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EUROMED AGREEMENTS AND AGRICULTURAL TRADE ISSUES

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This contribution was carried out within the activities of the INEA Observatory on European Union Agricultural Policies and is based on the findings of the INEA Report "L'Unione Europea e i Paesi Terzi del Mediterraneo".

Senior authorship is not assigned. Wherever necessary, the first section is due to C. dell'Aquila and the second section to B.E. Velazquez, the introductory paragraph and the conclusions are shared.

SUMMARY – An updated picture of EuroMed agreements is provided, focusing on preferential treatment in agro-food trade and identifying major EU's commodities and countries to be affected. EU-SEMC agro-food trade is analysed using a set of indicators, such as indexes of trade specialisation, similarity and complementarity. The findings show that preferential agro-food liberalisation between EU and SEMC is still weak and only partially capable to meet both the goals stated by the EuroMed Partnership and EU's aim to strengthen its Mediterranean ties. SEMC show the highest export specialisation indexes for fruit and vegetables, oils and fats, flowers; for the EU the highest values are shown for fibre crop, cereals, live animals. Export similarity indexes suggest that Spain, Greece, Holland, Italy and Portugal could face greater competition with SEMC exports, while the SEMC-EU complementarity is stronger for Belgium, Germany, Holland and France.

Key words: European Union, Mediterranean countries, Trading agreements, Agricultural trade, Trade indexes.

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INTRODUCTION

Since the Barcelona Conference (1995), the European Union (EU) is re-launching its global Mediterranean policy by building an Euro-Mediterranean Partnership (EMP) between the EU and twelve Southern and Eastern Mediterranean Countries (SEMC)[1]. Other than improving the limited results of 1970s Mediterranean agreements, the renewed effort is aimed at counterbalancing EU engagement on Eastern Europe recovery and integration. Once again, although in a wider and deeper framework compared to the old agreements, the major focus of EU initiative is the creation of a Mediterranean FTA.

Agriculture plays a relevant role in the new wave of Mediterranean agreements. This is due to several reasons stemming not only from the crucial importance of the sector in the economic structure of many SEMC, from the weight of agro-food in SEMC trade with the EU, as well as SEMC remarkable potential absorption for EU agro-food surpluses.

While providing an updated picture of Euro-Med Agreements, this paper focuses on agro-food trade issues raised both from preferential treatment granted to specific products and countries and from the observation of past and current EU-SEMC trade flows.

The first section deals with the current features of Mediterranean agreements and the preferential treatment agreed by EU and SEMC on agro-food products. In the second section SEMC trade with EU is examined using the Comex-EUROSTAT database from 1988 to 1999. Stock, trend and composition of EU-SEMC trade flows are analysed, by using a set of trade indicators, such as trade shares and indexes of trade specialisation similarity and complementarity, to show plausible competition and complementarity relations for major EU products and countries. The last section provides concluding remarks.

EU MEDITERRANEAN POLICY AND AGRICULTURAL TRADE PREFERENCES

Overview

The definition of trading agreements with many Mediterranean countries has been the major focus of the EU's global Mediterranean policy since the 1970s. The EMP is attempting to re-launch this approach, by placing the creation of a Mediterranean FTA and the widening and deepening of several other dimensions of co-operation on top of the Mediterranean agenda. Reciprocal trade liberalisation, as well as EU technical co-operation and financial support are seen as major threads driving development and integration in the Mediterranean area. All these measures have to comply WTO rules (open regionalism) and coordinate with IMF and World Bank stabilisation and structural adjustment programs.

Economic development and reduction of the gap between the EU and its Mediterranean neighbours, are considered as a prerequisite for socio-economic and political stability in the area. Hence, trading agreements are meant to be part of a multifaceted approach, aimed at strengthening the political and economic presence of the EU in the area, as well as SEMC economic and social structures.

The main instruments defining relations with SEMC within the EMP framework are association agreements and regulations on financial co-operation. In particular, the relationships with the three EU member candidates are defined on the basis of old association agreements, their further revisions, and the state of accession partnership of each country with the EU.

EU current political, economic and commercial relations with Cyprus, Malta and Turkey have been absorbed into pre-membership strategies. They look forward to progressive alignment of national legislation with EU *acquis* and provide for participation into a number of Community programmes, while addressing negotiations on all aspects of membership. Trade commitments have been reciprocal since the 1970s, although asymmetrical in favour of the three SEMC.

As regards the other nine countries, the relationships are defined by new Euro-Mediterranean Association Agreements (EMAA) or, should these not be yet in force (as in the case of Egypt, Algeria, Lebanon and Syria), by 1970s co-operation agreements. EMAA are almost completed and discipline political, economic and commercial relations in a relatively standard way, pursuing the goal of creating a FTA within a time span of twelve to sixteen years. Also EMAA trade commitments are reciprocal and

[1] The EMP gathers, besides EU members, three candidates to EU membership (Cyprus, Malta and Turkey) and nine countries negotiating new EuroMed Association Agreements (Tunisia, Morocco, Israel, Palestinian Authority, Jordan, Egypt, Lebanon, Algeria and Syria).

the liberalisation process varies considerably depending on whether manufacturing, agriculture or services sectors are considered.

EMAA's reciprocity represents a significant step forward compared to the first generation agreements, that, apart from the case of Israel, provided for unilateral concession by the Union side. In fact, as a good share of SEMC manufacturing exports already have free access to EU markets through old co-operation agreements, EMAA envisages new trading preferences for manufacturing products of a quasi-unilateral kind in favour of exports from the UE. Also for agro-food products the liberalisation process, albeit gradual and partial, entails the new commitment by SEMC to introduce preferential measures favouring EU exports (Table 1).

The other cornerstone of the EMP is the new modality of managing financial co-operation, which is closely linked to the perspective of creating a Mediterranean FTA and based on an autonomous financial regime with a single budget for the whole Mediterranean area (MEDA). MEDA replaces the old five year protocols stipulated with each country, entailing a considerable increase in the financial endowment provided by the EU (three times the former level), as well as relevant procedural changes and a notable enlargement of issues to be tackled. Among these issues are included several agricultural provisions within the EMP framework, supporting SEMC agriculture to improve economic performance, openness to trade and rural development (technical assistance, training, product diversification, environmental and social protection measures) (INEA, 2001; European Commission 2000a).

