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Agri-food Products' Competitivenes in Balkan Region - Study on Romanian Agri-food Trade

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Abstract

The paper presents the competitiveness of the agri-food products in Balkan region by the analysis of the trade flows. We focus on the Romanian trade with agri-food products and the commercial relations with different countries from Balkan area. We compare the evolution of the Romanian agri-food products trade with similar products from Balkan countries, in the last two decades. For this analysis we use data provided by the National Institute of Statistics (INS), EUROSTAT, internet databases and articles periodically published by the institutions specialized in economic analysis, as well as other specialty works, studies and working papers done by different researchers across Europe. Last but not least, we use the partial results from the FP7 Project COMPETE (International comparisons of product supply chains in the agro-food sectors: determinants of their competitiveness and performance on EU and international markets). By present paper we would like to show the effects of EU enlargement and globalization on regional trade, influences on agri-food products' competitiveness, with special attention on the Romanian agri-food trade. We would like to find the Romanian agri-food products which lost the markets and those products which have had a positive evolution in the past. In the same time, we intend to identify the competitive agri-food products from Romania, with influence on regional market.

Keywords: Competitiveness, Agri-food products, Trade, Balkan region, Romania

IntroductionIn the last twenty five years we are the witnesses of the rapid changes in the international trade. The globalization is, probably, the most dynamic phenomenon in the world, in the last century. This phenomenon includes the trade with agri-food products, as well. In the same time, the fall of the "Iron curtain" and European Union (EU) enlargement have had a direct influence on the regional trade, including agri-food trade in Balkan region.

These are the reasons why we want to analyze the main changes on the Balkan regional market, with special attention on Romanian agri-food trade.

By present analysis, we would like to identify the main agri-food "actors" on EU market and their influence on other markets. This has a direct connection with EU enlargement and globalization process. In addition, the analysis of the Romanian trade with agri-food products shows us the products competitive and non-competitive on EU and Balkan market. In other words, which are the "winners" and "losers" in the last decades. We consider that Balkan area, besides EU market are important at European level because of their size, potential and dynamic trends.

In order to analyze the competitiveness of the agri-food products, we must take a look at the general evolution of the Romanian trade and in this respect, we divide the last twenty five years in three distinct periods: transition period, CEFTA period (pre-accession period), EU membership (post-accession period). Each period has special characteristics and different results, in economic terms and policy recommendations.

Materials & Methods The meaning of the term "competitiveness" is "to be able to withstand market competition" (EU, 1999 a). For firms or companies, "competitiveness" as a measure of economic viability is broadly accepted. Here, in a competitive market, "competitiveness is the ability to produce the right goods and services of the right quality, at the right price, at the right time. It means meeting customers' needs more efficiently and more effectively than other firms do." (DTI, 1994, in Thomson&Ward, 2005).

For nations, the term competitiveness is defined by the OECD as "the degree to which [a nation] can, under free and fair market conditions, produce goods and services which meet the test of international markets, while simultaneously maintaining and expanding the real income of its people over the long term." (DTI, 1994, in Thomson&Ward, 2005).

In the same time, we can have in view the European Union's Sixth Periodic Report on the Regions (EU, 1999a) which specifies "Regional Competitiveness" as "'the ability of a region to generate, while being exposed to external competition, relatively high income and employment levels'. In other words, for a region to be competitive, it is important to ensure both quality and quantity of jobs." (EU, 1999 b).

The list of different definitions, to approach the term "competitiveness", as well as the list of different competitiveness indices and indicators could be expanded by a huge number of studies and papers, all of which have their strengths and weaknesses. However, it also becomes clear, that the idea of productivity and employment runs like a red thread through more or less all of the concepts of competitiveness, most of all in connection with the living standard of the regional population (Schaller, L., Kapfer, M., Kantelhardt, J., Boris van Zanten, Verburg, P., Amsterdam, 2012).

Not the last, it is obvious the link between the products (firms) "lost in transition" and the lack of a clear and stable policy in this field.

