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Exports Development - Trends and Challenges, the Case of Albanian Agriculture

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Abstract: Following the commitments at national and international strategic framework, especially European integration, the Government of Albania is engaged in improving the trade balance through export promotion strategies and policies. As a result, positive developments in exports, especially for agricultural products are evident. Export of agricultural products is substantially influencing the trade balance of the country, affecting at the same time its economic growth. According to the Ministry of Agriculture and Rural Development, in 2019 Albanian exports reached for the first time 300 million euros. Nowadays, agriculture and agro-processing industry have become the engine of the country's economy strongly contributing to GDP growth. This paper aims at providing a descriptive analysis of the current situation regarding foreign trade for agricultural products, the factors influencing exports increase as well as the barriers to trade. Under this study is also performed an analysis of the legal and institutional framework related to export promotion, fiscal incentives, governmental support, and their role in exports development in the country. Descriptive and SWOT analysis will serve as methodological instruments for this study. Comparison between 2020 trade data and past year will help to examine the impact of COVID 19 pandemic on trade in Albania. The findings of the paper will help to reveal the role of the export promotion policies in improving trade performance, the role of support schemes for increasing agriculture production, the barriers to exports in EU member states, etc. They will also help decision makers and research to better tailor appropriate strategies in order to improve trade balance in Albania.

Keywords: economic growth, exports, incentives, support schemes for agriculture

1. Introduction

The economy of Albania went through a process of transition from a centralized economy to a market-based economy on the principles of the free market. Albania is an upper-middle-income country and a member of the North Atlantic Treaty

Organization (NATO), World Trade Organization (WTO), Organization for Security and Co-operation in Europe (OSCE), and Organization of the Black Sea Economic Cooperation (BSEC). Service sector contributes at 54.1% at GDP while agriculture and industrial ones contribute with 21.7% and 24.3% respectively [1].

The Albanian agricultural sector is of crucial importance with regard to the socio-economic development. It contributes around 20% to the country's GDP and accounts for more than 40% of the overall employment [1]. The sector is characterised by a majority of small family farms with a low degree of commercialisation and mechanisation. However, the production of fruits and vegetables increased substantially during recent years due to agricultural policies. The agriculture sector in Albania is facing problems related to rural exodus, the limited size of farms and ownership of agriculture land, marketing of agriculture products, irrigation and drainage, low level of used technologies, weak organization of farmers and last the low level of development of the agro-food industry. Albanian economy has limited possibility to export its agricultural products because of non-sufficient and low level of agriculture production and agro-processing industry, no marketing facilitation (warehouses, packing of products etc.), low standards for food quality security, and high cost of products. As for foreign trade, exports values have been increasing despite the fluctuations during last years. The year 2018 has marked a large increase in exports compared to previous years with 310,436 million ALL [2]. However, the trade balance is still negative. Exports make up 18% of Gross Products. The year 2018 is a good year with regard to export contribution to Gross Domestic Product. The volume of foreign trade, the indicator of the level of openness of the economy is around 58% of GDP. In 2018 this indicator has its highest level, but being less than 60% of GDP shows that the economy is still a very closed one [1]. Albanian economy has limited possibility to export its agricultural products because of non-sufficient and low level of agriculture production and agro-processing industry, no marketing facilitation (warehouses, packing of products etc.), low standards for food quality security, and high cost of products. Considering the recent situation created by the SARS-CoV-2 global pandemic, Albania like many other countries of the world are facing serious health and economic challenges. In response, Albanian government has undertaken a series of measures to deal with the crisis, from social distancing measures, closing of borders, strict border checks accompanied with quarantine measures, restriction of movements to total lockdowns of countries or specific regions.

2 Albanian Economy: General Overview

Albania is a transition economy, not highly integrated into global capital flows but showing strong economical performances. In 2019, GDP growth was estimated at 2.2% (from 4.1% the year before), driven mainly by private consumption fueled by income gains, whereas lower rainfall caused a cut in hydroelectric power production

and thus in exports. According to the updated IMF forecasts from April 14, 2020 to the end of 2020, GDP growth will fall to -5% in 2020 due to the outbreak of the COVID-19. The same forecasts indicate that the value of this indicator will reach at 8% in 2021 in the frame of the post-pandemic global economic recovery [3].

