

**International workshop on F-3 (Food-Feed-Fuel) competition:  
perspectives from China and the European Union**

Report on the CATSEI Mid-Term Policy Conference<sup>1</sup>

Organized by IFPRI and SOW-VU, 15<sup>th</sup> December 2008  
Hotel Le Plaza, Brussels

*Introduction and background*

The workshop is organized as part of the EU-funded CATSEI project (*Chinese Agricultural Transition: Trade, Social and Environmental Impacts*)<sup>2</sup> that studies the impact of China's current economic transition on its agricultural economy, with special emphasis on social conditions and the environment in China's rural areas as well as on markets in the rest of the world. This three-year project now approaches the end of its second year.

The objectives of the workshop are to review the processes underlying the increased worldwide competition between food, feed and fuel that led earlier this year to sharp food price rises on the international agricultural markets, to discuss the specific roles of China and EU in these developments, and to report on related research within the CATSEI project. Special attention is paid to the rapidly changing international macro-economic conditions caused by the expanding credit crisis that will have a significant impact on food, feed and fuel demand in the coming years.

Including the project members, the workshop is attended by 26 participants. Most of them are national and international policy makers and advisors, but also the business sector is represented. The meeting is chaired by Prof. Gerrit Meester, advisor on agricultural and international policy affairs at the Dutch Ministry of Agriculture, Nature and Food Quality, and chairman of the Agricultural Committee of OECD.

Prof. Menzie Chinn (Robert La Follette School of Public Affairs, University of Wisconsin) has been invited as guest speaker to address the international macro-economic prospects in these turbulent times. On behalf of the CATSEI team, presentations are given by Prof. Jikun Huang (Center for Chinese Agricultural Policies of the Chinese Academy of Sciences) on the achievements of 30 years of rural reforms in China, and by Prof. Michiel Keyzer (Centre for World Food Studies, VU University of Amsterdam) on the international food-feed-fuel competition, with special emphasis on

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<sup>1</sup> This report has been prepared by Lisa Moorman (IFPRI) and Wim van Veen and Max Merbis (Centre for World Food Studies, SOW-VU)

<sup>2</sup> Cooperating partners in the CATSEI-project are the Centre for World Food Studies, Amsterdam (SOW-VU), the Center for Chinese Agricultural Policy, Beijing (CCAP), the International Institute for Applied Systems Analysis, Laxenburg (IIASA), the School of Oriental and African Studies, London (SOAS), the Agricultural Economics Research Institute, The Hague (LEI), and the International Food Policy Research Institute, Washington DC (IFPRI).

China and EU. After the break, a roundtable is organized with invited comments by Dr. Wang Kaiyuan (Mission of the People's Republic of China to the EU), Dr. Andrzej Kwiecinski (Trade and Agricultural Directorate, OECD), Dr. Monika Tothova (Directorate-General for Agriculture and Rural Development, European Commission) and Prof. Scott Rozelle (Freeman Spogli Institute for International Studies, Stanford University).

All presentations are available as powerpoint documents on the website of the project, [www.catsei.org](http://www.catsei.org). The program of the workshop can be found in Appendix I, the list of participants in Appendix II.

### *Opening*

The chairman opens the meeting at 13.00 and gives the floor first to Dr. Hans-Jörg Lutzeyer who welcomes the audience on behalf of the Directorate-General for Research of the European Commission. Dr. Lutzeyer explains that the current project is part of EU's research strategy to promote international scientific cooperation and, at the same time, to provide scientific support to his colleagues of other directorates-general in understanding developments on international agricultural markets. To this end, EU finances similar projects concerning its agricultural trade relations with India and Mercosur. He also announces that in the near future there will be more research projects focusing on China-EU relations, which may offer the possibility of a follow-up project to CATSEI.