Table 1. State of EMAA negotiations with major SEMC and agricultural products involved in trading Preferences (data in INEA, 2002, and EMAA texts reported in the reference section)

Country	Products involved:	
and type of agreement	EU trading preferences	SEMC trading preferences
Tunisia 1995 EMAA, in force since 1998	Live animals (horses); meat (sheep, goat); animal products; flowers; fruit and vegetable products; citrus fruits; potatoes; olives; olive oil; processed fruit, vegetable and citrus products; wine; cereal residues	Live animals (bovines); beef; milk in powder; butter; cheeses; eggs; seed potatoes; potatoes; wheat; other cereals; seed oil; sugar; feedstuff
Morocco 1996 EMAA, in force since 2000	Live animals (horse, sheep, goat); horse meat; flowers; fruit and vegetable products; citrus fruits; potatoes; olives; fruit; processed fruit, vegetable and citrus products; olive oil; wine	Live animals (bovines); beef; milk in powder; butter; seed potatoes; wheat; barley; corn; oilseeds; seed oil; sugar
Israel 1995 EMAA, in force since 2000	Meat (turkey, goose); flowers; fruit and vegetable products; citrus fruits; potatoes; sweet corn; processed fruit, vegetable and citrus products; baby food; bakery products	Beef; milk in powder; butter; cheeses; flowers; seed potatoes; potatoes; fruit and vegetable products; wheat; barley; other cereals; seed oil; sugar; processed vegetable and fruit products; feedstuff
Egypt[1] 1977 Co-op. Agreement 2001 EMAA to be implemented	fruit and vegetable products; potatoes; oranges; processed vegetable products; cereal residues	Live animals (bovines); beef; milk in powder; butter; cheeses; fruit; seed potatoes; oilseeds; seed oil; feedstuff
Algeria[1] 1976 Co-op. Agreement EMAA negotiation Concluded in 2001	Vegetable products; oranges; potatoes; dates; prepared olives and vegetable products; wine	Live animals (bovines); beef; milk in powder; seed potatoes; wheat; barley; seed oil

[1] EU trading preferences currently applied on the basis of 1970s agreements and further revisions. SEMC trading preferences to be applied following on the implementation of EMAA.

The budget is divided into bilateral (EU-single SEMC) and regional chapters. The three EU candidates have access to regional founding only, although specific bilateral founding is provided to them in a pre-accession framework. Over the time span covered by MEDA I (1995-99) about 86% of commitment credits have been addressed to bilateral co-operation and shared in a number of fields:

structural adjustment (15%), economic transition support (30%), socio-economic balance support (29%), environment (6,8%), rural development (4,5%). However, MEDA actual payments have been much lower compared to commitments (26%), due both to the length of the implementation period for some projects of relevant dimension, and to negotiating controversies and cumbersome procedures for project approval and management.

The EMP is largely falling short of the deadlines defined by the Barcelona Conference, due to the time needed for EMAA definition and implementation. This, in turn, results from a number of controversies on several negotiating chapters, particularly related to SEMC trade liberalisation, EU agro-food trade liberalisation and the difficulties in MEDA implementation. Other problems stem from the institutional architecture of the EU, which creates many opportunities for vetoes in the process of definition, ratification and implementation of the agreements.

Treatment of agro-food trade

As regards agro-food trade, the EMP envisages a very gradual liberalisation on a reciprocal basis. With this in mind, EMAA lay down a succession of deadlines for the revision of current protocols on the basis of an examination of the current trade situation and the prospects for further openings (but no defined schedule of tariffs and NTBs phasing out is provided for). Although the intention to move towards liberalisation is made explicit also for agro-food products and this should necessarily be the case with Cyprus, Malta and Turkey when they join the EU concessions in the new agreements are limited to improving, on the basis of traditional trade flows, the previous preferential regime. Moreover, new preferential treatment for EU exports is being introduced.

Generally speaking, the preferential treatment within the five EMAA agricultural protocols already in force is comparable to the treatment granted to the three EU candidates. All these countries benefit from a rather wide coverage of traditional trade flows and, for these flows, a lowering of the *ad valorem* tariff which now stands at 100% for nearly all products. Products involved are mainly Mediterranean (fruit and vegetables, citrus fruit, olive oil, wine), although for some countries the range is wider (Table 1).

On the other hand, the concessions on specific duties imposed on a number of vegetable and fruit products, as well as other Mediterranean products and some basic food stuffs, are much less incisive. In particular, in the case of fruit and vegetables, no preferential measures are foreseen regarding specific duties on a number of products subject to *entry price*[2], although there are some important concessions for certain countries on the level of some prices in question[3]. With reference to this, it has to be underlined that both the management of the entry price system emerging from the Uruguay Round and the concessions on some of these prices can determine a notable advantage for favoured exporters against rival contenders for EU market quotas[4] (Tangermann, 1996; Swinbank-Ritson, 1995).

The effect of the reduction in tariffs and NTBs is lessened by numerous exceptions, on a seasonal and/or product basis, which, taken as a whole, render the current EU agro-food preferences very similar to those characterising the old 1970s agreements. The seasonal exceptions concern the majority of fresh fruit and vegetables, for which the tariff cut is limited to determined periods of the year, compatible with the harvesting within the EU. Other exceptions cover a very small number of fresh or processed fruit and vegetables, some tropical products and a certain number of minor products, whose tariff reduction is less than 100%.

Furthermore, a variety of quantity restrictions of preferential treatment indicate that the EU is still pursuing its attempt to combine Mediterranean preference with protection of domestic production, manipulating the concessions in order to avoid radical changes in consolidated trade flows. Tariff rate quotas (TRQ) are currently imposed on imports of a large number of fresh fruit and vegetables and some dried or processed ones, as well as flowers, Tunisian olive oil and all qualities of wine. Usually TRQ restrict the preferential treatment, nevertheless there are a number of cases in which the excess quantity itself enjoys a tariff reduction, though a lower one. In many instances, instead of TRQ, reference

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2 The system implies that a relevant surcharge, over the normal tariff, is applied on imports whose c.i.f. price is below the entry price bound in the WTO Schedule of the EU.

3 Oranges from Morocco, Israel, Cyprus and Egypt benefit from some 25% reduction of the entry price over the period December 1st – May 31st. Similar provisions are provided for Moroccan exports of tomatoes, aubergines, artichokes, cucumbers and tangerines.