For our statistical analysis, we use long time data series (2000-2012) based on statistical data provided by the National Institute of Statistics of Romania (INS) and EUROSTAT, in terms of value and volume. According to these, we classify the Romanian agri-food most important products for export and their share on EU market. Comparisons with similar products from other countries are useful for the understanding of the present context.

Last but not least, we want to mention that we use the partial results from the FP7 Project COMPETE (International comparisons of product supply chains in the agro-food sectors: determinants of their competitiveness and performance on EU and international markets), leaded by IAMO (Halle/Saale-Germania), which started in 2012 and lasts three years (www.compete-project.eu)[1]. The project is the result of the cooperation of the consortium established and comprises sixteen institutions from ten countries, financed by European Communities and co-financed by National Ministry of Education.

Results

Main agricultural "actors" in European Union

At EU level, there are only a few countries with important agricultural contributions, even if we analyze the production of the area used. If we speak about the production, the main EU producers are: France, Germany, Italy and United Kingdom. The second group of EU countries is: Romania, Poland, Netherlands and Hungary. Thus, only 5-7 countries in EU concentrate the production of the main crops like: wheat, maize, sunflower, rape seed, soybean and potatoes. In all mentioned cases, over 75% of the EU production is realized in these countries. For instance, according to INS data (2011), in 2010, the concentration of the production was, in descending order, the following:

-75,9% from wheat: France, Germany, UK, Poland, Italy, Denmark, Romania;

-74,5% from maize: France, Romania, Italy, Hungary, Germany;

-90,7% from sunflower: France, Bulgaria, Romania, Hungary, Estonia;

-82,7% from rape seed: Germany, France, UK, Poland, Czech Rep., Romania;

-95,9% from soybean: Italy, Romania, France, Austria, Hungary;

-79,2% from potatoes: Germany, Poland, Netherlands, France, UK, Romania, Belgium.

Among the mentioned countries, only Romania and France are present in all cases. Romania is the only country from the New member states (NMS) with important areas and production in agriculture (main vegetal crops) and has permanent presence, if we take in view the products mentioned above. Other Balkan country is Bulgaria which has significant sunflower productions.

Romanian agri-food trade*Total agri-food trade*

Romania's foreign trade has undergone major changes after 1989 and after the entry into the EU in 2007. The same trend was observed in total agri-food trade.

The total agri-food trade balance has always been negative after 1990 (transition period); then, the deficit increased massively in 2002-2007 (CEFTA period); in the first two years after EU accession, the agri-food trade volume increased considerably: in 2008 the amount had doubled as compared to 2006, the last year before accession, but also negative. We mention that, this trend is similar to that seen in the other new member states immediately after accession.

[1] Alboiu, C. F., Voicilas, D. M. eds. (2014). Working paper "EU quality schemes: market potential for products produced and processed", www.compete-project.eu

The economic crisis that hit Romania in 2009 resulted in a contraction of the total agri-food trade volume by 12 %, after which the upward trend resumed (Figure 1).

