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## The Competitiveness Outlook of the European Agriculture with the new Green Deal Policy

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## Abstract

# Ivo Horák: The Competitiveness Outlook of the European Agriculture with the new Green Deal Policy

The working paper inquires into the topic of competitiveness of the European agricultural sector with regard on the new Green Deal Policy within the framework of the Common Agricultural Policy (CAP) that has been promoted as a core guidance to what agriculture in the European Union should look like in the up-coming years, providing a more thorough compliance with new environmental demands. The objective is to find a suitable methodology to analyze the possible impacts on the competitiveness of the European agriculture by implementing the new Green Deal standards.

#### Key words:

Agriculture, International Competitiveness, Green Deal, Agricultural Economics

JEL: Q10, Q17, Q18, Q57

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## 1. Introduction

The objective of this paper is to provide an overview of different approaches to measuring competitiveness in agriculture with an accent put on the new set of policies called the 'Green Deal'. Author aims to point out some key players that might come into consideration while contemplating European agriculture and create place for subsequent research on this topic. It is important to give out some defining characteristics of what European agriculture and competitiveness mean separately as well as together. The competitiveness is an essentiel ingredient for a well-functioning marketoriented economy where a certain extent of competition should be reached. This economic rationale applies nonetheless for the agrarian sector, these days very much omitted as the decline of farms and effectively farmers too is a long-lasting, considering data from Eurostat where it is estimated that number of farms dropped by about 25 % in the period of 2005 to 2016, which accounts for about 4.2 million farms in the EU, only in Poland 1.1 million farms closed down and in the Czech Republic the number dropped from 42 250 to 26 530 and the average size of a farm rose from 85 ha to 132 ha (Eurostat, 2018; Analytical Factsheet – Czech Republic, 2019). It must be considered that one of the key strategies is the *increase of competitiveness*. This will be a pivotal issue put forward in this paper trying to find a suitable mean to analyze possible impacts on European agriculture when and if the Green Deal ideas are effectively implemented. The European agriculture has a tradition within EU policymaking, and it was the European Community's first key policy to ensure food security in wardecimated Europe and to secure the population against the worst-case scenario, a starvation. In the 1960s, a program to support European agriculture was set up through production-subsidized schemes, which were intended to provide farmers with a sufficient income to be able to operate on their fields. It turned out that agriculture could reach the level of production needed and at the same time produce surpluses, which could not be exported due to their high prices, so they were being sold at dumping prices or totally disposed of. The CAP had the original function of a price guarantor, when the market value fell below the minimum guaranteed price, the intervention agencies were obliged to buy at a higher agreed price. The result was an ongoing overproduction, which benefited mainly farmers with intensive farming on large land units. The originally stated objective of ensuring the food self-sufficiency of the founding Member States was met and even exceeded the threshold for European consumption at the turn of the 1970s and 1980s, hence the words 'mountains of butter, lakes of milk, rivers of wine' (Der Spiegel, 1979). The structure of the paper will present the current situation of the European agriculture and then go on presenting some possible approaches that might be used to assess the impacts on competitiveness of this sector with the Green Deal, having it implemented, and potential contribution and conclusion is adumbrated at the end of the work.

