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**NOTE**

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From: General Secretariat of the Council  
To: Delegations

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Subject: Market situation, in particular following the invasion of Ukraine  
- Information from the Commission and the Member States  
- Exchange of views

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With a view to the Council (Agriculture and Fisheries) meeting on 23 September 2024, delegations will find in the Annex a background document on the above-mentioned subject.

**Market situation, in particular following the invasion of Ukraine**

EU agricultural markets show positive signals of recovery to a stable situation. Overall, price levels are in line with historical averages, input prices are declining although they remain above pre-Covid levels, and food inflation has fallen although prices remain high. The situation appears less positive for the cereal and oilseeds markets mainly affected by adverse weather conditions.

There are three areas of concern which affect EU agricultural markets:

- 1) adverse weather conditions during spring, namely exceptionally hot conditions in the south and excessive rainfall in the north, which affected several Member States and sectors.
- 2) the spread of animal diseases, such as the outbreak of Bluetongue and Epizootic Haemorrhagic Disease, and increasing pressure on the animal sectors linked to climate change; and,
- 3) Trade-related issues and trade perspectives, which raise concerns among producers and require attention, such as China's anti-dumping investigations and on-going EU-Mercosur negotiations.

With a view to preparing the Council (Agriculture and Fisheries) meeting on 23 September 2024, delegations provided written comments as set out in document 13296/24 and its addenda.

Between July and November, the Hungarian Presidency has planned a series of policy debates in the SCA, each focusing on challenges and future perspectives in different agricultural sectors:

- 8 July on the dairy sector
- 9 September on the pig and poultry sectors
- 16 September on the beef, veal, sheep- and goatmeat sectors
- 30 September on the cereals, oilseeds and sugar sectors
- 7 October (tbc) on the wine sector
- 11 October (tbc) on the fruit, vegetables, apiculture and olive sectors

A summary of the outcome of the SCA discussions will feature in the background document for the November debate to prepare the AGRIFISH Council.

The Commission's presentations for the policy debates in SCA on 8 July and 9 and 16 September were published on the Delegates portal as documents WK 9920/24, WK 11107/24 and WK 11423/24 respectively.

