
**THE ROMANIAN INTERNATIONAL AGRI-FOOD TRADE IN THE
TRANSITION PERIOD (1990-2000) – A HISTORICAL PERSPECTIVE**

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***Abstract:** The Romanian international trade saw major transformations after 1990. The period 1990-2000 had as main features the major reforms implemented in the whole economy; the present paper is analyzing the particular reforms in the Romanian international agri food trade, its main evolutions in passing from completely state-controlled operations during the centrally-planned era to a gradually liberalized trade during the transition period to the market economy. The analysis is focusing on the '90-s, and looks in detail at the major changes in the trade policy, as well as the in the evolution of the trade agreements of the country, and in the way they influenced the agri-food exports, imports and trade balance. The analysis is completed by looking at the trade flows composition by the products' processing degree. The results show a continuous development in the exchange flows, their increasing orientation to the EU, but also a deterioration of the ratio between the processed products and the agricultural commodities, indicating a rather low competitiveness in the international markets.*

Key words: *agri-food trade, trade reforms, trade agreements, CEFTA, processed products*

INTRODUCTION

The international trade is a form of connection between national markets, between commodity producers in different countries, a link that illustrates economic interdependence between states. Basically, it is a process of international specialization in production, adapting the economic potential of states to the changing demands of international markets. Various factors significantly influence the evolutions of each country involved in international trade; in particular, political factors may be either favoring or deeply inhibiting.

The paper is part of a series of works that analyze the evolution of the Romanian international agri-food trade in the last century [6]. The focus in the present paper is the transition period from the centralized-planned economy to the market economy (1990-2000).

In the period of centralized-planned economy, the international trade was strictly controlled and carefully managed by the state through specialized state-owned enterprises. The exchange rate between the national currency and foreign currencies was artificially fixed by the National Bank of Romania, resulting in disrupted statistical data series on foreign trade values (they are not entirely comparable among the periods 1981-1989 and after 1990 [1]).

The transition to the market economy brought major changes in the Romanian international trade. The state's monopoly on the international trade was abolished in February 1990, opening the way for far-reaching liberalization in this sector. The first fundamental changes in international trade were the transformation of the state-owned foreign trade enterprises into commercial companies, and the freedom of enterprises, irrespectively of their ownership (that is private ones included), to carry out independently foreign trade operations. In the subsequent years, the reforms deepened, gradually embracing all aspects of the sector, until it was able to function in the normal conditions of a market economy.

MATERIALS AND METHODS

The reform in the international trade has gone through several stages until one can talk about an open and liberalized trade regime; these stages, their content and influence on the agri-food trade are analyzed.

In the literature, there are many debates regarding the classification of agri-food products by the degree of processing.

A common classification divides agri-food product groups (chapters 01-24 of the Combined Nomenclature) into basic agricultural products (8 of the 24 chapters), food products (14 chapters), beverages and tobacco (one chapter) [15], the inclusion criterion being the weight of the number of 4-digit lines falling under the category of basic agricultural products and processed agricultural products respectively. It is a method that is used when international trade data is only available at the 2 digits level.

Other authors [13] combine horticultural products, processed and semi-processed products as "high value products", unlike "bulk commodities."

A more detailed approach [8] separates agri-food products into three categories: agricultural commodities (or basic agricultural products), primary products (or semi-processed products) and secondary processed products. The sum of the last two categories gives the total of processed products.

The first category (agricultural commodities) includes: live animals, live plants (trees, flowers), fresh fish, eggs, fresh vegetables, fresh fruit, cereals, oil, tobacco leaves.

Primary processed products include meat, liquid milk, cereal flour, edible oils, sugar, coffee, tea, dried fruit, frozen vegetables, animal feeds (soy cakes), mineral waters, etc. These products require minimal processing processes, and although they can be consumed as such, they are often used as raw material for other higher added-value products (secondary processed products).

The secondary processed products require more laborious industrial processing, resulting in food. This category includes: yoghurts, butter, cheese, ice cream, chocolate, bakery products, pastry and confectionery, wine, juices, food preparations (such as sausages, soups, canned fruits, vegetables, meat or fish), feed for animals, pet food, cigarettes, etc.

