAP Reform	12,988	13,005	13,064	12,943	12,650	12,198	11,962	11,840	11,782	11,757	11,748	12,295
CAP Reform	12,988	13,005	13,066	12,946	12,653	12,197	11,959	11,836	11,778	11,753	11,744	12,294
Baseline	12,988	13,005	13,067	13,102	13,067	13,011	12,951	12,895	12,847	12,808	12,776	12,953
Impact of Enlargement (%)	0.00	0.00	-0.01	-0.02	-0.02	0.00	0.03	0.03	0.04	0.03	0.03	0.01
Impact of CAP Reform (%)	0.00	0.00	-0.01	-1.20	-3.17	-6.26	-7.66	-8.21	-8.32	-8.24	-8.08	-5.11
Ending Cow Inventory												
Enlargement and CAP Reform	33,145	32,849	32,752	32,362	31,973	31,323	30,835	30,485	30,173	29,915	29,585	31,225
CAP Reform	33,145	32,891	32,800	32,423	31,978	31,362	30,847	30,509	30,191	29,944	29,628	31,257
Baseline	33,145	32,838	32,814	32,633	32,477	32,228	31,861	31,586	31,284	31,033	30,689	31,944
Impact of Enlargement (%)	0.00	-0.13	-0.15	-0.19	-0.01	-0.12	-0.04	-0.08	-0.06	-0.10	-0.15	-0.10
Impact of CAP Reform (%)	0.00	0.16	-0.04	-0.64	-1.54	-2.69	-3.18	-3.41	-3.49	-3.51	-3.46	-2.18
Total Slaughter												
Enlargement and CAP Reform	26,464	26,396	26,511	26,267	26,082	25,776	25,440	25,130	24,834	24,576	24,305	25,532
CAP Reform	26,464	26,416	26,521	26,287	26,089	25,808	25,455	25,153	24,850	24,597	24,329	25,550
Baseline	26,464	26,399	26,532	26,298	26,157	25,979	25,791	25,637	25,441	25,263	25,038	25,853
Impact of Enlargement (%)	0.00	-0.08	-0.04	-0.07	-0.03	-0.12	-0.06	-0.09	-0.06	-0.08	-0.10	-0.07
Impact of CAP Reform (%)	0.00	0.06	-0.04	-0.04	-0.26	-0.66	-1.30	-1.89	-2.32	-2.64	-2.83	-1.19
Average Slaughter Weight	(Kilograms per Head Carcass Weight)											
Enlargement and CAP Reform	275	277	279	279	279	279	280	280	281	281	282	280
CAP Reform	275	277	279	279	279	279	280	280	281	281	282	280
Baseline	275	277	279	279	279	279	280	280	280	281	281	280
Impact of Enlargement (%)	0.00	-0.01	-0.01	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.03	-0.05	-0.06	-0.02	0.04	0.09	0.12	0.15	0.02
Beef Production	(Thousand Metric Tons)											
Enlargement and CAP Reform	7,289	7,320	7,385	7,324	7,278	7,198	7,114	7,039	6,968	6,907	6,843	7,138
CAP Reform	7,289	7,326	7,388	7,329	7,279	7,207	7,118	7,045	6,972	6,913	6,849	7,143
Baseline	7,289	7,321	7,392	7,335	7,302	7,259	7,213	7,178	7,132	7,091	7,038	7,226
Impact of Enlargement (%)	0.00	-0.09	-0.05	-0.08	-0.03	-0.12	-0.05	-0.09	-0.06	-0.08	-0.09	-0.07
Impact of CAP Reform (%)	0.00	0.07	-0.04	-0.07	-0.31	-0.72	-1.32	-1.85	-2.24	-2.52	-2.69	-1.17
Beef Consumption												
Enlargement and CAP Reform	7,671	7,561	7,564	7,530	7,503	7,444	7,372	7,310	7,247	7,192	7,130	7,385
CAP Reform	7,671	7,553	7,562	7,535	7,504	7,451	7,375	7,315	7,251	7,197	7,136	7,388
Baseline	7,671	7,549	7,564	7,539	7,523	7,494	7,455	7,426	7,384	7,346	7,294	7,457
Impact of Enlargement (%)	0.00	0.10	0.03	-0.07	-0.02	-0.10	-0.04	-0.07	-0.05	-0.07	-0.09	-0.04
Impact of CAP Reform (%)	0.00	0.06	-0.03	-0.05	-0.24	-0.57	-1.07	-1.50	-1.81	-2.03	-2.16	-0.94
Beef Net Exports												
Enlargement and CAP Reform	-137	-201	-179	-206	-225	-246	-258	-271	-279	-285	-287	-244
CAP Reform	-137	-187	-173	-205	-225	-245	-257	-270	-279	-284	-287	-241
Baseline	-137	-188	-173	-204	-221	-235	-241	-249	-253	-255	-255	-227
Impact of Enlargement (%)	0.00	7.50	3.15	0.19	0.09	0.42	0.27	0.29	0.17	0.12	0.09	1.23
Impact of CAP Reform (%)	0.00	-0.37	0.30	0.66	1.96	4.04	6.51	8.67	10.28	11.48	12.29	5.58
Beef Ending Stocks												
Enlargement and CAP Reform	40	0	0	0	0	0	0	0	0	0	0	0
CAP Reform	40	0	0	0	0	0	0	0	0	0	0	0
Baseline	40	0	0	0	0	0	0	0	0	0	0	0
Impact of Enlargement (%)	0.00	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Impact of CAP Reform (%)	0.00	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Beef Producer Price †	(ECU per 100 Kilograms Carcass Weight)											
Enlargement and CAP Reform	229	223	217	216	214	215	217	218	220	222	225	219
CAP Reform	229	224	218	216	214	215	217	218	220	222	225	219
Baseline	229	224	217	215	212	210	210	209	209	209	211	213
Impact of Enlargement (%)	0.00	-0.33	-0.21	0.04	-0.11	0.13	-0.03	0.06	0.00	0.04	0.05	-0.04
Impact of CAP Reform (%)	0.00	-0.14	0.12	0.31	0.97	2.07	3.33	4.49	5.34	5.94	6.30	2.87

† Producer prices are projections of the MLC reference price.

A.18. Impacts of EU Enlargement on Czech Republic Livestock and Poultry

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Pork Production												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	583	581	563	563	560	558	558	560	561	564	568	564
CAP Reform	583	583	564	566	562	560	559	560	561	563	566	564
Baseline	583	583	565	566	562	561	559	561	561	563	566	565
Impact of Enlargement (%)	0.00	-0.20	-0.25	-0.40	-0.31	-0.36	-0.21	-0.07	0.11	0.24	0.40	-0.11
Impact of CAP Reform (%)	0.00	-0.03	-0.10	-0.08	-0.08	-0.06	-0.07	-0.06	-0.06	-0.06	-0.07	-0.07
Pork Consumption												
Enlargement and CAP Reform	586	585	589	592	596	599	603	605	607	608	609	599
CAP Reform	586	585	591	596	599	603	606	608	610	611	612	602
Baseline	586	585	591	596	599	603	606	608	610	611	612	602
Impact of Enlargement (%)	0.00	-0.16	-0.50	-0.56	-0.54	-0.56	-0.56	-0.56	-0.56	-0.55	-0.54	-0.51
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Broiler Production												
Enlargement and CAP Reform	317	328	325	328	331	334	337	345	355	365	376	342
CAP Reform	317	328	324	326	329	331	333	340	348	357	366	338
Baseline	317	328	324	327	329	332	334	341	349	357	366	339
Impact of Enlargement (%)	0.00	0.01	0.41	0.50	0.74	0.87	1.18	1.58	2.05	2.46	2.88	1.27
Impact of CAP Reform (%)	0.00	-0.04	-0.17	-0.22	-0.24	-0.21	-0.19	-0.17	-0.16	-0.16	-0.16	-0.17
Broiler Consumption												
Enlargement and CAP Reform	321	322	330	337	345	354	362	368	373	379	385	356
CAP Reform	321	323	335	343	352	361	369	375	380	386	392	362
Baseline	321	323	335	343	352	361	369	375	380	386	392	362
Impact of Enlargement (%)	0.00	-0.45	-1.35	-1.75	-1.80	-1.83	-1.82	-1.83	-1.82	-1.82	-1.81	-1.63
Impact of CAP Reform (%)	0.00	0.00	-0.01	0.00	-0.01	-0.01	-0.02	-0.02	-0.01	-0.01	-0.01	-0.01
Beef Production												
Enlargement and CAP Reform	203	198	189	188	185	185	185	185	185	184	183	187
CAP Reform	203	198	187	185	184	183	182	183	182	180	179	184
Baseline	203	198	187	185	184	183	182	183	182	180	179	184
Impact of Enlargement (%)	0.00	0.31	1.33	1.63	1.01	1.28	1.34	1.49	1.56	1.78	2.01	1.38
Impact of CAP Reform (%)	0.00	-0.01	-0.02	-0.01	0.00	0.02	0.02	0.02	0.01	0.00	0.00	0.00
Beef Consumption												
Enlargement and CAP Reform	189	188	188	188	189	190	190	190	190	190	190	189
CAP Reform	189	188	190	191	192	192	193	193	193	193	193	192
Baseline	189	188	190	191	192	192	193	193	193	193	193	192
Impact of Enlargement (%)	0.00	-0.19	-0.67	-1.30	-1.44	-1.47	-1.45	-1.46	-1.45	-1.46	-1.47	-1.23
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	-0.01	-0.02	-0.02	-0.02	-0.01	-0.01	-0.01	-0.01
Pork Producer Price												
	(Koruny per 100 Kilograms)											
Enlargement and CAP Reform	86	89	86	84	80	77	74	74	73	74	75	79
CAP Reform	86	88	81	78	75	72	69	69	69	69	70	74
Baseline	86	88	81	78	75	72	69	69	69	69	70	74
Impact of Enlargement (%)	0.00	1.80	5.78	6.95	6.83	7.00	6.96	7.02	6.98	6.93	6.79	6.30
Impact of CAP Reform (%)	0.00	-0.01	0.03	0.09	0.10	0.12	0.09	0.09	0.09	0.08	0.07	0.07
Poultry Producer Price												
Enlargement and CAP Reform	57	60	58	57	56	54	52	52	53	53	53	55
CAP Reform	57	59	55	54	52	50	49	49	49	50	50	52
Baseline	57	59	55	54	52	50	49	49	49	50	50	52
Impact of Enlargement (%)	0.00	1.92	5.90	6.85	6.81	6.96	6.93	6.97	6.94	6.91	6.81	6.30
Impact of CAP Reform (%)	0.00	0.01	0.03	0.04	0.04	0.05	0.06	0.06	0.06	0.06	0.06	0.05
Beef Producer Price												
Enlargement and CAP Reform	84	88	86	87	84	81	79	80	80	81	82	83
CAP Reform	84	87	81	78	75	72	71	71	72	72	73	75
Baseline	84	87	81	78	75	72	70	71	71	72	73	75
Impact of Enlargement (%)	0.00	1.91	6.52	11.27	12.24	12.51	12.32	12.43	12.36	12.41	12.41	10.64
Impact of CAP Reform (%)	0.00	0.00	0.01	0.04	0.08	0.13	0.14	0.14	0.11	0.09	0.06	0.08

A.20. Impacts of EU Enlargement on Poland Livestock and Poultry

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Pork Production (Thousand Metric Tons)												
Enlargement and CAP Reform	1,740	1,660	1,737	1,756	1,794	1,845	1,899	1,953	2,008	2,066	2,125	1,884
CAP Reform	1,740	1,658	1,713	1,728	1,759	1,805	1,855	1,906	1,957	2,012	2,067	1,846
Baseline	1,740	1,658	1,715	1,729	1,761	1,807	1,858	1,908	1,960	2,014	2,070	1,848
Impact of Enlargement (%)	0.00	0.16	1.40	1.63	2.02	2.24	2.38	2.49	2.59	2.69	2.79	2.04
Impact of CAP Reform (%)	0.00	-0.01	-0.09	-0.11	-0.13	-0.14	-0.14	-0.14	-0.13	-0.13	-0.13	-0.11
Pork Consumption												
Enlargement and CAP Reform	1,640	1,692	1,715	1,744	1,767	1,784	1,803	1,826	1,849	1,865	1,880	1,793
CAP Reform	1,640	1,692	1,715	1,739	1,758	1,775	1,794	1,817	1,840	1,856	1,871	1,786
Baseline	1,640	1,692	1,715	1,739	1,758	1,775	1,794	1,817	1,840	1,856	1,871	1,786
Impact of Enlargement (%)	0.00	0.00	0.00	0.31	0.50	0.49	0.49	0.48	0.49	0.50	0.52	0.38
Impact of CAP Reform (%)	0.00	0.00	-0.01	-0.02	-0.02	-0.02	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Broiler Production												
Enlargement and CAP Reform	500	521	534	544	555	567	576	583	587	593	597	566
CAP Reform	500	516	521	529	539	551	559	565	568	573	577	550
Baseline	500	516	522	530	541	552	561	566	570	575	578	551
Impact of Enlargement (%)	0.00	1.00	2.59	2.86	2.96	2.95	2.98	3.10	3.28	3.43	3.58	2.87
Impact of CAP Reform (%)	0.00	-0.05	-0.21	-0.27	-0.30	-0.27	-0.25	-0.23	-0.22	-0.21	-0.21	-0.22
Broiler Consumption												
Enlargement and CAP Reform	485	491	505	517	526	536	545	555	566	576	588	541
CAP Reform	485	490	502	513	521	531	540	550	561	571	582	536
Baseline	485	490	503	513	521	531	540	550	561	571	582	536
Impact of Enlargement (%)	0.00	0.22	0.47	0.78	0.93	0.92	0.91	0.91	0.91	0.92	0.93	0.79
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-0.01	0.00
Beef Production												
Enlargement and CAP Reform	275	298	255	269	271	273	272	274	275	278	279	274
CAP Reform	275	273	250	277	288	292	295	299	303	309	314	290
Baseline	275	273	250	277	288	293	295	299	303	309	314	290
Impact of Enlargement (%)	0.00	8.89	1.76	-2.99	-6.09	-6.67	-7.83	-8.44	-9.33	-10.26	-11.01	-5.20
Impact of CAP Reform (%)	0.00	0.04	0.05	-0.03	-0.07	-0.16	-0.10	0.00	0.03	0.04	0.00	-0.02
Beef Consumption												
Enlargement and CAP Reform	230	232	233	234	235	238	240	242	245	247	250	240
CAP Reform	230	233	236	239	241	244	247	249	251	254	257	245
Baseline	230	233	236	239	241	244	247	249	251	254	257	245
Impact of Enlargement (%)	0.00	-0.62	-1.25	-2.07	-2.50	-2.52	-2.50	-2.50	-2.50	-2.51	-2.53	-2.15
Impact of CAP Reform (%)	0.00	0.00	0.00	0.01	0.00	0.00	-0.01	-0.01	0.00	0.00	0.00	0.00
Pork Producer Price (Zlotys per 100 Kilograms)												
Enlargement and CAP Reform	3	3	3	3	3	3	3	3	3	3	3	3
CAP Reform	3	3	3	3	3	3	3	3	3	3	3	3
Baseline	3	3	3	3	3	3	3	3	3	3	3	3
Impact of Enlargement (%)	0.00	1.73	3.51	3.61	3.50	3.66	3.62	3.67	3.64	3.59	3.45	3.40
Impact of CAP Reform (%)	0.00	-0.01	0.03	0.09	0.11	0.13	0.09	0.09	0.09	0.08	0.07	0.08
Poultry Producer Price												
Enlargement and CAP Reform	5	5	5	5	5	5	5	5	5	5	5	5
CAP Reform	5	5	5	5	5	5	5	5	5	5	5	5
Baseline	5	5	5	5	5	5	5	5	5	5	5	5
Impact of Enlargement (%)	0.00	0.81	1.51	1.40	1.36	1.51	1.47	1.51	1.49	1.45	1.36	1.39
Impact of CAP Reform (%)	0.00	0.01	0.03	0.04	0.04	0.05	0.05	0.06	0.06	0.06	0.06	0.05
Beef Producer Price												
Enlargement and CAP Reform	3	3	3	3	3	3	3	3	3	3	3	3
CAP Reform	3	3	3	3	2	2	3	3	3	3	3	3
Baseline	3	3	3	3	2	2	3	3	3	3	3	3
Impact of Enlargement (%)	0.00	5.75	11.96	18.33	21.82	22.11	21.91	22.02	21.96	22.00	22.01	18.99
Impact of CAP Reform (%)	0.00	0.00	0.01	0.04	0.08	0.13	0.14	0.13	0.11	0.09	0.06	0.08

