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THE RUSSIAN PRESIDENTIAL ACADEMY
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2022 G20 Bali Summit Interim Compliance Report

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Feedback, as always, is welcome and is kept anonymous.
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3. Trade: Open Agricultural Trade

“We reiterate our support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on WTO [World Trade Organization] rules.”

G20 Bali Leaders' Declaration

Assessment

	No Compliance	Partial Compliance	Full Compliance
Argentina		0	
Australia			+1
Brazil		0	
Canada			+1
China			+1
France	Not applicable		
Germany	Not applicable		
India		0	
Indonesia			+1
Italy	Not applicable		
Japan		0	
Korea			+1
Mexico		0	
Russia		0	
Saudi Arabia			+1
South Africa			+1
Türkiye		0	
United Kingdom			+1
United States			+1
European Union			+1
Average	+0.59 (79%)		

Background

Maintaining free trade and open market access has been a feature of G20 summits since the Washington Summit in 2008. Before the 2017 Hamburg Summit it primarily took the form of an anti-protectionism pledge. This pledge was part of the response by the G20 to the 2008 financial crisis and was extended three times: at the 2009 London Summit, at the 2010 Toronto Summit and at the Los Cabos Summit until the end of 2014. At the 2013 St. Petersburg Summit, it was again extended until the end of 2016. At the 2015 and 2016 G20 summits in Antalya and Hangzhou, the G20 reaffirmed the commitment to a standstill and rollback on protectionist measures.

In 2022, the G20 agriculture and finance ministers noted the need “to improve agricultural productivity and capacity, increase sustainable farming practices and respond to climate change, maintain open and transparent trade.”²¹⁵ At the Bali Summit the G20 leaders expressed concern over the existing challenges to global food security, supported international efforts to keep food supply chains functioning under challenging circumstances, and “committed to addressing food insecurity by ensuring accessibility, affordability, and sustainability of food and food products for those in needs, particularly in developing countries and least developed countries.” The leaders also reiterated their “support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on WTO [World Trade Organization] rules.”²¹⁶

²¹⁵ G20 Presidency's Chair's Summary, G20 Joint Finance and Agriculture Ministers' Meeting, Washington DC, October 13, 2022, G20 Information Centre (Toronto). Access date: 6 February 2023. <http://www.g20.utoronto.ca/2022/221011-finance-agriculture.html>.

²¹⁶ G20 Bali Leaders' Declaration, G20 Information Centre (Toronto) 16 November 2022. Access date: 6 February 2023. <http://www.g20.utoronto.ca/2022/221116-declaration.html>.

Commitment Features

The commitment requires the G20 members to adhere to the WTO rules on trade in agricultural products. The WTO Agreement on Agriculture, which came into force in 1995, contains provisions regarding market access, domestic producers support measures, and export support measures.

In terms of market access the Agreement on Agriculture resulted in a prohibition of agriculture-specific non-tariff measures, while the tariffs on most agricultural products were bound in the WTO. These measures were essentially substituted by tariffs. Each WTO member has a “schedule” of tariff concessions covering all agricultural product, setting out the maximum tariff that can be applied on imports for each individual agricultural product. The schedules, containing WTO members’ commitments, can be accessed at the WTO Goods Schedules e-Library.²¹⁷

Domestic support measures are categorized either as measures with no or minimal trade-distorting effect (“Green Box”), or trade-distorting support (“Amber Box”). The aggregate monetary value of the measures falling under the “Amber Box” category was subject to reduction commitments as specified in the schedule of each WTO member providing such support.

Under the Agreement on Agriculture export subsidies are defined as referring to “subsidies contingent on export performance,” including the following subsidies listed in Article 9.1 of the Agreement:

- direct export subsidies contingent on export performance;
- sales of non-commercial stocks of agricultural products for export at prices lower than comparable prices for such goods on the domestic market;
- producer financed subsidies such as government programmes which require a levy on all production which is then used to subsidise the export of a certain portion of that production;
- cost reduction measures such as subsidies to reduce the cost of marketing goods for export: this can include upgrading and handling costs and the costs of international freight, for example;
- internal transport subsidies applying to exports only, such as those designed to bring exportable produce to one central point for shipping; and
- subsidies on incorporated products, i.e. subsidies on agricultural products such as wheat contingent on their incorporation in export products such as biscuits.