In his reply, the chairman emphasizes that the current conference is not only interesting for the EU but also for the member states, especially since it comes at a particularly relevant moment. On one hand, the world has just experienced a sudden period of food price hikes and, on the other hand, it is about to face the economic consequences of the credit crisis. Furthermore, China has recently adapted its rural development strategy, whereas the EU is reconsidering its energy policy and, in particular, its emphasis on biofuels.

### *Presentation Menzie Chinn*

Menzie Chinn (Robert La Follette School of Public Affairs, University of Wisconsin) demonstrates the negative impact of the credit crisis on real GDP worldwide on the basis of recent national and international statistics. Expected growth rates are rapidly adjusted downwards everywhere. Advanced economies do already face or are about to face negative growth. Emerging and developing economies see their growth rates fall considerably, although on average the expectations for next year remain well above population growth. In China, real GDP growth has fallen from double-digit levels to around 9 %. For next year, World Bank predicts a further decline to 7.5%. Although still very high, it will lead to a large surplus of production capacity in the Chinese economy.

Since exports are falling rapidly, the challenge for the country will be to raise its domestic demand.

As basic reasons for the transmission of the problems from the financial sector to the real sphere, he emphasizes the lack of confidence among banks and the forced deleveraging (reducing borrowings) by financial institutions, following write-downs of worsened asset portfolios. The lack of confidence among banks has led to a money market freeze, hampering companies to obtain sufficient working capital, and to a flight of funds to safe heavens such as US Treasury bonds. On the other hand, for emerging market economies risk perceptions have risen, making it more expensive for them to attract funds.

A significant change compared to earlier economic crises is that the US consumer can no longer act as 'engine of last resort' for the world market, due to the huge impact of the credit crisis just on the average American. Now the question is who will take over this role. Apparently, the European consumer cannot do it either. In the short run, central bank interventions, government support to the banking sector and fiscal stimulus plans may help to overcome the most imminent consequences of the forthcoming recession, but in the longer run recovery must come from consumer demand since governments cannot keep on raising national debt. Therefore, the hope of the world is placed on the emerging market consumer, especially in Asia.

#### *Presentation Jikun Huang*

Jikun Huang (Center for Chinese Agricultural Policies of the Chinese Academy of Sciences) shows how China, since the rural reforms started 30 years ago, has developed from an agriculture-based society to one that is based on industry and services. But at the same time, the agricultural sector itself has changed dynamically, with rapid overall growth, shifts from staple crops to cash crops, an increasing role of the livestock sector and a rising share of non-agriculture in rural employment (contributing more than 50% to farm incomes by 2007!). Although urban-rural and interregional income gaps have increased, the rural poor did also benefit from the overall improvements: poverty has fallen and nutrition has improved. Hence, both economically and socially there has been significant progress in these 30 years.

These achievements have been obtained by improved agricultural policies of various kinds. Agricultural productivity benefitted tremendously from investment in research, both conventional research and biotechnology. A system of competitive and well-integrated markets was developed, resulting in generally higher farm gate prices. Reduced tariff and non-tariff barriers allowed a better integration of China in world agricultural markets, leading to rising imports and exports and specialization in those commodities in which China has a comparative advantage. Land tenure rights by individual households, set at 10 years in the initial reforms, were extended to 30 years whereas also the conditions for land rental gradually improved. Currently, government is even considering extending land tenure rights to 70 years.

In addition, farmers benefitted from general rural policies focusing on achieving a balanced regional development throughout the country. Since 2000, spending on public infrastructure projects rose considerably, although in per capita terms it is still well below the levels that Japan and Korea reached in the corresponding stages of their development. Recently, also programs have been initiated to upgrade rural education (abolishing tuition fees for the first 9 grades), whereas new rural health and social security programs are being designed and introduced. Furthermore, an agricultural support program has been introduced that totals not less than 100 billion Yuan (about 11 billion Euros) in 2008, largely spent on grain subsidies and aggregate inputs. At the same time, all farm taxes have been abolished.