A.21. Impacts of EU Enlargement on World Beef Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Net Exporters												
Argentina												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	318	420	395	416	433	455	479	504	534	571	610	482
CAP Reform	318	420	395	415	433	455	479	504	533	570	609	481
Baseline	318	420	395	415	433	455	478	503	532	569	608	481
Impact of Enlargement (%)	0.00	-0.04	0.00	0.07	0.07	-0.01	0.00	0.04	0.10	0.15	0.18	0.06
Impact of CAP Reform (%)	0.00	0.00	0.00	0.02	0.06	0.11	0.14	0.15	0.15	0.13	0.12	0.09
Australia												
Enlargement and CAP Reform	1,243	1,286	1,290	1,324	1,378	1,434	1,491	1,545	1,595	1,641	1,682	1,467
CAP Reform	1,243	1,286	1,290	1,324	1,377	1,434	1,491	1,545	1,594	1,640	1,682	1,466
Baseline	1,243	1,286	1,290	1,324	1,378	1,434	1,491	1,545	1,594	1,640	1,682	1,466
Impact of Enlargement (%)	0.00	-0.02	0.00	0.02	0.02	0.02	0.04	0.03	0.03	0.02	0.01	0.02
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.01	-0.02	-0.03	-0.02	-0.01	0.00	0.00	0.01	-0.01
Canada												
Enlargement and CAP Reform	145	410	421	439	372	319	312	329	359	396	421	378
CAP Reform	145	410	421	438	372	319	311	327	356	395	421	377
Baseline	145	410	421	438	372	318	310	326	354	391	416	376
Impact of Enlargement (%)	0.00	-0.05	0.03	0.08	-0.07	-0.10	0.45	0.74	0.71	0.37	-0.08	0.21
Impact of CAP Reform (%)	0.00	-0.01	0.00	0.02	0.04	0.14	0.22	0.33	0.57	0.86	1.23	0.34
Czech Republic												
Enlargement and CAP Reform	13	11	1	0	-3	-4	-5	-5	-5	-6	-7	-2
CAP Reform	13	10	-3	-6	-8	-9	-10	-10	-11	-12	-14	-7
Baseline	13	10	-3	-6	-8	-9	-11	-10	-11	-12	-14	-7
Impact of Enlargement (%)	0.00	10.19	-142.16	-93.20	-57.99	-54.81	-49.96	-54.61	-51.87	-49.38	-47.06	-59.09
Impact of CAP Reform (%)	0.00	-0.15	1.54	0.27	-0.26	-0.67	-0.72	-0.66	-0.41	-0.21	-0.04	-0.13
Hungary												
Enlargement and CAP Reform	2	9	11	14	19	24	27	30	32	33	34	23
CAP Reform	2	8	9	13	18	22	24	27	28	29	30	21
Baseline	2	8	9	13	18	22	24	27	28	29	30	21
Impact of Enlargement (%)	0.00	13.56	25.81	9.40	7.48	9.79	11.30	12.42	12.98	13.94	14.80	13.15
Impact of CAP Reform (%)	0.00	-0.05	-0.15	-0.07	-0.03	0.07	0.14	0.16	0.15	0.14	0.13	0.05
New Zealand												
Enlargement and CAP Reform	515	510	506	517	521	525	540	541	542	533	522	526
CAP Reform	515	510	506	517	521	526	541	541	542	533	523	526
Baseline	515	510	506	517	521	525	540	541	542	533	522	526
Impact of Enlargement (%)	0.00	-0.03	-0.04	-0.01	-0.02	-0.06	-0.04	-0.06	-0.06	-0.04	-0.04	-0.04
Impact of CAP Reform (%)	0.00	-0.01	0.02	0.04	0.04	0.02	0.03	0.04	0.04	0.04	0.04	0.03
Poland												
Enlargement and CAP Reform	50	66	22	35	35	34	31	31	30	30	29	35
CAP Reform	50	40	15	38	47	48	48	50	52	55	57	45
Baseline	50	40	14	39	47	48	49	50	52	55	57	45
Impact of Enlargement (%)	0.00	63.87	51.25	-8.43	-24.48	-27.91	-35.00	-37.88	-42.21	-45.72	-49.12	-15.56
Impact of CAP Reform (%)	0.00	0.27	0.78	-0.22	-0.42	-0.95	-0.58	0.02	0.19	0.26	0.00	-0.07
United States												
Enlargement and CAP Reform	-125	-888	-497	-477	-361	-222	-132	-30	48	112	170	-228
CAP Reform	-125	-877	-492	-466	-348	-211	-122	-20	58	123	180	-217
Baseline	-125	-876	-492	-467	-352	-218	-132	-33	42	105	161	-226
Impact of Enlargement (%)	0.00	1.27	1.08	2.35	3.56	5.40	8.06	50.70	-18.37	-8.62	-5.40	4.00
Impact of CAP Reform (%)	0.00	0.05	-0.07	-0.32	-1.05	-3.28	-7.77	-40.07	37.79	17.25	11.90	1.44

A.22. Impacts of EU Enlargement on World Beef Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Net Importers												
Russia												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	691	664	762	783	776	764	754	750	749	746	744	749
CAP Reform	691	664	760	782	778	768	759	755	753	751	749	752
Baseline	691	664	760	783	778	767	758	755	754	751	749	752
Impact of Enlargement (%)	0.00	0.00	0.22	0.11	-0.20	-0.50	-0.66	-0.65	-0.63	-0.63	-0.66	-0.36
Impact of CAP Reform (%)	0.00	0.00	-0.05	-0.01	0.05	0.08	0.04	-0.02	-0.06	-0.07	-0.06	-0.01
Japan												
Enlargement and CAP Reform	825	811	875	944	970	1,003	1,042	1,081	1,115	1,138	1,158	1,014
CAP Reform	825	811	875	944	970	1,003	1,041	1,080	1,115	1,139	1,159	1,014
Baseline	825	811	875	944	970	1,003	1,042	1,081	1,115	1,139	1,159	1,014
Impact of Enlargement (%)	0.00	0.02	0.00	-0.03	-0.02	0.04	0.07	0.05	0.02	-0.03	-0.06	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	-0.01	-0.03	-0.06	-0.08	-0.08	-0.07	-0.05	-0.04	-0.04
Mexico												
Enlargement and CAP Reform	488	471	546	558	690	772	801	779	728	656	589	659
CAP Reform	488	471	546	559	692	776	805	784	733	660	593	662
Baseline	488	471	546	559	692	776	805	784	733	661	595	662
Impact of Enlargement (%)	0.00	0.01	0.01	-0.20	-0.34	-0.48	-0.60	-0.68	-0.69	-0.67	-0.58	-0.42
Impact of CAP Reform (%)	0.00	0.02	-0.01	0.01	0.03	0.06	0.06	0.01	-0.05	-0.16	-0.29	-0.03
Rest of World												
Enlargement and CAP Reform	863	788	885	957	935	902	884	903	925	985	1,026	919
CAP Reform	863	788	885	957	935	902	883	902	925	985	1,026	919
Baseline	863	788	885	957	935	902	884	903	925	985	1,026	919
Impact of Enlargement (%)	0.00	0.01	0.00	0.00	0.01	0.02	0.02	0.02	0.01	0.00	0.00	0.01
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	0.00	-0.01

A.23. Impacts of EU Enlargement on World Pork Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Net Exporters												
Argentina (Thousand Metric Tons)												
Enlargement and CAP Reform	-48	-55	-50	-52	-59	-68	-71	-72	-74	-83	-94	-68
CAP Reform	-48	-55	-50	-52	-60	-68	-71	-72	-74	-82	-94	-68
Baseline	-48	-55	-50	-53	-60	-68	-71	-72	-74	-83	-94	-68
Impact of Enlargement (%)	0.00	0.02	-0.03	-0.13	-0.07	0.03	0.05	0.03	0.01	0.02	0.03	0.00
Impact of CAP Reform (%)	0.00	-0.01	-0.06	-0.08	-0.08	-0.07	-0.03	-0.01	-0.01	-0.02	-0.03	-0.04
Australia												
Enlargement and CAP Reform	5	14	19	25	29	32	34	33	33	33	34	29
CAP Reform	5	14	19	25	29	33	34	33	33	33	34	29
Baseline	5	14	19	25	29	33	34	34	33	33	34	29
Impact of Enlargement (%)	0.00	-0.37	-0.45	-0.36	-0.40	-0.61	-0.79	-1.02	-1.11	-1.16	-1.18	-0.74
Impact of CAP Reform (%)	0.00	0.08	0.31	0.11	-0.04	-0.33	-0.27	-0.24	-0.22	-0.22	-0.21	-0.10
Canada												
Enlargement and CAP Reform	898	901	956	1,005	1,042	1,050	1,078	1,143	1,232	1,282	1,290	1,098
CAP Reform	898	901	957	1,005	1,044	1,052	1,081	1,146	1,235	1,285	1,294	1,100
Baseline	898	901	957	1,005	1,042	1,050	1,079	1,144	1,234	1,284	1,293	1,099
Impact of Enlargement (%)	0.00	-0.03	-0.05	-0.07	-0.12	-0.21	-0.22	-0.29	-0.28	-0.28	-0.28	-0.18
Impact of CAP Reform (%)	0.00	0.01	0.04	0.08	0.12	0.15	0.15	0.13	0.11	0.10	0.10	0.10
Czech Republic												
Enlargement and CAP Reform	3	-3	-26	-29	-36	-41	-45	-45	-45	-44	-40	-35
CAP Reform	3	-3	-27	-30	-38	-43	-47	-48	-49	-49	-46	-38
Baseline	3	-3	-27	-30	-37	-42	-47	-48	-49	-48	-46	-38
Impact of Enlargement (%)	0.00	8.19	-5.55	-3.72	-4.00	-3.22	-4.58	-6.34	-8.15	-9.69	-12.07	-4.91
Impact of CAP Reform (%)	0.00	7.58	2.09	1.37	1.08	0.69	0.69	0.66	0.62	0.66	0.78	1.62
Hungary												
Enlargement and CAP Reform	89	100	93	99	102	108	100	100	96	94	95	99
CAP Reform	89	91	93	102	108	117	111	110	106	103	102	104
Baseline	89	91	94	103	110	119	112	112	107	104	103	105
Impact of Enlargement (%)	0.00	9.68	-0.73	-2.89	-5.40	-7.83	-9.67	-9.67	-9.40	-8.25	-6.72	-5.09
Impact of CAP Reform (%)	0.00	-0.29	-1.02	-1.10	-1.31	-1.19	-1.31	-1.24	-1.23	-1.22	-1.27	-1.12
New Zealand												
Enlargement and CAP Reform	-2	-4	-3	-2	-2	-2	-2	-1	-1	-2	-2	-2
CAP Reform	-2	-4	-3	-2	-2	-2	-2	-1	-1	-1	-2	-2
Baseline	-2	-4	-3	-2	-2	-2	-2	-1	-1	-1	-2	-2
Impact of Enlargement (%)	0.00	0.16	-0.89	-6.80	-9.45	-2.38	0.70	6.29	7.60	7.57	4.40	0.72
Impact of CAP Reform (%)	0.00	-0.11	-0.70	-0.38	1.20	5.75	6.89	11.63	11.99	10.95	6.93	5.42
Poland												
Enlargement and CAP Reform	80	-2	22	12	27	61	96	127	159	200	245	95
CAP Reform	80	-5	-2	-11	0	30	61	89	117	155	197	63
Baseline	80	-4	0	-10	2	32	63	91	120	158	199	65
Impact of Enlargement (%)	0.00	-56.77	-1,510.41	-202.66	7,343	107.01	58.06	43.55	35.71	28.82	24.27	587.10
Impact of CAP Reform (%)	0.00	3.66	944.76	16.29	-85.02	-6.80	-3.87	-2.68	-2.01	-1.54	-1.28	86.15
United States												
Enlargement and CAP Reform	226	200	202	218	290	361	371	348	341	370	425	313
CAP Reform	226	200	205	221	292	360	370	346	340	369	426	313
Baseline	226	200	204	219	289	356	365	340	334	364	420	309
Impact of Enlargement (%)	0.00	-0.02	-1.34	-1.38	-0.60	0.32	0.33	0.63	0.26	0.07	-0.05	-0.18
Impact of CAP Reform (%)	0.00	0.13	0.55	0.83	0.99	1.11	1.26	1.55	1.69	1.58	1.37	1.11