In 2019, the budget deficit was estimated at 2.2% of GDP. The debt-to-GDP ratio declined to 66.7% (from 69.9% in 2018), and is expected to fall below the 60% Maastricht target in 2022 assuming a continued economic growth. During the same year, inflation went down to 1.4%. However, forecasts for 2020 and 2021 show that such indicator will accelerate to 2.4% and 2.8% respectively [3].

Albania remains one of the poorest countries in Europe. According to the World Bank, in 2019, 34.6% of Albanians were living on less than USD 5.5 per day per capita (considered the poverty threshold). Unemployment reached a record low of 11.5% in the second quarter of 2019, with a youth unemployment rate of 20.9% [9], although the IMF estimated the yearly unemployment average at 12% in 2019. Informal economy is containing a significant part of GDP (estimated at around 50%). The table below shows trends of main macroeconomic indicators.

Table 1. Main macroeconomic indicators 2015 -2019

	2015	2016	2017	2018	2019
Population (million)	2.9	2.9	2.9	2.9	2.9
GDP per capita (EUR)	3,498	3,687	4,016	4,439	4,735
GDP (million EUR)	10,100	10,200	11,500	12,800	13,600
Economic Growth	2.2	3.3	3.8	4.1	3
Unemployment rate %	17.3	14.2	13.4	12.3	11.2
Inflation rate %	1.9	1.3	2	2	1.4
Public debt /GDP	74	73.2	70.2	66.6	68

Source: <http://www.instat.gov.al/en/themes/economy-and-finance/national-accounts-gdp>

As for foreign trade, exports values have been increasing despite the fluctuations during last years. As we can see from Figure 1, the year 2018 has marked a large increase in exports compared to previous years with 310,436 million ALL. However, the trade balance is still negative [1].

Exports make up 18% of Gross Products. 2018 is a good year of export contribution to Gross Domestic Product. In 2018, the indicator of the level of openness of the

economy is around 58%, reaching its highest level, but it is still less than 60% of GDP showing that the economy is still a closed one [1].

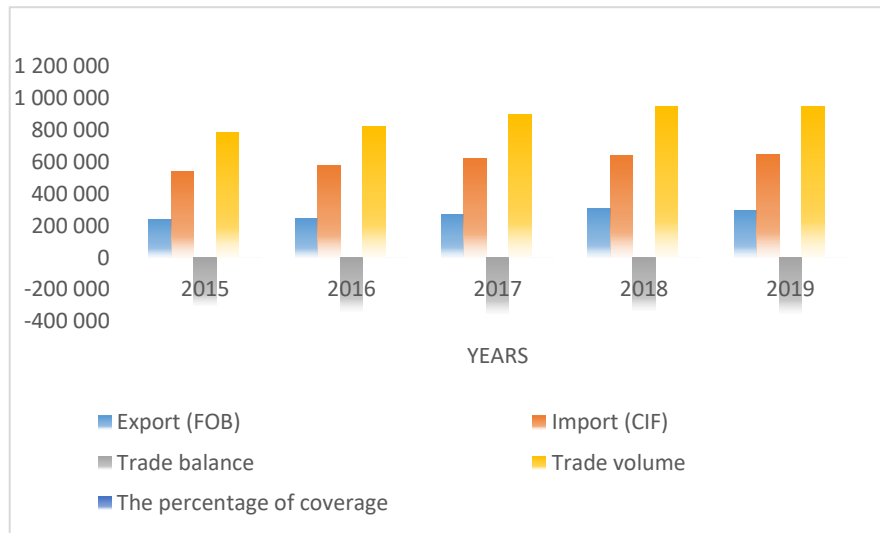


Figure 1

Foreign trade trends (our calculations based on INSTAT data)

3. Agriculture in Albanian Economy

Agriculture sector is one of the most important sector of Albanian economy. Nearly 46% of population lives in rural areas where the main activity is agriculture as the most important alternative of working.