The separation of agrifood products in the above-mentioned three categories required detailed calculations at 4 digit-level in the Combined Nomenclature classification for a total of 196 product subgroups.

As compared to the 2-digit product group analysis, the proposed methodology [8] (based on product separation at 4 digit-level) has the advantage of a higher degree of accuracy, when the necessary data is available. For our analysis, data from the Romanian National Institute of Statistics (NIS) – in the Tempo-online database [10] was used.

RESEARCH RESULTS

During the pre-transition period (1990-2000), the international trade was a state monopoly, and only certain specialized enterprises were entitled to carry out international trade operations [7], [9], [12]. The state's monopoly on the international trade was abolished in February 1990, but it opened the way for far-reaching liberalization in this sector (exchange of goods and services, but also circulation of foreign currencies on the domestic market).

Although the reform in the field had several stages until one could speak of an open and liberalized trade regime, the reform in the international trade included: the transformation of state-owned foreign trade enterprises into commercial companies, freedom in carrying out international trade operations irrespectively of the enterprise

ownership form, relaxation of the regime of export-import licenses, non-differentiated customs duty according to the end-user, ability to own, buy and sell currency on the domestic market (for both legal entities and individuals), provision of economic incentives and export promotion measures (financial support for participation in international fairs and exhibitions, commercial promotion through the media, export subsidies, indirect subsidies, tax incentives, etc.).

The year 1993 marked the adoption of a new customs tariff (based on the Combined Nomenclature), thus creating the appropriate framework for bilateral and multilateral trade agreements signed by Romania during the 1990s, and allowing the proper registration of all trade operations, irrespectively of the type and ownership of the enterprise performing them.

The general picture of the Romanian international agri-food trade until 1997 was generally a protectionist one. The instruments used were mainly tariffs and non-tariff barriers such as export bans on certain products, licensing regimes, quotas, minimum import prices, phytosanitary measures. The degree of protection has varied over time, so we can distinguish different stages in the border protection regime.

(1) 1990-1993. The import regime focused mainly on non-tariff measures, while tariff protection was relatively neutral (low for crop products and higher for animal products, beverages and tobacco). The budgetary resources used at that time for the international trade were mainly directed towards non-agricultural sectors, while private resources for agri-food imports were low.

In January 1990, all agri-food exports were temporarily banned. In the subsequent years, the ban gradually relaxed and only a list of certain products (e.g. meat products, cereals, milk and dairy products, edible oil, sugar, animal fodder) remained under the ban or subjected to export quotas (e.g. live animals, beef, pork meat).

(2) 1993 - June 1995. The 1993 customs tariff provided a moderate protection: customs duties were around 25% for agri-food products, and slightly higher for processed food. The Interim Agreement with the European Union (1993) did not really affect the tariff protection rate in a significant way, due in particular to the relatively low volume of exports included in the list of facilities granted. The list of prohibited exports has also been reduced, and only products considered indispensable for the population's food security or those with a potential or real negative food consumption balance have remained subject to prohibition (cereals, maize and sunflower seeds, butter), while for other products (such as sunflower oil), export quotas were applied.

(3) July 1995 - June 1996. Following the entry into force of the Uruguay Round Agreement on Agriculture (URAA), in July 1995 customs duties on imports of agri-food products increased significantly. In the World Trade Organization (WTO), Romania has benefited from the status of 'developing country' - a unique status among the Central and Eastern European countries. This has allowed the negotiation of very high consolidated custom duties. Since July 1995, duties became very high, even if not all have been applied at the consolidated level. They became the main tool for the protection of the domestic agricultural producers. This measure aimed at creating a competitive environment - on the one hand, in order to stimulate domestic producers to work efficiently, reduce costs and improve the quality of products, thus giving them a better development chance by temporarily preventing the entrance of large quantities of subsidized foreign products on the domestic market. But, on the other hand, it created a "wall" around the country, with significant negative consequences on domestic efficiency and competitiveness. The 'developing country' status also allowed lower commitments when reducing the average consolidated tariffs for agri-food products (with only 24% over a 10-year period).