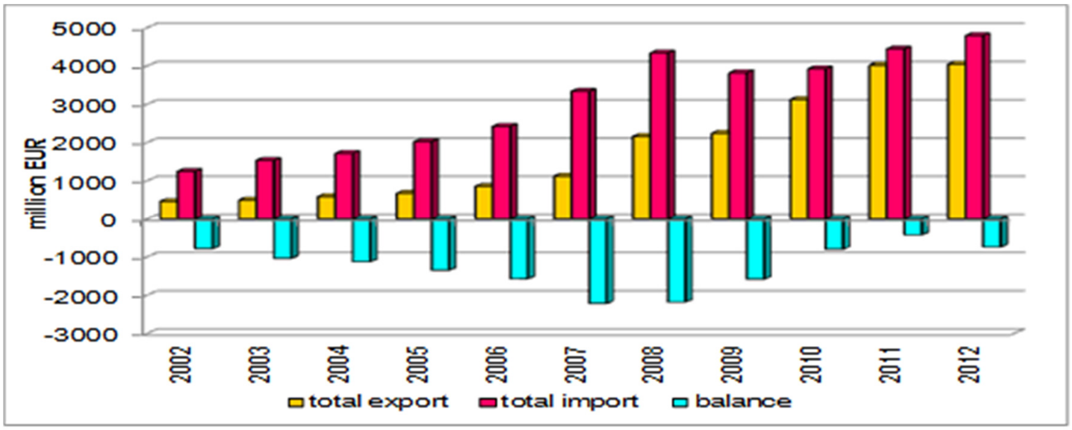

Figure 1. Romanian agri-food balance of trade

Source: Gavrilescu, Voicilas, 2014

In conclusion, the total Romanian agri-food balance of trade was permanently negative.

Intra-EU agri-food trade

If we analyze the intra-EU agri-food trade, a few characteristics are evident (see Figure 2). In the first decade after communist period (transition period), the imports increased much more than exports. The trade had a negative balance in CEFTA period, as well. After EU accession, the negative balance reached a maximum in 2008, being observed a rapid increase of import in the first two years, and then, later, exports had an ascending evolution. In fact, this is the main characteristic of intra-EU agri-food trade after EU accession: a rapid growth of imports in the first years and, in the same time, a slow growth of exports.

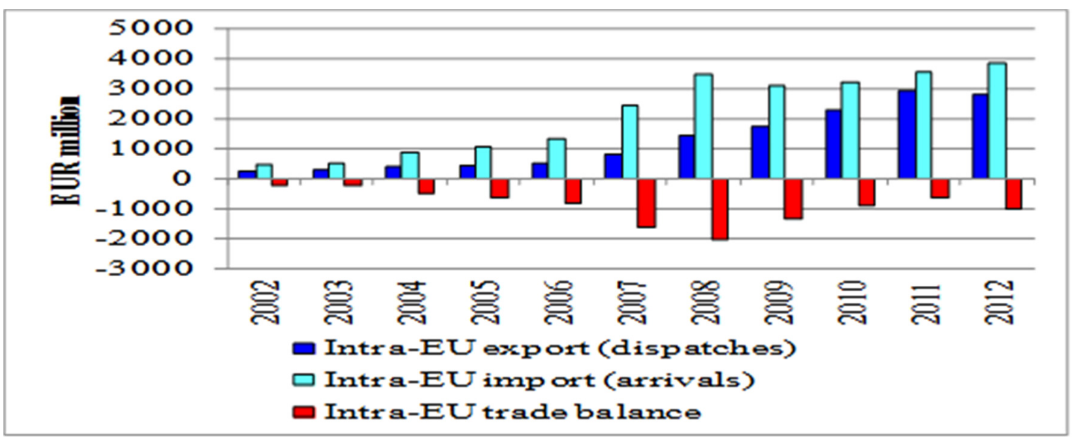

Figure 2. Intra-EU agri-food balance of trade

Source: Eurostat Database

In conclusion, the intra-EU agri-food balance of trade was permanently negative, in the last decades, after 1989.

Extra-EU agri-food trade

The Romanian agri-food trade with extra-EU countries had a similar evolution with intra-EU trade, for a long period of time. This corresponds with the first period (transition) and the second period (CEFTA). In the third period, major changes are observed, in comparison with previous two periods and intra-EU agri-food trade, as well. Thus, the imports decreased and the exports increased. In this way, since 2010 the agri-food balance of trade becomes positive, after twenty years of transformations.