4 The entry price system allows the preferred exporter to undercut the price of any MFN exporter, due to the concession on the level of both tariff and entry price.

quantities (RQ), or the right to impose RQ, are defined; so that the Commission has the option to submit a product to TRQ. RQ are imposed on many fresh fruit and vegetables, some dried or processed ones, nuts, and fresh and preserved tropical fruit (Table 2).

The restrictions in question are relevant not only for domestic protection purposes, but also for both the distribution of the preference margin between importers and exporters (due to trade licensing systems)[5] and the development of Mediterranean agro-food trade liberalisation, since there is little room left for further tariff concessions.

Table 2. EU restrictions on agro-food export from major SEMC. Main products/product groups (2001) (Data in INEA, 2002)

Country	Tariff rate quotas (TRQ)		Reference quantities (RQ)		Potential RQ
	Product	Tonn.	Product	Tonn.	Product
Turkey	Preserved tomatoes	30.000	n.a.	n.a.	n.a.
	Watermelons	14.000			
	Prepared tomatoes	8.000			
	Onions	2.000			
Tunisia	Olive oil	50.000	Almonds	1.120	Tomatoes
	Oranges	35.123	Apricots	2.240	Capers
	Potatoes	16.800	Dried oranges	1.680	Garlic
	Preserved tomatoes	4.000			Asparagus
Morocco	Oranges	380.800	Preserved apricots 1	7.560	Olives
	Tomatoes	168.757	Preserved apricots 2	7.200	Capers
	Mandarins and tangerines	168.000	Sweet peppers	3.360	Beans
	Cucumber	5.600	Dried citrus	1.120	Peas
Israel	Cut flowers	19.500	Avocados	37.200	Grapefruits
	Orange juice	92.600	Grapefruit juice	34.440	Dates
	Oranges	200.000	Grapefruits in segments	21.440	Mangoes and other tropical fruits
	Mandarins	21.000	Table grapes	2.280	
Egypt[1]	New potatoes	130.000	n.a.	n.a.	n.a.
	Dried onions	16.000*			
	String beans	15.000*			
	Oranges	50.000			

n.a.: not applicable.

1 TRQ to be applied following on the implementation of EMAA (1st year of implementation).

* TRQ gathering also other vegetable products and pulses.

Although SEMC reciprocal concessions in favour of the EU will not be discussed here in details, it must be mentioned that they are more limited, both in terms of share of preferential over total trade flows and in terms of tariff reductions. Products concerned are largely basic food stuffs or "continental" products and TRQ are frequently imposed.

As a whole, the treatment of agro-food trade appears to fall short of the liberalising project of the EMP and show some contradictions between objectives and policy instruments the negotiating parties have agreed upon. Even though SEMC are going to face many relevant problems with the perspective of opening up their economies, including the asymmetry in the pace of trading reform between various sectors of agriculture, as well as between the agricultural sector as a whole compared to other sectors, the rest of this section deepens the EU side.

As far as the EU is concerned, the current approach is in contrast with the set up of EMP technical and financial co-operation aimed at re-launching SEMC agriculture. While SEMC are supported also to rebuild their agricultural policies and improve the trading performance, EU agricultural markets remains substantially locked in the traditional protectionist framework. Moreover such an approach is in contrast

5 When a TRQ is actually binding, the "owner" of the licence is likely to attract most of the preference margin, as he is in a quasi-monopolist position. This should imply that most of the price advantage accrues to importing EU companies, since usually the EU issues licences to trading companies registered in the EU. However, when exporting countries manage to establish monopoly export agencies the result is more uncertain (Tangermann, 1996).

with the prevailing EU governments policies on immigration, since the containment of SEMC agricultural growth compromises job creation in SEMC agriculture and encourages migration.

Basically, in spite of the understanding of the links between trade liberalisation and other policies considered part of the complex approach to development and integration in the Mediterranean basin, the actual trading preferences are not consistent with (and therefore badly related to) a number of other policy dimensions relevant to the EMP objectives.

Besides these policy contradictions inside the EMP, from the EU's standpoint the treatment of trade in the agricultural chapter of current Mediterranean agreements shows two main shortfalls. The first one regards the difficulty to push through sufficient trade concessions to effectively support the strengthening of EU's role in the Mediterranean. The weakness of EU concessions can be appreciated considering that SEMC have currently no particular reason to expect noteworthy *new* commercial advantages from the EMP. In the manufacturing sector, where EU liberalisation took place at the end of the 1970s (and where SEMC have not been able to gain the expected benefits), the major change seems to consist of SEMC reciprocal concessions favouring EU exports. Furthermore, in the agricultural sector, where SEMC could have some competitive advantage, the aim is to constrain SEMC opportunities for trade expansion in EU markets, while, again, introducing some trading preferences in favour of EU exports. One can conclude, therefore, that the main current feature of the EMP consists of a trade off between preferential liberalisation by SEMC in exchange for EU financial support;

The second shortfall is related to the fact that current protectionist framework is becoming less suitable for the purpose of supporting Mediterranean EU producers (García Alvarez-Coque, 1999). While on EU fresh products markets (i.e. fruit and vegetables) non-price factors are becoming increasingly important for successful marketing, inward looking trade policies keep dealing mainly with cost and price factors of competitive advantage. In the long run, the lack of suitable structural policies, dealing with marketing systems, quality, technologies for product management and delivery, might eventually displace many EU producers from leading trading companies and operators (usually European as well), no matter the level of border protection carried out.

EU-SEMC AGRO-FOOD TRADE

In this section SEMC trade with EU is examined using the Comex-EUROSTAT database. Single SEMC countries considered are: Algeria, Cyprus, Egypt, Israel, Lebanon, Lybia, Malta, Morocco, Syria, Tunisia, Turkey, Palestinian Authority and Jordan, nevertheless, disaggregated data the last two countries is not available. Lybia was included in the analysis, although it did not participate to the Barcelona Conference, in order to document its relevance in SEMC-EU trade relations and in view of its future accession to the Euro Mediterranean Partnership.