A.25. Impacts of EU Enlargement on World Broiler Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Net Exporters												
Argentina												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	20	22	29	31	26	20	9	-2	-13	-22	-30	7
CAP Reform	20	22	28	31	25	20	9	-2	-13	-22	-30	7
Baseline	20	22	28	31	25	20	9	-2	-13	-22	-30	7
Impact of Enlargement (%)	0.00	-0.16	1.10	2.34	3.23	1.92	2.02	-4.52	-0.81	-0.24	-0.18	0.47
Impact of CAP Reform (%)	0.00	0.02	0.11	0.11	0.15	0.09	-0.13	0.93	0.20	0.08	0.05	0.16
Australia												
Enlargement and CAP Reform	19	18	18	18	18	18	18	18	18	17	17	18
CAP Reform	19	18	18	18	18	18	18	18	18	17	17	18
Baseline	19	18	18	18	18	18	18	18	18	17	17	18
Impact of Enlargement (%)	0.00	-0.10	-0.20	-0.35	-0.39	-0.42	-0.42	-0.44	-0.45	-0.49	-0.53	-0.38
Impact of CAP Reform (%)	0.00	0.00	0.04	0.01	-0.03	-0.09	-0.07	-0.06	-0.06	-0.06	-0.06	-0.04
Canada												
Enlargement and CAP Reform	0	-6	-9	-13	-16	-18	-19	-21	-23	-26	-27	-18
CAP Reform	0	-6	-9	-13	-16	-17	-19	-21	-23	-25	-27	-18
Baseline	0	-6	-9	-13	-16	-17	-19	-21	-23	-25	-27	-18
Impact of Enlargement (%)	NA	0.67	1.42	0.98	0.88	0.53	0.36	0.27	0.25	0.28	0.34	0.60
Impact of CAP Reform (%)	NA	-0.04	-0.24	-0.10	-0.08	-0.06	-0.01	-0.02	-0.02	-0.02	-0.03	-0.06
Czech Republic												
Enlargement and CAP Reform	-4	7	-5	-10	-14	-20	-25	-22	-18	-14	-9	-13
CAP Reform	-4	5	-11	-17	-23	-30	-36	-35	-32	-30	-27	-24
Baseline	-4	5	-11	-17	-22	-29	-35	-34	-32	-29	-26	-23
Impact of Enlargement (%)	0.00	28.48	-52.16	-43.81	-37.94	-31.95	-29.51	-35.25	-43.35	-53.18	-66.11	-36.48
Impact of CAP Reform (%)	0.00	-2.34	4.97	4.27	3.43	2.31	1.63	1.57	1.61	1.78	2.05	2.13
Hungary												
Enlargement and CAP Reform	15	28	35	40	46	52	50	52	54	55	55	47
CAP Reform	15	22	22	25	29	34	31	32	33	33	32	29
Baseline	15	22	23	26	29	35	32	33	34	34	33	30
Impact of Enlargement (%)	0.00	29.16	57.13	61.70	58.30	52.19	59.10	61.05	62.84	65.88	70.40	57.78
Impact of CAP Reform (%)	0.00	-0.41	-1.82	-2.00	-1.77	-1.26	-1.17	-1.03	-0.97	-0.95	-0.98	-1.24
New Zealand												
Enlargement and CAP Reform	0	4	4	4	2	1	-1	0	0	-2	-6	1
CAP Reform	0	4	4	4	2	1	-1	1	0	-1	-6	1
Baseline	0	4	4	4	2	1	-1	1	0	-1	-5	1
Impact of Enlargement (%)	0.00	-1.06	-0.12	2.51	3.69	-20.45	15.54	-52.27	-152.16	30.94	6.28	-16.71
Impact of CAP Reform (%)	0.00	0.12	0.53	-0.68	-3.95	-21.22	23.82	-31.81	-56.61	33.10	5.43	-5.13
Poland												
Enlargement and CAP Reform	-15	-30	-29	-27	-29	-31	-31	-28	-21	-17	-9	-25
CAP Reform	-15	-26	-18	-16	-18	-20	-19	-15	-8	-2	6	-14
Baseline	-15	-26	-19	-17	-19	-21	-21	-16	-9	-3	5	-15
Impact of Enlargement (%)	0.00	15.68	61.57	69.96	62.78	57.88	61.32	83.35	176.42	629.84	-262.94	95.58
Impact of CAP Reform (%)	0.00	-0.85	-5.48	-8.37	-8.37	-7.16	-6.78	-7.97	-13.80	-34.06	25.20	-6.76
United States												
Enlargement and CAP Reform	2,211	2,284	2,373	2,469	2,547	2,615	2,648	2,695	2,762	2,847	2,945	2,618
CAP Reform	2,211	2,286	2,379	2,473	2,552	2,622	2,655	2,702	2,771	2,856	2,953	2,625
Baseline	2,211	2,286	2,378	2,471	2,549	2,618	2,651	2,699	2,767	2,852	2,949	2,622
Impact of Enlargement (%)	0.00	-0.08	-0.26	-0.18	-0.21	-0.27	-0.27	-0.28	-0.30	-0.29	-0.27	-0.24
Impact of CAP Reform (%)	0.00	0.01	0.05	0.09	0.12	0.14	0.13	0.14	0.14	0.14	0.13	0.11

A.27. Impacts of EU Enlargement and CAP Reform on Intra EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Beef												
EU												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	1	2	11	12	15	15	15	14	14	15	15	13
CAP Reform	1	2	14	18	20	21	21	19	19	20	21	17
Baseline	1	1	13	18	20	20	20	19	19	20	21	17
Impact of Enlargement (%)	0.00	26.61	-23.74	-33.29	-26.40	-27.12	-25.75	-27.47	-26.68	-26.63	-26.56	-21.70
Impact of CAP Reform (%)	0.00	27.86	3.13	2.23	1.86	1.60	1.55	1.69	1.82	1.84	1.85	4.54
Czech Republic												
Enlargement and CAP Reform	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28
CAP Reform	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28
Baseline	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28	0.28
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hungary												
Enlargement and CAP Reform	1	8	11	14	18	24	26	30	32	33	34	23
CAP Reform	1	8	9	13	17	22	24	27	29	30	30	21
Baseline	1	8	9	13	17	22	24	27	29	29	30	21
Impact of Enlargement (%)	0.00	6.41	22.84	7.39	5.62	7.93	9.13	10.07	10.40	11.16	11.86	10.28
Impact of CAP Reform (%)	0.00	-0.05	-0.15	-0.07	-0.03	0.07	0.13	0.15	0.14	0.13	0.12	0.04
Poland												
Enlargement and CAP Reform	31	53	11	24	26	26	24	24	24	24	23	26
CAP Reform	31	25	0	23	32	35	37	40	43	46	49	33
Baseline	31	25	0	23	33	35	37	40	42	46	49	33
Impact of Enlargement (%)	0.00	108.89	9,568.7	4.79	-20.79	-25.89	-35.58	-39.12	-44.29	-48.21	-51.98	941.66
Impact of CAP Reform (%)	0.00	0.44	NA	-0.38	-0.63	-1.34	-0.81	-0.02	0.21	0.28	-0.02	NA
Pork												
EU												
Enlargement and CAP Reform	45	132	128	143	136	109	79	79	80	78	74	104
CAP Reform	45	125	150	165	161	137	112	89	92	90	84	120
Baseline	45	123	146	161	156	132	108	85	68	66	61	111
Impact of Enlargement (%)	0.00	5.39	-15.02	-13.10	-15.18	-20.46	-29.58	-11.28	-13.04	-12.72	-11.82	-13.68
Impact of CAP Reform (%)	0.00	1.70	2.60	2.48	2.99	3.27	3.62	4.58	34.72	35.92	39.34	13.12
Czech Republic												
Enlargement and CAP Reform	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38
CAP Reform	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38
Baseline	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hungary												
Enlargement and CAP Reform	17	29	21	28	31	37	28	28	24	22	23	27
CAP Reform	17	17	19	27	33	42	36	35	31	28	27	29
Baseline	17	17	20	29	35	44	38	37	32	29	28	31
Impact of Enlargement (%)	0.00	71.87	13.60	1.04	-7.86	-14.05	-20.93	-21.05	-21.76	-18.89	-13.54	-3.16
Impact of CAP Reform (%)	0.00	-1.62	-5.13	-4.48	-4.86	-4.19	-4.95	-4.81	-5.38	-5.89	-6.28	-4.76
Poland												
Enlargement and CAP Reform	16	0	0	0	0	0	0	30	60	100	143	33
CAP Reform	16	0	0	0	0	0	0	0	27	64	104	19
Baseline	16	0	0	0	0	0	0	0	7	44	84	14
Impact of Enlargement (%)	0.00	NA	NA	NA	NA	NA	NA	NA	122.86	56.22	37.30	NA
Impact of CAP Reform (%)	0.00	NA	NA	NA	NA	NA	NA	NA	280.61	44.67	23.18	NA

A.28. Impacts of EU Enlargement and CAP Reform on Intra EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Poultry												
EU												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	18	18	29	33	38	45	50	48	44	41	37	38
CAP Reform	18	15	31	38	45	53	61	61	60	58	64	49
Baseline	18	12	27	34	42	49	57	57	57	55	59	45
Impact of Enlargement (%)	0.00	23.25	-5.72	-13.16	-16.17	-16.22	-17.34	-21.61	-25.91	-30.08	-42.84	-16.58
Impact of CAP Reform (%)	0.00	25.70	12.86	11.13	9.26	7.42	6.19	6.01	6.05	6.24	9.01	9.99
Czech Republic												
Enlargement and CAP Reform	0	24	24	24	24	24	24	24	24	24	24	24
CAP Reform	0	20	20	20	20	20	20	20	20	20	20	20
Baseline	0	20	20	20	20	20	20	20	20	20	20	20
Impact of Enlargement (%)	0.00	22.11	22.11	22.11	22.11	22.11	22.11	22.11	22.11	22.11	22.11	22.11
Impact of CAP Reform (%)	0.00	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62	-0.62
Hungary												
Enlargement and CAP Reform	14	31	40	46	52	59	57	59	61	62	63	53
CAP Reform	14	23	24	27	32	38	35	36	37	37	37	33
Baseline	14	23	24	28	32	38	35	36	37	38	37	33
Impact of Enlargement (%)	0.00	37.12	67.28	69.48	63.82	56.53	62.80	64.08	65.15	67.32	70.86	62.44
Impact of CAP Reform (%)	0.00	-0.39	-1.69	-1.83	-1.62	-1.15	-1.06	-0.93	-0.87	-0.85	-0.87	-1.12
Poland												
Enlargement and CAP Reform	8	27	27	26	29	31	32	29	22	18	11	25
CAP Reform	8	22	16	14	17	20	20	16	9	4	4	14
Baseline	8	19	14	13	16	18	18	14	7	2	0	12
Impact of Enlargement (%)	0.00	21.32	74.70	80.14	67.37	59.84	61.06	80.89	157.72	396.24	205.61	120.49
Impact of CAP Reform (%)	0.00	14.55	14.28	12.06	8.85	8.24	8.92	12.10	25.60	97.40	NA	NA