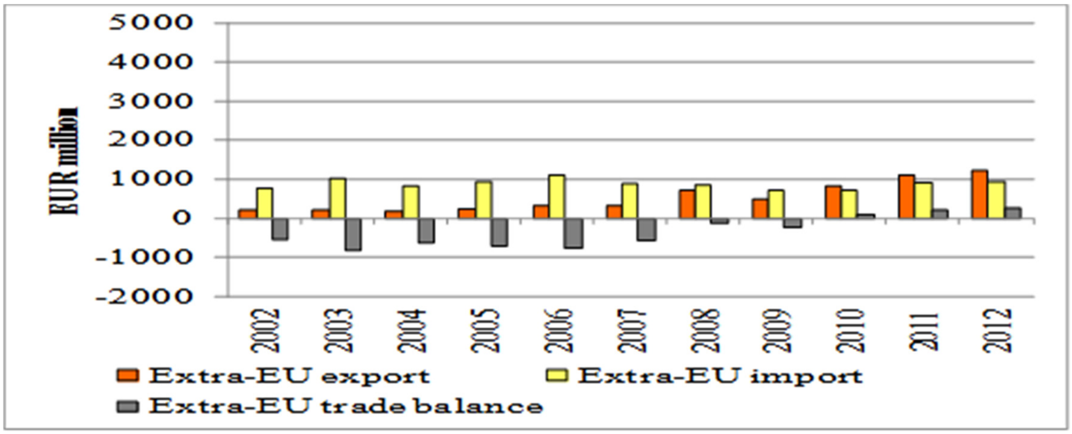

Figure 3. Extra-EU agri-food balance of trade

Source: Eurostat Database

We can expect that, in the next years Romania will keep the present trend, even for intra-EU agri-food trade, because the competitiveness of the Romanian products increased and they have good opportunities to gain new markets in EU and in the world, too.

Romanian agri-food "Winners" and "Losers"

In this subchapter we want to analyse the Romanian trade with agri-food products in intra-EU and extra-EU zone. For this, we calculated the share of the main Romanian agri-food products in the total Romanian agri-food exports, and the share of the Romanian agri-food products in the EU intra-trade. In this way, we want to determine the "winners" and "losers" of the three periods among Romanian agri-food products.

If we have in view the main Romanian agri-food products exported during the mentioned periods, we can identify the "winners", which are products still competitive (Table 1).

Table 1. Share of products in total Romanian agri-food export (FOB) – "Winners"

Source: Voicilas, 2013

In conclusion, we can mention that important for Romanian agri-food trade and (still) competitive in the world (including EU market) are: cereals (wheat, maize), oilseeds (rape), sunflower seeds, sheep/mutton/goat and secondary, even honey, which has an ascending trend.

Table 2. Share of products in total Romanian agri-food export (FOB) – "Losers"

Years	1991	1995	2000	2004	2007	2010
Cattle	18.3	7.1	**20.2**	12.5	14.1	**5.4**
Pork	**21.2**	12.5	0.2	0.1	**0.04**	0.3
Apple, pear (+quince)	***4.5***	1.9	***0.01***	0.02	0.7	0.3
Wine	***7.5***	6.1	7.2	5.2	2.5	***0.8***

Source: Voicilas, 2013

When we try to identify the losers, those products which lost the markets and are not important in exports nowadays, we find a few traditional products which did not remain at a competitive level (Table 2). From the table above we can conclude that not competitive for Romanian trade are: cattle, pork and secondary, the group of fruits (apple, pears) and wine. A dramatic negative decrease was in case of cattle and pork. The other two lost the traditional markets and became less competitiveness.

Next in this subchapter, we want to know the share of the Romanian agri-food products in the EU intra-trade market, in FOB prices. Which are the most competitive Romanian agri-food products on intra-EU market? This is another estimation of the competitiveness of the Romanian agri-food products at EU level (Table 3).