Trade between SEMC and EU in the period comprised between 1988-89 and 1998-99 increased visibly (Table 3). Total imports from the EU show a sharp expansion both in absolute terms (from over 29 billion euro to roughly 69 billion euro) and in relative terms (+130%). Exports display a slower growth pattern (+88%) increasing from slightly less than 26 billions to 48.5 billion euro. Consequently, the value of the overall trade balance has worsened markedly. As regards to agro-food trade, imports in 1998-99 reached 5.1 billions showing an increase of 48% compared with 1988-89. In the same period exports grew by 61%, reaching 4.7 billion euro in 1998-99. This leads to an improvement in the agro-food trade balance (from -882 to –653 million euro) and to a slight fall of the agro-food component weight over total trade.

Both SEMC as a whole and single country agro-food imports increased at a slower pace with respect to total imports, especially after 1994-95. This is particularly true for Syria, Lybia and Egypt, whose imports grew little in the whole period examined, and also for Tunisia, Malta and Turkey. Likewise, on the export side the growth rate of overall agro-food component increased at a lower rate than total exports, but single country exports show different behaviours: some almost doubled in value (Turkey, Syria and Tunisia), other revealed a distinct expansion (Algeria, Morocco, Egypt), while other grew little or even reduced. The good performance of Turkey, Tunisia and Morocco exports are due, probably, to their greater competitiveness but the preferential market access conditions agreed to them may certainty have helped, as discussed in the previous section.

For SEMC taken altogether the standardised agro-food trade balance improved from –14.4% in 1988-89 up to –6.5% in 1998-99. Nevertheless, if taken singularly countries show unlike performances, improvements are observed only in the case of Tunisia, Egypt, Syria and Algeria; all other countries

worsened their balances. The trade performance of Tunisia is remarkable as its balance ameliorated from an even situation in 1988-89 to a 15% surplus in 1998-99.

Table 3. SEMC Total and agro-food trade with EU (EUROSTAT data in INEA, 2002)

	Total			Agro-food		
	1988-89	1994-95	1998-99	1988-89	1994-95	1998-99
IMPORTS (million euro)						
Algeria	4,156	4,642	5,089	902	1,001	1,004
Cyprus	1,213	1,988	2,176	132	161	203
Egypt	3,636	4,702	7,368	730	627	741
Israel	4,776	9,165	11,233	261	440	491
Lebanon	830	2,310	2,765	180	327	423
Lybia	2,787	2,123	2,428	440	406	477
Malta	929	1,909	1,995	96	145	178
Morocco	2,850	4,518	6,487	196	407	454
Syria	706	1,465	1,530	190	198	201
Tunisia	2,244	3,947	5,811	225	289	287
Turkey	5,022	10,596	20,065	292	555	707
Other countries*	888	1,005	1,145	143	170	174
SEMC	30,036	48,370	68,092	3,788	4,726	5,339
EXPORTS (million euro)						
Algeria	4,468	4,610	5,474	20	27	31
Cyprus	456	678	508	142	141	107
Egypt	2,037	2,483	2,355	161	211	246
Israel	2,876	4,263	7,073	709	593	774
Lebanon	105	100	182	30	18	24
Lybia	5,764	5,878	6,251	2	16	3
Malta	456	1,018	779	8	7	10
Morocco	2,464	3,850	5,372	669	850	1,023
Syria	596	1,652	1,811	40	149	112
Tunisia	1,749	3,194	4,515	226	370	390
Turkey	4,915	8,370	14,238	893	1,552	1,953
Other countries*	102	132	160	4	12	12
SEMC	25,989	36,227	48,719	2,905	3,947	4,687

Single countries agro-food trade balances vary a lot. In 1998-99 only four of them are net exporters (Turkey, Tunisia, Morocco and Israel) all the others are net-importers. Particularly, Malta, Lybia, Lebanon and Algeria depend heavily on EU imports as shown by their standardised deficits, that go beyond –80% (Fig. 1).

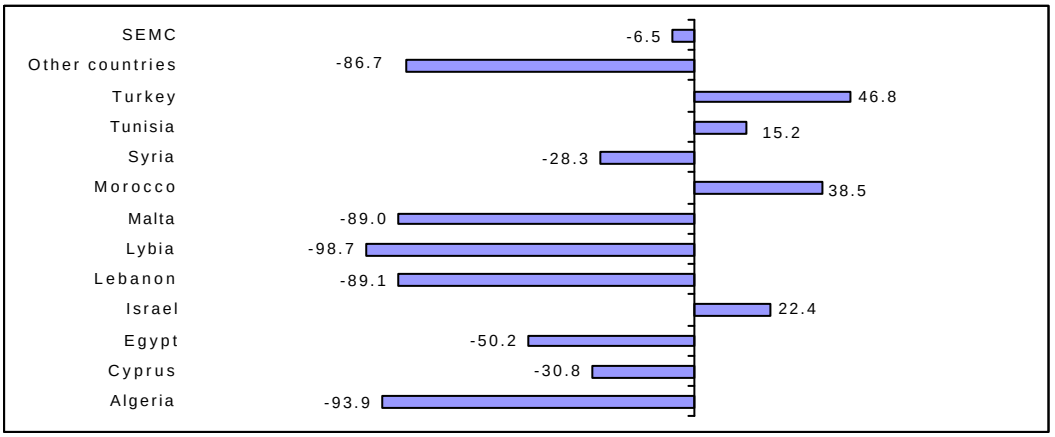

Fig. 1. SEMC agro-food standardised trade balance with EU (1998-99)
(EUROSTAT data in INEA, 2002)

As regards the import-export composition, SEMC agro-food imports from the EU tend to concentrate on processed products and mainly involve cereal, oilseed and animal products (Table 4). There is a noticeable concentration with the first five groups covering 60% of the total. These are cereals, sugar and confectionery, dairy products, other food products, and oils and fats. As regards the first four, the main supplier is France followed by Germany, the UK, Netherlands and Belgium. Various countries have dominant positions depending on the product: Spain (oils and fats), Italy (processed cereals, oilcakes and oilseed flour), EU Mediterranean countries in general (processed fruit and vegetables and fibre crops).