1

## 2. The state of affairs

The CAP approach was indeed unsustainable. European authorities began to take this fact into account, especially with the fall of the so-called "Iron Curtain", when the more democratic times began to dawn upon the states of Central and Eastern Europe, and it became clear that these states would also claim their place in the Europe. It was therefore necessary to reform. The reforms implemented in the 1990s and subsequently in 2003 had a major impact on the whole CAP. The principle of the reforms consisted mainly in reducing guaranteed prices. The guaranteed prices were gradually exchanged for direct payments to farmers in connection with the acreage of arable land. Ecological requirements (eg. putting the land to rest) were also placed under the McSharry's reform in 1992 and the creation of the Rural Development Program (second pillar) under the Agenda 2000 action programme (Konečný, 2004, p. 56). The competitiveness of European farmers vis-à-vis world agricultural producers was thus clearly lower than intended by European policymakers. However, this had changed over time, and from the production subsidies, farmers began to be supported by the system of subsidies for arable land, the so-called Single Area Payment Scheme (SAPS). It was to ensure the transformation of the agricultural sector and bring it closer to the market principles, so common in the world. This major change helped to a certain extent to get out of the grit of the ludicurous past of market distortion and never-ending spoils system. The announcement of the European Union's new policy, the Green Deal, is intended to take another step for European agriculture towards a higher degree of competitiveness, and a greater amount of responsibility held by farmers with regard on arable land and the environment in general. It is therefore important, in our view, to address the possible impacts of the new EU policy Green Deal on the overall competitiveness of the European farmers as it was necessary to evaluate our early membership in the EU from the benefit point of view of farmers (Bečvářová, 2008). The coronavirus crisis has touched firmly upon all areas of economic activity worldwide. That has been the case of for the new CAP of the period 2021-2027 as well. We saw that an outbreak of the pandemics had slowed down or even blocked many important events coming up in the year of 2020 and that was also true for making a new design of CAP and implementing into the new multiannual financial framework (MFF) of 2021-2027. In all the dismay of COVID-19 and the early stages in 2020, the consensus was made between the European Parliament and the Council laying down the foundantions of transitional period of 2021 and 2022 to secure a smooth continuation of the former MFF of 2014-2020 (EU Parliament and Council, 2020).

The overall condition of the structure of agri-food trade has been so far promising, however, the key component in the economic production function – land, or should we say the whole of environment, has not been taken that much into account. While the breaking point came just in 2019 and the ecological voices such as Greta Thunberg's and many other notable scientists started to be heard. Figure 1 below demonstrates the evolution of agri-food trade between EU and non-EU countries and structure of production. The tendency has been pro-export oriented since 2010 where it is clear to see that European agricultural sector has had a positive net-export reaching above 50 billion euros on the brink of 2019, where a major part played share of food preparations, processed products, and other primary commodities. Now, there is a room for a debate what will happen with a given red line of net-exports, whether it is going to be below zero or still, even with new the set of policies after 1<sup>st</sup> January 2023, well above in pro-export wave. A fervent pioneer of the EU integration, Finland, sought to dedicate its agricultural production to adjust to competitive conditions of the EU market when it joined the Union in 1995 and succeeded (Tomšík and Rosochatecká, 2007) despite having difficult conditions. This ought to be an example that Green Deal is feasible for the whole EU. It is clear, according to Nowak (2016), that new member states of Central and Eastern Europe still need to undergo a thorough set of structural changes and be prepared to invest in research and development in the agricultural branch and industry to reach balance the with the older member states.

Rzeszutko and Kita (2018, p. 68-69) inquired into Poland's position within the European agricultural sector since joining the EU and argued that structural changes in Polish agriculture are not satisfying mainly because of lack of competition. Rzeszutko and Kita (2018, p. 68-69) stated that only 30 % of land is owned by firms that are commercial which leaves the rest of 'non-competitive' farms or family farms that cannot have a responding level of competitiveness and thus the Polish agriculture has low level of competitiveness as a whole. Rzeszutko and Kita (2018, p. 68-69) argue that the the key and the most difficult thing to do is the ".... reduction of the agricultural employment.... (to improve) the competitiveness of this sector, domestically and internationally". This statement might suggest that a decrease in the number of labour force working in agricultural sector is desirable which contrasts all the logic given by the new Green Deal policy that favours more of a family type of farms (or small size farms) which operate in their area and sell their local products, i.e., from Farm to Fork. However, it must be said that there is a correlation between the level of competitiveness (viewed from different point of views) and the part that agriculture takes in a country's GDP.



