

농수산물식품 '12년 수출현황과 '13년 수출전망

<요약>

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요 약

- ❖ 지난해 세계적인 경기불황에도 불구하고 우리 농수산물 수출은 사상 최대 실적(80억불)을 기록하여 괄목할만한 성과를 거두었음
 - 비록 당초 100억불 수출목표액은 달성하지 못했지만 환율하락, 유럽발 금융위기 등 어려운 여건 하에서 농식품 수출이 선전했다는 평가를 받음
- ❖ '12년 농림수산물 수출은 80.1억불로 전년 대비 4.1% 증가
 - 2년 연속 신선농산물 10억불, 수산물 20억불 수출
 - 1억불 이상 품목은 '11년 12개에서 '12년 13개*로 증가
 - 껌·관련·참치 6억불, 김·라면 2억불 처음으로 돌파 기록
 - * 껌, 참치, 설탕, 커피제품, 라면, 인삼, 소주, 오징어, 김, 음료, 제3맥주, 김치
⇒ (추가)비스킷
 - 미국, EU, ASEAN 등 FTA 체결국에 대한 수출이 증가한 반면, 중국, 대만, 홍콩 등 중화권 수출은 부진
 - 1억불 이상 수출국은 11개국('11년)에서 14개국('12년)*으로 확대
 - * 필리핀, 싱가포르, 호주 등 3개국 신규 추가
- ❖ ('13전망) 지난해에 이어 미국 달러화와 엔화 환율 하락으로 원화 강세가 지속돼 전반적인 수출여건이 불리한 편이나 하반기부터 경기회복 전망
 - 올해 일본시장 수출전망은 다소 불투명한 반면, 중국과 아세안 시장은 매우 밝은 것으로 분석됨
 - 특히, 수출액의 30%수준인 일본은 엔화 환율등락에 큰 영향을 받을 전망
 - 가공식품은 원료수입, 부가가치 수출로 환율등락 상쇄효과로 영향이 덜함
- ❖ aT는 또 해외 바이어들로부터 올해 히트예감 품목을 추천받은 결과 ▲딸기는 홍콩·싱가포르·러시아 ▲고추장은 미국·일본 ▲분재와 알로에음료는 미국·중국 ▲조제분유는 중국에서 인기를 끌 것으로 예상됨
 - 올해에도 농식품 수출을 둘러싼 어려운 여건들을 극복하기 위해 시장다변화 노력, 한류의 적극 활용 및 공격적인 홍보·마케팅이 바람직함

I. 2012년 농수산물식품 수출실적 및 평가

1 수출실적 총평

- '12년 전체 농림수산물식품 수출은 전년대비 4.1% 증가한 80.1억불로 잠정 집계되었다
- 신선농식품은 '11년 대비 6.4% 증가한 10.8억불, 가공식품은 4.5% 증가한 45.7억불, 수산물식품은 2.4% 증가한 23.6억불로 나타났다

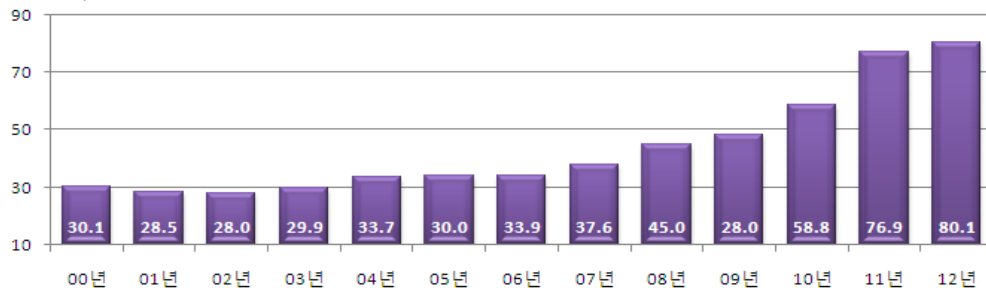
2012년 농림수산물식품 부류별 수출실적

(단위 : 백만불, %)

구 분	'11년		'12년(잠정)		증감률(%)	
	물 량	금 액	물 량	금 액	물 량	금 액
합 계	3,479.4	7,691.3	3,915.1	8,007.8	12.5	4.1
신선농식품	331.2	1,015.2	355.6	1,079.8	7.3	6.4
가공식품	2,461.5	4,368.3	2,850.9	4,566.0	15.8	4.5
수산물식품	686.7	2,307.8	708.6	2,362.0	3.2	2.4

연도별 농림수산물식품 수출 동향

(단위: 억불)



- '12년도 수출은 '10년 58.8억불, '11년도 76.9억불에 이어 계속된 높은 성장세가 기대되었으나, 전세계적인 경기침체 등 대내외 여건 악화로 당초 기대에는 미치지 못하였다. '12년 농식품 수출이 둔화된 이유로는
- 첫째, 유로존 경제위기 여파로 인한 전세계적인 경제불황이 지속되면서 소비심리가 위축되었고,

주요국의 소매판매 증가율(% , 전년 동기 대비)

	'10년	'11년	'12.1월	2월	3월	4월	5월	6월	7월	8월	9월	10월	11월
중국	18.4	17.1	-	14.7	15.2	14.1	13.8	13.7	13.1	13.2	14.2	14.5	14.9
미국	5.5	8.0	0.6	1.0	0.4	△0.5	△0.1	△0.7	0.7	1.0	1.2	△0.3	0.3
일본	2.5	△1.2	1.8	3.4	10.3	5.7	3.6	0.2	△0.7	1.7	0.4	△1.2	1.3
홍콩	18.6	24.9	14.9	15.6	17.1	11.4	8.7	11.0	3.9	4.6	9.4	4.0	

(출처 : 한국은행)

- 둘째, '11.3월 동일본 대지진 발생 이후 '12년부터 일본의 수출여력이 회복되고 있고, 특히 중화권에서의 **일본산 대체효과**가 감소하면서 동 시장으로의 한국산 수출이 저조하였다

일본과 한국의 대중국 농식품 수출 증감율(% , 전년동월 대비)

'12년	1월	2월	3월	4월	5월	6월	7월	8월	9월	10월	11월	12월
일본→중국	6.4	△24.4	△22.4	55.3	61.8	67.7	48.5	35.0	54.6	22.4	-	-
한국→중국	△8.4	33.8	9.5	△6.6	△6.0	△8.0	△12.1	△25.9	△22.3	△8.0	△6.6	△19.7

- 그러나, '12년도 농식품 수출은 어려운 여건에도 불구하고 나름의 주목할 만한 성과를 거둔 것으로 평가된다
- 국가 전체 수출액이 전년대비 1.3% 감소('12년 5,482억불)했음에도 불구하고 농식품 수출은 **4.1% 증가**로 성장세를 유지
 - 국가전체 수출액은 최근 5년간 1.5배 증가한 반면 농식품 수출액은 2.1배 증가하였고, 국가전체 수출액에서 차지하는 농식품 수출액 비중 또한 '07년 1.0%에서 '12년 1.5%로 증가

연도별 국가전체 및 농식품 수출

(단위 : 억불, %)

년도	'07	'08	'09	'10	'11	'12	'07~'12
국가전체	3,715	4,220	3,635	4,664	5,552	5,482	1.47배
농식품	37.6	45.0	48.1	58.8	76.9	80.1	2.13배
(비중)	1.01	1.06	1.32	1.26	1.38	1.46	

- 수출액 1억불 이상 품목과 1억불 이상 수출국이 증가하면서 품목 다양화 및 시장 다변화가 지속되고 있는 것으로 분석

- 1억불 이상 수출 품목은 '11년 12개에서 13품목으로 증가

* 껌, 참치, 설탕, 커피제품, 라면, 인삼, 소주, 오징어, 김, 음료, 제3맥주, 김치 ⇒ (추가)비스킷

1억불 이상 수출품목

(단위 : 백만불, %)

품목	2011년		2012년		증감률	
	물량	금액	물량	금액	물량	금액
1 껌	49.3	549.8	49.0	606.4	△0.7	10.3
2 참치	144.3	393.7	185.6	603.4	28.7	53.3
3 커피조제품	74.2	302.2	77.4	297.2	4.3	△1.7
4 자당	360.1	291.2	359.6	262.9	△0.1	△9.7
5 김	12.0	161.5	15.1	231.0	26.5	43.1
6 음료	242.0	184.1	237.8	225.9	△1.8	22.7
7 라면	44.8	186.7	46.5	206.2	3.7	10.4
8 인삼	3.7	189.3	4.4	151.1	18.7	△20.2
9 제3맥주	178.0	137.9	187.3	144.3	5.2	4.7
10 소주	69.4	114.3	77.7	126.8	12.0	10.9
11 오징어	65.3	180.9	56.7	119.6	△13.1	△33.9
12 비스킷	18.9	97.9	19.4	109.0	2.9	11.3
13 김치	27.4	104.6	27.7	106.6	0.9	1.9

- 2년 연속 신선농산물 10억불, 수산물 20억불 수출을 달성, 껌·참치는 6억불, 김·라면은 2억불을 최초로 달성

- 1억불 이상 수출국도 '11년 11개국에서 14개국으로 증가

* 일본, 중국, 미국, 베트남, 태국, 홍콩, 러시아, 대만, UAE, 인니, 뉴질랜드 ⇒ (추가)필리핀, 싱가포르, 호주

- 수출국 비중도 일본, 중국 등 기존 주력시장으로의 편중현상이 완화되고 있고, 미국, 아세안, EU 등 신흥시장 비중이 증가

주요 국가별 수출비중

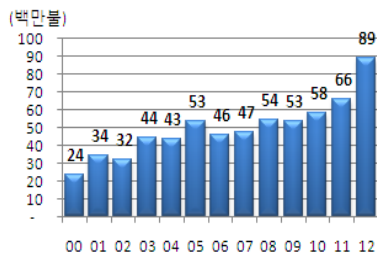
(단위 : %)