In reality, the import regime and the level of quotas were very volatile due to the frequent reductions or exemptions applied for very short periods of time to the benefit of certain privileged importers.

Romania's trade relations with neighboring and close countries have substantially increased due to implementation of bilateral concessions with the EFTA countries, the Czech and Slovak Republics, and with the Republic of Moldova.

(4) July 1997 – 2000. The international agri-food trade regime changed significantly in 1997 due to the implementation of a wide liberalization policy. As agreed with the World Bank under the ASAL (Agricultural Structural Adjustmet Loan) Program, the weighted average of all agri-food import duties decreased from 67 to 27% in mid-July 1997. This meant that the highest duties (for products considered as "sensitive" - meat and meat products, dairy products, some vegetables, sugar, sugars and fruit juices) were set at 60%, but most other tariff lines were set below 40% (exception: this rule was not applied to tobacco – the duty remained as high as 98%, and for alcoholic beverages - duties remained between 85-130%). All discretionary interventions such as temporary reductions or exemptions have been abolished and subsequently have only been applied in very exceptional cases.

In 1997, the regime of agri-food exports was liberalized: all unilateral export bans were removed and in 1998 all unilateral quotas were removed. The only remaining quotas were those resulting from specific trade agreements (such as those with CEFTA and the EU). Export licenses disappeared (except for those required for live sheep and sheep under the EU's preferential quota). Import licenses were lifted, except for a few preferential tariff quotas established again under international agreements.

The second phase of implementation of the ASAL Agreement concluded between the Government of Romania and the World Bank imposed a second reduction in import duties on agri-food products [2]. This condition applied since January 1999, and meant a reduction in import duties on sensitive products (pork and poultry meat, meat products) from 60 to 45%. Thus, the average duty level dropped from 29 to 22% for chapters 1-21 and 23 of the Combined Nomenclature (i.e. except for tobacco and alcoholic beverages).

(5) CEFTA. Since July 1997, Romania became a CEFTA member (Central European Free Trade Agreement). Participation in this free trade agreement, along with other EU-associated countries, has been a major objective of the national EU accession strategy. In the agri-food sector, Romania has accepted - for a number of products - the import duties already in place in CEFTA (0% or very low customs duties). For other products of common interest, bilateral agreements have been concluded separately with each Member State [3].

(6) EU Association Agreement (1995). It was preceded by the 1993 Interim Agreement. At the time of the entry into force of the Association Agreement (1995), Romania was granted three major types of trade preferences [11], [14]:

- unlimited quantitative preferences with zero or very low customs duties (for products such as honey, live horses, goose liver, watermelons, some vegetables and fruits);
- unlimited quantitative preferences with a 50% reduction in variable levies and a 10% annual increase of quotas (for geese (live and meat), sausages and canned pork);
- limited quantitative preferences (with import duties decreasing by 20% per annum for 3 years), to reach 40% of the basic duty level, and an annual increase of 10% of quotas (most of the animal products, wheat, fruits and vegetables).
- A separate agreement has been concluded for wine.

In 1994, the EU extended unilaterally its initial concessions and, following the adoption of the URAA and the EU Enlargement of 1995, new amendments were added to the Association Agreement.

(7) **Double-zero agreement.** In June 2000, trade liberalization continued by adopting double-zero quotas and agreements for a poultry, cheese and wine. These quotas were supposed to increase each year by 10% for unlimited time. For certain products of interest for Romania, the EU agreed to completely abolish the import duties for certain quotas since July 2000. At the same time, Romania agreed to remove all duties between July 2000 and July 2002. The agreement entered into force through the Government Emergency Ordinance 124/2000.

The EU opened an additional tariff quota for live sheep and goat exports to the EU in August 2000 (4,388 tons live weight per year) due to the inability of the country to use the sheep and goat meat quota because of the lack of slaughterhouses agreed by the EU. Also, reciprocal trade concessions were granted to certain wines and spirits in 2001, and the concept of "designation of origin" for wine and wine-type drinks was defined.

(8) **Other free trade agreements.** Under the free trade agreement with the EFTA countries, with Turkey (since 1997), and with Israel (since 2001), Romania has granted its trading partners preferential concessions for agri-food products. Under the Free Trade Agreement with the Republic of Moldova (since 1994), agri-food imports became free of customs duties. The only exception was the imposition - since autumn 2003 - of a 90% duty on sugar imports.