Figure 1 Structure of Agri-Food trade within EU 27, 2010 - 2019 (in million euro)

Source: EU Agriculture in numbers. Performance on the nine specific objectives of the CAP, 2020. European Commission. Retrieved 5th November 2021 [online]: https://ec.europa.eu/info/sites/default/files/food-farmingfisheries/farming/documents/analytical-factsheet-eu-level en.pdf

In Picture 1, new set of policies that has been already talked about, is supposed to make a new "life circle" of agriculture in Europe focusing mainly on the sector's resilience, reinforcement of environmental care and climate action amd improvement of living standarss in rural areas, meaning to bring life back to countryside. Therefore, a new approach showed in Picture 1 leads us to a conclusion that there is a firm will to undertake such important changes, considering the increase in competitiveness as well.





Source: Infographic - The future of EU agricultural policy, 2018. Council of the European Union. Retrieved 28th November 2021 [online]: https://www.consilium.europa.eu/pl/infographics/cap-reform-objectives/

## 3. Limits to competitiveness in European agriculture

In economic theory, one finds a robust collection of approaches on how to rate competitiveness and as Frohberg and Hartmann (1997) put it, we ought to differentiate between an economy, a sector or a firm level. According to the sector level approach, competitiveness is the aptness of a certain industry to *'maintain market share and be abe to compete with foreign counterparts'* (Kim and Marlon, 1997; Traill, 1998 in: Carraresi and Banterle, 2008, p. 1). It cannot be omitted that competitiveness is duly connected to comparative advantage in Heckscher-Ohlin theory (Lall, 2001 in: Carraresi and Banterle, 2008, p. 1). Trade indices are, according to Carraresi and Banterle (2008, p. 1), usually used to provide a comprehensive analysis assessing the competitiveness. Carresi and Banterle (2008, p. 1) provided a range of indices for international environment of which the most relevant for this work are export market share (EMS), net export index (NEI) and revealed comparative advantage – (RCA) (IAEI, 2020, p. 9; Doucha and Pohlová, 2013).

Since 2000, a strong indicator of competitiveness of the European agriculture expressed by the ratio between EU and world market prices (see Figure 2) has been drawing nearer and apart from the beef products and Skim Milk Powder (SMP), the cluster of soft wheat, pigmeat, poultry, butter, cheese and sugar assembled between 1.25 and 1.00 ratios whereas it does not apply for SMP where the ratio in 2018 approached 0.75. However, this favorable pattern does not apply for beef because the ratio has been on the rise since 2016. All in all, it must be said that these crucial agricultural products that create an important part of the market basket when it comes to a consumer have made themselves over time a more competitive compared to the world market for a various mixture of reasons, one of them being advancements in technologies farmers are using, nevertheless, very much is still owned to abandoning the market management which provided more trade possibilities and effectively tapered the price gap between prices in the EU and prices worldwide.





Source: EU Agriculture in numbers. Performance on the nine specific objectives of the CAP, 2020. European Commission. Retrieved 5th November 2021 [online]: https://ec.europa.eu/info/sites/default/files/food-farmingfisheries/farming/documents/analytical-factsheet-eu-level\_en.pdf