Table 3. Share of Romanian agri-food exports in EU intra-trade market (FOB)

Products	2004	2007	2008	2009	2010	2011
Cereals	0.3	1.0	1.2	3.7	**4.2**	3.8

Oilseeds	1.6	1.7	5.8	5.5	6.6	**7.2**
Honey	7.4	5.3	5.8	**10.1**	9.4	8.4
Sheep	31.8	26.5	32.4	33.7	32.0	**36.5**
Wheat	0.07	0.8	1.3	3.9	3.7	3.4
Maize	1.2	1.8	1.9	5.5	7.3	6.7

Source: Voicilas, 2013

Having in view the data presented, we identify two types of products: active (honey, sheep) and passive (cereals, oilseeds). Among cereals, we underline wheat and maize and among oilseeds only rape. The active products have an ascendant trend and very good perspectives (competitiveness) and the passive products have a linear evolution under the pressure of different factors.

Analyzing the extra-EU agri-food trade, by groups of products, we can identify the main competitive products and which are not competitive. In this respect, to determine the competitive products, we rank the first ten agri-food products for export, as share in total extra-EU trade (Table 4).

Table 4. Top products of Romanian extra-EU agri-food exports

Rank	2003		2006		2010		2012	
	Product group	%	Product group	%	Product group	%	Product group	%
1	01 - Live animals	36.0	12 - Oilseeds	22.9	10 - Cereals	55.7	10 - Cereals	61.9
2	12 - Oilseeds	20.1	01 - Live animals	20.8	12 - Oilseeds	16.3	01 - Live animals	13.9
3	22 - Beverages	8.5	10 - Cereals	20.8	01 - Live animals	8.3	12 - Oilseeds	7.2
4	08 - Fruit	7.4	15 - Fats & oils	6.9	24 - Tobacco	2.5	21 - Edible preparations	2.2
5	10 - Cereals	5.4	22 - Beverages	5.9	22 - Beverages	2.3	23 - Animal feed	2.2
6	15 - Fats & oils	5.3	08 - Fruit	4.5	08 - Fruit	2.0	24 - Tobacco	1.9
7	04 - Milk & dairy prod.	3.3	17 - Sugar	3.7	02 - Meat	2.0	22 - Beverages	1.8
8	19 - Bakery & pastry	3.0	23 - Animal feed	3.7	21 - Edible preparations	1.9	08 - Fruit	1.6
9	23 - Animal feed	2.8	24 - Tobacco	2.2	23 - Animal feed	1.6	19 - Bakery & pastry	1.5
10	20 - Veget.& fruit prepar.	1.8	19 - Bakery & pastry	1.5	19 - Bakery & pastry	1.4	17 - Sugar	1.1

lseeds.

1	10 - Cereals	18.1	02 - Meat	22.1	23 - Animal feed	16.4	17 - Sugar	23.4
2	17 - Sugar	15.0	24 - Tobacco	14.1	17 - Sugar	15.7	23 - Animal feed	18.6
3	24 - Tobacco	13.2	17 - Sugar	13.7	08 - Fruit	9.9	24 - Tobacco	10.2
4	08 - Fruit	8.5	08 - Fruit	11.2	07 - Vegetables	7.9	12 - Oilseeds	6.7
5	02 - Meat	7.8	09 - Coffee & tea	4.6	24 - Tobacco	7.4	08 - Fruit	5.3
6	09 - Coffee & tea	5.6	03 - Fish	4.2	21 - Edible preparations	6.4	21 - Edible preparations	5.2
7	12 - Oilseeds	4.6	20 - Veget.& fruit prepar.	4.1	12 - Oilseeds	5.9	09 - Coffee & tea	5.0
8	15 - Fats & oils	4.2	21 - Edible preparations	3.8	09 - Coffee & tea	5.4	15 - Fats & oils	4.6
9	23 - Animal feed	3.9	15 - Fats & oils	3.3	15 - Fats & oils	5.0	07 - Vegetables	4.0
10	20 - Veget.& fruit prepar.	3.7	07 - Vegetables	3.0	03 - Fish	4.0	05 - Other animal prod.	2.6

Source: Eurostat Database

Among the first ten agri-food products imported from extra-EU markets, central positions have: sugar, fruits, animal feed and tobacco. These are, in general, processed products, with value added. Comparing exports with imports, we can conclude that Romania exports on extra-EU markets primary products and imports processed products, which put pressure on commercial balance of trade and national budget.