	일본	중국	미국	러시아	홍콩	대만	아세안	EU
2011	30.9	17.9	7.8	3.2	4.0	3.4	13.4	4.7
2012	29.8	16.0	8.3	3.2	3.7	3.2	14.9	5.2

2 품목군별 수출실적 및 평가

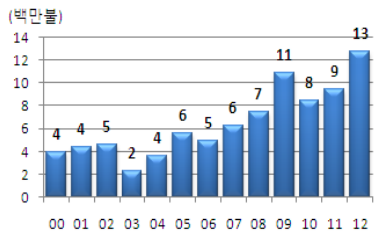
신선농식품

- 파프리카는 국내 생산량 증가와 최대파프리카 시장인 일본 시장규모 확대로 수출이 전년대비 **34.8%** 증가한 **88.8**백만불에 달했다



* 일본 파프리카 수입시장규모 : ('11.11) 24,370톤 → ('12.11) 30,409톤 (24.8% ↑)

- 단감은 상반기 저장단감 수출증가, 금년도 생산호조 및 홍콩, 필리핀, 태국 등 신규시장 수출확대로 전년대비 **36.5%** 증가한 **12.8**백만불을 기록하였다

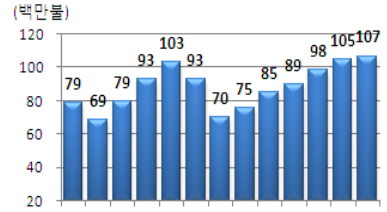


* 국가별 : 말련(5.2, 31%), 캐나다(1.9, 45%), 홍콩(1.4, 48%), 필리핀(1.2, 133%), 태국(0.5, 54%)

● 김치는 미국, 홍콩, 대만 시장 내 신규입점 및 한인마켓 매장 수가 확대되었으나,

- 수출비중이 79%에 육박하는 일본 소비감소로 전년대비 1.9% 증가에 머물렀다

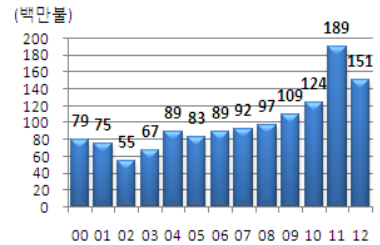
* 국가별 : 일본(84.6, △2.6%), 미국(3.9, 38.6%), 홍콩(3.3, 36.2%), 대만(2.7, 17%)



● 인삼은 한류마케팅과 현지법인 증설 등의 노력으로 대 일본 수출은 증가한 반면,

- 중국의 경기침체 영향으로 '11년 인삼공사의 중화권 재고가 미소진됨에 따라 전년대비 △20% 감소한 151.1백만불 수출에 그쳤다

* 국가별 : 일본(36.7백만불, 10.9%), 중국(32.4, △29%), 홍콩(26.6, △32%), 대만(22.3, △41%)

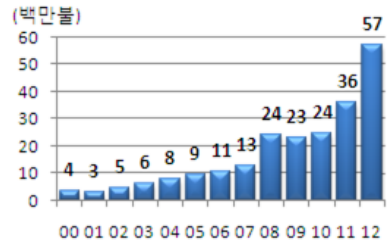


가공식품

● 조제분유는 중화권내 한국산 선호도가 증가하였고 중동지역 신규시장 개척노력으로 57.1백만불 수출하며 전년대비 57.6% 성장세를 이뤘다

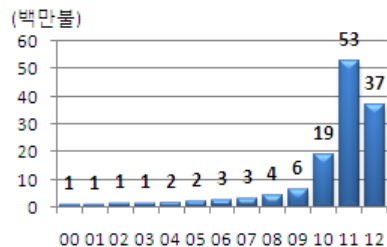
* 중화권 한국산 조제분유 수요 증가추세 : ('11) 25.3백만불 → 40.5(59.8% ↑)

* 국가별 수출현황 : 중국(39.1, 64.0%), 베트남(9.8, 30.9%), 사우디아라비아(5.7, 205.1%)

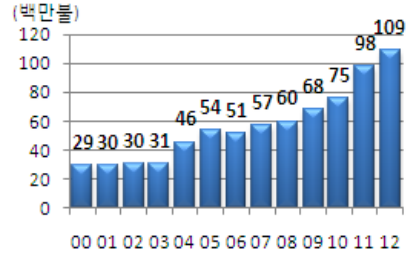


● 막걸리는 여성층을 중심으로 무알콜 음료가 인기를 끄는 등 일본 주류시장의 트렌드 변화에 따라 시장점유율이 하락하며 수출이 전년대비 △30.0% 하락한 36.9백만불에 그쳤다

* 막걸리 국가별 : 일본(32.0백만불, △33.9%), 미국(1.9, 0.2%), 중국(1.4, 11.4%)

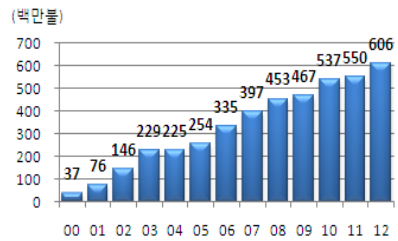


- 비스킷은 프리미엄 과자를 중심으로 일본, 중국 시장에서 점유율을 확대해 나간 결과 전년대비 11.3% 증가한 109백만불로 **최초 1억불을 돌파하였다**



* 비스킷 국가별 : 중국(23.9백만불, 58.1%), 일본(20.5, 7.6%), 홍콩(8.6, 44.5%)

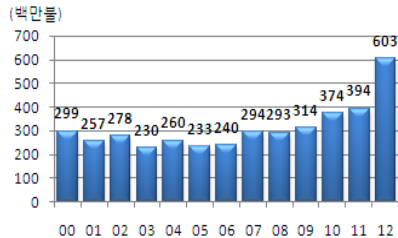
- **궤련**은 중동시장 경기악화에도 불구하고 對 UAE와 베트남 수출이 각각 25.6%, 65.2% 증가하며 전체실적은 전년대비 10.3% 증가하였다



* 국가별 : UAE(199.4백만불, 25.6%), 아프가니스탄(88.7, △1.1%), 베트남(72.4, 65.2%)

수산식품

- 참치는 어획량 증가 및 단가상승, 아세안 지역으로의 수출호조, 인도양 조업선 신규 투입 허가 등의 긍정적인 요인들에 힘입어 전년대비 53.3% 증가하며 **사상 최초 6억불 수출을 달성하였다**

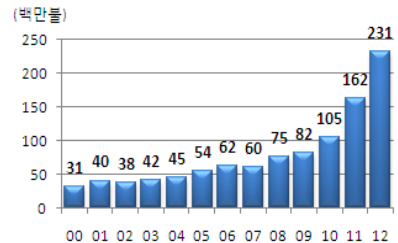


* 참치 연도별 : ('09)314.4백만불 → ('10)374.4 → ('11)393.7 → ('12)603.4

* 참치 국가별 : 일본(238.3, 34.2%), 중국(23.4, 42.5%), 스페인(22.3, 13.4%)

* 참치 ASEAN 지역 수요: 태국(201.9, 49.5%), 필리핀(9.9, 571.4%), 말레이시아(1.0, 81.9%)

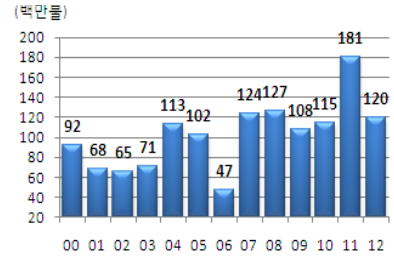
- **김**은 한미 FTA 체결로 인한 관세철폐가 수출에 긍정적인 요소로 작용하였고, 가공용·식재료용 마른김에 대한 한국산 수요증대로 인해 처음으로 **2억불 수출을 달성하였다**



* 김 연도별 : ('09) 0.8억불→ ('10) 1.1 → ('11) → 1.6 → ('12) 2.3 (43.1% ↑)

* 김 국가별 수출 : 일본(71.6백만불, 23.3%), 미국(51.3, 32.6%), 태국(33.6, 118.4%)

● 오징어는 원양 및 연근해안 생산이 증가 하였으나, 수출가격 하락으로 인해 중국, 뉴질랜드 등 주요수출국으로 단가가 하락 하여 전년대비 △34% 감소한 119.6백만불을 수출하였다

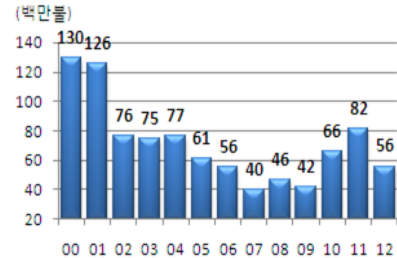


* 오징어 생산량 : 연근해(109,193톤, 전년대비 10.4% 증가), 원양(72,969톤, 14.4% 증가)

* 수출단가 : ('11.12) 2.8\$/kg → ('12.12) 2.1\$/kg

* 국가별 : 중국(39.5백만불, △60.5%), 미국(20.1, 27.1%), 뉴질랜드(18.7, △50.9%)