Table 4. Composition of SEMC imports from EU in 1998-99
(EUROSTAT data in INEA, 2002)

	Imports			Top trading partner	
	Value 000 euro	Quota (%)	Cumulated quota (%)		Quota (%)
Cereals	712,277	13.3	13.3	France	55.8
Sugar & confectionery	686,130	12.9	26.2	France	27.3
Dairy products	684,602	12.8	39.0	France	42.6
Other food products	584,922	11.0	50.0	France	25.5
Oil & fat	503,817	9.4	59.4	Spain	32.6
Processed cereals	362,204	6.8	66.2	Italy	33.8
Fresh & frozen meat	292,478	5.5	71.7	Ireland	65.1
Oilcakes & oilseed flour	242,104	4.5	76.2	Italy	17.4
Live animals for consumption	226,912	4.2	80.4	Germany	37.7
Beverages	223,912	4.2	84.6	UK	49.4
Prepared & preserved fish	134,780	2.5	87.2	Netherlands	37.2
Fresh vegetables & pulses	124,361	2.3	89.5	Netherlands	63.3
Fibre crops	109,200	2.0	91.5	Greece	92.1
Processed vegetables	76,626	1.4	93.0	Italy	29.5
Raw tobacco	62,443	1.2	94.1	Italy	45.7
Processed fruit	47,964	0.9	95.0	Spain	21.1
Forestry products	47,513	0.9	95.9	Finland	34.6
Prepared meat	42,426	0.8	96.7	Netherlands	32.6
Other food products	39,917	0.7	97.5	France	20.9
Flowers & ornamental plants	27,354	0.5	98.0	Netherlands	59.6
Other products	107,556	2.0	100.0		
Total	5,339,492	100.0		France	26.5

SEMC exports are less concentrated, although over half the total is due to fresh and processed fruit and vegetables (Table 5). The first five products cover 51% of total foreign sales: these are dried fruit, fresh vegetables, preserved fruit, fish products and citrus fruit. The importing countries vary by item, Germany has an important role as importer of dried and preserved fruit, France for vegetables, Spain and Italy for fish and UK and France for citrus fruit.

Summing up, a common characteristic of SEMC is the product and geographical concentration of their agricultural trade with the EU. This can be seen from the fact that a high proportion of overall trade concerns a relatively small number of products/countries.

Table 5. Composition of SEMC exports to EU in 1998-99
(EUROSTAT data in INEA, 2002)

	Exports			Top trading partner	
	Value 000 euro	Quota (%)	Cumulated quota (%)		Quota (%)
Dried fruit	698,303	14.9	14.9	Germany	39.4
Fresh vegetables & pulses	460,441	9.8	24.7	France	45.2
Processed fruit	443,549	9.5	34.2	Germany	33.2
Prepared & preserved fish	432,279	9.2	43.4	Spain	43.8
Citrus	370,204	7.9	51.3	UK	27.8
Fresh fruit	318,181	6.8	58.1	France	47.7
Oil & fats	305,011	6.5	64.6	Italy	65.7
Processed vegetables	277,988	5.9	70.5	France	28.5
Fibre crops	193,807	4.1	74.7	Italy	53.0
Flowers & ornamental plants	174,954	3.7	78.4	Netherlands	65.6
Fish products	149,724	3.2	81.6	Italy	33.3
Raw tobacco	129,165	2.8	84.4	Germany	38.1
Other food products	118,957	2.5	86.9	France	25.0
Fresh & frozen meat	97,046	2.1	89.0	Germany	56.1
Coffee, tea & spices	78,737	1.7	90.6	Germany	31.8
Cereals	73,414	1.6	92.2	Italy	36.9
Sugar & confectionery	59,125	1.3	93.5	Germany	29.2
Beverages	58,504	1.2	94.7	Germany	38.9
Oily fruit & seeds	47,937	1.0	95.7	Spain	27.4
Oilcakes & oilseed flour	40,941	0.9	96.6	Spain	36.6
Other products	158,570	3.4	100.0		
Total	4,686,833	100.0		Germany	19.7

Product specialisation in EU-SEMC trade

The structure of EU-SEMC trade is analysed here using two indicators of relative trade specialisation, based on market quotas standardised respect to different bases. The indexes allow identifying more precisely the composition of agro-food trade, highlighting single country differences respect to the average composition of flows.

A disaggregation of 29 items that correspond to EUROSTAT database four-digit level for the two-year period 1998-99 was used in the calculations. Besides, as indexes are standardised with respect to specific markets (i.e. extra-EU countries, EU as a whole), they do not take into account absolute values of flows, therefore they have to be analysed in relative terms. Hence, when flows are pretty narrow or concentrated on few commodities the index calculation may be distorted, in this case specific or relevant situations are underlined.

The first specialisation index proposed is the standardised quota of SEMC exports to EU (S_1). The share of each SEMC exports to EU with respect to EU imports from non-EU countries is calculated by product. An index value greater than one for a specific product/country reveals that its share on total agro-food exports to EU is larger for this country with respect to other non-EU countries. In this sense, the index gives an estimate of the country relative product specialisation compared to all non-EU countries taken together

The index is calculated as follows: $(S_1) = (X_{Pj} / X_P)/(M_{EUj} / M_{EU})$

where:

X_{Pj} = exports to EU from the *p* SEMC country relatively to the *j* product
X_P = total agro-food exports from the *p* SEMC country to EU
M_{EUj} = EU imports from non-EU countries (net of imports from the *p* SEMC) relatively to the *j* product
M_{EU} = total EU agro-food imports from non-EU countries (net of imports coming from the *p* SEMC)

The specialisation of SEMC exports to the EU with respect to EU imports from non-EU countries (S_1) presents the highest values for fruit and vegetables products, whose relevance in many SEMC countries is well known, followed by citrus fruit, dried fruit and processed vegetables (Table 6). As regards to fresh vegetables, whose specialisation index is 14 for SEMC as a whole, major values are ranked for Cyprus (29), Egypt (27), Malta (20), Morocco (17) and Israel (10). Indexes remain below the average for Syria, Turkey and Lybia. Countries that have contributed mostly to the index value are Egypt, Morocco and Israel, respectively, in first, second and fourth position in terms of their contribution to SEMC agro-food exports. In the case of citrus fruit (9) top values were figured out for Cyprus (19), Morocco (13) and Israel (12). For dried fruit (7) the contribution of Turkey (17) to the index is remarkable. Other than representing more than one third of total agro-food exports to EU, Turkey absorb a good 90% of total dried fruit exports to EU. Processed vegetables show a relatively high specialisation index (4), with Morocco (5.6) and Turkey (5.3) that contributed mostly to this value.