Agriculture contributes about 20% of GDP. The real average growing in agriculture sector in the last five years is 3-3.5% per year.

Agriculture in Albania is mainly characterised by very small family farms oriented toward self-subsistence. Nearly 46% of farm holds own less than 1 Ha of agricultural land, whereas 86% of them own less than 2 Ha of agricultural land. As a result, 30-40% of agricultural and livestock products are intended for the markets, the rest is used by farmers for their personal consumption [4].

3.1. Challenges of Albanian agriculture

The agriculture sector in Albania is facing problems related to rural exodus, the limited size of farms and ownership of agriculture land, marketing of agriculture

products, irrigation and drainage, low level of used technologies, weak organization of farmers and last the low level of development of the agro-food industry. Albanian economy has limited possibility to export its agricultural products because of non-sufficient and low level of agriculture production and agro-processing industry, no marketing facilitation (warehouses, packing of products), low standards for food quality security, and high cost of products [4]. Farmers face automation problem. Only 74 % of families involved in agriculture are making use of automation to perform basic land processing/preparation while 23% use draft animals to plough the land, and 59% use both farmhands and automation. About 75% of family farms located in the highlands regions possessing less than 2 Ha use labourers to plough the land. At the national level, nearly 93% of farmers use chemical fertilisers, which take up approximately 23% of a farm's total spending or 50% of the value of inputs purchased by farmers. All the above-mentioned factors influence exports of agricultural and agro-processing products.

The figure below presents a SWOT analysis of the agricultural sector in Albania.

STRENGTH	WEAKNESSES
• Proper climate conditions • Tradition • Good geographical position • Natural resources • Trade Agreements & relations • Organic farming potentials	• Small farm size (family farm) • Inadequate production capacity • Low technical level • Land property issues • Insufficient vertical integration • Low level of marketing efforts • Low access to markets • Missing Market Information System (MIS) • Quality certification • Food safety
OPORTUNITIES	THREATS
• preferential schemes for exports • Increased demand for agricultural products • Increased interests for investments (emigrants) • Pre-accession funds (IPARD) • Governmental initiatives and incentives • awareness on the importance of horizontal integration is increasing	• Competition from neighboring countries • EU market self sufficiency



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The SWOT analysis above is the result of desk research as well as contact with exporting companies.

- Farm size

According to the latest Census of Agricultural Holdings (2012), more than 98% of the farms in Albania are family farms. The small size of farm and the lack of land market because of ownership problems are hampering increase of production in quality and quantity in the country.

In addition, number of farms decreased by 6% in 2015 compared to 2005 [8]. Immigration and emigration are the main factors that contributed to this significant decrease of the number of farms.

- Low *technical* level

Farmers lack the appropriate knowledge about production technology and the use of inputs and equipment. Farmers also often lack basic equipment, such as pesticide spray pumps that have the right technical standards to ensure the proper spray of pesticides, which is necessary to ensure quality and compliance with standards. Furthermore, farmers across sectors lack basic storage and/or postharvest capacity.

Albanian farmers faced automation's problem. There are still not enough/adequate number of modern machines/equipment for specialised processes. Existing owners of these agricultural machineries demand high prices from farmers for different automated agricultural processes such as ploughing, seeding, harvesting, transporting, etc. [4].

- Access to market

The agro-food sector as a whole is facing problems with creating market institutions, establishing marketing and distribution channels, meeting European Union quality and veterinary and phytosanitary standards, and building the administrative capacity to support these processes. The agro - food value chain may change substantially in the coming years, as the share of supermarkets in the retail sector increases significantly. In some agro-food subsectors, such as greenhouse vegetables and watermelons, production significantly exceeds domestic demand. Such subsectors need to be strongly oriented toward export markets. As mentioned, export markets – particularly the lucrative EU markets – are highly demanding in terms of standards. Improved vertical and horizontal coordination brings improved quality and safety standards, (including traceability) and efficiency. EU marketing standards also may be a problem in this respect, since most producers are not aware of the standards and do not meet them.