● 굴은 한국산 패류의 대미수출 중단으로 전년대비 △31.6% 감소했으나 12월부터 굴 통조림품에 대한 중단조치가 해지(단, 1·2호 해역 제외)됨으로써 '13년도에는 통조림 제품 등의 수출회복세가 전망된다



* 국가별 : 일본(33.6백만불, △11.6%), 미국(5.6, △73.7%), 홍콩(5.4, △13.3%)

▣ 국가별로는, 미국(10.7%), EU(15.6%), ASEAN(15.6%) 등 FTA 체결국에 대한 수출이 크게 증가한 반면 중화권 수출은 부진하였다

(단위 : 백만불, %)

국가	일본	중국	미국	러시아	홍콩	대만	ASEAN	EU
수출액	2,389.6	1,279.0	664.1	259.2	297.2	253.8	1,193.1	419.5
증가율	0.7	△7.3	10.7	6.8	△2.7	△2.8	15.6	15.6
(비중)	29.8	16.0	8.3	3.2	3.7	3.2	14.9	5.2

● 對 일본 수출은 참치, 파프리카, 김 등 기존 주력품목들이 수출호조세를 지속했으나, 음료, 김치 등 주요 품목들이 부진하며 전년대비 0.7% 증가한 23.9억불을 기록하였다

* 일본 : 참치(238.3백만불, 34.3%), 제3맥주(144.0, 4.8%), 소주(102.2, 10.3%)

- **중국**은 설탕, 커피조제품 등 지난해 높은 증가세를 보였던 품목들이 보합세에 그쳤고, 주력품목인 인삼의 부진으로 전년대비 $\Delta 7.3\%$ 감소한 12.8억불을 수출하였다
 - * 중국 : 설탕(146.8백만불, 2.8%), 커피조제품(54.2, 6.9%), 인삼(32.4, $\Delta 29\%$)
- **對美 수출**은 한미FTA 체결('12.3.15)에 따른 관세철폐 품목과 켈런, 배, 오징어 등 기존 주요수출품목 위주로 호조세를 보이며 전년대비 10.7% 성장한 6.6억불을 기록하였다
 - * 미국 : 켈런(39.0백만불, 32.6%), 배(26.3, 10.4%), 오징어(20.1, 27.1%)
 - * 한미FTA 관세 즉시철폐 품목 : 음료(50.4, 49.1%), 김(51.3, 32.6%), 김치(3.9, 39.0%), 라면(22.1, 7.8%), 홍삼조제품(3.4, 25.2%)
- **EU**는 참치, 오징어, 김 등 수산식품이 수출증가세를 이끌었으며 국가별로는 네덜란드, 독일, 영국으로 수출이 늘었다
 - * EU : 참치(54.7, 88.5%), 오징어(4.8, 48.5%), 김(4.5, 49.8%)
 - * 국가별 : 네덜란드(99.5, 4.9%), 독일(52.5, 57.9%), 영국(47.9, 28.7%)
- **아세안** 지역으로는 참치, 켈런, 김, 라면, 음료 수출이 대폭 증가하였으며 국가별로는 베트남, 인도네시아, 필리핀 등지로의 수출이 호조세를 나타내었다
 - * 아세안 : 참치(228.7, 50.5%), 켈런(106.4, 57.4%), 김(40.7, 98.7%), 라면(27.2, 42.8%), 음료(25.4, 87.8%)

2012년 대 ASEAN 국가별 수출현황

(단위 : 백만불, %)

국가	총계	베트남	태국	인도네시아	필리핀	싱가포르	말레이시아	캄보디아	미얀마
수출액	1,193.1	338.5	314.4	151.9	123.6	108.7	79.2	49.5	26.2
증가율	15.6	22.9	6.0	25.0	27.1	11.4	$\Delta 17.3$	74.6	38.5

- 세계적인 경제불황의 지속과 환율 하락 등은 2013년도 농식품 수출 전망에 부정적인 요인으로 판단된다
 - 특히, 수출액의 30% 수준에 달하는 일본시장의 비중을 감안하면 엔화 환율의 움직임과 향후 한일관계에 따라 농식품 수출이 영향을 받을 것으로 전망된다

- 농림수산식품부는 금년도 농식품 수출을 둘러싼 어려운 여건들을 극복하기 위해 시장다변화 노력을 가속화하는 한편 韓流 등 유리한 자원을 농식품 수출에 적극 활용할 계획이다

- 시장다변화를 위해 신규 유망시장을 대상으로 면밀한 시장조사를 추진하고 마켓테스트를 위한 안테나샵을 운영하는 등 적극적인 신규 시장개척에 노력하면서
 - 금년부터 실시되는 ‘글로벌 K-Food 프로젝트’(154억원)를 통해 주력시장에 대한 공격적인 홍보·마케팅을 추진할 계획이다

농림수산물 수출실적(2012년 잠정치)

부류별

(단위 : 백만불, %)

구 분	'11년	당월실적(12월)			누계실적(1~12월)		
		'12년	'11년	증감률	'12년	'11년	증감률
전 체	7,691.3	675.2	754.4	△10.5	8,007.8	7,691.3	4.1
○ 신 선	1,015.3	95.9	118.8	△18.9	1,079.8	1,015.3	6.4
- 채소류	178.2	19.9	25.3	△21.2	224.7	178.2	26.1
- 김 치	104.6	8.9	9.9	△9.5	106.6	104.6	1.9
- 인삼류	189.3	15.8	13.6	16.7	151.1	189.3	△20.2
- 화훼류	90.6	12.0	16.2	△25.9	83.8	90.6	△7.5
- 과실류	199.5	23.3	30.8	△24.2	222.2	199.5	11.4
- 버섯류	38.2	3.8	8.9	△57.0	33.5	38.2	△12.4
- 돼지고기	1.6	0.4	0.2	162.4	2.9	1.6	86.8
- 가금육류	40.9	4.7	5.8	△17.8	41.2	40.9	0.9
- 산림부산물	172.4	7.1	8.1	△11.8	213.8	172.4	24.0
○ 가 공	4,368.2	389.8	402.4	△3.2	4,566.0	4,368.2	4.5
* 면 류	290.3	23.3	25.9	△10.3	315.6	290.3	8.7
* 소스류	155.4	13.8	13.2	5.0	171.9	155.4	10.7
* 주 류	403.2	30.2	28.9	4.7	417.4	403.2	3.5
* 과자류	375.1	35.9	34.1	5.1	403.3	375.1	7.5
* 연초류	572.1	65.8	85.0	△22.5	632.8	572.1	10.6
* 유제품	66.8	13.6	7.2	87.6	101.5	66.8	52.1
- 목 재 류	94.1	20.4	5.9	249.2	251.1	94.1	167.0
○ 수 산	2,307.8	189.5	233.2	△18.8	2,362.0	2,307.8	2.4
- 어 류	1,312.3	115.5	149.0	△22.5	1,382.4	1,312.3	5.3
- 연체동물	447.5	27.9	35.5	△21.5	342.3	447.5	△23.5
- 해조류	257.9	22.8	21.6	5.7	316.5	257.9	22.7
- 갑각류	122.8	10.1	12.5	△18.9	124.8	122.8	1.6
- 기 타	167.3	13.2	14.6	△9.6	196.0	167.3	17.2

국가별

(단위 : 백만불, %)

구 분	'11년	당월실적(12월)			누계실적(1~12월)		
		'12년	'11년	증감률	'12년	'11년	증감률
전 체	7,691.3	675.2	754.4	△10.5	8,007.8	7,691.3	4.1
일본	2,374.2	192.0	222.4	△13.6	2,389.6	2,374.2	0.7
중국	1,380.0	113.2	141.0	△19.7	1,279.0	1,380.0	△7.3
미국	599.8	57.8	51.3	12.7	664.1	599.8	10.7
러시아	242.7	20.2	18.0	12.2	259.2	242.7	6.8
홍콩	305.5	26.8	34.2	△21.7	297.2	305.5	△2.7
대만	261.0	25.4	32.8	△22.6	253.8	261.0	△2.8
A S E A N	1,031.9	100.9	97.4	3.6	1,193.1	1,031.9	15.6
E U	362.9	37.5	31.3	20.0	419.5	362.9	15.6
기타	1,133.3	101.4	126.0	△19.5	1,252.3	1,133.3	10.5

주요 품목별

(단위 : 백만불, %)