(9) **Export subsidies.** Romania's 'developing country' status in the WTO allowed export subsidies to be reduced by 24% over a period of 10 years and the volume of subsidized exports to decrease by 14%. Thus, Romania was entitled to subsidize most agri-food exports (within certain quantitative and value limits). These commitments under WTO regulations proved not being restrictive in providing distortive support or export subsidies to agri-food products. The real problem was actually the lack of available financial means to provide these types of support, potentially very costly for the budget. When Romania was to replace the 'developing country' status with 'developed country', the provision of such domestic support could have become a problem.

(10) **Trade liberalization.** The year 1997 was the most important moment in the process of liberalization of the international agri-food trade. It was basically the year of "normalization" of the customs duties. Together with the full liberalization of agri-food trade, it induced a strong shock in the sector. The removal of export barriers has provided a good opportunity to export products that have a comparative advantage in international markets (based on reduced internal costs).

The significant drop in customs duties pushed the agri-food trade deficit (which reached a minimum level in 1997: EUR -88 million) to deteriorate rapidly in the coming years, reaching a peak of EUR -867 million, the highest level in 1991-2001 (Figure 1).

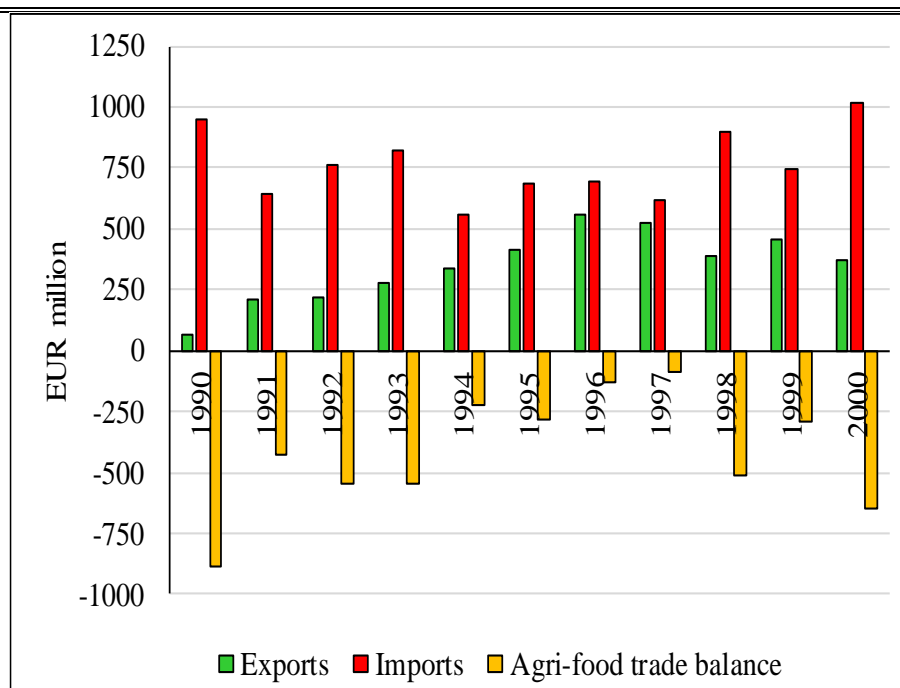


Figure 1. Romanian international agri-food trade in the transition period (1990-2000)

Source: processed data from Tempo-online (NIS)

Agri-food products are a very important trade sector in Romania, but its main feature is the lack of competitiveness, as proved by the continuous trade deficit with these products. In 2000, the contribution of the agri-food sector to the total trade deficit was 22%. The share of the agri-food trade deficit in the total trade deficit varied widely across the transition period, from 3.5% in 1997 to 39.1% in 1993.

Agri-food exports have increased steadily until 1996 (when they reached the highest level of the transition period (EUR 562 million), which was 8.6 times higher than in 1990), then declined only to resume the upward trend after 2000. The share of agri-food exports in the total exports declined between 1996 and 2000 from 8.7% to 3.3%, not due to a reduction in value, but due to a faster increase of the total imports value.