Challenges and priorities for the next stage of rural development are (i) agricultural mechanization and further improvement of research, (ii) better implementation of land contracting laws, (iii) expansion of infrastructural investments, (iv) development of effective farmer organizations and rejuvenation of the agricultural labor force, (v) achieving a more balanced urban-rural development and improving equity in rural areas e.g. by increasing the coverage amounts of the new social security program, and (vi) designing a proper food safety policy. The recent decisions at the 3<sup>rd</sup> Plenary Session of the Central Committee of the Communist Party (October 12<sup>th</sup>, 2008) are focused on meeting these challenges.

*Presentation Michiel Keyzer*

Michiel Keyzer (Centre for World Food Studies, VU University of Amsterdam) divides his presentation in two parts. In the first part, he discusses the food-feed-fuel competition worldwide taking into account also fibers (hence F4 instead of F3), and in the second part he looks into China and presents the broad picture of future agricultural trends that emerge so far from the work of the CATSEI project. Next year, CATSEI will report more in detail about these trends.

In historical perspective, world agricultural markets have experienced a remarkable shift in recent years. After a century of increases in per capita food supply and declining real prices, the trend seems to have turned since 2000 and prices are rising. Now, the question is whether this turn is a temporary or a lasting phenomenon. In the short run, the answer is uncertain due to supply fluctuations and the consequences of the macro-economic recession. In the longer run, the trends are relatively clear, at least for three of the four components, viz. food, feed and fiber. Food and fiber demand will be determined largely by population growth, projected to grow from the current 6.8 billion to around 9 billion people in 2050. For feed, there is the additional effect of rising meat demand in developing countries in response to the improved income situation of especially the middle classes. This will require more feed, even if the feed efficiency will also rise (currently, 4-6 calories feed are necessary for 1 calorie of meat). To meet these demands, agricultural production has to increase steadily, which is feasible albeit not by traditional local methods.

But for biofuels, the situation is full of uncertainties. Bio-ethanol and biodiesel demand is a newcomer on the market and, in combination with regional crop failures, a major determinant of the recent food price rises. Future demand for biofuels depends to a large extent on the policy targets that will be set in developed countries. The current mandates for 2020 in US and EU are small in terms of their total energy use but large in terms of crop requirements (in 2007 already 25% of maize area in US and 15% of oilseed area in EU). These policies are severely criticized not only due to their impact on crop demand (especially after the recent price hikes), but also because they involve large subsidies at current crop and energy prices, whereas the effectiveness of biofuels in curbing CO<sub>2</sub>-emissions is debatable. However, it is unlikely that current targets will be reduced.

On the positive side, an unexpected by-effect of the biofuel policies is the relative large supply of byproducts (such as protein-rich oilseed cakes) that become available as feed. This 'biofuel-feed paradox' takes away part of the pressure on feed and meat prices. Nevertheless, biofuels demand remains problematic as long as it is imposed via mandatory blending and promoted via subsidies. Second-generation biofuel, based on cracking cellulose in non-food crops, would be a much better alternative. The global policy challenge is to ensure social and environmental sustainability and to prevent violent conflicts in the competition for food, feed, fuel and fiber.

Turning to China, now already a major player on world agricultural markets, the project has analyzed how its imports and exports will develop in the coming decades. To this end, use is made of the Chinagro simulation model, a general equilibrium model developed in an earlier EU-funded project and updated and maintained in CATSEI. Based on the literature and expert opinions, a coherent set of assumptions on drivers of the agricultural economy is made. Then, the model calculates endogenously spatially detailed outcomes for agricultural output, consumption, prices, farm incomes and foreign trade flows.