A.29. Impacts of EU Enlargement and CAP Reform on Extra EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Beef												
EU												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	344	332	319	321	313	304	294	288	281	276	271	300
CAP Reform	344	332	315	315	308	299	290	283	276	271	265	295
Baseline	344	332	316	316	310	303	296	291	286	281	276	301
Impact of Enlargement (%)	0.00	0.02	1.12	1.83	1.65	1.60	1.65	1.66	1.73	1.87	2.03	1.52
Impact of CAP Reform (%)	0.00	-0.04	-0.20	-0.30	-0.66	-1.29	-2.04	-2.72	-3.23	-3.62	-3.86	-1.80
Czech Republic												
Enlargement and CAP Reform	16	13	12	12	12	11	11	10	10	9	9	11
CAP Reform	16	13	13	14	14	13	13	12	11	11	11	13
Baseline	16	13	13	14	14	13	13	12	11	11	11	13
Impact of Enlargement (%)	0.00	-2.83	-8.83	-13.84	-14.59	-14.47	-13.98	-13.78	-13.48	-13.31	-13.18	-12.23
Impact of CAP Reform (%)	0.00	0.00	0.00	0.01	0.02	0.04	0.06	0.06	0.06	0.05	0.04	0.03
Hungary												
Enlargement and CAP Reform	2	2	2	2	2	2	1	1	1	1	1	2
CAP Reform	2	2	2	2	2	2	2	2	2	2	2	2
Baseline	2	2	2	2	2	2	2	2	2	2	2	2
Impact of Enlargement (%)	0.00	-5.82	-16.30	-16.57	-16.51	-16.82	-16.76	-16.83	-16.71	-16.67	-16.64	-15.56
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.01	0.03	0.05	0.05	0.05	0.04	0.03	0.03
Poland												
Enlargement and CAP Reform	19	14	12	11	10	9	8	7	6	6	6	9
CAP Reform	19	15	14	15	14	13	12	11	10	9	9	12
Baseline	19	15	14	15	14	13	12	11	10	9	9	12
Impact of Enlargement (%)	0.00	-10.68	-20.37	-28.76	-32.88	-33.33	-33.16	-33.23	-33.04	-32.96	-32.91	-29.13
Impact of CAP Reform (%)	0.00	0.00	0.00	0.01	0.03	0.07	0.10	0.10	0.10	0.08	0.06	0.05
Pork												
EU												
Enlargement and CAP Reform	1,154	1,013	910	883	880	918	953	976	999	1,074	1,208	981
CAP Reform	1,154	1,018	884	860	854	890	918	964	985	1,060	1,195	963
Baseline	1,154	1,020	888	866	862	900	927	973	1,014	1,090	1,225	977
Impact of Enlargement (%)	0.00	-0.47	2.93	2.66	3.03	3.21	3.75	1.18	1.42	1.29	1.07	2.01
Impact of CAP Reform (%)	0.00	-0.19	-0.47	-0.69	-0.96	-1.10	-0.95	-0.94	-2.91	-2.72	-2.41	-1.33
Czech Republic												
Enlargement and CAP Reform	34	33	31	31	31	31	31	31	31	31	31	31
CAP Reform	34	35	35	35	35	35	35	35	35	35	35	35
Baseline	34	34	34	34	34	34	34	34	34	34	34	34
Impact of Enlargement (%)	0.00	-3.14	-8.95	-10.31	-10.31	-10.31	-10.31	-10.31	-10.31	-10.31	-10.31	-9.46
Impact of CAP Reform (%)	0.00	0.01	0.12	0.39	0.71	1.13	0.99	1.00	1.08	1.14	1.19	0.78
Hungary												
Enlargement and CAP Reform	73	72	72	72	73	72	73	73	73	73	73	73
CAP Reform	73	75	76	76	76	76	76	76	76	76	76	76
Baseline	73	75	76	76	76	75	76	76	76	76	75	76
Impact of Enlargement (%)	0.00	-4.37	-4.37	-4.38	-4.38	-4.39	-4.40	-4.41	-4.41	-4.40	-4.38	-4.39
Impact of CAP Reform (%)	0.00	0.01	0.06	0.20	0.37	0.59	0.52	0.52	0.56	0.60	0.63	0.41
Poland												
Enlargement and CAP Reform	104	107	107	109	110	112	113	115	116	117	119	112
CAP Reform	104	108	110	111	113	114	115	117	118	120	121	115
Baseline	104	108	110	111	112	114	115	117	118	119	121	114
Impact of Enlargement (%)	0.00	-1.03	-2.02	-2.02	-2.02	-2.02	-2.02	-2.02	-2.02	-2.02	-2.02	-1.92
Impact of CAP Reform (%)	0.00	0.00	0.04	0.13	0.23	0.37	0.33	0.33	0.36	0.38	0.40	0.26

A.31. Impacts of EU Enlargement and CAP Reform on Total EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Beef												
EU												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	-137	-201	-179	-206	-225	-246	-258	-271	-279	-285	-287	-244
CAP Reform	-137	-187	-173	-205	-225	-245	-257	-270	-279	-284	-287	-241
Baseline	-137	-188	-173	-204	-221	-235	-241	-249	-253	-255	-255	-227
Impact of Enlargement (%)	0.00	7.50	3.15	0.19	0.09	0.42	0.27	0.29	0.17	0.12	0.09	1.23
Impact of CAP Reform (%)	0.00	-0.37	0.30	0.66	1.96	4.04	6.51	8.67	10.28	11.48	12.29	5.58
Czech Republic												
Enlargement and CAP Reform	13	11	1	0	-3	-4	-5	-5	-5	-6	-7	-2
CAP Reform	13	10	-3	-6	-8	-9	-10	-10	-11	-12	-14	-7
Baseline	13	10	-3	-6	-8	-9	-11	-10	-11	-12	-14	-7
Impact of Enlargement (%)	0.00	10.19	-142.16	-93.20	-57.99	-54.81	-49.96	-54.61	-51.87	-49.38	-47.06	-59.09
Impact of CAP Reform (%)	0.00	-0.15	1.54	0.27	-0.26	-0.67	-0.72	-0.66	-0.41	-0.21	-0.04	-0.13
Hungary												
Enlargement and CAP Reform	2	9	11	14	19	24	27	30	32	33	34	23
CAP Reform	2	8	9	13	18	22	24	27	28	29	30	21
Baseline	2	8	9	13	18	22	24	27	28	29	30	21
Impact of Enlargement (%)	0.00	13.56	25.81	9.40	7.48	9.79	11.30	12.42	12.98	13.94	14.80	13.15
Impact of CAP Reform (%)	0.00	-0.05	-0.15	-0.07	-0.03	0.07	0.14	0.16	0.15	0.14	0.13	0.05
Poland												
Enlargement and CAP Reform	50	66	22	35	35	34	31	31	30	30	29	35
CAP Reform	50	40	15	38	47	48	48	50	52	55	57	45
Baseline	50	40	14	39	47	48	49	50	52	55	57	45
Impact of Enlargement (%)	0.00	63.87	51.25	-8.43	-24.48	-27.91	-35.00	-37.88	-42.21	-45.72	-49.12	-15.56
Impact of CAP Reform (%)	0.00	0.27	0.78	-0.22	-0.42	-0.95	-0.58	0.02	0.19	0.26	0.00	-0.07
Pork												
EU												
Enlargement and CAP Reform	1,134	1,054	938	913	896	897	902	893	889	918	993	929
CAP Reform	1,134	1,061	955	931	918	921	927	921	919	951	1,030	953
Baseline	1,134	1,061	956	933	922	926	932	926	925	957	1,036	957
Impact of Enlargement (%)	0.00	-0.66	-1.80	-2.01	-2.39	-2.55	-2.72	-2.97	-3.24	-3.47	-3.61	-2.54
Impact of CAP Reform (%)	0.00	0.01	-0.04	-0.22	-0.39	-0.60	-0.53	-0.57	-0.64	-0.62	-0.55	-0.42
Czech Republic												
Enlargement and CAP Reform	3	-3	-26	-29	-36	-41	-45	-45	-45	-44	-40	-35
CAP Reform	3	-3	-27	-30	-38	-43	-47	-48	-49	-49	-46	-38
Baseline	3	-3	-27	-30	-37	-42	-47	-48	-49	-48	-46	-38
Impact of Enlargement (%)	0.00	8.19	-5.55	-3.72	-4.00	-3.22	-4.58	-6.34	-8.15	-9.69	-12.07	-4.91
Impact of CAP Reform (%)	0.00	7.58	2.09	1.37	1.08	0.69	0.69	0.66	0.62	0.66	0.78	1.62
Hungary												
Enlargement and CAP Reform	89	100	93	99	102	108	100	100	96	94	95	99
CAP Reform	89	91	93	102	108	117	111	110	106	103	102	104
Baseline	89	91	94	103	110	119	112	112	107	104	103	105
Impact of Enlargement (%)	0.00	9.68	-0.73	-2.89	-5.40	-7.83	-9.67	-9.67	-9.40	-8.25	-6.72	-5.09
Impact of CAP Reform (%)	0.00	-0.29	-1.02	-1.10	-1.31	-1.19	-1.31	-1.24	-1.23	-1.22	-1.27	-1.12
Poland												
Enlargement and CAP Reform	80	-2	22	12	27	61	96	127	159	200	245	95
CAP Reform	80	-5	-2	-11	0	30	61	89	117	155	197	63
Baseline	80	-4	0	-10	2	32	63	91	120	158	199	65
Impact of Enlargement (%)	0.00	-56.77	-1,510.41	-202.66	7,343	107.01	58.06	43.55	35.71	28.82	24.27	587.10
Impact of CAP Reform (%)	0.00	3.66	944.76	16.29	-85.02	-6.80	-3.87	-2.68	-2.01	-1.54	-1.28	86.15

A.32. Impacts of EU Enlargement and CAP Reform on Total EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Poultry												
EU												
	(Thousand Metric Tons)											
Enlargement and CAP Reform	280	197	175	157	143	132	133	129	127	122	122	144
CAP Reform	280	207	200	190	179	171	173	171	171	169	171	180
Baseline	280	207	200	191	181	173	175	174	175	172	175	183
Impact of Enlargement (%)	0.00	-4.68	-12.52	-17.27	-20.50	-22.64	-23.01	-24.51	-25.90	-27.71	-28.65	-20.74
Impact of CAP Reform (%)	0.00	-0.02	-0.27	-0.54	-0.90	-1.32	-1.49	-1.72	-1.91	-2.04	-2.16	-1.24
Czech Republic												
Enlargement and CAP Reform	-4	7	-5	-10	-14	-20	-25	-22	-18	-14	-9	-13
CAP Reform	-4	5	-11	-17	-23	-30	-36	-35	-32	-30	-27	-24
Baseline	-4	5	-11	-17	-22	-29	-35	-34	-32	-29	-26	-23
Impact of Enlargement (%)	0.00	28.48	-52.16	-43.81	-37.94	-31.95	-29.51	-35.25	-43.35	-53.18	-66.11	-36.48
Impact of CAP Reform (%)	0.00	-2.34	4.97	4.27	3.43	2.31	1.63	1.57	1.61	1.78	2.05	2.13
Hungary												
Enlargement and CAP Reform	15	28	35	40	46	52	50	52	54	55	55	47
CAP Reform	15	22	22	25	29	34	31	32	33	33	32	29
Baseline	15	22	23	26	29	35	32	33	34	34	33	30
Impact of Enlargement (%)	0.00	29.16	57.13	61.70	58.30	52.19	59.10	61.05	62.84	65.88	70.40	57.78
Impact of CAP Reform (%)	0.00	-0.41	-1.82	-2.00	-1.77	-1.26	-1.17	-1.03	-0.97	-0.95	-0.98	-1.24
Poland												
Enlargement and CAP Reform	15	30	29	27	29	31	31	28	21	17	9	25
CAP Reform	15	26	18	16	18	20	19	15	8	2	-6	14
Baseline	15	26	19	17	19	21	21	16	9	3	-5	15
Impact of Enlargement (%)	0.00	15.68	61.57	69.96	62.78	57.88	61.32	83.35	176.42	629.84	-262.94	95.58
Impact of CAP Reform (%)	0.00	-0.85	-5.48	-8.37	-8.37	-7.16	-6.78	-7.97	-13.80	-34.06	25.20	-6.76

A.33. Impacts of EU Enlargement and CAP Reform on EU Dairy Prices

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
EU Milk Price (ECU/100 kg)												
Enlargement and CAP Reform	30	29	29	27	27	27	27	27	27	27	27	28
CAP Reform	30	29	28	27	27	27	27	27	27	27	27	27
Baseline	30	30	29	28	27	27	27	27	27	27	27	27
Impact of Enlargement (%)	0.00	1.17	1.45	1.45	0.96	1.11	1.37	1.69	1.76	1.81	1.89	1.47
Impact of CAP Reform (%)	0.00	-2.20	-1.49	-1.73	-0.45	-0.07	-0.39	-0.35	-0.54	-0.30	-0.33	-0.78
EU Cheese Price												
Enlargement and CAP Reform	416	412	404	389	384	383	385	386	386	387	386	390
CAP Reform	416	407	398	383	379	378	379	379	379	380	379	384
Baseline	416	415	403	387	378	376	378	378	380	380	380	386
Impact of Enlargement (%)	0.00	1.22	1.59	1.70	1.16	1.35	1.59	1.85	1.86	1.87	1.86	1.61
Impact of CAP Reform (%)	0.00	-1.91	-1.42	-1.25	0.36	0.65	0.14	0.04	-0.29	-0.03	-0.18	-0.39
EU Butter Price												
Enlargement and CAP Reform	325	315	306	285	272	269	270	276	279	281	285	284
CAP Reform	325	310	301	281	270	267	267	271	273	275	277	279
Baseline	325	325	307	295	285	281	279	279	279	280	281	289
Impact of Enlargement (%)	0.00	1.72	1.68	1.42	0.70	0.83	1.15	1.87	2.10	2.29	2.80	1.66
Impact of CAP Reform (%)	0.00	-4.56	-2.05	-4.90	-5.32	-4.77	-4.22	-3.10	-2.30	-2.07	-1.27	-3.46
EU SMP Price												
Enlargement and CAP Reform	208	202	199	190	191	194	196	196	195	197	195	196
CAP Reform	208	201	196	187	188	190	192	191	191	192	191	192
Baseline	208	204	200	187	181	182	186	187	189	190	190	190
Impact of Enlargement (%)	0.00	0.53	1.46	1.81	1.52	1.72	2.08	2.33	2.42	2.45	2.33	1.86
Impact of CAP Reform (%)	0.00	-1.52	-2.37	-0.10	4.05	4.74	3.30	2.26	0.82	1.24	0.28	1.27
EU WMP Price												
Enlargement and CAP Reform	255	243	236	225	221	221	222	223	223	224	223	226
CAP Reform	255	239	232	222	219	219	219	219	219	220	219	223
Baseline	255	244	235	225	219	217	218	219	220	220	220	224
Impact of Enlargement (%)	0.00	1.58	1.81	1.55	0.94	1.09	1.45	1.84	1.96	1.99	2.02	1.62
Impact of CAP Reform (%)	0.00	-1.86	-1.49	-1.43	0.14	0.56	0.11	-0.02	-0.39	-0.13	-0.30	-0.48
Cheese, FOB N.Eur. (U.S. Dollars/MT)												
Enlargement and CAP Reform	1,839	2,145	2,088	2,068	2,080	2,104	2,122	2,145	2,163	2,192	2,220	2,133
CAP Reform	1,839	2,023	1,992	1,999	2,038	2,059	2,070	2,089	2,108	2,133	2,158	2,067
Baseline	1,839	2,041	1,999	1,999	2,027	2,050	2,064	2,081	2,101	2,122	2,148	2,063
Impact of Enlargement (%)	0.00	6.02	4.81	3.45	2.02	2.18	2.52	2.69	2.61	2.77	2.86	3.19
Impact of CAP Reform (%)	0.00	-0.88	-0.35	0.02	0.54	0.47	0.28	0.36	0.33	0.49	0.48	0.17
Butter, FOB N.Eur.												
Enlargement and CAP Reform	1,392	1,552	1,517	1,575	1,615	1,648	1,684	1,707	1,707	1,743	1,786	1,654
CAP Reform	1,392	1,511	1,484	1,550	1,601	1,630	1,661	1,691	1,693	1,729	1,772	1,632
Baseline	1,392	1,525	1,476	1,525	1,576	1,612	1,641	1,664	1,662	1,696	1,735	1,611
Impact of Enlargement (%)	0.00	2.67	2.25	1.65	0.85	1.10	1.38	0.96	0.87	0.84	0.81	1.34
Impact of CAP Reform (%)	0.00	-0.89	0.49	1.65	1.57	1.16	1.21	1.64	1.85	1.95	2.10	1.27
SMP, FOB N.Eur.												
Enlargement and CAP Reform	1,709	1,810	1,810	1,765	1,753	1,769	1,780	1,817	1,866	1,892	1,894	1,816
CAP Reform	1,709	1,756	1,748	1,719	1,716	1,727	1,727	1,750	1,791	1,814	1,817	1,756
Baseline	1,709	1,763	1,760	1,735	1,717	1,724	1,730	1,759	1,807	1,828	1,835	1,766
Impact of Enlargement (%)	0.00	3.04	3.57	2.70	2.17	2.45	3.08	3.84	4.19	4.25	4.23	3.35
Impact of CAP Reform (%)	0.00	-0.39	-0.71	-0.95	-0.08	0.16	-0.22	-0.55	-0.89	-0.76	-0.97	-0.54
WMP, FOB N.Eur.												
Enlargement and CAP Reform	1,747	1,792	1,781	1,763	1,774	1,793	1,813	1,842	1,877	1,895	1,897	1,823
CAP Reform	1,747	1,752	1,742	1,739	1,761	1,779	1,794	1,818	1,851	1,872	1,876	1,798
Baseline	1,747	1,764	1,752	1,749	1,758	1,773	1,793	1,820	1,857	1,875	1,882	1,802
Impact of Enlargement (%)	0.00	2.29	2.28	1.38	0.74	0.80	1.08	1.35	1.40	1.27	1.10	1.37
Impact of CAP Reform (%)	0.00	-0.65	-0.58	-0.61	0.18	0.33	0.04	-0.11	-0.32	-0.17	-0.27	-0.22