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- *Integration among farmers*

According to discussions with farmers and buyers, and studies conducted in Albania informal agreements dominate contracting in agriculture. Awareness campaigns help farmers to understand that contract farming can contribute to the reduction of market-access risks, taking up innovative technologies, increased productivity and improved product quality. This may lead to higher incomes for small farmers and a better livelihood for their families.

Regarding horizontal cooperation, the main problems faced by farmers are critical determinants of their cooperation in Albania's vegetable sector. Problems include input provision, joint sale, agricultural machinery, advice, benefits from cooperation, perceptions of leadership availability, participation in former collective-action activities, and age. Low trust levels have a negative impact on farmers' decisions to cooperate.

The most prevailing collective action activities observed in a recent study [5] are the exchange of labour with other farmers, for example in harvesting products, rotating shepherds, etc. Slightly fewer than two out of three farmers (64.9 percent) participate in at least one such activity, while 40.5 percent of farmers participate (or have participated) in at least one collective agricultural production activity related to repair or maintenance of irrigation canals and rural roads, or similar tasks.

It is worth mentioning that still many farmers are reluctant towards the notion of cooperatives because of reminiscences to the communist past of the country. Still, more than half (53 percent) of the farmers are willing (they either agree or strongly agree) to cooperate with other forms of collaboration (in associations, for example) towards product marketing and the group/collective provision of agricultural inputs such as seed and seedlings, fertilizer, plant protection chemicals and other purchased inputs [5].

- *Standards and Food safety*

As a member of CEFTA, Albania enjoys a free access to markets of Bosnia and Herzegovina, Croatia, Kosovo, Republic of Moldova, Montenegro, Republic of North Macedonia, and Serbia. However, there is a lack of mutual recognition of certificates and test reports. Due to the implementation of the Stabilisation and Association Agreement between Albania and the EU, starting in 2006, preferential tariffs, often zero, apply for exports to EU countries. However, non-tariff measures such as technical barriers to trade (TBT) and sanitary and phytosanitary standards (SPS) might still represent challenges and limit expansion of exports [6].

There are gaps in food safety standards throughout the downstream food value chain. Albania faces serious problems with regard to food safety and respective control system. More specifically, these problems relate to legislation, infrastructure, institutional capacity, control, and law enforcement. These problems create real and perceived safety risks for consumers. Such problems are most notable in meat and dairy products [6]. The dairy sector still faces numerous



challenges. First, there are concerns about the safety and quality of raw milk and processed dairy products [7].

- Access to finance

Access to finance is one of the key factors that condition growth and modernization of the agriculture sector. Despite the macroeconomic stability in the last 15 years, access to finance has been a major challenge for agriculture sector development in Albania. Indeed, a strong macroeconomic framework is necessary, but it is not sufficient. Other preconditions for functioning financial markets may still be inadequate due to insufficient focus given to developed institutions. Despite the importance of the agriculture sector for the Albanian economy, the share of credits provided to agriculture and fisheries has been historically extremely small (roughly, 2 percent of total credits of the banks to the private sector).

4. Trade for agricultural products

As shown in Table 2, in 2019 the trade turnover of basic agriculture products was around 235 million euro, with an increase of 17.0% compared to 2018. The exports and imports of basic agriculture products increased respectively by 25.1% and 15.4%.

Table 2: Trade indicators (in million euro)

Description	2018	2019	2020	Index 2020/2019
Export	33,988	42,084	44,332	105.4
Import	169,324	193,010	178,304	92.2
Turnover	203,312	235,094	222,636	94.5
Balance	-135,336	-150,926	-133,971	88.5

Source: Authors calculation based on Ministry of Agriculture and Rural Development data