Products with lower specialisation indexes, but with a value greater than 1, include flowers and ornamental plants, fibre crops, preserved fruit, oils and fats, the residual group “other products”, dried vegetables and fresh fruit. For certain products, like flowers and ornamental plants, dried fruit, oils and fats, there is a very close product/country link and therefore little competition between countries in those markets. On the other hand, more countries have a high degree of specialisation in the case of fresh vegetables (Cyprus, Egypt and Morocco), citrus fruit (Cyprus, Israel and Morocco) and fishery products (Malta, Morocco and Libya).

The second specialisation index proposed is the standardised quota of EU exports to SEMC (S_2). The share of each EU country exports to SEMC with respect to EU exports to non-EU countries is calculated by product.

Like in the previous case, an index value greater than one for a specific product/country reveals that its share on total agro-food exports to SEMC is larger for this specific country with respect to other non-EU countries.

The index is calculated as follows: $(S_2) = (X_{iPj} / X_{iP})/(X_{tEXj} / X_{tEX})$

where:

X_{iPj} = exports to SEMC from the *i* EU country relatively to the *j* product;

X_{iP} = total agro-food exports from the *i* EU country to SEMC;

X_{tEXj} = *i* EU country exports to non-EU countries (net of export to SEMC) relatively to the *j* product;

X_{tEX} = *i* EU country total agro-food exports to non-EU countries (net of exports to SEMC).

The specialisation index on exports from individual EU countries to SEMC highlights that the EU overall is specialised mainly in three product groups: fibre crops, cereals and live animals (Table 7). Besides, in all three cases a good number of member countries are relatively specialised. It should be noted, moreover, that products where the EU as a whole demonstrates above average specialisation are those more involved in SEMC exports. In particular, the group in which the EU is most specialised is fibre crops (5); among EU members, Greece (5), Spain (3) and Italy (3) have the highest values. As regards cereals (4), the single most important SEMC import, the countries with a degree of specialisation above average are, in order of importance, Austria (9), Belgium (9), Sweden (7), Germany (7) and Spain (5). For live animals, Denmark (11), Spain (11), Ireland (11) and Germany (9) have values above average.

The specialisation index assume relatively high values for fresh vegetables in the case of Denmark (23) and United Kingdom (16), and for live animals, oilcakes and oilseed flour in the case of Italy (9 in both cases). It is also noticeable that Ireland shows very high index values for some products, like fresh and dried vegetables, whose exports to SEMC are very narrow.

Table 6. Specialisation of single SEMC exports to EU with respect to EU imports from third countries, main products (1998-99). (EUROSTAT data in INEA, 2002)

	SEMC	Algeria	Cyprus	Egypt	Israel	Lebanon	Lybia	Malta	Morocco	Syria	Tunisia	Turkey
Fresh vegetables & pulses	14.0	0.1	29.3	27.3	10.5	0.3	1.0	20.7	17.0	3.7	0.7	1.3
Citrus fruit	9.4	0.1	18.9	1.2	11.7	0.1	0.0	0.0	13.2	0.0	1.9	2.8
Dried fruit	7.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.1	17.4
Processed vegetables	4.4	0.5	0.1	0.6	1.8	3.9	0.0	0.0	5.6	0.6	0.2	5.3
Flowers & ornamental plants	2.9	0.0	0.0	0.2	15.3	1.4	0.0	1.1	0.4	0.0	0.1	0.6
Fibre crops	2.6	0.0	0.0	15.7	1.6	0.0	0.0	0.1	0.1	44.3	0.0	0.7
Processed fruit	2.5	0.0	1.0	0.1	2.3	0.5	0.0	0.1	1.0	0.1	0.0	4.3
Oils & fats	1.7	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.3	0.1	15.0	1.0
Other products	1.7	0.0	0.0	3.1	5.2	1.3	0.0	0.3	0.3	3.8	0.5	1.0
Dried vegetables & pulses	1.2	0.4	0.0	8.5	0.2	0.5	0.0	0.2	0.3	1.3	0.1	1.4
Fresh fruit	1.1	7.6	0.8	0.5	2.3	0.1	0.2	0.0	0.7	0.0	2.0	0.7
Game & fish	1.0	0.8	0.6	0.1	0.3	0.1	3.5	14.1	2.6	0.1	1.7	0.5

Table 7. Specialisation of EU single country exports to SEMC with respect to extra-EU exports, main products (1998-99) (EUROSTAT data in INEA, 2002)

	EU	Austria	Bel-Lux	Denmark	Finland	France	Germany	Greece	Ireland	Italy	Netherlands	Portugal
Fibre crops	5.02	0.1	0.1	0.0	0.0	0.1	0.3	4.7	0.0	2.5	0.2	1.4
Cereals	4.42	8.9	9.1	0.9	0.0	4.0	6.8	1.0	3.1	2.5	3.6	2.9
Live animals for consumption	3.41	1.9	4.0	11.2	0.0	3.5	9.4	0.3	10.5	8.6	2.9	0.0
Sugar & confectionery	1.92	0.7	2.2	1.0	0.3	3.4	1.1	1.7	0.7	3.5	1.0	12.9
Oils & fats	1.74	0.1	0.6	1.7	0.4	6.8	0.6	1.4	0.0	1.3	1.5	2.8
Other products	1.74	0.5	4.3	0.5	0.0	2.0	1.5	1.1	0.0	3.0	1.1	0.4
Oilcakes & oilseed flour	1.53	0.5	1.8	5.1	0.0	1.2	0.8	1.6	0.5	9.1	0.8	2.9
Dairy products	1.44	3.8	2.7	2.1	1.7	2.3	1.2	0.8	0.3	0.3	1.3	0.7
Raw tobacco	1.36	0.0	0.0	0.0	0.0	0.5	0.1	0.6	0.0	4.4	0.0	6.5
Cereal preparations	1.26	0.3	0.6	1.2	0.0	1.1	1.3	0.5	0.5	1.5	1.3	0.3
Fresh vegetables & pulses	1.20	0.0	0.7	23.4	0.0	0.8	1.4	0.4	169.3	0.0	1.9	0.0
Dried vegetables & pulses	1.15	0.3	0.0	1.1	0.0	1.7	0.6	0.4	113.1	0.4	0.4	0.1
Dried fruit	1.04	0.6	1.3	0.8	1.0	2.2	0.4	0.7	0.0	0.4	0.4	2.5

Similarity and complementarity in SEMC-EU trade

The export similarity index is calculated using the formula proposed by Finger-Kreinin (1979) both for EU and SEMC as a whole and by country. A more disaggregated set of EUROSTAT data (185 items) for the two-year period 1998-99 was used in the calculations due to the index high sensitivity to the number of aggregates.