구 분	'10년	'11년	증감률	당월실적(12월)			누계실적(1~12월)			
				'12년	'11년	증감률	'12년	'11년	증감률	
전 체	5,880.0	7,691.3	30.8	675.2	754.4	△10.5	8,007.8	7,691.3	4.1	
○ 신 선	873.9	1,015.3	16.2	95.9	118.8	△18.9	1,079.8	1,015.3	6.4	
김치	98.4	104.6	6.3	8.9	9.9	△9.5	106.6	104.6	1.9	
인삼	124.2	189.3	52.4	15.8	13.6	16.7	151.1	189.3	△20.2	
채소류	파프리카	58.3	65.9	13.0	6.8	6.5	3.3	88.8	65.9	34.8
	채소종자	24.1	29.0	20.2	3.0	3.3	△7.1	40.5	29.0	39.5
	딸기	26.1	20.6	△21.1	4.8	5.4	△10.4	24.4	20.6	18.2
	멜론	4.7	4.5	△3.8	0.0	0.4	△88.4	4.9	4.5	8.4
	토마토	6.6	9.7	45.3	1.4	1.0	41.9	12.9	9.7	33.7
과실·건과류	배	54.1	47.3	△12.7	7.8	12.4	△37.1	50.0	47.3	5.7
	유자차	32.6	40.4	24.0	4.9	5.9	△17.8	40.8	40.4	0.9
	사과	17.9	8.9	△50.5	0.6	1.7	△65.9	5.9	8.9	△33.4
	단감	8.4	9.4	12.1	1.4	1.7	△21.7	12.8	9.4	36.5
	감귤	1.6	2.7	70.7	1.8	0.8	110.9	4.8	2.7	77.2
화훼류	밤	30.2	29.0	△4.0	0.8	1.0	△23.8	35.9	29.0	24.0
	장미	34.2	25.7	△25.0	1.4	2.3	△40.9	27.1	25.7	5.7
	백합	27.8	33.1	18.8	3.9	5.5	△28.7	30.1	33.1	△9.1
버섯류	국화	13.8	11.2	△18.9	1.1	1.8	△40.0	9.7	11.2	△13.6
	팽이	26.3	22.6	△14.1	2.3	7.0	△67.6	16.9	22.6	△25.4
가금육	새송이	8.6	11.3	32.0	1.2	1.3	△8.2	12.5	11.3	10.3
	닭고기오리고기	31.4	40.6	29.5	4.7	5.8	△17.9	41.0	40.6	0.9
○ 가 공	3,207.9	4,368.2	36.2	389.8	402.4	△3.2	4,566.0	4,368.2	4.5	
가공 식품	결련	536.5	549.8	2.5	61.5	83.2	△26.2	606.4	549.8	10.3
	제3맥주	97.1	137.9	42.0	8.9	7.0	26.7	144.3	137.9	4.7
	커피조제품	205.9	302.2	46.8	26.2	31.7	△17.5	297.2	302.2	△1.7
	라면	157.2	186.7	18.8	15.1	17.1	△11.6	206.2	186.7	10.4
	설탕	242.1	291.2	20.2	18.9	29.3	△35.7	262.9	291.2	△9.7
	소주	123.1	114.3	△7.1	9.9	11.5	△13.9	126.8	114.3	10.9
	음료	102.6	184.1	79.5	14.7	12.5	17.1	225.9	184.1	22.7
	비스킷	75.4	97.9	29.9	9.6	8.9	7.4	109.0	97.9	11.3
	맥주	46.8	65.4	39.6	4.2	3.5	19.3	67.8	65.4	3.7
	마요네즈	38.1	37.2	△2.4	2.0	2.5	△18.5	37.8	37.2	1.5
	고추장	16.8	21.8	29.8	2.0	1.9	7.5	23.8	21.8	9.0
	막걸리	19.1	52.7	176.2	2.0	3.8	△47.0	36.9	52.7	△30.0
조제분유	24.4	36.2	48.6	9.2	3.5	164.7	57.1	36.2	57.6	
○ 수 산	1,798.2	2,307.8	28.3	189.5	233.2	△18.8	2,362.0	2,307.8	2.4	
어류	참치	374.4	393.7	5.2	42.6	52.5	△18.8	603.4	393.7	53.3
	고등어	27.4	48.8	78.4	6.3	7.5	△17.0	71.6	48.8	46.7
	삼치	54.6	67.6	23.8	6.2	10.8	△42.5	53.7	67.6	△20.6
	넙치	78.8	79.4	12.3	7.4	4.7	57.9	69.0	79.4	△13.0
연체	오징어	114.8	180.9	57.7	9.1	10.1	△10.1	119.6	180.9	△33.9
	굴	66.1	81.7	23.7	3.8	4.2	△8.3	55.8	81.7	△31.6
동물	전복	36.8	52.4	42.2	7.4	7.9	△6.7	58.2	52.4	11.3
	김	105.2	161.5	53.5	16.4	15.7	4.4	231.0	161.5	43.1
해조류	미역	19.0	40.8	114.1	1.9	1.6	16.1	36.5	40.8	△10.5
	수생동물	12.4	13.1	5.5	1.4	0.4	256.1	13.4	13.1	2.3

주요 품목별(누계금액순)

(단위 : 백만불, %)

구 분	'10년	'11년	증감률	당월실적(12월)			누계실적(1~12월)		
				'12년	'11년	증감률	'12년	'11년	증감률
전 체	5,880.0	7,691.3	30.8	675.2	754.4	△10.5	8,007.8	7,691.3	4.1
○ 가 공	3,207.9	4,368.2	36.2	389.8	402.4	△3.2	4,566.0	4,368.2	4.5
○ 수 산	1,798.2	2,307.8	28.3	189.5	233.2	△18.8	2,362.0	2,307.8	2.4
○ 신 선	873.9	1,015.3	16.2	95.9	118.8	△18.9	1,079.8	1,015.3	6.4
커피련	536.5	549.8	5.2	61.5	83.2	△26.2	606.4	549.8	10.3
참치	374.4	393.7	2.5	42.6	52.5	△18.8	603.4	393.7	53.3
커피조제품	205.9	302.2	46.8	26.2	31.7	△17.5	297.2	302.2	△1.7
설탕	242.1	291.2	20.2	18.9	29.3	△35.7	262.9	291.2	△9.7
김	105.2	161.5	53.5	16.4	15.7	4.4	231.0	161.5	43.1
음료	102.6	184.1	79.5	14.7	12.5	17.1	225.9	184.1	22.7
라면	157.2	186.7	18.8	15.1	17.1	△11.6	206.2	186.7	10.4
인삼	124.2	189.3	52.4	15.8	13.6	16.7	151.1	189.3	△20.2
제3맥주	97.1	137.9	42.0	8.9	7.0	26.7	144.3	137.9	4.7
소주	123.1	114.3	△7.1	9.9	11.5	△13.9	126.8	114.3	10.9
오징어	114.8	180.9	57.7	9.1	10.1	△10.1	119.6	180.9	△33.9
비스킷	75.4	97.9	29.9	9.6	8.9	7.4	109.0	97.9	11.3
김치	98.4	104.6	6.3	8.9	9.9	△9.5	106.6	104.6	1.9
파프리카	58.3	65.9	13.0	6.8	6.5	3.3	88.8	65.9	34.8
고등어	27.4	48.8	78.4	6.3	7.5	△17.0	71.6	48.8	46.7
넙치	78.8	79.4	12.3	7.4	4.7	57.9	69.0	79.4	△13.0
맥주	46.8	65.4	39.6	4.2	3.5	19.3	67.8	65.4	3.7
전복	36.8	52.4	42.2	7.4	7.9	△6.7	58.2	52.4	11.3
조제분유	24.4	36.2	48.6	9.2	3.5	164.7	57.1	36.2	57.6
굴	66.1	81.7	23.7	3.8	4.2	△8.3	55.8	81.7	△31.6
삼치	54.6	67.6	23.8	6.2	10.8	△42.5	53.7	67.6	△20.6
배	54.1	47.3	△12.7	7.8	12.4	△37.1	50.0	47.3	5.7
닭고기·오리고기	31.4	40.6	29.5	4.7	5.8	△17.9	41.0	40.6	0.9
유자차	32.6	40.4	24.0	4.9	5.9	△17.8	40.8	40.4	0.9
채소종자	24.1	29.0	20.2	3.0	3.3	△7.1	40.5	29.0	39.5
마요네즈	38.1	37.2	△2.4	2.0	2.5	△18.5	37.8	37.2	1.5
막걸리	19.1	52.7	176.2	2.0	3.8	△47.0	36.9	52.7	△30.0
미역	19.0	40.8	114.1	1.9	1.6	16.1	36.5	40.8	△10.5
밤	30.2	29.0	△4.0	0.8	1.0	△23.8	35.9	29.0	24.0
백합	27.8	33.1	18.8	3.9	5.5	△28.7	30.1	33.1	△9.1
장미	34.2	25.7	△25.0	1.4	2.3	△40.9	27.1	25.7	5.7
딸기	26.1	20.6	△21.1	4.8	5.4	△10.4	24.4	20.6	18.2
고추장	16.8	21.8	29.8	2.0	1.9	7.5	23.8	21.8	9.0
팽이	26.3	22.6	△14.1	2.3	7.0	△67.6	16.9	22.6	△25.4
해삼	12.4	13.1	5.5	1.4	0.4	256.1	13.4	13.1	2.3
토마토	6.6	9.7	45.3	1.4	1.0	41.9	12.9	9.7	33.7
단감	8.4	9.4	12.1	1.4	1.7	△21.7	12.8	9.4	36.5
새송이	8.6	11.3	32.0	1.2	1.3	△8.2	12.5	11.3	10.3
국화	13.8	11.2	△18.9	1.1	1.8	△40.0	9.7	11.2	△13.6
사과	17.9	8.9	△50.5	0.6	1.7	△65.9	5.9	8.9	△33.4
멜론	4.7	4.5	△3.8	0.0	0.4	△88.4	4.9	4.5	8.4
감귤	1.6	2.7	70.7	1.8	0.8	110.9	4.8	2.7	77.2

Ⅱ. 2013년 수출전망

1 세계경제 전망

- IMF 등 주요기관들은 세계경제가 금년 한해 완만한 회복세를 보일 것으로 전망하고 상반기보다 하반기 경기 반등에 무게를 두고 있음. 특히 미국과 중국의 경기 회복에 초점을 둠
- 유럽 재정위기는 작년보다는 전반적으로 위기수준이 완화되겠으며, 주요국의 통화정책 및 글로벌 유동성 부문에서 양적 완화가 강화되어 상대적으로 원화강세로 수출에 부정적 영향
- 주요 원자재 가격 변동성 부문에도 금년에는 수급 등 펀더멘탈에 큰 변화가 없는 가운데 경기 불확실성이 대체로 박스권 움직임 예상
- 작년에 이어 금년에도 Big3(미·중·유로존) 등 주요국의 정책대응 시기 및 강도에 따라 재정위기와 경기 방향이 크게 좌우될 전망
- 국제유가는 글로벌 경기의 점진적 회복에도 불구하고 공급 확대, 높은 재고수준 등의 영향으로 안정세를 보일 전망
- 세계 경제가 위기에서 한 발짝 벗어나 최근 경기 회복의 긍정적 신호가 나타나고 있다고 국내 경제전문가들이 진단하고 있음