Imports had an oscillating trend, but were always significantly higher than exports. Agri-food imports varied between EUR 556 million (in 1994) and EUR 1015 million (in 2000). The share of agri-food imports in total imports was around 8% to the end of the period.

For Romania, as well as for the other candidate countries, the EU was the main trading partner. Exports to the EU increased throughout the entire transition period, more significantly after 1993; their value doubled between 1993 and 1999 (when it reached EUR 199 million). After the entry into force of the Association Agreement in 1995, the upward trend was stronger, as shown by the increase of the share of agri-food exports in total exports to the EU: in 1996 only 22.6% of Romania's agricultural exports were directed to the EU, in 2000 this share was almost half (48%).

The EU was also the main source of agri-food imports. Imports from the EU were always higher than imports, resulting in a permanent negative balance. Despite some rather significant variations, the overall trend of imports from the EU increased between 1995-2000 (up to EUR 322 million) (Figure 2).

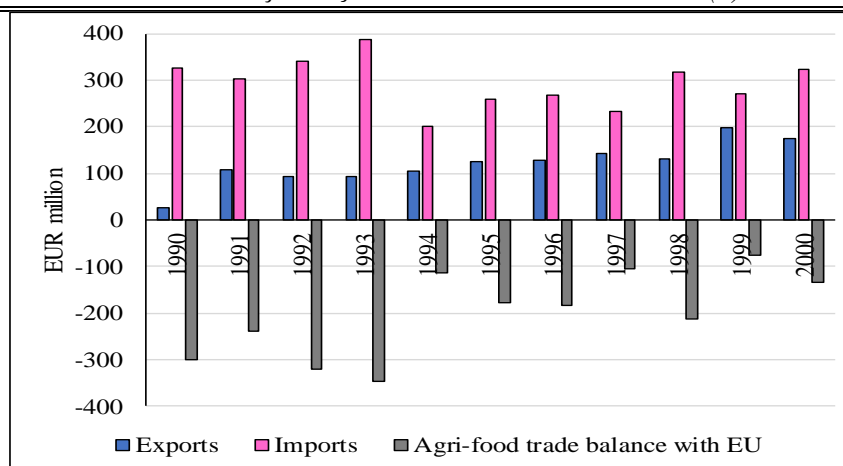


Figure 2. Romanian agri-food trade with the EU (1990-2000)

Source: processed data from Tempo-online (NIS)

Only 32-39% of Romania's agri-food imports came from the EU in 1995-2000; the other major sources of import were CEFTA, Moldova and Turkey (under bilateral free trade agreements).

Romania's second major trading partner in the '90-s was CEFTA. Only a few months after the initial enthusiasm for CEFTA accession, Romania realized that its agri-food sector must face strong competition and it is relatively unprepared to give an adequate response. Before joining CEFTA, the Romanian agri-food trade balance with the agreement member countries was positive, but as soon as Romania signed the CEFTA accession agreement, in 6 months only the balance became negative and the deficit increased significantly in the subsequent years (Figure 3).

Agri-food exports to CEFTA were relatively low in 1997-1998, but increased significantly, reaching EUR 55 million in 2000 (about 2.5 times higher than in 1997-1998).

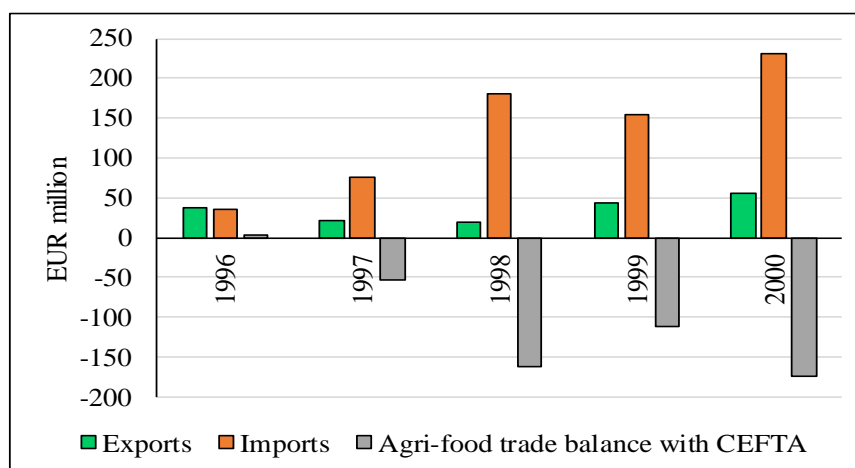


Figure 3. Romanian agri-food trade with CEFTA countries (1996-2000)