The export similarity index is calculated as follows: $Sim_{ip} = (\Sigma_j \min (Q_{EUij}, Q_{EUpj}))*100$

Where:

Q_{EUij}= j product share on *i* EU country agro-food exports to EU;

Q_{EUpj} = j product share on *p* SEM country agro-food exports to EU.

The index value varies from zero to 100. Whenever the structure of exports were completely different, the index value would be zero, whenever they were identical the index would be equal to 100. Intermediate values indicate different export similarity levels among EU and SEMC countries.

As can be seen from the above equation, SEMC and EU vectors of export shares to EU are compared. In other words, the index points out to what extent SEMC and EU export structures are similar and then gives a rough idea of possible competition among the two areas. It should be noted that given the notable differences in the absolute amount of trade of EU and SEMC, any consideration should be done in relative terms.

Beginning with the similarity index value relatively to overall SEMC (Table 8), Spain has the highest export similarity with respect to SEMC (46.1) followed by Greece (43.6), and hence both countries could eventually face greater competition from SEMC. For some EU Mediterranean countries - Italy (30.9), Portugal (27.2) and France (22.4) - the index assumes below average values, even lower than that of Netherlands (32.6). On the contrary, Finland and Ireland present the most dissimilar structure of exports to EU with respect to SEMC.

Table 8. Similarity of SEMC and EU exports to EU (1998-99)
(EUROSTAT data in INEA, 2002)

	SEMC	Algeria	Cyprus	Egypt	Israel	Lebanon	Lybia	Malta	Morocco	Syria	Tunisia	Turkey
Spain	46.1	12.3	27.4	14.8	36.3	19.0	6.8	10.7	43.4	6.3	18.6	28.7
Greece	43.6	11.3	19.0	11.2	19.6	17.7	2.6	18.8	26.6	7.1	31.0	41.3
Netherlands	32.6	10.6	17.9	14.2	37.4	21.4	6.4	12.3	21.3	6.4	8.1	23.2
Italy	30.9	12.6	22.0	12.3	24.1	21.3	4.8	11.1	18.5	5.9	10.6	24.9
Portugal	27.2	21.1	12.6	11.7	14.7	18.3	6.5	13.6	27.9	6.6	12.1	20.1
Bel-Lux	25.2	10.9	15.3	15.8	25.3	19.5	7.3	11.3	17.3	6.1	7.8	19.7
Germany	22.9	12.6	17.1	13.7	21.5	21.0	5.7	13.3	16.4	6.8	7.2	19.5
France	22.4	13.8	16.1	18.1	19.6	20.5	6.3	12.2	15.9	6.8	9.7	17.4
UK	22.1	14.1	12.9	12.7	17.5	19.8	9.6	15.5	19.9	6.7	11.2	15.8
Sweden	21.2	15.6	11.6	10.8	17.8	18.5	9.8	20.0	22.3	5.7	7.3	16.0
Denmark	20.1	12.5	12.7	9.0	15.0	13.5	6.9	16.7	22.5	6.1	8.6	12.8
Austria	18.8	12.6	14.9	11.3	22.0	18.3	4.9	8.7	12.9	5.7	5.3	16.2
Ireland	13.9	11.1	11.8	8.1	15.3	10.9	8.4	10.7	11.1	4.3	6.3	9.5
Finland	12.1	22.5	11.6	7.7	11.2	16.9	7.1	10.7	9.8	3.9	4.7	10.0
EU	33.5	13.7	19.6	16.5	29.4	22.9	7.2	13.6	24.1	7.0	11.1	24.6

As regards relations between single countries, Morocco and Spain are the most similar with an index value of 43.4, followed by Turkey with respect to Greece (41.3) and Israel with respect to Netherlands (37.4) and Spain (36.3). Other countries with relatively high similarity indexes are Morocco with respect to Portugal and Greece, Spain with respect to Morocco and Cyprus.

The comparison between the structure of EU exports and those of SEMC to the EU and particularly the analysis the single product contribution to the index brought out the leading role of fruit and vegetable products (both fresh and processed), fishery products and olive oil (INEA, 2002). In these products, Turkey, Morocco and Israel could represent a source of potential competition. As regards olive oil, another product that has some relevance on the similarity index, only Tunisia appears to be in rivalry with EU countries. Moreover, among the products mainly responsible for the value of the EU/SEMC

similarity index, most of them show high specialisation indexes in SEMC exports to the EU only relatively to specific countries. The relevant specialisation indicator for preserved fruit is high only in the case of Turkey, Israel and Cyprus. The other products where competition with EU exports appears to be stronger are fresh fruit, with high values for Israel and Tunisia, and processed vegetables, where Morocco, Turkey, Lebanon and Israel show significant values of the specialisation index.

Summing up, competition among EU and SEMC seems to be concentrated in Mediterranean products and to involve EU Southern countries. As already pointed out elsewhere, EU-SEMC competition, and its impacts, regards a limited number of regions of the EU Mediterranean countries, particularly, those where Mediterranean products account for over 40% of agricultural production values[6] (García Alvarez-Coque, 1999).

The complementarity index is a variation of the Finger and Kreining similarity index. In this case EU export structure to non-EU countries and SEMC import structure from EU, both for the two areas as a whole and by country, are compared.

The complementarity index was calculated as follows: $Com_{ip} = (\Sigma_j \min(Q_{iEXj} , Q_{EUpj}))*100$

where:

Q_{iEXj}= j product share on *i* EU country agro-food exports to non-EU countries,

Q_{EUPj} = j product share on *p* SEM country agro-food imports from EU.

For each EU country, the SEMC countries with higher index values are those whose import structure resemble mostly the structure of export to non-EU countries of the EU country itself. This implies the existence of complementarity and, thus, a potential advantage for both countries considering that products mostly exported by EU countries tend to reflect those mostly imported by SEMC from EU.