* 최근 외환시장의 3대특징 및 시사점

최근 들어 2008년 금융위기 이후 보기 드물었던 ① 달러화 약세 반전, ② 엔화의 가파른 약세, ③ 원화의 두드러진 강세 현상이 동시에 발생했다. 2008년 금융위기 이후 달러화 약세와 원화 강세 현상이 발생한 시기에도 엔화는 일반적으로 달러화 대비 강세를 기록했다. 2012년 9월 중순부터 강세를 보이던 달러화 가치가 11월 중순 이후 약세로 반전했다. (출처 : SERI보고서)

- ⇒ 금년 세계경제는 상반기까지는 글로벌 경기둔화 및 유럽 재정위기 관련 불확실성 등으로 불안정한 조정 흐름이 지속된 후 하반기 반등 모색 전망

2

수출 전망

■ 국내 경제는 아직 내수와 수출이 부진한 추세를 이어가고 있음

● '13년은 저성장 시대에 대한 적응과 극복 노력이 동시에 필요

수출	· 위기의 일상화·장기화로 세계수요 부진 · 원고, 신보호무역 등 수출환경 불투명
내수	· 가계부채 문제, 주택가격 하락 → 소비부진 · 수출회복 지연, 건설경기 부진 → 투자부진
정부	· 성장부진으로 인한 세수 부족 · 복지지출 증대

* 출처 : 삼성경제연구소

■ 작년말부터 본격화된 원화 강세는 가격 경쟁력 약화와 수출채산성 악화로 이어져 수출활동이 둔화 예상

* 원·엔 환율이 1% 떨어지면 총수출 역시 1% 정도 떨어진다는 진단

● 국내 경제성장 전망(한국은행 '13년1월)

- 국내경제 : 2013년 GDP 성장률 연간 2.8% 전망
- 민간소비 : 소비심리 회복, 실질구매력 증가로 완만히 개선 2.8% 증가
- 투자부문 : 2013년 설비투자 2.7%내외, 건설투자 2.5%내외 증가 전망
- 대외부문 : 2013년 상품수출 완만한 회복 5.5%, 상품수입 4.0%
- 소비자물가 : 2013년 연간 2.5% 상승으로 안정세 유지
- 고용부문 : 2013년 취업자수는 30만명 내외 증가 전망
- 원/달러 환율 : 2013년 연평균 1,062 원 전망

■ 금년도 농수산물식품 수출을 둘러싼 어려운 여건들을 극복하기 위해 FTA 및 한류 활용 등을 통한 시장다변화 노력과 보다 공격적인 홍보·마케팅을 적극 추진함이 바람직함



aT, 농수산물 해외수출시장 분석

■ aT(한국농수산물유통공사)가 aT센터 해외지사와 현지 바이어 등을 통해 분석한 ‘2013년 농수산물 수출전망’ 발표에 의하면,

● 지난해에 이어 올해도 미국 달러화와 엔화 환율 하락으로 원화 강세가 지속돼 전반적인 수출여건이 불리한 편임

● 다행히 올해 하반기부터 세계경제가 점차 회복될 전망이고, 중국 및 아세안 신흥시장을 중심으로 고품질 위주의 상품과 한류 열풍을 적극 활용하면 수출이 지속적으로 확대될 것으로 전망

● 올해 일본시장 수출전망은 다소 불투명한 반면, 중국과 아세안 시장은 매우 밝은 것으로 분석됨

- 올해 일본 수출전망은 원화강세 영향과 한·일관계 회복 지연 등으로 전년 대비 5~8% 증가에 그칠 것으로 예상

- 반면 올해 대중국 수출액이 전년 대비 10~15% 크게 확대될 것으로 전망됐는데 지난해 중국의 위생기준 변경으로 인한 통관지연이 올해 정상화되고 내수소비 확대 등으로 한국식품의 소비 증가가 예상되기 때문임

- 홍콩·싱가포르·베트남 등 아세안도 한류 및 ‘케이팝(K-POP)’ 열풍으로 한국산 소비가 확대돼 수출액은 전년대비 15~20%증가할 것으로 전망

■ aT는 또 해외 바이어들로부터 올해 히트예감 품목을 추천받은 결과 ▲ 딸기는 홍콩·싱가포르·러시아 ▲고추장은 미국·일본 ▲분재와 알로에 음료는 미국·중국 ▲조제분유는 중국에서 인기를 끌 것으로 예상됨

부 록**미국 식품안전현대화법(FSMA) 이행을 위한 규정(안) 공청 안내**

미국 FDA는 2013년 1.11일자로 2011년 1월 4일 통과된 식품안전현대화법(FSMA) 이행을 위한 2개의 제안규정에 대한 공청(Public Comment)을 실시하고 있음

이에 우리 공사에서는 미국 식품안전현대화법 이행 관련 공청실시에 대해 '수출입 뉴스'(주2회), 'aT Focus'(월간) 및 'KATI'(농수산물 수출정보) 등을 통해 수출업계에 알릴 계획임을 알려 드림

* 공청관련 FDA 웹사이트 : <http://www.fda.gov/Food/FoodSafety/FSMA/default.htm>

미국FSMA법 이행 제안규정 주요 내용

개요(OVERVIEW)

- 다수의 국가들이 국민을 위한 식품안전의 유효성 향상에 매진하고 있음. 미국의 식품매개 질병은 매년 3,000명을 죽음으로, 130,000명을 병원으로 내몰면서 소비자들에 큰 피해를 입히고 있음. 미국 식품의약청(FDA)은 미국 내 식품매개 질병을 예방하기 위해 두 가지 새 식품안전 규제를 제안함.
- 공개 코멘트가 게시되는 규정안은 다음의 두 가지임 ;
 - ① “인간소비식품의 현행우수제조관리기준, 위험분석, 리스크기반 예방제어 (Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food)”
 - ② “인간소비를 위한 생산품의 재배, 수확, 포장, 보관 기준(Standards for the Growing, Harvesting, Packing, and Holding of Produce for Human Consumption)”
 상기 규정안에 대한 자세한 내용은 FDA의 웹사이트에서 확인 가능함;
 (<http://www.fda.gov/Food/FoodSafety/FSMA/default.htm>)
- 본 규정안은 FDA의 식품안전현대화법(FSMA)의 일부로써 시행됨. FSMA는 문제 발생 후 대책을 세우는 기존의 방식에서 탈피하여 문제 발생의 예방에 더욱 초점을 맞추는 법으로, 예방은 시스템 상의 모든 참가자들의 공동 책임임.
- 두 규정안은 모두 과학에 기반을 두고 있으며, 융통성이 있음.
- 본 규정안은 FDA 관할권 하의 미국 식품공급 일부에 적용되며, 농무부(USDA)가 관할권을 갖고 있는 육류, 가금류, 난제품 등에는 적용되지 않음.
- FDA는 해외 산업체, 정부, 국제사회의 공공 및 기타 회원 등이 위 규정안을 검토하고, 공개 코멘트에 참여하길 장려함. 이 제안은 게시 일로부터 120일 간 개방되어 있을 것임.
- 미국 정부는 2013년 1월 4일 WTO SPS 위원회에 상기 규정안 및 관련 꼬리표 지침을 보고했으며, WTO의 온라인 통지가 조속히 이뤄지길 바람.
- **첫 번째 규정안**은 인간소비식품에 관한 예방제어에 관한 사항으로, 미국 내·외 생산여부에 관계없이, 미국 내 판매되는 모든 식품의 제조업자를 대상으로 해 식품매개 질병의 발생을 막기 위한 공식적인 계획을 수립하기를 요구함.

- 당해 계획서는 잠재적인 식품 안전 위해요소를 식별하고, 그것을 예방하기 위한 조치를 취하고, 그러한 조치들이 효과가 있는지 여부를 확인하고, 발생 가능한 문제를 어떻게 고칠지에 대한 대략적인 윤곽을 잡는 것에 활용될 것임.
- FDA는 본 규정안이 연방정부의 공보에 의해 최종적으로 공표되고 일 년 후, 중대규모의 식품제조 업체들 이에 먼저 응하도록 제안하고, 이를 차후 소규모 및 초소규모 업체로 확대해갈 예정임.
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가. FSMA 제안규정 1)

Fact Sheet on the FSMA Proposed Rule for Preventive Controls for Human Food: Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food

Updated January 14, 2013

[Preventive Standards under the FSMA Main Page](#)

View the [Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food Proposed Rule](#).