The Agreement on Agriculture limits the use of export subsidies to four situations:

- export subsidies subject to product-specific reduction commitments within the limits specified in the schedule of the WTO Member concerned;
- any excess of budgetary outlays for export subsidies or subsidized export volume over the limits specified in the schedule which is covered by the “downstream flexibility” provision of Article 9.2(b) of the Agreement on Agriculture;
- export subsidies consistent with the special and differential treatment provision for developing country Members (Article 9.4 of the Agreement);
- export subsidies other than those subject to reduction commitments provided that they are in conformity with the anti-circumvention disciplines of Article 10 of the Agreement on Agriculture.²¹⁸

To fully comply with the commitment the G20 member must avoid violating the WTO rules in all three of the Agreement on Agriculture issue areas: market access, domestic producers support measures, and export support measures. If the G20 member violates the stipulations of the Agreement in only one area it is

²¹⁷ Goods Schedules e-Library, WTO 2023. Access date: 6 February 2023. <https://goods-schedules.wto.org>.

²¹⁸ Agreement on Agriculture, WTO 1995. Access Date: 6 February 2023. https://www.wto.org/english/docs_e/legal_e/14-ag_02_e.htm.

awarded a partial compliance. If a member violates the rules in two or three areas, it receives a score of –1 for failing to comply with the commitment.

Scoring Guidelines

–1	G20 member took action, violating the World Trade Organization (WTO) rules in two or three areas of the Agreement on Agriculture: market access, domestic producers support measures and export support measures.
0	G20 member took action, violating the WTO rules in any one area of the Agreement on Agriculture: market access, domestic producers support measures, and export support measures.
+1	G20 member avoids violating the WTO rules in all three of the Agreement on Agriculture issue areas: market access, domestic producers support measures, and export support measures.

Compliance Director: Alexander Ignatov

Lead Analyst: Andrei Sakharov

Argentina: 0

Argentina has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 1 February 2023, the Argentine National Bank announced the allocation of ARS20 billion (USD106.8 million) for refinancing credits for agricultural producers affected by droughts.²¹⁹ Specifically, the loans will be provided to agricultural producers to refinance past loans at the same rate. Eligible beneficiaries will have to accredit the losses caused by the climate emergency. According to the press release, the credit line aims “not to stifle the liquidity of producers.”

Argentina took action, violating the WTO rules in the area of the Agreement on Agriculture regarding domestic producers support measures.

Thus, Argentina receives a score of 0.

Analyst: Irina Popova

Australia: +1

Australia has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by Australia.

Thus, Australia receives a score of +1.

Analyst: Alexander Ignatov

Brazil: 0

Brazil has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 14 February 2023, the National Bank for Economic and Social Development of Brazil provided a BRL100 million (USD19.3 million) loan to Agrocerec Pic Suínos Ltda.²²⁰ The beneficiary is a Brazilian company that operates in the food sector, focusing on technological projects related to plant and animal genetics. The loan will finance the construction of the “Genesis” farm. The farm will have the capacity to

²¹⁹ The BNA provided 50 billion pesos at the service of production, Argentine National Bank (Buenos Aires) 1 February 2023. Access Date: 10 April 2023. Translation provided by the analyst. https://www.bna.com.ar/BackOffice/institucional/prensadoc/1392_a.pdf.

²²⁰ BNDES approves R\$ 100 million for elite genetic innovation in pig farming in Paraná, BNDES (Brasília) 14 February 2023. Access Date: 10 April 2023. Translated by the analyst. <https://www.bndes.gov.br/wps/portal/site/home/imprensa/noticias/conteudo/bndes-aprova-rs-100-milhoes-para-inovacao-genetica-de-elite-em-sinocultura-no-parana/>

house around 3,600 elite females with an estimated production of up to 110,000 animals per year. It will produce the needed electricity renewably from its residues. The total project costs are BRL332.4 million (USD64.2 million).