The new EU policies are meant to be shifting European agriculture towards a greener approach because there is a constant, and legitimate, pressure on the whole society to behave more responsibly towards the environment. However, the outlook carried out by the European Commission on the period of 2020-2030 have not considered the possible negative impacts of the Green Deal and new CAP on European agriculture. Thus, there is a potential to open a discussion about the implications the implementation of a new approach might have. The subsequent research aims to utilize available information concerning the CAP and the Green Deal to draw possible conclusions by implementing suggested measures in the new set of policies. More specifically, the competitiveness of the agrarian sector is divided into two main parts, being it competitiveness of the agricultural branch itsel and of the manufacturing food industry (IAEI, 2020, p. 9). Then, an analysis of competitiveness of agrarian sector might be approached with a wide range of methods, being it assessment ex ante, aiming to analyze possible impacts of implementing the proposed set of new policies or assessment ex post, for an analysis of impacts after the period, in our case Multiannual financial framework, once it is carried out and finished. The subsequent research aims to offer a comprehensive overview of available information concerning transformation of the EU agrarian policies towards a greener approach and by the same token, author aims to analyze the possible impacts of implementing the new CAP on the competitiveness of agriculture. Grega (2004) characterizes competitiveness of the agrarian sector by the usage of production on national and international market as well as by the importance of outter factors such as the specifics of a given economy and the political establishment. Grega (2004) argues that the competitiveness in agriculture is made by various forms of non-perfect competition, technological level of manufacturing industry and factors making the economic policy. On the other hand, Bečvářová (2008, p. 401) suggests two other possible approaches on how to assess the competitiveness, the first being a comparison between companies – horizontal, and vertical – prerequisities for participation in the creation of added value in the final product. The latter approach might appear feasible for a potent evaluation of competitiveness in terms of the wholly contributed value to the GDP.

However, Grega's approach (2004) on how to assess the competitiveness of Czech agriculture by successive analysis of impacts and conjunctions, stressing mainly the influence of the development of agriculture and its productivity, ability to adapt on market conditions, influence of the whole level of economy, the influence of the nature of the competitive environment and effect of economic sounds more apt to assess fully the national competitiveness. *Ex ante* evaluation as used by Wrzaszcz and Pandecki (2020) adjusted to a further accent on competitiveness with the SWOT analysis, however, will give an overall insight of what might be the prospects of the European agriculture. Within the SWOT analysis and according to IAEI (2020, p. 6), these result indicators for increasing the

6

competitiveness should be taken into account: R1 – *increasing the efficiency through knowledge and innovation*, R3 - *digitalisation of agriculture*, R8 – *focus on firms in agribusiness struggling (typically support from subsidies coupled to a production to ameliorate competitiveness, sustainability or quality*, R9 – *modernisation of agricultural enterprises (notably investing for restructuralisation and modernisation)*. Particularly, the digitalisation together with research and development, according to the European Commission (2020), "*will increasingly be at the core of yield productivity gains, improved labour conditions and high environmental standards*" despite limitations streaming from the growth of pasture and forest areas.

According to a study carried out by Nowak and Kamińska (2016, p. 514), there has been an enourmous variation within the EU as far as the competitiveness in agriculture is concerned when the Netherlands (the most competitive) outreached Slovenia (the weakest) 3.5 times. Nowak and Kamińska (2016, p. 515) also found out that the more a country is developed in terms of socioeconomic point of view, the more likely it is to be highly competitive in agricultural terms. This might seem like stating the obvious, however, socio-economic development of a country is often linked by scholars to a more industrial (conventional) branch like automotive and others rather than the agricultural branch where less socially and economically developed countries are expected to have a higher degree of competitiveness in agriculture, and one might say a comparative advantage. Here, it rather seems like an absolute advantage held by the strongest in the Union. Nowak (2016, p. 113) also inquired partial productivity indicators which are the basic production factors, namely land, labour and capital in a study considering the years 2007-2014 where it was clear the worst competitiveness position was held by countries with low development level, according to GDP per capita in Bulgaria, Romania and Poland. There also can be seen a link with non-membership in the Eurozone because of a good advantage held by member states while looking at the exchange rate outlook USD/EUR when, according to the European Commission (2020, p. 16), the rate will appreciate from 1.12 USD/EUR in 2021 to 1.16 USD/EUR in 2030, which could lead, however, to a slight decrease in overall export to third countries.