See also:

- [Analysis of Economic Impacts – Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food \(PDF: 1.4MB\)](#)
 - [Draft Qualitative Risk Assessment of Risk of Activity/Food Combinations for Activities \(Outside the Farm Definition\) Conducted in a Facility Co-Located on a Farm \(PDF: 660KB\)](#)
 - [External Peer Review of the FDA/CFRAN Draft Qualitative Risk Assessment: Risk of Activity/Food Combinations for Activities \(Outside the Farm Definition\) Conducted in a Facility Co-Located on a Farm \(PDF: 585KB\)](#)
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Summary

FDA has released for public comment its proposed rule on preventive controls for human food that focuses on preventing problems that can cause foodborne illness. The proposed rule, which is required by the FDA Food Safety Modernization Act, would apply to many domestic and foreign firms that manufacture, process, pack or hold human food. These firms would be required to have written plans that identify hazards, specify the steps that will be put in place to minimize or prevent those hazards, identify monitoring procedures and record monitoring results and specify what actions will be taken to correct problems that arise. FDA would evaluate the plans and continue to inspect facilities to make sure the plans are being implemented properly. FDA will soon issue its proposed rule on importer foreign supplier verification; future proposed rules will address preventive controls for animal food, and accreditation of third-party auditors.

Under the proposed rule, the first compliance date would be one year after the final rule is published in the Federal Register. Recognizing that smaller businesses may need more time to comply with the requirements, FDA is proposing to allow two years for small businesses and three years for very small businesses to comply. The proposed rule will publish on January 16, 2013 and comments are due within 120 days of that date. FDA will hold public meetings to explain the proposal and provide additional opportunity for input.

Background

High-profile outbreaks of foodborne illness over the last decade and data showing that such illnesses strike one in six Americans each year have caused a widespread recognition that we need a new, modern food safety system that prevents food safety problems in the first place--not a system that just reacts once they happen. The FDA Food Safety Modernization Act (FSMA) was signed into law on January 4, 2011, to better protect public health by helping to ensure the safety and security of the food supply. FSMA embraces preventing food safety problems as the foundation of a modern food safety system and recognizes the need for a global approach to food safety. Section 103 of FSMA, Hazard analysis and risk-based preventive controls, requires facilities to evaluate hazards, identify and implement preventive controls to address these hazards, verify that the preventive controls are adequate to control the hazards identified, take corrective action when needed, and maintain a written plan and documentation.

Who is Covered?

The proposed rule on preventive controls for human food would apply to facilities that manufacture, process, pack or hold human food. In general, with some exceptions, the new preventive control provisions would apply to facilities that are required to register with FDA under FDA's current food facility registration regulations. Facilities that are required to register include manufacturers, processors, warehouses, storage tanks and grain elevators. **Exemptions and modified requirements** in the proposed rule are listed at the end of this page. FDA may withdraw certain exemptions if it determines it is necessary to protect the public health and prevent or control a foodborne illness outbreak. Activities within the definition of "farm" would not be subject to the proposed rule, and the proposed rule would clarify those activities.

Highlights of the Proposed Rule

The rule has two major features. First, it contains new provisions requiring hazard analysis and risk-based preventive controls. Second, it would revise the existing Current Good Manufacturing Practice (CGMP) requirements found in 21 CFR part 110. The new preventive control requirements and the modified CGMPs would be placed in a new Part 117, "Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food."

Hazard Analysis and Risk-Based Preventive Controls

Under the proposal, each owner, operator or agent in charge of a facility (those required to register with FDA under Section 415 of the FD&C Act), with certain exceptions, would be required to comply with the hazard analysis and risk-based preventive controls. The preventive controls are **science- and risk-based** in that the rule would require controls only where necessary to prevent hazards to public health and exempt certain facilities from requirements or modify requirements for certain low-risk activities. Second, they are **flexible** in that firms could develop preventive controls that fit their products and operations, as long as they are adequate to significantly minimize or prevent all food safety hazards that are reasonably likely to occur.

The proposed hazard analysis and risk-based preventive control requirements are similar to Hazard Analysis and Critical Control Points (HACCP) systems, which were pioneered by the food industry and are required by FDA for juice and seafood. Operators of a facility would be required to understand the hazards that are reasonably likely to occur in their operation and to put in place preventive controls to minimize or prevent the hazards. Although this proposed rule aligns well with HACCP, it differs in part in that preventive controls may be required at points other than at critical control points and critical limits would not be required for all preventive controls.

Each covered facility would be required to prepare and implement a **written food safety plan**, which would include the following:

- A **Hazard analysis** that identifies and evaluates known or reasonably foreseeable hazards for each type of food manufactured, processed, packed or held at the facility.
- **Preventive controls**, which would be required to be identified and implemented to provide assurances that hazards that are reasonably likely to occur will be significantly minimized or prevented. Preventive controls would be required to include, as appropriate: (1) process controls, (2) food allergen controls, (3) sanitation controls, and (4) a recall plan. However, the preventive controls required would depend on which, if any, hazards are reasonably likely to occur. It is unlikely that all possible prevention measures and verification procedures would be applied to all foods at all facilities. FDA believes a supplier approval and verification program is a risk-based and appropriate control to significantly minimize or prevent hazards from raw materials and ingredients that is consistent with current scientific understanding of food safety practices and is seeking comment on such a program.
- **Monitoring** procedures to provide assurance that preventive controls are consistently performed and records to document the monitoring.
- **Corrective actions** that would be used if preventive controls are not properly implemented. Facilities

would be required to correct problems and minimize the likelihood of reoccurrence, evaluate the food for safety and prevent affected food from entering commerce when necessary. If specific corrective action procedures were not identified for the problem, or if a preventive control were found to be ineffective, the facility would also be required to re-evaluate the food safety plan to determine if modifications are needed.

- **Verification** activities to ensure that preventive controls are consistently implemented and are effective. Verification activities might include validation that the preventive controls are adequate for their purpose and are effective in controlling the hazard, activities to verify that controls are operating as intended and review of monitoring records. In addition, the proposed rule would require reassessment of the food safety plan at least every three years and at other times as appropriate. FDA recognizes that product and environmental testing programs are science-based verification activities that are commonly accepted in many sectors of the food industry and is seeking comment on these programs. FDA also is asking for comments regarding review of customer and other complaints as part of verification.
- **Recordkeeping.** Facilities would be required to keep a written food safety plan, including the hazard analysis. They also would be required to keep records of preventive controls, monitoring, corrective actions, and verification.

A qualified individual would be required to prepare the food safety plan, develop the hazard analysis, validate the preventive controls, review records and conduct a reanalysis of the food safety plan (or oversee these activities). To be qualified, an individual would be required to successfully complete training in accordance with a standardized curriculum or be otherwise qualified through job experience to develop and apply a food safety system.

Revisions to the Current Good Manufacturing Practices

The CGMP regulation would be modified to clarify that certain existing CGMP provisions requiring protection against contamination of food also require protection against cross-contact of food by allergens. Further, language in the regulation would be updated and certain provisions containing recommendations would be deleted. In addition, FDA is requesting comment on whether it should mandate training for employees and supervisors, including a requirement for records that document training, and whether it should require, rather than recommend, certain provisions, such as cleaning non-food-contact surfaces of equipment as frequently as necessary to protect against contamination of food and food-contact surfaces.

Generally, CGMP provisions would still apply to facilities that would be exempt from the hazard analysis and risk-based preventive control requirements or that would be subject to modified requirements.

Draft Qualitative Risk Assessment of Risk of Activity/Food Combinations for Activities (Outside the Farm Definition) Conducted in a Facility Co-Located on a Farm

Along with the proposed rule, FDA is announcing the availability of, and requesting comment on, [a draft qualitative risk assessment](#) designed to provide a science-based risk analysis of those on-farm activity/food combinations that would be considered not reasonably likely to introduce hazards that are reasonably likely to cause serious adverse health consequences. Interested persons may submit written comments regarding the draft risk assessment. Public comments will be considered in preparing a final version of the risk assessment.

The draft risk assessment was submitted to a group of scientific experts external to FDA for [peer review](#), and the draft was revised, as appropriate, considering the comments of those experts.

Effective and Compliance Dates and Definitions for Small and Very Small Businesses

FDA is proposing the following effective and compliance dates for businesses subject to the proposed rule. Recognizing that small and very small businesses may need more time to comply with the requirements, the compliance dates are adjusted accordingly.

- **Effective Date:** 60 days after the final rule is published

- **Compliance Dates:**
 - **Small Businesses**—a business that employs fewer than 500 persons and that does not qualify for an exemption would have to comply two years after publication of the final rule.
 - **Very Small Businesses**—Three options are being proposed for the definition of a very small business: less than \$250,000, less than \$500,000, and less than \$1,000,000 in total annual sales of food, adjusted for inflation. Very small businesses, which would be considered “qualified facilities” and subject to modified requirements for preventive controls, would have to comply three years after publication of the final rule.
 - **Other Businesses**—a business that is not small or very small and does not qualify for an exemption would have to comply one year after publication of the final rule.

Economic Impact of the Proposed Rule

The proposed rule is aimed at reducing the public health burden of foodborne illness. FDA estimates that close to 1,000,000 illnesses each year are attributable to food that would fall under the scope of this proposed rule. The economic cost of illnesses avoided is \$2 billion a year. The proposed rule has a first-year cost to industry of \$701 million and an annualized cost of \$472 million using a 7 percent discount rate according to Office of Management and Budget guidelines. The proposed rule would cover an estimated 97,600 domestic and 109,200 foreign facilities.

Rulemaking Process and How to Submit Comments

The proposed rule, “Current Good Manufacturing Practice and Hazard Analysis and Risk-Based Preventive Controls for Human Food,” is published in the Federal Register so that the public can review it and submit comments. FDA considers comments received during the comment period on the proposed rule and then considers revising the rule, based on its review of the comments, before issuing a final rule. The proposed and final rules and supporting documents are filed in FDA’s official docket on <http://www.regulations.gov> and also can be accessed on the [FSMA website](#).