Brazil took action, violating the WTO rules in the area of the Agreement on Agriculture regarding domestic producers support measures.

Thus, Brazil receives a score of 0.

Analyst: Irina Popova

Canada: +1

Canada has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by Canada.

Thus, Canada receives a score of +1.

Analyst: Nikita Shilikov

China: +1

China has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by China.

Thus, China receives a score of +1.

Analyst: Irina Popova

France: Not applicable

Trade policy is set by the European Commission. Thus, as a member of the European Union, France is not assessed for compliance with this commitment.

Germany: Not applicable

Trade policy is set by the European Commission. Thus, as a member of the European Union, Germany is not assessed for compliance with this commitment.

India: 0

India has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 30 December 2022, the Central Board of Indirect Taxes and Customs under the Ministry of Finance through Notification No. 113/2022-CUSTOMS (N.T.) increased the import tariff value applicable on the following goods: 1) on RBD palm oil from USD 979 to USD 982 per metric tonne (HS 1511.90); 2) on others-palm oil from USD 978 to USD 981 per metric tonne (HS 1511.90).²²¹

On 14 February 2023, the Ministry of Commerce and Industry through Notification No. 57/2015-2020 amended the import price that triggers an import ban for areca nuts (HS 0802.80) and betel nuts (HS 2106.90).²²² For these products, imports valued at less than INR351 per kg (USD4.23) will be prohibited.

²²¹ Notification No. 113/2022, Ministry of Finance (New Delhi) 30 December 2022. Access Date: 10 April 2023. <https://www.globaltradealert.org/state-act/71524/india-tariff-value-applicable-on-the-imports-of-certain-goods-amended-30-december-2022>.

²²² Notification No. 57/2015-2020, Ministry of Commerce and Industry (New Delhi) 14 February 2023. Access Date: 10 April 2023. <https://content.dgft.gov.in/Website/dgftprod/57af135f-0d65-4671-a3c2-a355553dc42/Notification%2057%20Eng.pdf>.

The trigger price applicable on areca nuts earlier was INR251 per kg (USD3.03) while no such restriction was applicable on betel nuts.

On 23 March 2023, the Directorate General of Foreign Trade through Public Notice No. 62/2015-2020 imposed a local content requirement on exports of multigrain/fortified wheat flour.²²³ Specifically, the notice states that only multigrain/fortified wheat flour with at least 80 per cent whole wheat flour will be permitted and that all other ingredients (such as soya flour, oatmeal, fenugreek powder, vitamins, etc.) in the final product must be sourced locally.

India took actions violating the WTO rules in the area of the Agreement on Agriculture regarding market access.

Thus, India receives a score of 0.

Analyst: Irina Popova

Indonesia: +1

Indonesia has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by Indonesia.

Thus, Indonesia receives a score of +1.

Analyst: Pavel Doronin

Italy: Not applicable

Trade policy is set by the European Commission. Thus, as a member of the European Union, Italy is not assessed for compliance with this commitment.

Japan: 0

Japan has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 23 December 2022 the Government of Japan announced a JPY 907 million (USD 6.83 million) in order to promote export activities of certain food products such as beef, pork, chicken, milk and etc. totaling of 27 items in FY 2023-24.²²⁴ The overall subsidy for FY 2023-24 is lower than the JPY 5.1 billion (USD 38 million) subsidy for FY 2022-23. The subsidy is aimed to cushion the financial burden related with market research, increasing Japanese brand awareness overseas, sales development, demonstrations and exhibitions and etc.

Japan took action, violating the WTO rules in the area of the Agreement on Agriculture regarding export subsidies.

Thus, Japan receives a score of 0.

Analyst: Pavel Doronin

Korea: +1

Korea has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

²²³ Public Notice No. 62/2015-2020, Government of India (New Delhi) 23 March 2023. Access Date: 10 April 2023.

<https://content.dgft.gov.in/Website/dgftprod/75aa37be-28bc-46f0-a835-422445122bea/Public%20Notice%20no.%2062-Eng.pdf>.