The baseline scenario has as main driving forces through 2030: (i) sustained growth of non-agricultural output, albeit at a lower rate than the double-digit rates of past years, (ii) moderate population growth with urbanization rising to 60%, (iii) moderate crop land losses, (iv) continued intensification of the livestock sector, (v) steady input-efficiency improving progress for both crops and livestock, (vi) further trade liberalization, (vii) abolition of farm taxes, (viii) introduction of grain price support, and (ix) no significant biofuel use of crop output. The trends in world food and feed prices follow by and large the joint FAO-OECD projections of earlier this year, and can be characterized as modest in terms of their assumed rise in meat and biofuel demand worldwide.

The simulation results show that China's agriculture will adapt and manage to assure the country's food supply even with significantly higher per capita meat demand, albeit at the expense of large feed imports. Imports of maize and carbohydrate feed (such as cassava) may be considerably larger than predicted elsewhere, viz. between 15 and 20 million tons each by the year 2030. For protein-rich commodities (like oilseeds and their meal or cake) feed imports may even be as high as 40 million tons, but this prediction is similar to other studies. Hence, the Chinese government is wisely abstaining from ambitious biofuel plans. The future call on the international markets is already large enough. On the other

hand, the simulations confirm China's sizable export potential for fruits and vegetables, although the absorption capacity of specific submarkets needs to be studied further.

The simulations refer not only to trade but also to social and environmental conditions (as emphasized by the T, S and E in the acronym CATSEI). Socially, the baseline outcomes show a steady and significant growth of on-farm incomes per manyear, but nevertheless lower than the growth of non-agricultural incomes. Hence, the results confirm the present concerns about the urban-rural income distribution in China. No solution will be possible without rural-based industrialization. Environmentally, the simulations show that the application of fertilizer, currently already quite high, keeps on increasing, especially in densely populated areas. Together with the observed manure surpluses, these findings point to serious health threats for the population. Social and environmental concerns will be addressed more in detail in the final year of CATSEI.

Summarizing, the era of global agricultural surpluses seems to have come to an end, and although effects of increasing meat demand may be tempered by increasing feed efficiency, the consequences of increasing feed imports by emerging economies such as China will no doubt be felt in the coming decades. Apart from this, overly ambitious targets for mandatory blending of biofuels can drive world food markets through the roof. The major powers, including EU and China, have to prevent that the international competition for food, feed, fuel and fiber (to which forest, fertilizer and fish may be added) leads to conflicts on the ground elsewhere in the world.

### *Roundtable*

Wang Kaiyuan (Mission of the People's Republic of China to the EU), who speaks on her own behalf, addresses two issues: China's macro-economic problems and agricultural trade volumes between China and EU. With respect to the first issue, the overdependence of China's growth on export earnings is worrying and causes a lot of uncertainty in these times of global financial crisis. Domestic reforms are necessary. Hopefully, the recent rural development reforms will bring at the same time a better balance between export demand and domestic demand. Currently, the macroeconomic uncertainty makes it difficult to assess China's future food and feed import needs.

When looking at China's role in world agricultural trade, one should consider both the import and the export side. In this respect, focusing on China and EU, the challenge is to overcome prevailing obstacles and enhance trade in two directions. Current agricultural trade flows from China to EU are larger than the flow from EU to China. Yet, China is a big market that should offer ample possibilities to EU traders, especially for specialized products. Main obstacles faced by EU traders appear to be insufficient protection of Geographical Origin (GI) denominations and slow progress in proper application of Sanitary and PhytoSanitary (SPS) rules that, therefore, still act as significant trade barriers. Nevertheless, now that China is member of WTO, it does not have much space anymore to tweak trade policies in its own favor. On the other hand, China complains about EU's tariff quotas and anti-dumping policies that put too easily the blame for

European problems on unfair practices of foreign exporters. She emphasizes that think-tanks need to come with proposals to further mutual trade gains.