Source: calculations based on data from Tempo-online (NIS)

At the same time, CEFTA agri-food imports exploded: in 1997, their value doubled compared to 1996, and in the following years they increased so that in 2001 they were 6.6 times higher than in 1996. These developments resulted in very high trade deficits; in 2000 the trade deficit with CEFTA was 3.2 times higher than the actual exports.

Generally speaking, since 1997, trade flows have changed in terms of quantity, value and origin / destination. Competitive Romanian products (such as sunflower and wheat seeds) were exported, while domestic markets for non-competitive products were

invaded by imports (pork and poultry meat, dairy products). The main exports destinations changed (they went to Middle-East countries); the main sources of imports changed as well (Hungary's share of sensitive products increased). The government interventions (enforcement of the safeguard clause) tried to correct this trend, mainly in relation to Hungary, but the trend could not be reversed. In general, Hungary has a positive agri-food trade balance with all CEFTA member countries, except for Bulgaria [4].

These trends continued even after the founding countries (Hungary, Poland, Czech Republic, Slovakia) exited CEFTA in order to join the EU in 2004 [5].

Trade analysis by the agri-food products processing degree

The analysis of the Romanian international agri-food trade by the products processing degree in the period 1991-2000 was made using the Jankune-Wagner method, given the availability of data detailed at 4 digits level. The results show that during the whole analyzed period, agricultural commodities were predominant in exports, their shares varying between 54-67% (Table 1).

Table 1.

Structure of agri-food exports and imports by the products' processing degree (1991-2000) (%)

Year	Export				Import			
	Agricultural commodities	Processed agri-food products			Agricultural commodities	Processed agri-food products		
		Total	of which: primary processed products	secondary processed products		Total	of which: primary processed products	secondary processed products
1991	53.9	46.1	31.3	14.7	43.2	56.8	27.6	29.1
1992	46.1	53.9	38.1	15.8	39.6	60.4	31.7	28.7
1993	32.8	67.2	52.7	14.5	48.6	51.4	27.5	23.9
1994	36.8	63.2	48.5	14.7	19.4	80.6	41.8	38.8
1995	54.6	45.4	33.9	11.5	13.4	86.6	43.2	43.4
1996	60.2	39.8	27.5	12.3	17.9	82.1	44.9	37.3
1997	39.5	60.5	46.5	14.0	24.0	76.0	39.2	36.7
1998	51.9	48.1	32.7	15.4	22.3	77.7	45.1	32.6
1999	67.3	32.7	22.2	10.5	28.8	71.2	40.6	30.6
2000	63.1	36.9	19.8	17.1	28.3	71.7	41.7	30.1

Source: calculations based on data from Tempo-online (NIS)

After joining CEFTA, the share of processed products decreased gradually; primary processed products from 47% down to 20% in 2000. The share of the secondary processed products was even lower, and decreased from 15% down to a minimum of 11% (in 1999).

At the same time, imports of processed agri-food products were very high (varying between 71-87%). The only moment when the share of imported basic agricultural commodities was close to half was in 1993 (just as an exception), when an extreme severe drought destroyed most crops (cereals, oilseeds, pulses, vegetables and fruits), and massive imports were required in order to meet the domestic demand.

When analyzing the trade balance by the degree products' processing degree during the period 1991-2000, both categories of processed products (primary and secondary) showed negative balances (Figure 4).