It can be observed that countries whose structure of imports from the EU most mirrors the export structure of EU countries to non-EU countries are Cyprus (64), Malta (61) and Israel (56). Diversely, countries with the lowest complementarity values are Syria and Lybia (Table 9).

Table 9. Complementarity of SEMC imports from EU and EU exports to non-EU countries (1998-99) (EUROSTAT data in INEA, 2002)

	SEMC	Algeria	Cyprus	Egypt	Israel	Lebanon	Lybia	Malta	Morocco	Syria	Tunisia	Turkey
Bel-Lux	60.7	45.0	53.5	40.7	54.2	47.9	38.5	53.8	36.5	37.9	43.8	41.6
Germany	58.2	37.4	61.6	43.2	55.3	45.0	33.2	57.5	43.4	27.2	40.2	49.7
Netherlands	51.7	31.4	49.7	36.5	46.2	45.4	27.5	50.3	34.2	28.2	30.3	42.9
France	51.1	34.6	48.8	38.3	39.3	38.7	23.7	42.8	34.8	23.6	33.6	38.7
Denmark	40.8	24.1	44.3	30.8	39.2	38.9	21.6	43.4	29.2	23.7	21.2	35.3
Austria	40.3	25.6	52.4	28.1	47.6	38.4	23.8	52.4	27.8	20.8	28.5	33.1
UK	39.5	24.0	45.6	25.8	45.5	36.3	17.5	43.8	23.3	22.1	24.5	37.8
Sweden	38.8	24.5	49.9	25.1	42.9	32.4	19.9	45.3	31.8	23.3	25.2	40.2
Spain	35.9	22.5	39.3	24.7	35.4	31.2	22.8	40.6	27.4	15.8	27.0	29.5
Finland	35.8	24.0	44.8	27.3	38.0	34.6	20.8	39.5	28.6	23.0	22.9	34.5
Italy	34.5	20.2	40.1	21.6	35.8	35.5	24.4	43.6	19.7	16.9	20.5	28.9
Portugal	32.2	21.5	34.9	21.7	28.7	29.0	25.2	35.6	25.2	11.7	23.9	26.3
Ireland	30.9	16.6	32.1	39.2	34.4	27.8	10.9	29.1	17.6	14.3	14.5	33.6
Greece	27.1	16.9	27.3	20.4	24.9	23.8	16.4	30.3	18.9	11.5	21.5	31.9
EU	56.3	33.4	63.8	39.0	56.4	49.1	27.1	60.2	35.8	26.1	35.2	50.0

Taking into consideration single EU countries, it seems that non-EU agro-food exports from Belgium are most in line with SEMC imports from the EU, the index value in this case is 61; it is followed by Germany (58), Netherlands (52), and France (51). The case of France is of some interest considering that, as pointed out in the preceding paragraphs, it is by far the most important SEMC partner. The other EU Mediterranean countries (together with Finland and Ireland) have a medium to low complementarity rating. Finally the country will the lowest rating is Greece.

[6] Ioanissia and Peloponnissos in Greece, La Rioja, Andalucia, Murcia, Valencia, Canary Islands and Balearic Islands in Spain, Liguria, Trentino-Alto Adige, Lazio, Campania, Abruzzo, Puglia, Calabria and Sicilia in Italy, Algarve and Madeira in Portugal) and Languedoc-Rousillon, Provence-Alpes-Cote d'Azur and Corse in France.

Considering each SEMC singularly, Algeria shows the greatest affinity with respect to Belgium. The latter reveals major complementarity values with all SEMC, with the exemption of Syria and Lybia, besides showing a higher value with respect to overall EU, enhancing its leading role as potential SEMC partner.

Germany and Belgium exports to non-EU countries are most in line with Israel, Egypt and Turkey imports from EU, so their complementarity index values are beyond the EU average. Complementary indexes for Netherlands and Sweden with respect to Turkey are relatively high.

As regards EU and SEMC as a whole, the analysis of the main products that contribute to this index shows that the first one is a heterogeneous group labelled “other products”, follow by flour and other foodstuff grain products. Other relevant products are sugar and confectionery, oils and fats, and spirits and liqueurs (INEA, 2002).

CONCLUDING REMARKS

The analysis of the EuroMed agreements suggests that SEMC should not expect noteworthy new commercial advantages from EMP trading preferences, since the main current feature of the EMP consists of a trade-off between preferential liberalisation by SEMC in exchange for EU financial support.

While a new preferential treatment for EU exports is being introduced, EU concessions in agro-food trade are limited to improve the previous preferential regime on the basis of traditional trade flows. For SEMC trading interests, the variety of seasonal and quantity restrictions still hampering liberalisation depict a scene similar to that of the old agreements, when Mediterranean preference, combined with protection of EU producers, granted SEMC some market shares on EU markets from competition of other exporting countries.

Trade restrictions still strong on EU agricultural import from SEMC, make preferential liberalisation only partially capable to meet both the goals stated by the EMP and the EU ’s aim to strengthen its Mediterranean ties: (i) they contrast with the line envisaged under the EMP, regarding the measures of technical co-operation aimed at restructuring and opening SEMC agriculture, as well as with EU policies on immigration (since it hamper job creation in SEMC agriculture); (ii) they make trade concessions insufficient to re-launch EU role in the Mediterranean; (iii) they hinder the development of modern, Mediterranean scale marketing systems, which would ultimately benefit a large number of operators both inside and outside the EU.

The overall analysis of preferential agreements and trade flows show that comparative advantages and policy biases in EU-SEMC agro-food trade have determined the highest level of SEMC export specialisation for products that enjoy preferential access to EU markets: fresh vegetables, citrus, nuts, processed fruit and vegetables, oils and fats, flowers. EU exports to SEMC show the highest specialisation for fibre crops, cereals and live animals, oilseed products and dairy. It is worth to note that most of these products enjoy preferential access to SEMC markets within EMAA.

Export similarity indexes suggest that, over a gradual and partial liberalisation process, Spain, Greece, Netherlands, Italy and Portugal could face greater competition with SEMC exports. SEMC import complementarity with EU exports is stronger for imports from Belgium, Germany, Netherlands and France, while it is lower for Southern EU countries (Greece, Italy, and Spain).

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