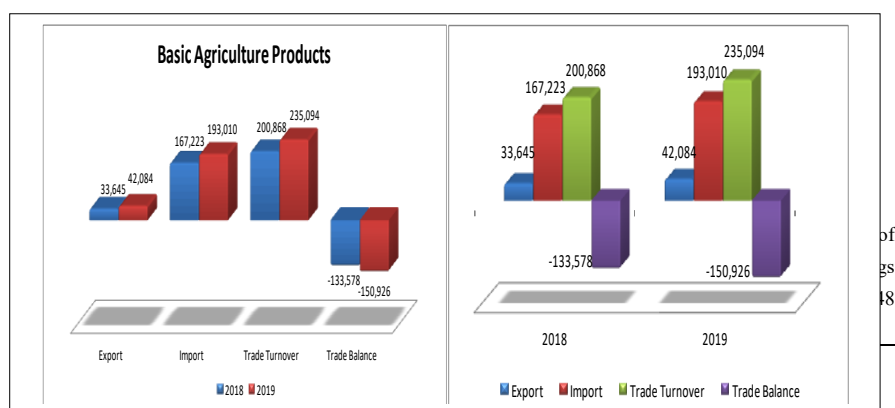


Figure 2

Trade of basic agriculture products 2018-2019

Source: Our calculations based on INSTAT data

4.1 Export of basic agriculture products to EU countries

The sector, which shows the best performance (after MAP), is vegetables, for which it is observed a significant increase in exports. We have to mention that in 2000 trade for those products was almost inexistent, Export import ratio for food and agriproducts is increased from 11.7 in 2005 to 25,2 in 2016 [8].

Vegetables make up one fifth of the total agro food exports in 2015, compared to only 3 % in 2005, and fruits make up 10% , compared to only 2% in 2005 [8].

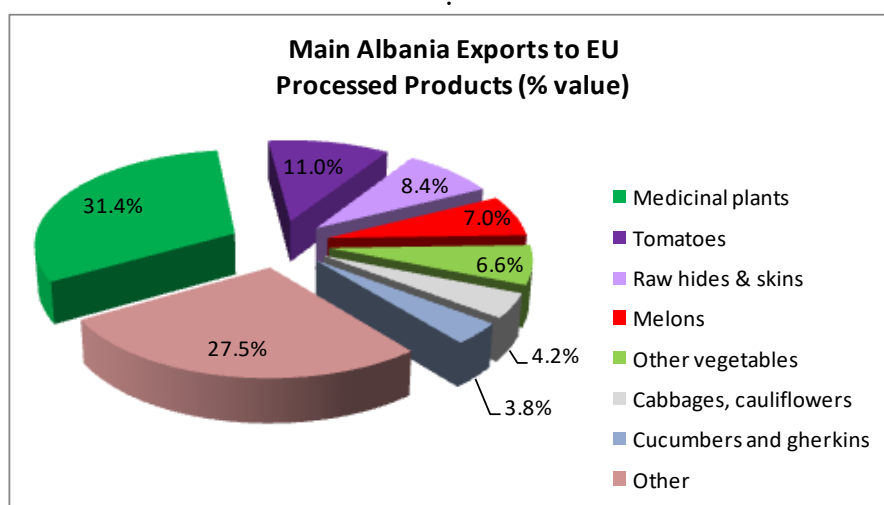


Figure 3

Main exports to EU market (2019)

Source: Our calculations based on INSTAT data

“Medicinal plants” even during 2019 continue to have the highest specific weight in the total exports of basic agriculture products, with a share of 31.4%. The export

value of this group increased by 12.1% compared to the same period in 2018. The second most exported group of products is “fresh tomatoes” (code 0702) which account for 11.0% of the total exports. The export of this group of products increased by 23.3% in 2019 compared to 2018. The export of this group of products continues its increasing tendency from previous years showing that Albania has a great potential in increasing export of this product. The third most exported group of products is “Raw hides & skins of bovine/equine”. The export of this group of products increased by 42.0%. For 2019, this group accounts for 8.4% of the total exports. The other most exported groups of products include: “Melons (including watermelons)”, “Other vegetables, fresh or chilled”, “Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled”, “Cucumbers and gherkins, fresh” which respectively account for 7.0%; 6.6%, 4.2% and 3.8% of the exports in 2019. The export of “Other vegetables, fresh or chilled” and “Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled” increased by 70.2% and 223.5% respectively.