Andrzej Kwiecinski (Trade and Agricultural Directorate, OECD) begins with some comments on the baseline outcomes, especially concerning the huge increase in feed imports, and underlying scenario assumptions. He doubts whether average urban meat consumption in China will indeed go to the calculated level of 81 kg per person per year, since rich neighbouring countries like Korea and Japan have not reached such a level either. In this respect, he notes in particular that meat output data are notoriously unreliable. Secondly, he wonders whether China's maize import policy will indeed be liberalized as strongly as assumed in the baseline scenario when large volumes of maize imports will be required. Current tariff rates for above-quota maize volumes are rather high. Thirdly, the degree of increase in farm sizes, one of the factors underlying the assumed rates of technical progress and small anyhow in the Chinese context, may have to be reconsidered since the policy changes of last October enhance the power of small individual farmers. Finally, he suggests that the trend towards liberalization may easily be disrupted by strong concerns about national food security, especially given the experiences during this year's food crisis when grain exports were forbidden.

Furthermore, he has prepared in advance a small Powerpoint presentation (also on the CATSEI website) to emphasize that:

- urban-rural income differences deepen in spite of the progress in rural areas,
- although income from agriculture played a crucial role in the initial stages of reforms, the highest rates of poverty are now found especially in those provinces where the share of agriculture in employment is still high,
- the share of agriculture in valued added is typically only between 25% and 50% of its share in employment, and in some provinces even less,
- in recent years budgetary support to agriculture has steadily risen, leading to a PSE (Producer Subsidy Equivalent) of about 11% in 2007,
- producer SCT's (Single Commodity Transfers) show a mixed pattern, with the largest relative support for cotton, sugar and maize.

He underscores the conclusion from the earlier presentations that the key towards more rural prosperity is not agricultural policy *per se* but income diversification: out-migration, diversification of the rural economy, diversification within agriculture, and retirement arrangements (because of the aging agricultural population). National food security concerns may obstruct this process but food-feed-fuel-fiber competition might offer a chance, albeit for a diminishing part of the rural economy.

Monika Tothova (Directorate-General for Agriculture and Rural Development, European Commission) has observed a sudden change of attitude this year towards China. First, China was blamed for too much agricultural imports, contributing to the food crisis. Now, China may become one of the saviors of the world's economic system, either by making its huge foreign exchange reserves available to help the budget problems of rich economies or by boosting its own consumptive demand. Also Menzie Chinn referred to this option in his presentation. Isn't there some sort of contradiction here? Concerning the

presentation of Jikun Huang, she notes that he emphasizes the shift of China's agricultural exports towards high-value-added products, but does not talk much about China's huge feed imports, especially soybeans. Nevertheless, the implications of these imports for worldwide agricultural commodity markets are significant. Furthermore, she wonders how long China's agricultural research can survive with only public funding and when and where private sector research should come in.

Concerning the presentation of Michiel Keyzer, she reacts mainly to his analysis of the role of biofuels. Although some international publications may be too optimistic about the stress that biofuels will put on the international food system, one should not go to the other extreme either and overstate the negative effects of biofuel. With respect to EU, the biofuel policy is not an agricultural policy, but a renewable energy policy and it should be evaluated in this way. She emphasizes that recent EU decisions on biofuel targets are conditional on (i) sustainability criteria, and (ii) commercialization of second-generation biofuel. Since the sustainability criteria have not yet been developed fully, there is still room for improvement. But whatever the precise mode of implementation, biomass is going to stay with us. Finally, it is difficult for her to react to the predictions of China's feed import needs, since the sensitivity of the outcomes to the scenario assumptions is not so clear, but she is definitely interested in hearing more about the implications of these flows for the rest of the world.

Prof. Scott Rozelle (Freeman Spogli Institute for International Studies, Stanford University) returns to the discussion on meat and feed outcomes. According to him an urban meat consumption of 81 kg per person per day by 2030 is quite realistic. One cannot directly compare China with Japan and Korea since the latter two countries have more fish available to meet their protein demand. He agrees that one has to be very careful with meat output statistics, which are still overstated by 30-40% in his view. He does not consider a maize import volume of 16 million tons to be very high. China needs it for its livestock and demand will rise. In its policy targets, the Chinese government will have to redefine national food security in terms of merely foodgrains, i.e. rice and wheat, and treat maize like it treats soybeans, hence allowing significant imports and relaxing tariff regulations.