Romanian agri-food trade partners on extra-EU markets

In frame of extra-EU trade with agri-food products, there are a few countries traditional partners for Romania. Due to special trade agreements or historical and geographical nearness, the trade with these countries has developed in the last decades, as a continuation of the previous traditions. In the next table (Table 6) we present the main partners for Romanian agri-food export, on extra-EU market.

Table 6. Top destinations of Romanian extra-EU agri-food exports

Rank	2003		2006		2010		2012	
	Country	%	Country	%	Country	%	Country	%
1	Croatia	18.1	Turkey	19.6	Turkey	17.3	Egypt	13.9
2	Turkey	16.0	Croatia	14.8	Korea	10.6	Turkey	9.7
3	Syria	14.2	Pakistan	9.2	Syria	6.5	Saudi Arabia	7.9
4	Moldova	10.4	Moldova	6.4	Israel	5.5	Libya	7.4
5	Pakistan	7.9	Russian Fed.	5.2	Saudi Arabia	5.4	Iran	6.0
6	USA	4.5	Bosnia &Herzegovina	5.1	Philippines	4.9	Korea	5.6

Source: Gavrilescu, Voicilas, 2014

The main partners of Romania in extra-EU trade, in case of exports, are countries from Arabia (Saudi Arabia, Iran, Syria, Israel), Asia (Pakistan, Korea) and Balkans, with permanent presence in top six main partners. In all period analyzed, they totalized more than 50% from total Romanian agri-food trade with extra-EU countries. Among countries from Balkan region, the main partners for export are: Turkey, Croatia, Moldova and Bosnia&Herzegovina. In some selected years, they cumulated over 40% from the total exports on extra-EU markets. In the same time, we see that after Romanian accession into EU, the exports to some Balkan countries declined (Moldova, Croatia) and they were replaced with EU countries.

In case of imports from extra-EU countries, the main partners are presented in Table 7.

Table 7. Top sources of Romanian extra-EU agri-food imports

Rank	2003		2006		2010		2012	
	Country	%	Country	%	Country	%	Country	%
1	Brazil	20.6	Brazil	25.3	Brazil	21.5	Brazil	28.2
2	USA	13.0	USA	12.6	Turkey	15.6	Turkey	11.5
3	Russia	9.3	Turkey	8.5	USA	6.8	USA	7.3
4	Turkey	7.5	Canada	7.6	China	6.7	Moldova	7.1
5	Canada	5.6	Moldova	5.3	Argentina	5.7	Zimbabwe	5.8
6	Moldova	5.5	Ecuador	5.0	Moldova	4.4	China	4.6

*Source: Gavrilescu, Voicilas, 2014*Among them, Brazil, USA, Turkey and Moldova are omnipresent in top firs six countries. During the analyzed period, the countries from Balkan region mentioned before totalized between 15-20% from total imports of agri-food products from extra-EU countries, being one of the most important import partners.

Romanian agri-food trade in Balkan region

In the present subchapter, we want to analyze the Romanian agri-food trade within Balkan region. In this respect, we select a few countries from Balkan area which have had important trade flows with Romania and available data at the moment of present study. We mention that some of the countries from Balkan region were already studied in the previous subchapters and in the present subchapter we only add some more important information at the conclusions already mentioned. At the end, we will analyze the trade with cereals, which are important for all members of Balkan region.

We would like to start the analysis with presentation of the agricultural trade of EU-27 with Balkan countries, except Turkey and Moldova, based on the data available in EUROSTAT database (Figure 4).