FDA has conducted extensive outreach to industry, the consumer community, other government agencies and the international community to gain input and perspective on how best to implement this and other proposed rules required by FSMA. That input and perspective shaped the proposed rules in a way that will help to ensure they are practical, flexible and effective. FDA held a public meeting on preventive controls in April 2011, and will hold one or more public meetings during the comment period to explain the proposal and provide additional opportunity for input.

Assistance to Industry

FDA will publish within six months of publication of the final rule, a guidance document that provides the requirements in plain language to help businesses, particularly small businesses, comply with the hazard analysis and preventive controls requirements. In addition, FDA has helped to establish a Food Safety Preventive Controls Alliance to develop a core training curriculum and to disseminate information on hazards and controls to help industry, particularly small and mid-sized businesses, comply with the new requirements.

For Additional Information

- [Video: The Rulemaking Process: A Primer by FDA](#)
- [Video: FDA Food Safety Modernization Act, A Primer by FDA](#)
- [Fact sheet: The Food Safety Law and the Rulemaking Process: Putting FSMA to Work](#)

Exemptions and Modified Requirements for Preventive Controls for Human Food*

Exemptions and Modified Requirements for Preventive Controls for Human Food*

Type of facility or operation	Hazard Analysis and Risk Based Preventive Control Requirements	Current Good Manufacturing Practices (CGMP)
Certain low-risk manufacturing/processing activities, packing or holding activities that are conducted by small or very small businesses on farms for specific foods. Examples including making jams and jellies and manufacturing honey and maple syrup.	Exempt	Must comply
Foods subject to the low-acid canned food (LACF) regulation. The exemption for facilities producing low-acid canned food applies only to those microbiological hazards addressed by LACF regulation.	Exempt	Must comply
Foods subject to HACCP regulations (seafood and juice)	Exempt	Must comply
Dietary supplements	Exempt	Must comply with dietary supplement CGMPs
Alcoholic beverages at certain alcohol-related facilities, and certain prepackaged food sold in limited quantities along with alcoholic beverages at the same facilities.	Exempt	Must comply
A facility that has food sales averaging less than \$500,000 per year during the last three years. In addition, sales to qualified end users must exceed sales to others. A qualified end-user is either a consumer (in any location), or a restaurant or retail food establishment purchasing the food for sale directly to consumers that is located in the same State or not more than 275 miles away	Modified Preventive Control Requirements Apply: Facility must certify that it is a “qualified facility” and that it is implementing and monitoring preventive controls or complying with applicable non-Federal food safety law (which triggers a labeling requirement). Also must maintain records to support certifications.	Must comply
A very small business. Three options are being proposed to define a very small business: less than \$250,000, less than \$500,000, and less than \$1,000,000 in total annual sales of food, adjusted for inflation.	Modified Preventive Control Requirements Apply: Facility must certify that it is a “qualified facility” and that it is implementing and monitoring preventive controls or complying with applicable non-Federal food safety law (which triggers a labeling requirement). Also must maintain records to support certifications.	Must comply
Activities within the definition of “farm”	Exempt	Exempt

<p>Facilities, such as warehouses, that only store packaged foods that are not exposed to the environment</p> <ul style="list-style-type: none"> • Packaged food for which refrigeration is not required for safety • Packaged food for which refrigeration is required for safety 	<p>If refrigeration is not required for safety, the facility is exempt</p> <p>If refrigeration is required for safety, modified preventive control requirements apply: Requirements concerning temperature controls, including monitoring, verification and records.</p>	<p>Must comply</p>
<p>Facilities such as grain elevators and warehouses that store only raw agricultural commodities (other than fruits and vegetables) intended for further distribution or processing.</p>	<p>Exempt (provided they are solely engaged in such storage)</p>	<p>Exempt</p>
<p>Facilities, such as warehouses, that store raw agricultural commodities that are fruits and vegetables intended for further distribution or processing.</p>	<p>Must comply*</p>	<p>Exempt</p>

* This chart does not contain all of the information necessary to determine the proposed requirements for compliance in a particular circumstance. Consult the proposed rule for specific requirements

나. FSMA 제안규정 2)

Fact Sheet on the FSMA Proposed Rule for Produce: Standards for the Growing, Harvesting, Packing, and Holding of Produce for Human Consumption

[Produce Safety Standards under the FSMA Main Page](#)

View [the Standards for the Growing, Harvesting, Packing, and Holding of Produce for Human Consumption Proposed Rule](#).

See also:

- [Analysis of Economic Impacts – Standards for the Growing, Harvesting, Packing and Holding of Produce for Human Consumption \(PDF: 1.7MB\)](#)
 - [What You Need to Know: Proposed Rule on Standards for Produce Safety Under the FDA Food Safety Modernization Act \(FSMA\)](#)
 - [Fact Sheets on Subparts of the Rule](#)
 - [Equipment, Tools, Buildings, and Sanitation: Subpart L](#)
 - [Biological Soil Amendments: Subpart F](#)
 - [Domesticated and Wild Animals: Subpart I](#)
 - [Personnel Qualifications, Training, and Health and Hygiene: Subparts C and D](#)
 - [Agricultural Water: Subpart E](#)
 - [Sprouts: Subpart M](#)
-

Summary

On January 4, 2013, FDA released for public comment its proposed rule to establish science-based standards for growing, harvesting, packing and holding produce on domestic and foreign farms. The proposed rule is one of five proposed rulemakings that would lay the cornerstone of the prevention-based, modern food safety system we need.

Section 105 of the Food Safety Modernization Act (FSMA) directs FDA to set science-based standards for the safe production and harvesting of fruits and vegetables that the Agency determines minimize the risk of serious adverse health consequences or death. FDA proposes to set standards associated with identified routes of microbial contamination of produce, including: (1) agricultural water; (2) biological soil amendments of animal origin (3) health and hygiene (4) animals in the growing area and (5) equipment, tools and buildings. The proposed rule includes additional provisions related to sprouts.

The proposed produce rule covers most fruits and vegetables while they are in their raw or natural (unprocessed) state. It would not apply to raw agricultural commodities that are rarely consumed raw, those produced for personal or on-farm consumption, and (with certain documentation) those destined for commercial processing, such as canning, that will adequately reduce microorganisms of public health concern.

Some farms would not be covered by the rule, or would be eligible for a partial exemption based on factors including the monetary value of their food sales and to whom they sell. The partial exemption would still subject eligible farms to certain modified requirements, and could be withdrawn in certain circumstances.

FDA is proposing that the requirements be effective 60 days after a final rule is published in the Federal Register. Recognizing that small and very small businesses may need more time to comply with the requirements, compliance dates would be phased in based on business size.

In a separate Federal Register notice, FDA will be announcing a series of public meetings to explain the proposal and additional proposed rules and to provide additional opportunity for input.

Background

FSMA was signed into law by President Obama on January 4, 2011 to better protect public health by helping to ensure the safety and security of the food supply. FSMA embraces preventing food safety problems as the foundation of a modern food safety system.

It is widely recognized that produce is an essential component of a healthy diet, and the safe production and harvesting of fruits and vegetables helps consumers to maintain healthy diets. Foodborne illness outbreaks associated with contaminated produce over the last decade have caused a widespread recognition that we need a new, modern food safety system that prevents food safety problems in the first place—not a system that just reacts once they happen. FDA's analysis of available foodborne illness outbreak data document 131 outbreaks associated with contaminated produce between 1996 and 2010, causing more than 14,000 illnesses and 34 deaths. These foodborne illness outbreaks were caused mainly by biological hazards such as *Salmonella*, *E.coli*O157:H7, *Shigella*, Hepatitis A, and *Cyclospora*. Therefore, the proposed FDA produce rule focuses on setting enforceable standards that are reasonably necessary to prevent the introduction of known or reasonably foreseeable biological hazards and providing reasonable assurances that produce is not adulterated on account of these hazards.

The proposed rule builds on the more than 10 years of produce safety activities by the FDA, as well as the produce industry and other stakeholders, to put in place science-based best practices and standards for the growing, harvesting, packing and holding of fruits and vegetables. For instance, the FDA has issued guidance to the industry on Good Agricultural Practices (GAPs) and commodity-specific guidance on sprouts, and has also developed draft commodity-specific guidance that addresses food safety considerations for tomatoes, melons and leafy greens. Industry efforts have included development of numerous commodity-specific guidance documents that address on-farm food safety practices. Additionally, the industry, in collaboration with the U.S. Department of Agriculture and State departments of agriculture, has developed Leafy Greens Marketing Agreements in California and Arizona. In 2009, the Association of Food and Drug Officials published a Model Code for Produce Safety that was developed with input from industry, consumer groups, researchers, and state and local public health officials. Florida also passed state regulations for the safe production and handling of fresh market tomatoes. We also considered relevant international guidelines related to the safety of fruits and vegetables in developing this proposed rule.

Who is Covered by the Rule?

The proposed rule would establish science-based minimum standards for the safe growing, harvesting, packing, and holding of produce in its raw or natural (unprocessed) state on farms. For the purposes of this proposed rule, produce means fruits and vegetables grown for human consumption. This would include, for example, lettuce, spinach, cantaloupe, tomatoes, sprouts, mushrooms, onions, peppers, cabbage, citrus, strawberries, and walnuts. The FDA proposed produce safety rule considers both the commodity and the practices associated with growing, harvesting, packing and holding produce as well as how produce will be used and consumed after it leaves the farm. The proposed produce rule provides growers flexibility in their approach to on-farm food safety, so that food safety practices being taken by farmers can be appropriate for the scale of production and type of agricultural practices being used.