The new CAP with its Green Deal which was agreed on in 2019 is slowly taking place whilst giving the apparatus of the EU time to rethink possible implications of the new policy design which is shifting towards a more environment-friendly approach. Only on 14<sup>th</sup> July 2021, the implementation of the Green Deal package has started when all 27 Member States of the Union have committed themselves to transforming Europe into the first climate-neutral continent by 2050. Therefore, they have promised to reduce emissions by at least 55% by 2030 compared to 1990. As far as the Green Deal with the new CAP are concerned, the new objectives for the European Agriculture are mainly to,

7

according to the European Commission: ".... ensure a reliable food supply in the face of climate change and biodiversity loss, reduce the environmental and climate footprint of the food system, increase the resilience of the EU food system and mainly to steer the global transformation towards a competitive sustainability from farmer to consumer<sup>1</sup>".

The last mentioned has a slightly more prior air to other objectives of future CAP. The competitiveness together with sustainability will play a major role in the decision-making about allocations of subsidies while the regime of decoupled payment schemes for farmers will diminish as those subsidies will flow to reach mentioned objectives above through following these good practices: organic farming, integrated pest management, agro-ecology (crop rotation with leguminous crops, winter soil cover and catch crops), husbandry and animal welfare (friendly housing: increased space allowances, improved flooring, straw bedding provided on a daily basis, free farrowing, provision of enriched environment, providing access to pastures and increasing grazing period for grazing animals), agro-forestry (conventional agriculture combined with permanent trees), high nature value (HNV) farming (land lying fallow with species composition for biodiversity purpose (pollination, birds, game feedstocks) and many others<sup>2</sup>. It was guite clear from the research carried out by Carresi and Banterle (2008) that level of competitiveness reflected a solid degree of profitability thanks to the EU integration process. Nonetheless, the case of the accession of the Czech Republic shows, according to Doucha and Pohlová (2013), that some competitive disadvantages might come from degraded soil and low effectiveness of the Czech agriculture and food industry linked duly to the openness of the European market. This should be regarded as well while considering relatively recently accepted members of the EU. The main limit to measuring the competitiveness in agriculture regarding the Green Deal effectively is the fact that new set of policies is not only related to agriculture, however, to many other sectors in the European economy and this might cause distortion in the possible results of the research.

<sup>&</sup>lt;sup>1</sup>A healthy food system for people and planet, 2021. European Commission. Retrieved 30<sup>th</sup> November 2021 [online]: <u>https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal/agriculture-and-green-deal cs</u>

<sup>&</sup>lt;sup>2</sup> List of potential AGRICULTURAL PRACTICES that ECO-SCHEMES could support, 2021. European Commission. Retrieved 30<sup>th</sup> November 2021 [online]: <u>https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/key\_policies/documents/factsheet-agri-practices-under-ecoscheme\_en.pdf</u>

## 4. Contribution and conclusion

Since 13<sup>th</sup> October 2020, there has been a strengthening call to provide a comprehensive impact assessment (see CEMA, 2020) of the European Green Deal initiatives being part of the new CAP, thus the contribution of this paper is to fuel up a debate concerning competitiveness of the agrarian sector while counting with all the possible impacts that are yet to come with the Green Deal policies. Considering the opinion made by Wrzaszcz and Pandecki (2020) who favoured rapid acceleration of the changes towards more sustainable agricultural practices, there is an urgent need to promote a debate concerning issues that agricultural sector can tackle and while this tackling must be in thorough compliance with preservation of the current level of competitiveness or even enhancing it.

For the purpose of this ongoing research, the utmost aim is to assess possible means on how to assess and effectively increase competitiveness and market orientation in the framework of resilience in agriculture. This has been the hidden target throughout the reforms made in the last decades when it was well obvious that coupled payments and, in general, direct subsidies are just not sustainable in long run. The new design of the agricultural policy complying with Green Deal is causing quite a decent amount of concern for the future of other sectors of economy as well. As the agricultural sector touches not only the so-called 'food industry' but also energy production, industrial production or even services such as cattering or tourism, it must be said that the ability of agriculture to adapt itself to the new set of policies and to the new challenges such as climate change, biodiversity loss, degradation of land and many others is crucial for understanding the state of affairs of the competitiveness in the European agriculture and for an effective assessment.

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