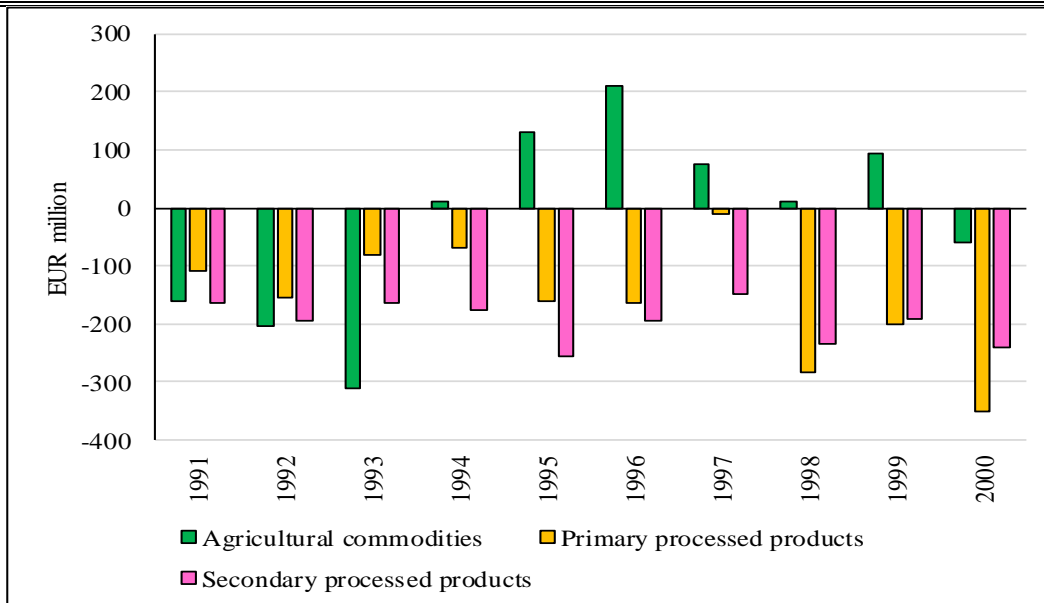


Figure 4. Structure of the international agri-food trade by the products' processing degree (1991-2000)

Source: calculations based on data from Tempo-online (NIS)

The balance of basic agricultural products was positive in the period 1994-1997 due to exports of fresh vegetables and fruits, as well as the resumption of exports of cereals (forbidden to export or very low export volumes in 1991-1993), with a maximum surplus in 1996 (EUR +215 million). Subsidizing grain exports in 1999 led to the re-emergence of a trade surplus on basic agricultural products. The year 1993, with very low agricultural output due to excessive drought, showed the largest trade deficit in basic agricultural products.

The trade deficit has grown significantly in processed products since the second half of 1997, when Romania became a CEFTA member, and due to the substantial reduction in customs duties, large imports of agro-food products mainly from Hungary and Poland - mainly primary processed products (pork and poultry meat, wheat and maize flour).

The balance for agricultural commodities varied from positive to negative in relation with the climate conditions which heavily influenced the crops and vegetables production, thus the available quantities for export or, conversely, with the needs for imports. The variation reduced subsequently after 2000, due to technological improvements and increased productivity.

CONCLUSIONS

The transition to the market economy (the transition period 1990-2000) resulted a deep rupture in the structure and functioning of the Romanian economy, from the point of view of the ownership structures, to the relations on the agri-food chains, reflected in the economic crisis and productivity losses in agriculture.

Nevertheless, it brought major changes in the Romanian international trade. The state's monopoly on the international trade was abolished in early 1990, opening the way for far-reaching liberalization in this sector. The reforms took some time to implement, but due to external pressures for the export-import operations to run in a 'normal' way (in international terms), the changes were implemented quicker than in other economic sectors.

The severe disturbances all along the agri-food chains (from farm production to industrial food processing) was reflected during the transition period in the low competitiveness of the Romanian agri-food products on international markets and in the inability to cover the domestic demand through national production and retail. These kinds of inefficiencies resulted in important imports of agri-food products and a continuous and increasing trade deficit negative in the analyzed period (1990-2000).

In the subsequent years, and mainly after EU accession, the Romanian agri-food trade increased sharply in value and volume terms, but the deficit (although variable) is still there.

The ratio between agricultural commodities and processed products deteriorated after joining CEFTA and later the EU, but in the latest years started a slow and continuous recovery trend.

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