A.34. Impacts of EU Enlargement and CAP Reform on EU Milk

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Milk Production (Thousand MT)												
Enlargement and CAP Reform	121,600	121,023	121,265	121,601	122,182	122,657	122,662	122,818	122,726	122,563	122,366	122,186
CAP Reform	121,600	121,014	121,193	121,492	122,053	122,581	122,563	122,732	122,621	122,453	122,227	122,093
Baseline	121,600	120,765	121,238	121,773	122,625	122,860	122,571	122,733	122,657	122,531	122,327	122,208
Impact of Enlargement (%)	0.00	0.01	0.06	0.09	0.11	0.06	0.08	0.07	0.09	0.09	0.11	0.08
Impact of CAP Reform (%)	0.00	0.21	-0.04	-0.23	-0.47	-0.23	-0.01	0.00	-0.03	-0.06	-0.08	-0.09
Prod. per Cow (Kilograms)												
Enlargement and CAP Reform	6,188	6,256	6,318	6,423	6,486	6,579	6,667	6,758	6,845	6,924	7,036	6,629
CAP Reform	6,188	6,242	6,300	6,399	6,479	6,561	6,656	6,742	6,831	6,905	7,010	6,613
Baseline	6,188	6,246	6,298	6,396	6,481	6,559	6,649	6,736	6,825	6,897	7,004	6,609
Impact of Enlargement (%)	0.00	0.22	0.29	0.39	0.12	0.27	0.16	0.22	0.21	0.27	0.37	0.25
Impact of CAP Reform (%)	0.00	-0.06	0.03	0.04	-0.03	0.04	0.11	0.10	0.10	0.12	0.08	0.05
Milk Cows (Thousands)												
Enlargement and CAP Reform	19,650	19,344	19,192	18,931	18,837	18,644	18,398	18,175	17,928	17,701	17,392	18,454
CAP Reform	19,650	19,386	19,237	18,987	18,839	18,682	18,413	18,203	17,950	17,733	17,436	18,487
Baseline	19,650	19,334	19,250	19,039	18,922	18,733	18,434	18,221	17,973	17,766	17,464	18,514
Impact of Enlargement (%)	0.00	-0.21	-0.23	-0.30	-0.01	-0.20	-0.08	-0.15	-0.12	-0.18	-0.25	-0.18
Impact of CAP Reform (%)	0.00	0.27	-0.07	-0.27	-0.43	-0.27	-0.12	-0.10	-0.13	-0.19	-0.16	-0.15
Fluid Milk Cons. (Thousand MT)												
Enlargement and CAP Reform	27,116	27,885	27,909	27,958	27,955	27,922	27,877	27,829	27,782	27,729	27,677	27,852
CAP Reform	27,116	27,906	27,934	27,981	27,971	27,939	27,898	27,854	27,808	27,755	27,704	27,875
Baseline	27,116	27,866	27,908	27,953	27,963	27,938	27,892	27,849	27,800	27,750	27,700	27,862
Impact of Enlargement (%)	0.00	-0.08	-0.09	-0.08	-0.05	-0.06	-0.07	-0.09	-0.09	-0.09	-0.10	-0.08
Impact of CAP Reform (%)	0.00	0.14	0.09	0.10	0.03	0.00	0.02	0.02	0.03	0.02	0.02	0.05
Industrial Milk Use												
Enlargement and CAP Reform	90,026	88,795	89,031	89,389	89,996	90,578	90,712	91,009	91,057	91,028	91,015	90,261
CAP Reform	90,026	88,743	88,907	89,223	89,844	90,462	90,578	90,877	90,908	90,865	90,812	90,122
Baseline	90,026	88,566	88,990	89,551	90,432	90,754	90,607	90,897	90,962	90,956	90,928	90,264
Impact of Enlargement (%)	0.00	0.06	0.14	0.19	0.17	0.13	0.15	0.15	0.16	0.18	0.22	0.15
Impact of CAP Reform (%)	0.00	0.20	-0.09	-0.37	-0.65	-0.32	-0.03	-0.02	-0.06	-0.10	-0.13	-0.16
Milk Used for Cheese												
Enlargement and CAP Reform	57,334	57,870	58,262	58,875	59,273	59,535	59,719	59,932	60,125	60,292	60,472	59,435
CAP Reform	57,334	57,845	58,247	58,835	59,246	59,508	59,713	59,961	60,179	60,357	60,558	59,445
Baseline	57,334	57,664	58,117	58,720	59,272	59,560	59,722	59,962	60,153	60,351	60,540	59,406
Impact of Enlargement (%)	0.00	0.04	0.03	0.07	0.04	0.05	0.01	-0.05	-0.09	-0.11	-0.14	-0.01
Impact of CAP Reform (%)	0.00	0.31	0.22	0.20	-0.04	-0.09	-0.02	0.00	0.04	0.01	0.03	0.07
Milk Used for SMP												
Enlargement and CAP Reform	11,892	11,437	11,249	10,886	10,734	10,683	10,623	10,559	10,466	10,396	10,316	10,735
CAP Reform	11,892	11,463	11,250	10,886	10,723	10,677	10,601	10,511	10,397	10,315	10,213	10,704
Baseline	11,892	11,594	11,376	11,036	10,792	10,677	10,596	10,512	10,426	10,332	10,244	10,758
Impact of Enlargement (%)	0.00	-0.23	-0.01	-0.01	0.10	0.06	0.21	0.46	0.66	0.78	1.01	0.30
Impact of CAP Reform (%)	0.00	-1.13	-1.11	-1.36	-0.64	0.00	0.04	0.00	-0.27	-0.16	-0.30	-0.49
Milk Used for WMP												
Enlargement and CAP Reform	4,877	4,756	4,728	4,770	4,767	4,747	4,723	4,714	4,715	4,690	4,667	4,728
CAP Reform	4,877	4,726	4,713	4,774	4,779	4,761	4,736	4,729	4,731	4,710	4,692	4,735
Baseline	4,877	4,670	4,671	4,736	4,779	4,772	4,739	4,732	4,728	4,711	4,690	4,723
Impact of Enlargement (%)	0.00	0.64	0.32	-0.09	-0.26	-0.30	-0.28	-0.32	-0.34	-0.42	-0.53	-0.16
Impact of CAP Reform (%)	0.00	1.19	0.89	0.80	0.01	-0.24	-0.08	-0.08	0.08	-0.03	0.05	0.26
Milk Price (ECU/100 Kg)												
Enlargement and CAP Reform	30	29	29	27	27	27	27	27	27	27	27	28
CAP Reform	30	29	28	27	27	27	27	27	27	27	27	27
Baseline	30	30	29	28	27	27	27	27	27	27	27	27
Impact of Enlargement (%)	0.00	1.17	1.45	1.45	0.96	1.11	1.37	1.69	1.76	1.81	1.89	1.47
Impact of CAP Reform (%)	0.00	-2.20	-1.49	-1.73	-0.45	-0.07	-0.39	-0.35	-0.54	-0.30	-0.33	-0.78

A.35. Impacts of EU Enlargement and CAP Reform on EU New Member States Milk

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Milk Production												
	(Thousand MT)											
Enlargement and CAP Reform	22,434	21,783	21,250	20,991	21,143	20,983	20,881	20,777	20,714	20,670	20,651	20,984
CAP Reform	22,434	22,623	22,681	22,703	22,707	22,779	22,901	23,024	23,139	23,311	23,464	22,933
Baseline	22,434	22,629	22,696	22,719	22,719	22,778	22,892	23,017	23,133	23,308	23,461	22,935
Impact of Enlargement (%)	0.00	-3.71	-6.31	-7.54	-6.89	-7.88	-8.82	-9.76	-10.48	-11.33	-11.99	-8.47
Impact of CAP Reform (%)	0.00	-0.03	-0.07	-0.07	-0.05	0.01	0.04	0.03	0.03	0.01	0.01	-0.01
Prod. per Cow												
	(Kilograms)											
Enlargement and CAP Reform	4,448	4,540	4,636	4,733	4,823	4,907	4,991	5,062	5,134	5,207	5,279	4,931
CAP Reform	4,448	4,534	4,602	4,671	4,738	4,809	4,879	4,947	5,015	5,085	5,153	4,843
Baseline	4,448	4,535	4,603	4,672	4,738	4,808	4,878	4,947	5,015	5,085	5,153	4,843
Impact of Enlargement (%)	0.00	0.12	0.73	1.33	1.79	2.05	2.30	2.32	2.38	2.40	2.45	1.79
Impact of CAP Reform (%)	0.00	0.00	-0.01	0.00	0.00	0.01	0.01	0.00	0.00	0.00	0.00	0.00
Milk Cows												
	(Thousands)											
Enlargement and CAP Reform	5,044	4,798	4,584	4,435	4,384	4,276	4,184	4,105	4,034	3,970	3,912	4,268
CAP Reform	5,044	4,989	4,928	4,860	4,792	4,737	4,694	4,654	4,614	4,584	4,553	4,741
Baseline	5,044	4,990	4,931	4,863	4,795	4,737	4,693	4,653	4,613	4,584	4,553	4,741
Impact of Enlargement (%)	0.00	-3.82	-6.99	-8.75	-8.52	-9.74	-10.87	-11.80	-12.57	-13.41	-14.09	-10.06
Impact of CAP Reform (%)	0.00	-0.02	-0.06	-0.07	-0.05	0.00	0.03	0.03	0.03	0.01	0.01	-0.01
Fluid Milk Cons.												
	(Thousand MT)											
Enlargement and CAP Reform	7,949	7,740	7,629	7,568	7,467	7,376	7,428	7,478	7,538	7,577	7,636	7,544
CAP Reform	7,949	7,943	8,029	8,097	8,129	8,154	8,185	8,212	8,241	8,264	8,294	8,155
Baseline	7,949	7,937	8,025	8,095	8,132	8,158	8,187	8,213	8,240	8,264	8,293	8,154
Impact of Enlargement (%)	0.00	-2.55	-4.98	-6.53	-8.14	-9.54	-9.24	-8.94	-8.53	-8.30	-7.93	-7.47
Impact of CAP Reform (%)	0.00	0.07	0.05	0.03	-0.04	-0.04	-0.02	-0.01	0.01	0.00	0.00	0.00
Industrial Milk Use												
Enlargement and CAP Reform	13,012	12,646	12,294	12,155	12,428	12,393	12,279	12,145	12,039	11,971	11,909	12,226
CAP Reform	13,012	13,271	13,269	13,232	13,219	13,283	13,385	13,491	13,585	13,741	13,871	13,435
Baseline	13,012	13,283	13,288	13,250	13,227	13,277	13,375	13,483	13,579	13,738	13,867	13,437
Impact of Enlargement (%)	0.00	-4.71	-7.35	-8.15	-5.99	-6.70	-8.26	-9.97	-11.38	-12.88	-14.14	-8.95
Impact of CAP Reform (%)	0.00	-0.09	-0.14	-0.13	-0.06	0.04	0.08	0.06	0.04	0.02	0.02	-0.02
Milk Used for Cheese												
Enlargement and CAP Reform	4,758	4,562	4,485	4,388	4,497	4,431	4,382	4,334	4,308	4,292	4,270	4,395
CAP Reform	4,758	4,917	4,869	4,831	4,812	4,797	4,792	4,794	4,792	4,830	4,850	4,828
Baseline	4,758	4,927	4,874	4,833	4,810	4,792	4,786	4,786	4,783	4,820	4,839	4,825
Impact of Enlargement (%)	0.00	-7.22	-7.89	-9.17	-6.54	-7.63	-8.55	-9.60	-10.08	-11.13	-11.96	-8.98
Impact of CAP Reform (%)	0.00	-0.20	-0.11	-0.03	0.04	0.09	0.12	0.15	0.18	0.19	0.22	0.07
Milk Used for SMP												
Enlargement and CAP Reform	3,014	2,948	2,809	2,799	2,827	2,821	2,791	2,751	2,712	2,685	2,660	2,780
CAP Reform	3,014	2,982	3,024	3,025	3,020	3,048	3,086	3,113	3,142	3,173	3,196	3,081
Baseline	3,014	2,978	3,028	3,033	3,025	3,048	3,084	3,115	3,147	3,180	3,203	3,084
Impact of Enlargement (%)	0.00	-1.15	-7.11	-7.46	-6.40	-7.43	-9.53	-11.64	-13.71	-15.40	-16.76	-9.66
Impact of CAP Reform (%)	0.00	0.13	-0.15	-0.25	-0.17	0.00	0.03	-0.06	-0.15	-0.20	-0.24	-0.10