He is surprised by the huge subsidies mentioned by Jikun Huang. A back-of-the-envelope calculation learns that a program of 100 billion subsidies to Chinese farmers would mean an amount close to 60\$ per acre! Relevant research questions are then: is this amount distorting and is it stimulating grain output? In his view, the CATSEI project should not have its attention diverted away by short-term fluctuations, like the impact of the current economic slowdown, but keep its focus on long-term issues such as urbanization, land titling, and the aging agricultural population. Having said so, he would personally advise Chinese policy makers to use the current economic crisis, which reduces the wages and, more generally, the tension on the economic system, as an opportunity to plan reforms, particularly in rural areas. Making new investments, restructuring existing industry and increasing labor productivity will make the rural sector more competitive when demand will go up again.

## *Discussion*

In the final discussion, speakers have the opportunity to react to the comments given in the roundtable whereas the floor is also open to the audience at large to express its views or raise new issues. This discussion is hard to record verbatim. The main points may be summarized as follows:

*China's macro-economy.* There is general agreement that China should indeed use this period of sluggish international demand to restructure its domestic industry and make it more competitive, not only in terms of costs but also in terms of product standards. However, so far it is not even sure whether the amount of the package by which the government is effectively willing to stimulate the economy, is indeed anywhere near the 20% of GDP that has been suggested in the media. Concerning global effects, whatever the size of the stimulus package, in the coming years China's demand will not yet be large enough to replace the US consumer as motor of the world economy.

*Private investment.* Although the contribution of private sector investment is growing fast, viz. from 3% of total investment in 2001 to 20% last year, investment demand is still dominated by the public sector. It is not easy for government to design policies that stimulate private investments further. In particular, in agriculture it is hardly possible at the current stage to enforce Intellectual Property Rights (IPR) at farm level, making it hard for, especially, biotech companies to invest in the country. There is a need for more study on these policy issues, since profitable investment options are forgone currently.

*Specific rural problems.* Apart from the general need for more rural employment opportunities, recent surveys conducted in rural areas have clearly revealed the following specific problems: (i) too many young people are leaving agriculture, (ii) rural private investment is focused too much on housing instead of productive activities, and (iii) labor-contract regulations make farmers hesitating to hire labor since employees cannot be laid off anymore after two years.

*New subsidy measures.* There is still considerable uncertainty about the way in which government will spend the 100 billion Yuan support package to agriculture. Therefore, at the moment it is not yet possible to make an assessment of the distortions to which it will lead.

*Feed demand.* The projections of the baseline scenario of the Chinagro model have been obtained by assumptions on a variety of driving forces of the agricultural economy, such as consumer preferences for meat, herd growth and intensification, feed efficiency, cropland availability, international feed and meat prices, and government tariff policies. As mentioned in the presentation of Michiel Keyzer, these assumptions are based on the literature and expert opinions. The resulting trends in feed supply and demand, while taking all these forces into account, lead to serious concerns about the pressure on the world markets by China's future feed demand. In the remainder of the project, more

alternative scenarios will be investigated in order to see under which conditions the pressure will be relaxed.

*Climate change.* So far, climate change has not received much attention in the discussion on scenario drivers. Nevertheless, the project is working on it also. At IIASA, outputs of Global Climate Models have been used to assess likely productivity changes in China. The Northeast region seems to get better supply conditions, which is important since it is a major feed producing area. For China as a whole the prospects are mixed. For instance, in the Southern part it may become too wet, leading to problems in rice and maize cultivation. The project will examine alternative climate scenarios.