The export of “tobacco unmanufactured/ tobacco refuse” for 2019 decreased by 47.2% accounting for 2.1% of total exports of basic agriculture products from 5.0% in the same period in 2018. The level of export of processed agricultural products to EU markets continued to remain very low compared to imports’ value originating from the EU Member States. For 2019 exports’ value covers only around 2.9% of the total imports’ value because the agro processing industry is still under development and mainly focused in meeting the domestic demand. As a result the trade volume increased also by 10.5 % and the trade balance deteriorated by 9.5% as the imports represent 97.2% of the trade turnover.

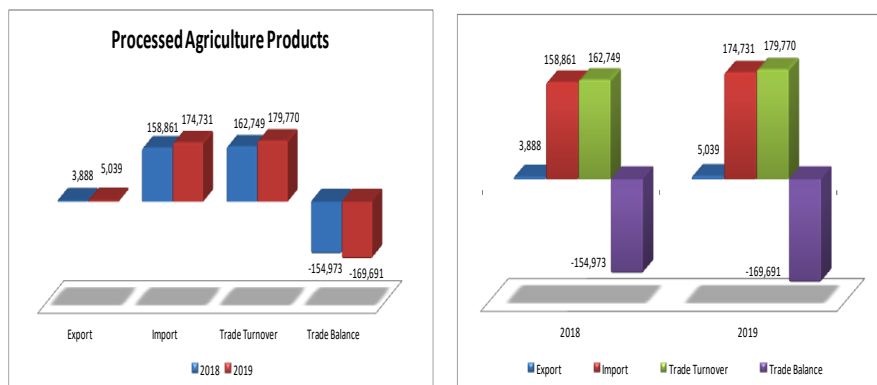


Figure 4

Trade for processed agricultural products

Source: Our calculations based on INSTAT data

5. Government policies to support exports and investments

Actually, there does not exist any dedicated strategy for export promotion in Albania. However, agriculture one of the priority sector for economic development of the whole country. According to the National Strategy for Development and Integration 2014-2020, challenges in this sector include:

- Enhancement of competitiveness of agriculture and agro-processing in national, regional and global markets;
- Enhancement of farm size through land consolidation and land market development;
- Improvement of the technology and innovation transfer system through extension services;
- Further improvement of infrastructure in agriculture towards sustainable use and management of natural resources and mitigation of climate change;
- Improvement of basic and recreational services, and
- Diversification of the activities that generate income in rural areas.

Strategic priorities and objectives: Foster a viable, high quality food production by developing a competitive and innovative agro-food sector, able to sustain the competitive pressure in the domestic and EU markets and meeting EU standards and market requirements

Main governmental initiatives are the following:

a. 1 Euro leasing of state own land

According to this initiative, the land rent is of 1 Euro:

- **Up to 10 years**, when it is destined for the cultivation of plants, herbs and decorative plants;
- **Up to 30 years, when destined for:** creation and cultivation of vineyards; fruit trees; construction of greenhouses and cultivation of plants in them;
- **Up to 99 years, when:** intended for the cultivation of olives; fruit trees, such as crops and other species, age biological properties of which coincides with this duration;

b) Additional fiscal incentives

Machineries and equipment is used in agribusiness, fertilizers, pesticides, seeds and veterinary services are VAT exempted. Exception of excise for fuel used in fishing boats and reimbursement of excise for the fuel used in greenhouses

In addition, from 2017 the government increased visibly its budgetary support for agriculture, with the inclusion of support schemes implemented by the Agency for



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Agricultural and Rural Development (AARD), IPARD II, foreign investment, farmer formalisation and construction of collection and distribution centres. Financial schemes and the support from new technologies has contributed to the creation of new fruit orchards and boosting of produce/crops from certain subsectors. Agricultural production has increased in average by 3% the last few years. Increase in yield has been most notable in grapes, potatoes, milk, eggs, and fruit. In addition, dairy production increased by 21% while other agricultural crops/products by 10%. The main agricultural products in Albania are olives, and nuts. [1].