A.36. Impacts of EU Enlargement and CAP Reform on Czech Republic Milk

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Milk Production												
	(Thousand MT)											
Enlargement and CAP Reform	2,814	2,860	2,714	2,711	2,797	2,782	2,777	2,778	2,783	2,786	2,789	2,778
CAP Reform	2,814	2,836	2,783	2,792	2,792	2,796	2,791	2,795	2,782	2,778	2,765	2,791
Baseline	2,814	2,836	2,784	2,792	2,792	2,795	2,791	2,795	2,782	2,778	2,765	2,791
Impact of Enlargement (%)	0.00	0.85	-2.47	-2.92	0.20	-0.50	-0.50	-0.60	0.03	0.28	0.87	-0.48
Impact of CAP Reform (%)	0.00	-0.01	-0.02	-0.01	-0.01	0.01	0.01	0.00	0.00	-0.01	0.00	0.00
Prod. per Cow												
	(Kilograms)											
Enlargement and CAP Reform	5,924	6,036	6,096	6,190	6,286	6,373	6,464	6,554	6,646	6,737	6,827	6,421
CAP Reform	5,924	6,020	6,094	6,189	6,280	6,373	6,464	6,556	6,645	6,735	6,824	6,418
Baseline	5,924	6,020	6,095	6,189	6,280	6,373	6,464	6,556	6,645	6,735	6,824	6,418
Impact of Enlargement (%)	0.00	0.26	0.02	0.02	0.08	0.01	-0.01	-0.03	0.01	0.03	0.04	0.04
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Milk Cows												
	(Thousands)											
Enlargement and CAP Reform	475	474	445	438	445	436	430	424	419	414	408	433
CAP Reform	475	471	457	451	445	439	432	426	419	412	405	436
Baseline	475	471	457	451	445	439	432	426	419	413	405	436
Impact of Enlargement (%)	0.00	0.59	-2.49	-2.93	0.11	-0.51	-0.49	-0.57	0.02	0.26	0.83	-0.52
Impact of CAP Reform (%)	0.00	-0.01	-0.02	-0.01	-0.01	0.00	0.01	0.00	0.00	-0.01	0.00	0.00
Fluid Milk Cons.												
	(Thousand MT)											
Enlargement and CAP Reform	440	436	440	445	457	467	476	482	488	494	501	469
CAP Reform	440	446	455	463	470	477	483	489	495	501	507	479
Baseline	440	446	455	463	470	477	483	489	495	501	507	479
Impact of Enlargement (%)	0.00	-2.13	-3.37	-3.86	-2.76	-1.97	-1.43	-1.45	-1.42	-1.42	-1.30	-2.11
Impact of CAP Reform (%)	0.00	0.05	0.02	0.01	-0.02	-0.02	-0.01	-0.01	0.00	-0.01	-0.01	0.00
Industrial Milk Use												
Enlargement and CAP Reform	2,300	2,347	2,198	2,196	2,272	2,245	2,233	2,230	2,230	2,228	2,226	2,240
CAP Reform	2,300	2,313	2,252	2,256	2,251	2,249	2,240	2,239	2,221	2,213	2,195	2,243
Baseline	2,300	2,313	2,253	2,257	2,251	2,249	2,239	2,239	2,221	2,213	2,195	2,243
Impact of Enlargement (%)	0.00	1.46	-2.39	-2.68	0.96	-0.21	-0.30	-0.40	0.39	0.69	1.41	-0.11
Impact of CAP Reform (%)	0.00	-0.02	-0.03	-0.02	0.00	0.01	0.01	0.00	0.00	-0.01	0.00	-0.01
Milk Used for Cheese												
Enlargement and CAP Reform	877	906	932	890	939	938	943	956	971	982	995	945
CAP Reform	877	930	885	887	895	893	888	903	910	923	934	905
Baseline	877	935	886	886	892	891	886	900	907	920	930	903
Impact of Enlargement (%)	0.00	-2.58	5.34	0.34	4.88	5.05	6.27	5.98	6.70	6.43	6.61	4.50
Impact of CAP Reform (%)	0.00	-0.61	-0.21	0.06	0.31	0.25	0.17	0.25	0.27	0.35	0.37	0.12
Milk Used for SMP												
Enlargement and CAP Reform	437	436	329	373	370	353	338	321	304	290	274	339
CAP Reform	437	390	402	405	396	397	394	377	358	338	315	377
Baseline	437	385	401	406	399	399	395	379	360	341	318	378
Impact of Enlargement (%)	0.00	11.81	-18.24	-7.83	-6.64	-11.04	-14.29	-14.85	-14.83	-14.11	-13.09	-10.31
Impact of CAP Reform (%)	0.00	1.38	0.34	-0.21	-0.69	-0.52	-0.33	-0.58	-0.68	-0.96	-1.07	-0.33
Domestic Milk Price												
	(Koruny/kg)											
Enlargement and CAP Reform	7.2	7.8	8.1	8.2	7.8	7.5	7.3	7.3	7.3	7.3	7.3	7.6
CAP Reform	7.2	7.2	7.0	6.9	6.9	6.8	6.7	6.7	6.8	6.8	6.8	6.9
Baseline	7.2	7.2	7.0	6.9	6.9	6.8	6.7	6.7	6.8	6.8	6.8	6.9
Impact of Enlargement (%)	0.00	8.92	15.11	18.28	13.70	10.27	7.76	8.15	8.24	8.52	8.07	10.70
Impact of CAP Reform (%)	0.00	-0.20	-0.10	-0.02	0.12	0.11	0.06	0.06	0.03	0.06	0.05	0.02

A.37. Impacts of EU Enlargement and CAP Reform on Hungary Milk

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Milk Production (Thousand MT)												
Enlargement and CAP Reform	2,254	2,099	2,095	2,099	2,120	2,096	2,087	2,060	2,050	2,060	2,047	2,081
CAP Reform	2,254	2,255	2,256	2,219	2,185	2,168	2,159	2,134	2,114	2,119	2,099	2,171
Baseline	2,254	2,255	2,257	2,220	2,184	2,165	2,156	2,132	2,112	2,117	2,097	2,170
Impact of Enlargement (%)	0.00	-6.88	-7.13	-5.40	-2.98	-3.29	-3.31	-3.47	-3.00	-2.76	-2.50	-4.07
Impact of CAP Reform (%)	0.00	-0.01	-0.03	-0.05	0.03	0.10	0.10	0.08	0.08	0.09	0.10	0.05
Prod. per Cow (Kilograms)												
Enlargement and CAP Reform	6,590	6,668	6,730	6,794	6,862	6,930	6,997	7,066	7,134	7,203	7,271	6,966
CAP Reform	6,590	6,667	6,722	6,789	6,857	6,927	6,994	7,065	7,132	7,201	7,269	6,962
Baseline	6,590	6,667	6,722	6,790	6,857	6,927	6,994	7,065	7,132	7,201	7,269	6,962
Impact of Enlargement (%)	0.00	0.01	0.12	0.08	0.06	0.04	0.04	0.01	0.03	0.02	0.03	0.04
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.00	0.00	0.01	0.01	0.00
Milk Cows (Thousands)												
Enlargement and CAP Reform	342	315	311	309	309	302	298	292	287	286	282	299
CAP Reform	342	338	336	327	319	313	309	302	296	294	289	312
Baseline	342	338	336	327	319	313	308	302	296	294	289	312
Impact of Enlargement (%)	0.00	-6.89	-7.24	-5.47	-3.04	-3.33	-3.35	-3.48	-3.03	-2.78	-2.52	-4.11
Impact of CAP Reform (%)	0.00	-0.01	-0.03	-0.05	0.02	0.09	0.10	0.07	0.07	0.09	0.10	0.05
Fluid Milk Cons. (Thousand MT)												
Enlargement and CAP Reform	837	829	834	838	840	840	843	844	845	846	848	841
CAP Reform	837	837	839	843	843	843	844	846	847	848	849	844
Baseline	837	837	839	843	844	844	845	846	847	849	850	844
Impact of Enlargement (%)	0.00	-0.96	-0.62	-0.51	-0.36	-0.34	-0.12	-0.23	-0.20	-0.22	-0.17	-0.37
Impact of CAP Reform (%)	0.00	0.02	0.04	-0.01	-0.06	-0.05	-0.04	-0.04	-0.05	-0.05	-0.05	-0.03
Industrial Milk Use												
Enlargement and CAP Reform	1,225	1,083	1,084	1,086	1,108	1,087	1,078	1,054	1,048	1,060	1,048	1,073
CAP Reform	1,225	1,229	1,231	1,193	1,164	1,152	1,145	1,123	1,106	1,113	1,096	1,155
Baseline	1,225	1,229	1,232	1,194	1,162	1,149	1,143	1,121	1,104	1,111	1,093	1,154
Impact of Enlargement (%)	0.00	-11.88	-11.99	-9.01	-4.82	-5.64	-5.85	-6.11	-5.27	-4.81	-4.41	-6.98
Impact of CAP Reform (%)	0.00	-0.04	-0.08	-0.09	0.10	0.23	0.22	0.17	0.19	0.22	0.24	0.12
Milk Used for Cheese												
Enlargement and CAP Reform	833	719	721	725	747	730	722	701	695	704	693	715
CAP Reform	833	847	848	821	801	791	784	765	749	755	741	790
Baseline	833	848	849	821	800	789	782	763	747	753	738	789
Impact of Enlargement (%)	0.00	-15.13	-14.99	-11.66	-6.73	-7.83	-7.92	-8.38	-7.32	-6.84	-6.48	-9.33
Impact of CAP Reform (%)	0.00	-0.13	-0.08	-0.07	0.15	0.29	0.28	0.25	0.27	0.32	0.35	0.16
Milk Used for SMP												
Enlargement and CAP Reform	130	117	118	117	118	117	116	114	113	115	114	116
CAP Reform	130	125	129	123	118	116	118	115	114	114	112	118
Baseline	130	125	129	123	118	116	118	115	114	114	112	118
Impact of Enlargement (%)	0.00	-6.86	-8.69	-4.33	0.71	0.25	-1.40	-0.96	-0.45	0.55	1.62	-1.96
Impact of CAP Reform (%)	0.00	0.47	-0.21	-0.32	-0.01	0.23	0.17	-0.03	-0.04	-0.04	-0.07	0.01
Domestic Milk Price (Florint/kg)												
Enlargement and CAP Reform	64.3	74.6	71.2	67.8	66.8	67.3	64.8	65.1	65.2	65.5	65.5	67.4
CAP Reform	64.3	66.5	65.8	63.1	63.4	64.0	63.6	62.7	63.1	63.0	63.5	63.9
Baseline	64.3	66.7	66.1	63.0	62.9	63.5	63.2	62.4	62.6	62.4	62.9	63.6
Impact of Enlargement (%)	0.00	12.19	8.30	7.35	5.38	5.14	1.87	3.69	3.34	3.88	3.06	5.42
Impact of CAP Reform (%)	0.00	-0.25	-0.50	0.21	0.87	0.83	0.60	0.62	0.79	0.92	0.96	0.51