#### *Closing statements of the workshop*

After thanking the speakers for their excellent presentations (as expressed also already by individual members of the audience) and the audience at large for their attendance and contribution to the discussion, the chairman summarizes the main themes for further research that emanated in his view from today's conference:

- the nature of the large new farm subsidies in China,
- the sensitivity of feed import projections to alternative scenario assumptions,
- the importance of rural non-agricultural growth for restructuring the farm sector,
- the long-term effects of climate change on China's role in the global food-feed-fuel competition.

Looking forward to next year's results, he closes the meeting at 16.45 hours.

## Appendix I      Program of the Conference

- 12.00 hr    *Lunch*
- 13.00 hr    Opening address  
(Dr. Hans-Jörg Lutzeyer, Scientific Support to Policies-Common Agricultural Policy, Directorate-General for Research, European Commission)
- 13.10 hr    Introduction to the seminar by the Chair  
(Prof. Gerrit Meester, Advisor Agricultural and International Policy Affairs at the Dutch Ministry of Agriculture, Nature and Food Quality, and Chairman of the Agricultural Committee of OECD)
- 13.15 hr    International macro-economic outlook  
(Prof. Menzie D. Chinn, Associate Director, Robert M. La Follette School of Public Affairs, Department of Economics, University of Wisconsin)
- 13.35 hr    China's agricultural transition: 30 years of rural reforms  
(Prof. Jikun Huang, Director of the Center for Chinese Agricultural Policies of the Chinese Academy of Sciences)
- 14.05 hr    Food, feed, fuel: international prospects with special emphasis on China and the EU  
(Prof. Michiel Keyzer, Director of the Centre for World Food Studies, VU University Amsterdam, and CATSEI coordinator)
- 15.00 hr    *Coffee/tea break*
- 15.20 hr    Invited comments: roundtable with EU, Chinese and international policy makers or advisors:  
Dr. Wang Kaiyuan, First Secretary, Mission of the People's Republic of China to the EU  
Dr. Andrzej Kwiecinski, Senior Agricultural Policy Analyst, Trade and Agricultural Directorate, OECD  
Dr. Monika Tothova, Agricultural Trade Policy Analysis, Directorate-General for Agriculture and Rural Development, European Commission  
Prof. Scott Rozelle, Helen Farnsworth Senior Fellow and Professor, Freeman Spogli Institute for International Studies, Stanford University.
- 16.00 hr    Floor discussion
- 16.30 hr    Concluding remarks (Chairman)
- 16.45 hr    *Drinks*

## Appendix II List of participants

### *External*

Richard van den Bergh	Ministry of Agriculture, Nature and Food Quality, The Netherlands
Menzie Chinn	Robert M. La Follette School of Public Affairs, Department of Economics, University of Wisconsin
Timo Delveaux	European Commission, DG Agriculture
Bernd Gruner	CELCAA, European Liaison Committee for the Agricultural and Agri-Food Trade
Lucia Hucecova	European Commission, DG Agriculture
Roel Jongeneel	Agricultural Economics Institute (LEI), The Hague
Wang Kaiyuan	Mission of the People's Republic of China to the EU
Andrzej Kwiecinski	Trade and Agricultural Directorate, OECD
Hans-Jörg Lutzeyer	European Commission, DG Research
Gerrit Meester	Ministry of Agriculture, Nature and Food Quality, The Netherlands
Aurélië Storme	European Commission, DG Development
Monika Tothova	European Commission, DG Agriculture
Cees Vermeeren	AVEC, European Association of Poultry Processors and Poultry Trade

### *CATSEI project members*

Günther Fischer	IIASA
Jikun Huang	CCAP
Michiel Keyzer	SOW-VU
Marijke Kuiper	LEI
Bo Liu	SOW-VU
Max Merbis	SOW-VU
Lisa Moorman	IFPRI
Huanguang Qiu	CCAP
Scott Rozelle	Stanford University
Laixiang Sun	SOAS
Wim van Veen	SOW-VU
Xiaobo Zhang	IFPRI
Xiaoyong Zhang	LEI