²²⁴ Japan: Export subsidy announced for certain food products for the year 2023-2024 (December 2022), Global Trade Alert 01 April 2023. Access Date: 30 April 2023. <https://www.globaltradealert.org/intervention/115178/other-export-incentive/japan-export-subsidy-announced-for-certain-food-products-for-the-year-2023-2024-december-2022>

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by Korea.

Thus, Korea receives a score of +1.

Analyst: Alexander Ignatov

Mexico: 0

Mexico has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 30 December 2022, the Government announced the budget of the National Programme of Fertilizers for the fiscal year of 2023.²²⁵ The Government would allocate USD1.1 billion as to increase production of priority crops through better delivery of fertilizers.

On 16 January 2023, the Government imposed a temporary export tax on white maize. Previously, white maize export was not a subject to any kind of export tax.²²⁶ The new regulation was set on 50 per cent. The measure would remain active till 30 June 2023.

Mexico introduced measures violating the WTO rulings in one out of three key spheres: domestic producers support measures.

Thus, Mexico receives a score of 0.

Analyst: Alexander Ignatov

Russia: 0

Russia has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 25 November 2022, the Government provided RUB899 million in subsidies to support local agricultural producers in 22 regions.²²⁷ The farmers would be compensated for costs arise due to production and sales of agricultural products.

On 17 December 2022, the Government allocated RUB10 billion to support agricultural products manufacturers.²²⁸ The allocated sum would be used as to provide local producers with better access to equipment leasing to sustain the seamless production of agricultural products.

On 19 December 2022, the Government decided to extend the tax benefit policy for the chemical industry producers.²²⁹ The Government would grant tax reliefs for the industry based on research and development expenses at certain categories of chemical goods that would allow to reduce the overall tax payments.

²²⁵ AGREEMENT by which the Operating Rules of the Fertilizer Program for the year 2022 are disclosed, Diario Oficial de la Federación (Mexico) 31 December 2022. Translation provided by Google Translate. Access Date: 4 May 2023.

https://dof.gob.mx/nota_detalle.php?codigo=5639904&fecha=31/12/2021#gsc.tab=0

²²⁶ DECREE by which the Tariff of the Law of General Import and Export Taxes is modified, Diario Oficial de la Federación (Mexico) 16 January 2023. Translation provided by Google Translate. Access Date: 4 May 2023.

https://dof.gob.mx/nota_detalle.php?codigo=5677205&fecha=16/01/2023#gsc.tab=0

²²⁷ The Government to Allocate Approximately 900 million rubles to Support Agrarian Producers, Government of the Russian Federation (Moscow) 25 November 2022. Translation provided by the analyst. Access Date: 4 May 2023.

<http://government.ru/news/47137/>

²²⁸ The Government Allocates Extra 10 billion rubles to Grant Leasing Preferences for Agricultural Producers, Government of the Russian Federation (Moscow) 15 December 2022. Translation provided by the analyst. Access Date: 4 May 2023.

<http://government.ru/news/47357/>

²²⁹ The Government to Provide Tax Benefits for Chemical Goods Manufacturers and Developers, Government of the Russian Federation (Moscow) 19 December 2022. Translation provided by the analyst. Access Date: 4 May 2023.

<http://government.ru/news/47364/>

On 3 March 2023, the Government announced the allocation of RUB914.5 million as a state support for sport equipment manufacturers.²³⁰ The sector producers would receive aid in three subsequent years till 2025. The Government would compensate the expenses involved in production of pilot products and testing.

Russia introduced measures violating the WTO rulings in one out of three key spheres: domestic producers support measures.

Thus, Russia receives a score of 0.

Analyst: Alexander Ignatov

Saudi Arabia: +1

Saudi Arabia has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by Saudi Arabia.

Thus, Saudi Arabia receives a score of +1.

Analyst: Alexander Ignatov

South Africa: +1

South Africa has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by South Africa.

Thus, South Africa receives a score of +1.

Analyst: Alexander Ignatov

Türkiye: 0

Türkiye has partially complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization (WTO) rules.