A.38. Impacts of EU Enlargement and CAP Reform on Poland Milk

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Milk Production (Thousand MT)												
Enlargement and CAP Reform	11,996	11,509	11,249	11,081	11,016	10,951	10,947	10,894	10,839	10,798	10,785	11,007
CAP Reform	11,996	12,122	12,221	12,229	12,250	12,320	12,429	12,539	12,643	12,744	12,857	12,435
Baseline	11,996	12,126	12,231	12,241	12,263	12,323	12,426	12,536	12,642	12,746	12,860	12,439
Impact of Enlargement (%)	0.00	-5.06	-7.95	-9.38	-10.08	-11.11	-11.92	-13.12	-14.27	-15.27	-16.12	-11.43
Impact of CAP Reform (%)	0.00	-0.03	-0.08	-0.10	-0.10	-0.03	0.02	0.02	0.01	-0.02	-0.02	-0.03
Prod. per Cow (Kilograms)												
Enlargement and CAP Reform	4,043	4,141	4,218	4,297	4,373	4,454	4,536	4,601	4,665	4,729	4,796	4,481
CAP Reform	4,043	4,140	4,209	4,269	4,333	4,399	4,467	4,533	4,600	4,667	4,735	4,435
Baseline	4,043	4,140	4,209	4,270	4,333	4,399	4,466	4,533	4,600	4,667	4,735	4,435
Impact of Enlargement (%)	0.00	0.03	0.23	0.66	0.94	1.24	1.55	1.49	1.42	1.33	1.28	1.02
Impact of CAP Reform (%)	0.00	-0.01	-0.01	-0.01	-0.01	0.00	0.01	0.00	0.00	0.00	0.00	0.00
Milk Cows (Thousands)												
Enlargement and CAP Reform	2,967	2,779	2,667	2,579	2,519	2,459	2,414	2,368	2,323	2,283	2,249	2,464
CAP Reform	2,967	2,928	2,903	2,864	2,828	2,801	2,783	2,766	2,748	2,730	2,715	2,807
Baseline	2,967	2,929	2,906	2,867	2,830	2,802	2,782	2,766	2,748	2,731	2,716	2,808
Impact of Enlargement (%)	0.00	-5.08	-8.15	-9.98	-10.91	-12.20	-13.26	-14.39	-15.47	-16.38	-17.18	-12.30
Impact of CAP Reform (%)	0.00	-0.03	-0.07	-0.09	-0.09	-0.03	0.02	0.02	0.01	-0.01	-0.02	-0.03
Fluid Milk Cons. (Thousand MT)												
Enlargement and CAP Reform	4,950	4,873	4,785	4,720	4,618	4,505	4,534	4,567	4,608	4,632	4,670	4,651
CAP Reform	4,950	4,954	5,026	5,070	5,087	5,098	5,113	5,126	5,140	5,149	5,165	5,093
Baseline	4,950	4,950	5,022	5,067	5,089	5,100	5,114	5,126	5,139	5,148	5,163	5,092
Impact of Enlargement (%)	0.00	-1.63	-4.80	-6.90	-9.21	-11.63	-11.34	-10.91	-10.35	-10.05	-9.58	-8.64
Impact of CAP Reform (%)	0.00	0.08	0.07	0.05	-0.04	-0.05	-0.01	0.01	0.03	0.01	0.03	0.02
Industrial Milk Use												
Enlargement and CAP Reform	6,400	6,022	5,886	5,806	5,860	5,924	5,908	5,826	5,734	5,673	5,625	5,826
CAP Reform	6,400	6,555	6,596	6,558	6,565	6,627	6,723	6,821	6,912	7,004	7,103	6,746
Baseline	6,400	6,563	6,610	6,573	6,575	6,628	6,719	6,818	6,912	7,007	7,107	6,751
Impact of Enlargement (%)	0.00	-8.12	-10.77	-11.47	-10.74	-10.61	-12.12	-14.59	-17.04	-19.01	-20.81	-13.53
Impact of CAP Reform (%)	0.00	-0.13	-0.21	-0.23	-0.16	0.00	0.06	0.04	0.00	-0.05	-0.06	-0.07
Milk Used for Cheese												
Enlargement and CAP Reform	1,805	1,703	1,637	1,608	1,598	1,582	1,577	1,563	1,550	1,538	1,532	1,589
CAP Reform	1,805	1,864	1,882	1,881	1,884	1,894	1,913	1,929	1,943	1,957	1,978	1,912
Baseline	1,805	1,864	1,884	1,883	1,887	1,896	1,913	1,928	1,941	1,957	1,977	1,913
Impact of Enlargement (%)	0.00	-8.61	-13.02	-14.52	-15.18	-16.48	-17.54	-18.95	-20.23	-21.44	-22.55	-16.85
Impact of CAP Reform (%)	0.00	-0.02	-0.06	-0.09	-0.19	-0.11	0.00	0.03	0.06	0.01	0.03	-0.03
Milk Used for SMP												
Enlargement and CAP Reform	1,841	1,739	1,718	1,688	1,701	1,723	1,723	1,704	1,680	1,667	1,657	1,700
CAP Reform	1,841	1,838	1,850	1,844	1,849	1,872	1,903	1,940	1,976	2,011	2,043	1,912
Baseline	1,841	1,841	1,856	1,849	1,850	1,870	1,901	1,939	1,978	2,013	2,046	1,914
Impact of Enlargement (%)	0.00	-5.37	-7.18	-8.42	-7.99	-7.92	-9.43	-12.16	-14.97	-17.11	-18.88	-10.94
Impact of CAP Reform (%)	0.00	-0.17	-0.28	-0.28	-0.07	0.11	0.11	0.04	-0.07	-0.10	-0.14	-0.09
Domestic Milk Price (Zlotys/kg)												
Enlargement and CAP Reform	0.72	0.78	0.86	0.92	1.02	1.13	1.13	1.14	1.14	1.15	1.15	1.04
CAP Reform	0.72	0.82	0.78	0.75	0.74	0.74	0.73	0.74	0.74	0.75	0.75	0.75
Baseline	0.72	0.83	0.78	0.75	0.74	0.73	0.73	0.74	0.74	0.75	0.75	0.75
Impact of Enlargement (%)	0.00	-5.38	10.65	23.35	37.68	53.28	54.41	54.52	53.79	53.98	53.56	38.98
Impact of CAP Reform (%)	0.00	-0.38	-0.34	-0.28	0.20	0.27	0.07	-0.03	-0.19	-0.10	-0.18	-0.10

A.39. Impacts of EU Enlargement and CAP Reform on World Cheese Markets

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
EU Net Exports (Thousand MT)												
Enlargement and CAP Reform	299	306	311	331	336	345	345	344	339	332	328	332
CAP Reform	299	291	295	312	324	331	332	334	332	326	326	320
Baseline	299	286	291	308	324	332	332	334	331	326	325	319
Impact of Enlargement (%)	0.00	4.98	5.34	6.06	3.85	4.24	3.96	3.10	2.06	1.63	0.72	3.59
Impact of CAP Reform (%)	0.00	1.71	1.45	1.41	-0.01	-0.43	-0.10	0.04	0.32	0.18	0.30	0.49
New Zealand Net Exports												
Enlargement and CAP Reform	283	262	278	292	305	316	326	336	345	355	366	318
CAP Reform	283	258	275	290	303	314	324	334	344	354	364	316
Baseline	283	258	275	289	303	314	324	334	344	353	364	316
Impact of Enlargement (%)	0.00	1.50	1.01	0.85	0.53	0.51	0.47	0.36	0.28	0.35	0.40	0.63
Impact of CAP Reform (%)	0.00	-0.17	0.06	0.18	0.08	-0.02	0.02	0.10	0.13	0.12	0.16	0.07
Australia Net Exports												
Enlargement and CAP Reform	165	129	120	110	103	100	96	95	97	95	92	104
CAP Reform	165	124	117	108	102	99	95	93	94	92	88	101
Baseline	165	124	118	112	105	101	98	97	99	97	94	105
Impact of Enlargement (%)	0.00	3.78	2.53	2.17	1.57	1.38	1.19	2.58	2.78	3.38	3.84	2.52
Impact of CAP Reform (%)	0.00	0.50	-1.45	-3.91	-3.51	-2.84	-3.18	-4.14	-4.82	-4.99	-5.63	-3.40
Argentina Net Exports												
Enlargement and CAP Reform	22	17	17	19	20	25	31	38	45	53	61	32
CAP Reform	22	12	12	14	16	21	27	33	40	48	55	28
Baseline	22	13	13	14	16	21	26	33	40	48	55	28
Impact of Enlargement (%)	0.00	32.53	38.24	32.71	24.38	19.13	16.49	14.03	11.99	10.69	9.65	20.98
Impact of CAP Reform (%)	0.00	-4.67	-3.16	-1.08	1.69	1.57	0.87	0.72	0.40	0.46	0.34	-0.28
Russia Net Imports												
Enlargement and CAP Reform	160	169	175	181	188	193	198	203	209	213	219	195
CAP Reform	160	174	181	187	193	198	203	210	215	220	225	201
Baseline	160	173	181	187	193	199	204	210	216	220	226	201
Impact of Enlargement (%)	0.00	-2.77	-3.23	-3.08	-2.72	-2.63	-2.78	-2.92	-3.01	-3.07	-3.09	-2.93
Impact of CAP Reform (%)	0.00	0.48	0.39	0.18	-0.19	-0.33	-0.26	-0.21	-0.14	-0.16	-0.14	-0.04
Japan Net Imports												
Enlargement and CAP Reform	196	202	200	199	200	201	202	202	204	206	209	203
CAP Reform	196	202	201	201	202	202	203	204	205	207	210	204
Baseline	196	202	201	201	202	202	203	204	205	208	210	204
Impact of Enlargement (%)	0.00	-0.23	-0.59	-0.82	-0.75	-0.66	-0.61	-0.57	-0.57	-0.60	-0.63	-0.60
Impact of CAP Reform (%)	0.00	0.04	0.05	0.01	-0.04	-0.07	-0.08	-0.09	-0.11	-0.13	-0.14	-0.06
U.S. Net Imports												
Enlargement and CAP Reform	159	159	159	159	159	159	159	159	159	159	159	159
CAP Reform	159	159	159	159	159	159	159	159	159	159	159	159
Baseline	159	159	159	159	159	159	159	159	159	159	159	159
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rest of World Net Imports												
Enlargement and CAP Reform	266	243	235	241	243	241	239	234	225	220	214	233
CAP Reform	266	247	238	244	245	243	241	238	229	225	220	237
Baseline	266	249	236	240	242	240	238	233	225	220	215	234
Impact of Enlargement (%)	0.00	-1.59	-1.19	-1.08	-1.14	-1.05	-0.97	-1.67	-1.87	-2.27	-2.59	-1.54
Impact of CAP Reform (%)	0.00	-0.79	0.55	1.64	1.60	1.27	1.34	1.77	1.99	2.11	2.34	1.38
Cheese, FOB N.Eur. (U.S. Dollars/MT)												
Enlargement and CAP Reform	1,839	2,145	2,088	2,068	2,080	2,104	2,122	2,145	2,163	2,192	2,220	2,133
CAP Reform	1,839	2,023	1,992	1,999	2,038	2,059	2,070	2,089	2,108	2,133	2,158	2,067
Baseline	1,839	2,041	1,999	1,999	2,027	2,050	2,064	2,081	2,101	2,122	2,148	2,063
Impact of Enlargement (%)	0.00	6.02	4.81	3.45	2.02	2.18	2.52	2.69	2.61	2.77	2.86	3.19
Impact of CAP Reform (%)	0.00	-0.88	-0.35	0.02	0.54	0.47	0.28	0.36	0.33	0.49	0.48	0.17

A.40. Impacts of EU Enlargement and CAP Reform on World Butter Markets

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
EU Net Exports	(Thousand MT)											
Enlargement and CAP Reform	180	185	174	136	110	106	102	106	103	104	106	123
CAP Reform	180	174	167	132	109	102	94	92	87	87	88	113
Baseline	180	167	172	148	123	114	107	108	105	105	108	126
Impact of Enlargement (%)	0.00	6.14	4.14	3.44	0.93	3.86	7.90	15.53	17.62	19.60	19.96	9.91
Impact of CAP Reform (%)	0.00	4.25	-2.74	-10.81	-11.92	-10.28	-11.97	-15.31	-17.12	-17.35	-18.26	-11.15
New Zealand Net Exports												
Enlargement and CAP Reform	368	369	377	382	387	392	398	404	410	416	420	395
CAP Reform	368	368	375	380	385	391	395	401	407	413	417	393
Baseline	368	369	375	381	385	391	396	401	408	413	418	394
Impact of Enlargement (%)	0.00	0.30	0.49	0.43	0.39	0.44	0.53	0.62	0.69	0.69	0.68	0.53
Impact of CAP Reform (%)	0.00	-0.05	-0.07	-0.08	0.01	0.03	-0.02	-0.06	-0.11	-0.10	-0.13	-0.06
Australia Net Exports												
Enlargement and CAP Reform	112	109	117	129	135	140	146	152	158	165	173	142
CAP Reform	112	108	116	127	133	138	143	150	156	163	171	140
Baseline	112	109	115	126	132	137	143	149	155	162	170	140
Impact of Enlargement (%)	0.00	1.27	1.32	1.29	1.18	1.35	1.45	1.28	1.22	1.12	1.02	1.25
Impact of CAP Reform (%)	0.00	-0.46	0.20	0.70	0.75	0.60	0.57	0.67	0.70	0.72	0.72	0.52
Argentina Net Exports												
Enlargement and CAP Reform	2	3	3	2	2	2	2	3	3	3	3	3
CAP Reform	2	3	2	2	2	2	2	2	2	3	3	2
Baseline	2	3	2	2	2	2	2	2	2	3	3	2
Impact of Enlargement (%)	0.00	8.53	15.71	16.99	16.30	17.96	21.04	21.50	21.74	20.55	19.73	18.00
Impact of CAP Reform (%)	0.00	-1.67	-0.84	0.95	3.45	3.36	2.44	2.10	1.18	1.40	1.00	1.34
Russia Net Imports												
Enlargement and CAP Reform	130	125	127	125	126	128	128	129	131	132	132	128
CAP Reform	130	126	129	128	129	131	131	133	135	135	136	131
Baseline	130	126	129	129	130	131	132	134	136	136	137	132
Impact of Enlargement (%)	0.00	-0.91	-1.77	-2.23	-2.25	-2.29	-2.48	-2.48	-2.64	-2.76	-2.85	-2.27
Impact of CAP Reform (%)	0.00	0.45	-0.05	-0.61	-0.67	-0.64	-0.68	-0.77	-0.75	-0.72	-0.74	-0.52
Ukraine Net Exports												
Enlargement and CAP Reform	20	4	6	5	7	6	5	4	2	0	-2	4
CAP Reform	20	4	5	4	7	6	5	3	2	0	-2	3
Baseline	20	5	5	4	7	6	5	3	1	-1	-2	3
Impact of Enlargement (%)	0.00	-2.05	6.28	12.15	9.42	8.78	9.84	13.75	31.32	-122.05	-23.72	-5.63
Impact of CAP Reform (%)	0.00	-0.92	-0.24	1.70	1.37	1.98	2.90	4.61	9.70	-24.32	-5.94	-0.92
U.S. Net Exports												
Enlargement and CAP Reform	-4	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6
CAP Reform	-4	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6
Baseline	-4	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6	-6
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rest of World Net Imports												
Enlargement and CAP Reform	440	427	427	408	399	393	387	385	387	402	413	403
CAP Reform	440	424	423	407	398	393	386	382	384	398	410	400
Baseline	440	423	427	413	402	395	390	387	390	404	417	405
Impact of Enlargement (%)	0.00	0.73	0.78	0.40	0.34	0.23	0.25	0.81	0.90	0.87	0.80	0.61
Impact of CAP Reform (%)	0.00	0.14	-0.72	-1.54	-1.00	-0.64	-0.89	-1.29	-1.54	-1.44	-1.55	-1.05
Butter, FOB N.Eur.	(U.S. Dollars/MT)											
Enlargement and CAP Reform	1,392	1,552	1,517	1,575	1,615	1,648	1,684	1,707	1,707	1,743	1,786	1,654
CAP Reform	1,392	1,511	1,484	1,550	1,601	1,630	1,661	1,691	1,693	1,729	1,772	1,632
Baseline	1,392	1,525	1,476	1,525	1,576	1,612	1,641	1,664	1,662	1,696	1,735	1,611
Impact of Enlargement (%)	0.00	2.67	2.25	1.65	0.85	1.10	1.38	0.96	0.87	0.84	0.81	1.34
Impact of CAP Reform (%)	0.00	-0.89	0.49	1.65	1.57	1.16	1.21	1.64	1.85	1.95	2.10	1.27