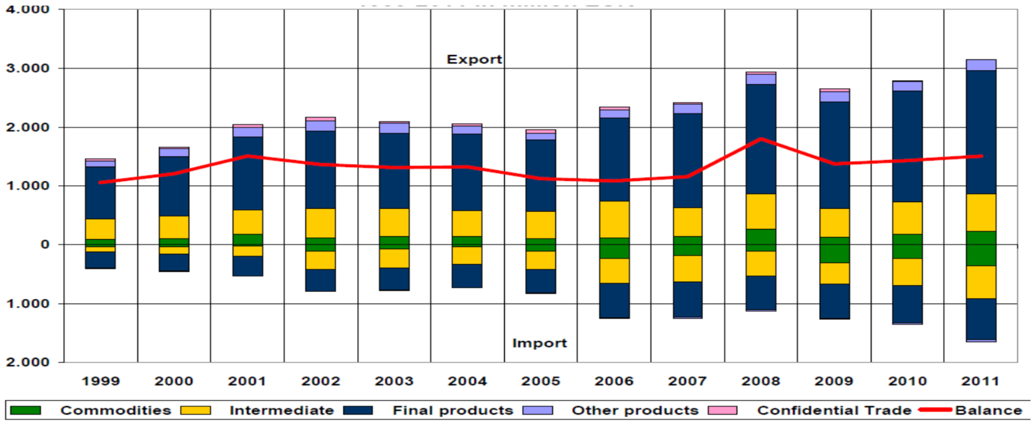

Figure 4. EU-27 agricultural trade with Western Balkans (incl. Croatia), in mil EUR

Source: Eurostat Database

The conclusion is that the trade of EU-27 with Balkan countries increased in the last decade, which is a positive aspect and sign that the area is an important trade partner for EU. The trade increased for all types of agricultural products. Still, the balance of trade is negative for Balkan countries.

Besides other Balkan countries analyzed before, we select Bulgaria and Slovenia to show the level and intensity of the Romanian trade with agri-food products in the region (Table 8).

Table 8. Romanian agri-food trade balance within Balkan region (mil.EUR)

Country	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bulgaria	-14.7	-22.5	1.6	3.0	13.6	5.7	-103.2	-98.6	-148.9	-110.1	-71.3
Slovenia	1.7	1.9	-0.6	2.0	0.0	-0.5	-9.6	-4.4	0.8	1.2	5.3

Source: Eurostat Database

In conclusion, Romania had a negative balance of trade with selected countries, in many years from analyzed period. We also mention that in the years with negative balance, the level was extremely low, in disadvantage for Romania.

Now, we turn to the analysis of the Romanian trade with cereals, which we consider important products for all Balkan countries. In the Table 9, we present the evolution of the Romanian trade with cereals within Balkan region.

Table 9. Share of trade with cereals in Balkan, in total Romanian trade with cereals

Romania	2002	2003	2004	2005	2006	2007	2008	2009	2010
Import BK	37.2	9.5	5.2	16.7	9.8	23.3	22.9	29.3	37.9
Export BK	19.6	40.1	16	4.6	7.4	50.3	16.2	8.6	10.8

Source: Calculation based on INS Database

The share of the Romanian trade with cereals in Balkan area in total Romanian trade with cereals shows a huge variation during the years, both in case of import and export. This annually variation does not help us to express a certain conclusion about the characteristics of the trade with cereals within Balkan region, especially the trade of Romania in relation with other Balkan countries. But, we can speculate that the variation is a result of the fluctuation of the production (close connected to weather conditions), or existence of special agreements between Romania and different Balkan countries. In the same time, other reasons could be Romanian EU accession and speculations of the traders.

The statistical analysis of the main partners of Romania, in case of imports, is presented in the next table (Table 10).