On 28 January 2023, the Presidential Decision on Supporting the Effectiveness of the Use of Agricultural Lands, prepared by the Ministry of Agriculture and Forestry and Forestry entered into force.²³¹ The measures under this Decision are aimed to support investment projects for post-harvest product processing, with priority given to areas that are left empty, fallow and unsuitable for cultivated agriculture in order to stimulate the use of agricultural lands. The regulation covers grant payments up to 75 per cent of the project amount for investment projects aimed at improving crop production and increasing agricultural output.

On 14 March 2023, the Turkish Grain Board purchased 142,000 tons of grain from farmers in areas damaged by the earthquake in order to avoid the interruption of agricultural production.²³²

²³⁰ The Government to Support Sport Equipment Producers, Government of the Russian Federation (Moscow) 3 March 2023. Translation provided by the analyst. Access Date: 4 May 2023. <http://government.ru/news/47908/>

²³¹ The Support To Be Provided To Agricultural Production And Facility Investments In Atil Lands Announced, T.C. Tarım Ve Orman Bakanlığı (Ankara) 28 January 2023. Translation provided by Google Translate. Access Date: 30 April 2023. <https://www.tarimorman.gov.tr/Haber/5705/Atil-Arazilerde-Tarimsal-Uretim-Ve-Tesis-Yatirimlarina-Saglanacak-Destekler-Belli-Oldu>

²³² 142 Thousand Tons Of Products Were Purchased By Tmo From Our Farmers In The Disaster Region, T.C. Tarım Ve Orman Bakanlığı (Ankara) 14 March 2023. Translation provided by Google Translate. Access Date: 30 April 2023. <https://www.tarimorman.gov.tr/Haber/5784/Tmo-Tarafından-Afet-Bolgesinde-Ciftimizden-142-Bin-Ton-Urun-Alimi-Yapıldı>

On 5 April 2023, the Ministry of Agriculture and Forestry would increase subsidy for planting certified seed in area damaged by the earthquake by 100 per cent.²³³ This measure, amounting USD100 per hectare for wheat, barley, rye, oats, triticale and USD 120 per hectare of legumes will be applied to domestically produced seeds grown on land that is registered through national Farmer Registration System.

Türkiye has taken steps violating the WTO rules of the Agreement on Agriculture.

Thus, Türkiye receives a score of 0.

Analyst: Pavel Doronin

United Kingdom: +1

The United Kingdom has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by the United Kingdom.

Thus, the United Kingdom receives a score of +1.

Analyst: Nikita Shilikov

United States: +1

The United States has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by the United States.

Thus, the United States receives a score of +1.

Analyst: Nikita Shilikov

European Union: +1

European Union has fully complied with the commitment to support for open, transparent, inclusive, predictable, and non-discriminatory, rules-based agricultural trade based on World Trade Organization rules.

On 25 April 2023, the EU agriculture Commissioner Janusz Wojciechowski addressed the authorities of Poland, Hungary, and Slovakia with a claim to lift imposed import ban on the import of agricultural goods from Ukraine. As an incentive, the Commission proposing financial aid to support farmers in these countries. The deal is to be negotiated later in May 2023.²³⁴

During the compliance period no actions violating the areas of the Agreement on Agriculture were taken by the EU. However, further actions proposed by the Commission, if taken, might affect the score.

Thus, the European Union receives a score of +1.

Analyst: Alexander Ignatov

²³³ Certified Seed Support In The Earthquake Region Increased 100 Percent, T.C. Tarım Ve Orman Bakanlığı (Ankara) 05 April 2023. Translation provided by Google Translate. Access Date: 30 April 2023.

<https://www.tarimorman.gov.tr/Haber/5812/Deprem-Bolgesindeki-Sertifikali-Tohum-Destekleri-Yuzde-100-Artirildi>

²³⁴ Drop import bans if you want the money, Commission tells frontline EU countries, Euractiv (Brussels) 26 April 2023.

Access Date: 4 May 2023. <https://www.euractiv.com/section/agriculture-food/news/drop-import-bans-if-you-want-the-money-commission-tells-frontline-eu-countries/>