A.41. Impacts of EU Enlargement and CAP Reform on World SMP Markets

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
EU Net Exports												
	(Thousand MT)											
Enlargement and CAP Reform	135	110	114	113	109	98	92	80	68	54	47	88
CAP Reform	135	109	109	109	106	94	85	71	59	44	35	82
Baseline	135	108	107	110	111	99	89	74	60	46	36	84
Impact of Enlargement (%)	0.00	0.10	5.25	3.94	2.14	4.46	7.83	12.10	16.80	24.75	33.54	11.09
Impact of CAP Reform (%)	0.00	1.02	1.89	-0.60	-3.96	-5.06	-4.28	-3.98	-2.68	-4.18	-2.74	-2.46
New Zealand Net Exports												
Enlargement and CAP Reform	287	326	338	346	353	362	371	381	392	401	408	368
CAP Reform	287	324	335	343	351	359	367	376	386	396	403	364
Baseline	287	324	335	343	351	359	367	377	388	397	404	365
Impact of Enlargement (%)	0.00	0.52	0.97	0.83	0.78	0.88	1.07	1.26	1.39	1.38	1.35	1.04
Impact of CAP Reform (%)	0.00	-0.09	-0.17	-0.22	0.01	0.05	-0.05	-0.15	-0.26	-0.25	-0.31	-0.14
Australia Net Exports												
Enlargement and CAP Reform	212	197	210	231	245	256	267	280	291	305	319	260
CAP Reform	212	195	207	228	241	252	263	276	287	301	316	257
Baseline	212	196	207	226	239	250	261	273	285	298	313	255
Impact of Enlargement (%)	0.00	1.23	1.47	1.32	1.27	1.41	1.57	1.45	1.32	1.16	1.04	1.32
Impact of CAP Reform (%)	0.00	-0.44	0.01	0.72	1.06	0.87	0.72	0.80	0.86	0.93	0.92	0.64
Mexico Net Imports												
Enlargement and CAP Reform	165	168	169	171	171	171	169	167	166	165	166	168
CAP Reform	165	168	171	173	173	173	172	171	170	170	171	171
Baseline	145	168	170	172	173	173	172	171	170	169	170	171
Impact of Enlargement (%)	0.00	-0.39	-1.05	-1.10	-1.22	-1.39	-1.74	-2.13	-2.48	-2.62	-2.72	-1.68
Impact of CAP Reform (%)	13.79	0.09	0.21	0.26	0.00	-0.11	-0.01	0.10	0.26	0.24	0.32	0.14
Brazil Net Imports												
Enlargement and CAP Reform	11	9	8	14	18	20	22	25	28	32	37	21
CAP Reform	11	11	10	17	21	23	25	28	32	36	41	24
Baseline	11	11	10	17	21	23	25	28	32	36	41	24
Impact of Enlargement (%)	0.00	-20.22	-26.73	-16.58	-13.32	-13.29	-12.95	-12.78	-12.12	-11.37	-10.57	-14.99
Impact of CAP Reform (%)	0.00	3.23	3.79	2.24	0.10	-0.35	0.10	0.33	0.63	0.43	0.50	1.10
U.S. Net Exports												
Enlargement and CAP Reform	151	151	151	151	151	151	151	151	151	151	151	151
CAP Reform	151	151	151	151	151	151	151	151	151	151	151	151
Baseline	151	151	151	151	151	151	151	151	151	151	151	151
Impact of Enlargement (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Impact of CAP Reform (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rest of World Net Imports												
Enlargement and CAP Reform	513	434	441	445	453	454	458	458	461	458	452	451
CAP Reform	513	453	459	461	467	470	475	477	481	480	475	470
Baseline	513	454	460	465	468	470	476	479	483	481	477	471
Impact of Enlargement (%)	0.00	-4.29	-3.83	-3.50	-2.96	-3.34	-3.71	-3.98	-4.16	-4.60	-4.94	-3.93
Impact of CAP Reform (%)	0.00	-0.13	-0.34	-0.71	-0.35	-0.11	-0.19	-0.31	-0.38	-0.34	-0.34	-0.32
SMP, FOB N.Eur.												
	(U.S. Dollars/MT)											
Enlargement and CAP Reform	1,709	1,810	1,810	1,765	1,753	1,769	1,780	1,817	1,866	1,892	1,894	1,816
CAP Reform	1,709	1,756	1,748	1,719	1,716	1,727	1,727	1,750	1,791	1,814	1,817	1,756
Baseline	1,709	1,763	1,760	1,735	1,717	1,724	1,730	1,759	1,807	1,828	1,835	1,766
Impact of Enlargement (%)	0.00	3.04	3.57	2.70	2.17	2.45	3.08	3.84	4.19	4.25	4.23	3.35
Impact of CAP Reform (%)	0.00	-0.39	-0.71	-0.95	-0.08	0.16	-0.22	-0.55	-0.89	-0.76	-0.97	-0.54

A.42. Impacts of EU Enlargement and CAP Reform on World WMP Markets

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
EU Net Exports												
	(Thousand MT)											
Enlargement and CAP Reform	475	458	455	462	464	465	465	467	472	472	472	465
CAP Reform	475	452	452	462	466	467	466	469	473	474	475	466
Baseline	475	445	446	457	466	468	467	470	473	474	474	464
Impact of Enlargement (%)	0.00	1.19	0.71	0.02	-0.31	-0.35	-0.29	-0.31	-0.34	-0.45	-0.60	-0.07
Impact of CAP Reform (%)	0.00	1.65	1.22	1.09	0.03	-0.31	-0.11	-0.12	0.09	-0.05	0.04	0.35
New Zealand Net Exports												
Enlargement and CAP Reform	571	623	636	646	655	661	667	671	676	681	686	660
CAP Reform	571	628	642	651	659	665	672	677	683	687	692	666
Baseline	571	627	641	652	660	666	673	678	683	688	693	666
Impact of Enlargement (%)	0.00	-0.79	-0.93	-0.73	-0.56	-0.64	-0.79	-0.87	-0.93	-0.93	-0.92	-0.81
Impact of CAP Reform (%)	0.00	0.11	0.05	-0.05	-0.17	-0.17	-0.13	-0.12	-0.09	-0.12	-0.11	-0.08
Australia Net Exports												
Enlargement and CAP Reform	194	162	182	204	215	225	235	244	252	263	275	226
CAP Reform	194	167	186	207	218	227	238	248	257	268	281	230
Baseline	194	166	186	206	217	227	237	247	255	266	279	229
Impact of Enlargement (%)	0.00	-2.64	-2.45	-1.53	-1.00	-1.12	-1.40	-1.77	-1.94	-1.98	-1.94	-1.78
Impact of CAP Reform (%)	0.00	0.06	0.43	0.76	0.40	0.24	0.38	0.55	0.74	0.70	0.76	0.50
Argentina Net Exports												
Enlargement and CAP Reform	100	70	75	82	88	96	106	116	126	138	150	105
CAP Reform	100	72	76	82	88	97	106	116	127	138	150	105
Baseline	100	71	76	82	89	97	106	116	127	139	150	106
Impact of Enlargement (%)	0.00	-2.06	-1.54	-0.44	0.05	-0.23	-0.53	-0.60	-0.58	-0.46	-0.34	-0.67
Impact of CAP Reform (%)	0.00	0.23	-0.06	-0.32	-0.50	-0.35	-0.20	-0.17	-0.10	-0.13	-0.10	-0.17
Brazil Net Imports												
Enlargement and CAP Reform	20	10	6	21	29	32	36	39	42	48	55	32
CAP Reform	20	17	13	27	33	36	41	45	48	54	61	38
Baseline	20	15	12	26	33	37	41	45	48	53	61	37
Impact of Enlargement (%)	0.00	-42.45	-54.96	-20.69	-12.98	-12.55	-12.84	-13.36	-12.88	-11.49	-9.90	-20.41
Impact of CAP Reform (%)	0.00	12.09	13.24	6.03	-1.08	-2.04	-0.23	0.49	1.48	0.69	0.95	3.16
Rest of World Net Imports												
Enlargement and CAP Reform	1,065	1,024	1,050	1,066	1,075	1,085	1,098	1,113	1,130	1,146	1,164	1,095
CAP Reform	1,065	1,046	1,066	1,075	1,078	1,088	1,101	1,116	1,131	1,147	1,165	1,101
Baseline	1,065	1,041	1,064	1,075	1,080	1,090	1,103	1,118	1,133	1,150	1,167	1,102
Impact of Enlargement (%)	0.00	-2.09	-1.42	-0.85	-0.29	-0.27	-0.31	-0.25	-0.14	-0.11	-0.08	-0.58
Impact of CAP Reform (%)	0.00	0.47	0.17	0.01	-0.24	-0.22	-0.14	-0.18	-0.17	-0.23	-0.23	-0.08
WMP, FOB N.Eur.												
	(U.S. Dollars/MT)											
Enlargement and CAP Reform	1,747	1,792	1,781	1,763	1,774	1,793	1,813	1,842	1,877	1,895	1,897	1,823
CAP Reform	1,747	1,752	1,742	1,739	1,761	1,779	1,794	1,818	1,851	1,872	1,876	1,798
Baseline	1,747	1,764	1,752	1,749	1,758	1,773	1,793	1,820	1,857	1,875	1,882	1,802
Impact of Enlargement (%)	0.00	2.29	2.28	1.38	0.74	0.80	1.08	1.35	1.40	1.27	1.10	1.37
Impact of CAP Reform (%)	0.00	-0.65	-0.58	-0.61	0.18	0.33	0.04	-0.11	-0.32	-0.17	-0.27	-0.22

A.43. Impacts of EU Enlargement and CAP Reform on Intra EU-25 Trade

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Average
Butter												
EU												
	(Thousand MT)											
Enlargement and CAP Reform	0	-11	-13	-14	-17	-14	-11	-8	-5	-3	0	-10
CAP Reform	0	-21	-19	-19	-18	-18	-18	-18	-17	-17	-16	-18
Baseline	0	-21	-19	-19	-18	-18	-18	-18	-17	-17	-16	-18
Impact of Enlargement (%)	NA	-45.35	-32.57	-23.68	-4.84	-20.05	-40.14	-53.78	-67.59	-81.40	-96.91	-46.63
Impact of CAP Reform (%)	NA	-0.81	-0.58	-0.40	0.20	0.82	1.01	0.88	0.47	0.23	0.13	0.20
EU New Member States												
Enlargement and CAP Reform	0	11	13	14	17	14	11	8	5	3	0	10
CAP Reform	0	21	19	19	18	18	18	18	17	17	16	18
Baseline	0	21	19	19	18	18	18	18	17	17	16	18
Impact of Enlargement (%)	NA	-45.35	-32.57	-23.68	-4.84	-20.05	-40.14	-53.78	-67.58	-81.40	-96.91	-46.63
Impact of CAP Reform (%)	NA	-0.81	-0.58	-0.40	0.20	0.82	1.01	0.88	0.47	0.23	0.13	0.20
Cheese												
EU												
Enlargement and CAP Reform	0	-33	-22	-14	-18	-9	0	9	17	23	31	-1
CAP Reform	0	-34	-30	-29	-28	-25	-19	-15	-9	-8	-4	-20
Baseline	0	-35	-30	-29	-28	-24	-19	-14	-9	-7	-3	-20
Impact of Enlargement (%)	NA	-4.57	-26.08	-51.22	-38.14	-64.54	-99.97	-159.52	-285.22	-402.66	-828.04	-195.99
Impact of CAP Reform (%)	NA	-2.66	-1.62	-0.39	1.32	2.51	3.40	5.43	9.65	13.21	30.09	6.09
EU New Member States												
Enlargement and CAP Reform	0	33	22	14	18	9	0	-9	-17	-23	-31	1
CAP Reform	0	34	30	29	28	25	19	15	9	8	4	20
Baseline	0	35	30	29	28	24	19	14	9	7	3	20
Impact of Enlargement (%)	NA	-4.57	-26.08	-51.22	-38.14	-64.54	-99.97	-159.52	-285.22	-402.66	-828.03	-195.99
Impact of CAP Reform (%)	NA	-2.66	-1.62	-0.39	1.32	2.51	3.40	5.43	9.65	13.21	30.09	6.09
SMP												
EU												
Enlargement and CAP Reform	0	-28	-22	-23	-25	-24	-23	-23	-21	-19	-18	-23
CAP Reform	0	-26	-26	-27	-27	-28	-29	-30	-29	-29	-28	-28
Baseline	0	-26	-26	-27	-27	-28	-29	-30	-29	-29	-28	-28
Impact of Enlargement (%)	NA	8.89	-14.76	-13.69	-7.00	-13.33	-20.58	-25.01	-29.13	-32.86	-36.54	-18.40
Impact of CAP Reform (%)	NA	0.94	-0.07	-0.67	-0.46	0.04	0.15	-0.17	-0.54	-0.74	-1.00	-0.25
EU New Member States												
Enlargement and CAP Reform	-44	28	22	23	25	24	23	23	21	19	18	23
CAP Reform	0	26	26	27	27	28	29	30	29	29	28	28
Baseline	0	26	26	27	27	28	29	30	29	29	28	28
Impact of Enlargement (%)	NA	8.88	-14.76	-13.69	-7.00	-13.33	-20.58	-25.01	-29.13	-32.87	-36.54	-18.40
Impact of CAP Reform (%)	NA	0.94	-0.07	-0.67	-0.46	0.04	0.15	-0.17	-0.54	-0.74	-1.00	-0.25

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