Table 10. Romanian main partners for trade with cereals (Import %)

Country	2002	2003	2004	2005	2006	2007	2008	2009	2010
Turkey	0	0	8	0.2	0.1	-	0.1	0	-
Bulgaria	37.8	60.5	5.9	34.1	3.4	13.5	87	85.2	90.7
Moldova	61.7	37.8	85.2	63.9	76.8	-	1.4	5.5	1.8
Serbia	0.5	1.7	0.7	1.5	3	65.7	8	8.4	4.3
Greece	0	0	0.1	0.3	16.5	1.4	2	0.9	2.4

Source: Calculation based on INS Database

Among Balkan countries, some had an intensive cereals trade with Romania. In the case of Romanian imports we selected the main important partners. They are Moldova, Bulgaria and in a second group of countries Serbia and Greece. The rest of the Balkan countries did not have significant trade with Romania. A special attention we must give to the trade with Moldova which was at a higher level before Romanian EU accession. Then, due to the EU restrictions the trade failed. Presently, the most important partner in the region remains Bulgaria.

In the Table 11, we present the Romanian exports with cereals, the main partners from Balkan region.

Table 11. Romanian main partners for trade with cereals (Export %)

Country	2002	2003	2004	2005	2006	2007	2008	2009	2010
Turkey	94.4	57.9	77.9	49	14.7	54.8	74	47.5	57.5
Bulgaria	0	20	-	0.6	0.6	22.4	4.4	3.6	5.1
Moldova	0.1	0.4	0.2	0.8	0.1	0.5	0.1	0.1	0.4
Serbia	-	0	6.7	3.2	4	1.1	0.9	0	0.1
Greece	5.5	21.6	10.6	39.1	70.5	20.6	14.9	47.6	35.9

Source: Calculation based on INS Database

The Romanian exports of cereals with Balkan countries have a few different characteristics than imports. For exports, the main partners are Turkey and Greece, the rest of the countries having a minor role. We underline that the majority of the Romanian exports with cereals within Balkan countries go to Turkey.

In conclusion, we can add that the Romanian imports and exports with cereals within Balkan region have double flows, which are not the identical. Romania has preferred countries for exports and different preferred countries for imports.

Conclusions

The results of the research can be summarizing as follows:

- In the last 25 years, the evolution of the Romanian agri-food trade can be divided in three different periods, with specific characteristics: transition period, CEFTA Agreement (pre-accession period), EU membership (post-accession period).
- Transition period is characterized by negative agri-food balance of trade and the products lost the markets.
- Pre-accession period was a continuation of the transition period, with permanent negative agri-food balance of trade; Romania was the "looser" of CEFTA Agreement.
- EU membership and enlargement had a positive impact on agri-food balance of trade and the products' competitiveness increased; Imports increased faster than exports at the beginning, then the exports increased faster than imports.
- The total agri-food balance of trade was permanently negative; the same in the case of intra-EU market, but become positive since 2010 in the case of extra-EU market.
- Romanian exports: primary products.
- Romanian imports: processed products.
- "Winners" (competitive) of the Romanian agri-food trade are: cereals (wheat, maize), oilseeds (rape), sheep/mutton/goat and honey.
- "Losers" (not competitive) of the Romanian agri-food trade are: cattle, pork, fruits and wine.
- Active Romanian players (competitive) on intra-EU market are: honey and sheep.
- Passive Romanian players (less competitive) on intra-EU market are: cereals (wheat, maize), oilseeds (rapeseeds).
- The intra-community general trade is three times larger than the extra-community and four times larger for agri-food products, due to stronger barriers.
- The Romanian extra-EU agri-food trade flows are relatively different from those of the intra-EU in terms of share of product destination and origin countries.
- Main Romanian partners from Balkan region are: Turkey, Moldova, Bulgaria, Greece and Serbia.
- There are preferred (traditional) countries for exports and different for imports.

At the end, we would like to mention that, during the last decades various domestic and external factors had implications (direct/indirect) on the performance (competitiveness) of the agri-food products, like: privatization, state farms bankruptcy, CEFTA membership, the pre-accession support programs (SAPARD), or EU membership. Obvious, the EU accession had a direct positive impact on the Romanian agri-food trade by the free access on the Single Market, with special measures (programs) applied for higher and better quality of domestic agri-food supply, as basis for increased competitiveness of Romanian products, resulting in increased exports on both intra-EU and extra-EU markets.

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