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**Economic Environment**

**EU farmers gain access to Japanese food and wine markets**

The European Union rushed to promote its preliminary free-trade agreement with Japan by stressing the benefits for EU farmers, who stand to gain easier access to the lucrative, highly protected Japanese food and wine markets.

"The access to the difficult market of Japan is largely going to be liberalized," Hogan told reporters during an agriculture conference on Friday in Brussels. "It’s a growing, premium market for our high-quality food and drink products." The EU marketing offensive reflects a desire to win over European farmers, who are often skeptical about the merits of international trade deals, and to counter the anti-globalization forces that almost scuttled the bloc’s recent commercial pact with Canada.

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**Major Wine Producing Countries**

**2017 Harvest Report: La Niña Delivers Frost and Flame to Argentina and Chile**

A hot, dry year lowered yields in South America’s top wine regions, but quality looks good.

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**Spain has moved beyond a purely price-based discussion**

With Spain losing bottom end market share, down 10% in volume across 2016 (Nielsen, off-trade to 31.12.16), but reporting only a 7% loss of off-trade value, while growing its value share of the on-trade by 2% over the same period, the consensus was that the concept of quality Spanish wines has reached a critical point with UK buyers.
With Spain the conversation has moved on from price as the growth of both quality of the wines and the label design mean that the country is very well placed to capitalise on it’s quality and presentation. The assertion was that Spain is being pushed out of the ankle biting level of cheap bulk shelf fillers and that any setback this might deliver is a very temporary one compared with the opportunity to underpin the growth of more premium sales.

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