Some figures about financial support are following:

IPARD Program: 94 million Euro Grant 2016-2023 (50-60 % of the investment), financed by European Union (75%) and the Albanian government (25%) [9].

Driven by EU IPARD program, a total of about \$ 161 million will be invested in agriculture sector until 2020. From this sum, about \$ 94.3 million is public aid (EU & Government of Albania), and \$ 66.7 million as private investment.

National support scheme: 20 million euro Grant in 2018, from which 4.1 million euro exclusively for agro-processing. National Fund of warranty in Agriculture: 136 million euro warranty to get loans from the Banks, with the support of EBRD [9].

Support of agro-tourism: The initiative “100 Villages”. The Albanian government launched the “100 villages” initiative in 2018. The list of the 100 villages is part of the Integrated Rural Development Program. This initiative consists of a four-year program that aims at providing financial support for infrastructural, economic, and sustainable tourism development. The list of these villages includes places known as tourism destinations. [9].

Agriculture and SARS COV 2

SARS COV 2 affect agriculture as all the sectors of Albanian economy. The overall impact of SARS-CoV-2 on the Albanian agricultural sector is difficult to assess but based to information from Ministry of Agriculture and Rural Development it tends to be limited.

The impact can be direct (on production and exports), and indirect (remittances).

In particular, out of home consumption declined drastically while food demand of private households might have even increased. While world wheat prices increased, prices for maize declined [10]. Quantifying the net effect of demand shocks and global price developments for the sector needs further analysis. MARD has declared that there is not any negative impact of SARS COV 2 on production and exports of agriculture products. Despite border closures and restrictions of human mobility



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trade flows of agricultural commodities have been affected to a limited extent and only temporarily [10].

Restrictions of public life and economic activities in Italy and Greece potentially affect Albanian rural areas through a reduction of remittance flows [10].

Conclusions

Agriculture remains one of the largest sectors in Albania with a significant contribution to GDP and employment. Actually, its contribution to GDP is around 20% while it accounts for more than 40% of the overall employment. The latter is due to the small farms size and low degree of commercialization and mechanization.

Despite the difficulties and challenges faced, significant potentials for exports of agricultural products exists especially for fruits and vegetables, greenhouses, nuts, medicinal and aromatic plants. Exports of these products can increase through a more aggressive export promotion strategy. In addition, a further increase in product quality can contribute to the diversification of exports destination and enhancement of the respective revenues.

Emigrants are considering investments in the country during last years. Successful farms are being operated by returning migrants, who bring their savings and know how increasing export potentials of the country. The Government has undertaken a reform regarding land titles, but still the situation of land titles is unclear, which in addition to informality are hampering the investment of emigrants and the FDIs.

One of main challenges the exports market is facing are the standards of commodities, which tends to enter EU markets. Thus, improved standards are “a must” in order to improve access to export markets, particularly European Union, which markets are very demanding. Improved vertical and horizontal coordination can contribute to the fulfillment of quality and safety standards requirements (including traceability) and to expansion of efficiency. However, Albanian producers need to be aware about the EU marketing standards.

Improved both vertical and horizontal integration of farmers is necessary. Actually, awareness campaigns are in place to promote the role of contract farming to reduce market-access risks for farmers and to lead to higher incomes for small farmers and a better livelihood for their families. Regarding horizontal cooperation, low trust levels have a negative impact on farmers’ decisions to cooperate. Training and extension activities should intensified for re-establishing and strengthening producer’s orientation at market conditions in terms of quality and quantity.

Access to finance is one of the major challenges for the agriculture sector development in Albania. Low access to finance hamper growth and modernization of the agriculture sector. Despite the importance of the agriculture sector for the Albanian economy, the share of credits provided to agriculture and fisheries is still small because of the risk retained by the sector.



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Recently, the Government increased the budgetary support for agriculture, with the inclusion of support schemes combined with EU, IPARD II funds. Financial schemes and the support from new technologies has contributed to the improvement of quality and quantity of products. But still, Access to state subsidies is hampered by a number of factors, including high levels of bureaucracy, lack of information, and gaps in transparency in the application procedure and in the distribution of grants.

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