Farm mixed-type facilities (farms that are also engaged in activities outside the definition of "farm" that require food facility registration), may be subject to both the proposed produce safety rule and the forthcoming preventive controls proposed rule, depending on whether any exemptions apply. An example is an establishment that grows and harvests produce but also conducts activities such as processing fresh-cut produce that requires the establishment to be registered. In such cases, only the establishment's "farm" activities would be subject to the proposed produce safety rule.

Limitations on Coverage of the Proposed Rules

As required by Congress, farms would be partially exempt from the proposed rule if they meet two requirements. First, they must have food sales averaging less than \$500,000 per year during the last three years (adjusted for inflation). Second, their sales to qualified end-users must exceed their sales to others during the same period. A

qualified end-user is either a consumer (in any location) or a restaurant or retail food establishment located in the same State as the farm or not more than 275 miles away from the farm. However, FDA may withdraw this partial exemption if the farm is directly linked to an outbreak, or if FDA determines it is necessary to protect the public health and prevent or mitigate an outbreak based on conditions or conduct that create the potential for the farm's produce to cause an outbreak.

If a farm qualifies for this partial exemption, certain labeling requirements would apply. That is, if a label is otherwise required on the produce that would otherwise be covered (tomatoes packaged in a clam shell are an example) then the label must include the name and business address of the farm where the produce was grown. If a label is not required then the name and business address of the farm where the produce was grown must be displayed at the point of purchase (such as on a poster, for example).

In addition, the proposed rule excludes certain produce that constitute the lowest risk with respect to biological hazards. Examples include produce that is rarely consumed raw, such as potatoes, or that is destined for further processing that includes a kill step (with certain documentation), such as green beans destined for a canning operation.

The proposed rule also would not apply to produce for personal or on-farm consumption.

FDA also is proposing that the smallest farms—those with an average annual value of food sold during the previous three-year period of \$25,000 or less—would not be covered.

Highlights of the Proposed Rule

FDA is proposing to establish science-based minimum standards for the safe growing, harvesting, packing, and holding of produce on farms. The proposed rule focuses on identified routes of microbial contamination of produce, including:

- **Agricultural Water.** Water used for produce production presents different microbial quality demands depending on its use. Water can be a carrier of many different microorganisms of public health concern. The proposed rule would require that all agricultural water be safe and of adequate sanitary quality for its intended use. "Agricultural water" would be defined in part as water that is intended to, or likely to, contact covered produce or food-contact surfaces. The proposed rule would require that, at the beginning of the growing season, the agricultural water system components under a farm's control be inspected to identify conditions that are reasonably likely to introduce pathogens to produce or food-contact surfaces. FDA is proposing that specific criteria for the quality of agricultural water be established for water that is used for certain purposes, with proposed requirements for periodic analytical testing.
- **Biological Soil Amendments of Animal Origin.** Biological soil amendments of animal origin, such as composted manure, may contain pathogens of public health concern. To address this, the rule proposes three types of measures to reduce the risk: types of treatment, methods of application, and time intervals between the application of a biological soil amendment of animal origin and crop harvest. The proposed rule also has provisions pertaining to the handling and storage of biological soil amendments of animal origin.
- **Health and Hygiene.** Bacteria, viruses, and parasites are frequently transmitted from person to person and from person to food, particularly through the fecal-oral route. The proposed rule would require that farm personnel use hygienic practices, including hand washing and maintaining adequate personal cleanliness.
- **Domesticated and Wild Animals.** Pathogens can be introduced into fruit and vegetable production systems via animal feces. Where there is a reasonable probability that animals will contaminate produce, the rule proposes certain requirements, such as an adequate waiting period between grazing of domesticated animals and harvesting produce from that growing area. Similarly, for working animals used where a produce crop has been planted, farms would be required to take measures to prevent pathogens from being introduced onto the produce. In addition, farms would be required to monitor for

significant wild animal intrusion events both immediately before harvest, and, as needed during the growing season, and not harvest produce that is visibly contaminated with animal excreta.

- **Equipment, tools and buildings.** Among other things, the proposed rule also would set standards for certain equipment and tools, buildings, and sanitation used for produce operations on farms.

Other areas addressed in the standards include:

- **Sprouts.** Sprouts present a unique risk because the warm, moist, and nutrient-rich conditions required to produce sprouts are the same conditions that are also ideal for the growth of pathogens. The proposed rule would require treating seed before sprouting, testing spent sprout irrigation water (or sprouts, in some cases) for pathogens and monitoring the growing environment for *Listeria species* or *Listeria monocytogenes*.
- **Training.** The proposed rule would require training for farm personnel who handle the produce or food-contact surfaces, and for supervisors.

Alternatives and Variances

The proposed rule would provide that farms may establish alternatives to certain requirements related to water and biological soil amendments of animal origin if the alternative is scientifically established to provide the same amount of protection as the requirement in the proposed rule without increasing the risk of adulteration.

The proposed rule also would allow a state or foreign country to request a variance from some or all provisions of the proposed rule, if the state or country determines that it is necessary in light of local growing conditions, and practices under the proposed variance provide the same level of public health protection as the requirements of the proposed rule without increasing the risk of adulteration. The proposed rule provides a process by which FDA would consider such requests and approve or deny them, and also provides that FDA may specify that an approved variance applies to other farms (for example, those with similar agricultural conditions).

Recordkeeping

The proposed rule would require certain records, for example, to document that certain of the standards are being met. However, it would not require duplication of records already kept for other purposes.

Effective and Compliance Dates and Definitions for Small and Very Small Businesses

FDA is proposing the following effective and compliance dates. The effective date is the date on which the rule would be codified in the Code of Federal Regulations. Recognizing that the farming community, especially small and very small farms, would need time to comply with the provisions of the rule, FDA is proposing extended times compliance dates.

- **Effective Date:** 60 days after a final rule is published.
- **Compliance Dates:** For farms that would be covered by the proposed rule, the following definitions and compliance dates would apply:
 - **Very Small Businesses**—a very small business is defined as having, on a rolling basis, an average annual monetary value of food sold during the previous three years of no more than \$250,000. These farms would have four years after the effective date to comply; for some of the water requirements, they would have six years.
 - **Small Businesses**—a small business is defined as having, on a rolling basis, an average annual monetary value of food sold during the previous three years of no more than \$500,000. These farms would have three years after the effective date to comply; for some of the water requirements, they would have five years.
 - **Other Businesses**—other businesses would have to comply two years after the effective date. For some of the water requirements, they would have four years to comply.

Risk Assessment

In a separate document cited as a reference to the proposed rule, FDA is issuing a draft qualitative assessment of risk that provides a scientific evaluation of potential adverse health effects resulting from human exposure to hazards in produce, with a focus on the public health risk associated with on-farm microbial contamination of produce. This document helps to inform the proposed produce rule.

Economic Impact of the Proposed Rule

The proposed rule on produce safety is aimed at reducing the public health burden of foodborne illness associated with contaminated produce. We estimate the number of foodborne illnesses that would be prevented by this proposed rule to be 1.75 million, with an associated benefit of \$1.04 billion, annually. We estimate the annualized costs of the proposed rule to be \$459.56 million annually for domestic farms, and \$170.62 million annually for foreign farms covered by the rule (for a grand total of \$630.18 million annually). The proposed rule would cover an estimated 40,496 domestic farms and 14,927 foreign farms.

An estimated 75,716 domestic farms that engage in direct farm marketing to qualified end-users would be partially exempted from this proposed rule but will be subject to a labeling requirement. It is estimated that the annual total cost of the labeling requirement will be \$3.82 million.

Additionally, an estimated 34,433 farms that grow, harvest, pack or hold produce that have an average annual monetary value of food sold during the previous three-year period of \$25,000 or less will not be covered by this proposed rule.

However, the vast majority (approximately 90%) of covered produce acreage grown and consumed by Americans would either be covered by this proposed regulation, consumed cooked, or sent to food processing plants that have processes designed to address biological hazards associated with produce.

Rulemaking Process and Submitting Comments

FDA issues proposed rules in the Federal Register so that the public can review them and submit comments. The official title of the proposed rule is “Standards for the Growing, Harvesting, Packing, and Holding of Produce for Human Consumption.”

FDA will consider comments received during the comment period on the proposed rule and then consider revising the rule based on its review of the comments before issuing a final rule. The proposed rule and supporting documents are filed in FDA’s official docket on <http://www.regulations.gov> and also can be accessed on the [FSMA website](#). When a final rule is available, the rule and its supporting documents will be available in the same place.

FDA has conducted extensive outreach to the produce industry, the consumer community, other government agencies and the international community to gain input and perspective on this and other proposed rules required by FSMA. That input and perspective helped shape the proposed regulations in a way that will help to ensure the proposed rules are practical and flexible, as well as effective. FDA will be holding several additional meetings, including regional public meetings, during the comment period for these rules.

Assistance to Industry

Assistance to Industry

FDA intends to publish guidance documents, including guidance that explains the requirements of the rule in plain language to help businesses, particularly small and very small businesses, comply with the produce safety requirements. In addition, FDA is working with its partners through the Produce Safety Alliance and the Sprouts Safety Alliance to develop training materials and to disseminate information on produce safety to help industry, particularly small and very small businesses, comply with the a final rule.

For Additional Information

- [Video: The Rulemaking Process: A Primer by FDA](#)
- [Video: FDA Food Safety Modernization Act, A Primer by FDA](#)
- [Fact sheet: The Food Safety Law and the Rulemaking Process: Putting FSMA to Work](#)