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Trade of Agricultural Products in the Western Balkans: Situation and Trends

Trade of agri-food products among WB countries/territories

- WB countries/territories – important trade partners in mutual agri-food trade
- % of WB in total national agri-food imports ranging from 14% (Albania) to 62% (Montenegro)
- % of WB in total national agri-food exports ranging from 11% (Albania) to 81% (Montenegro)

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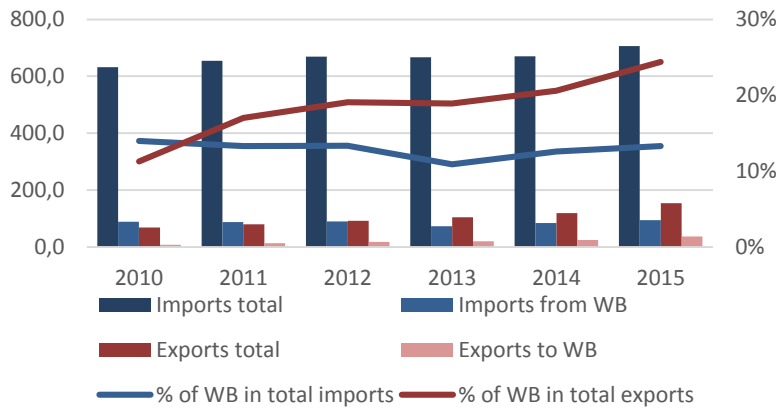


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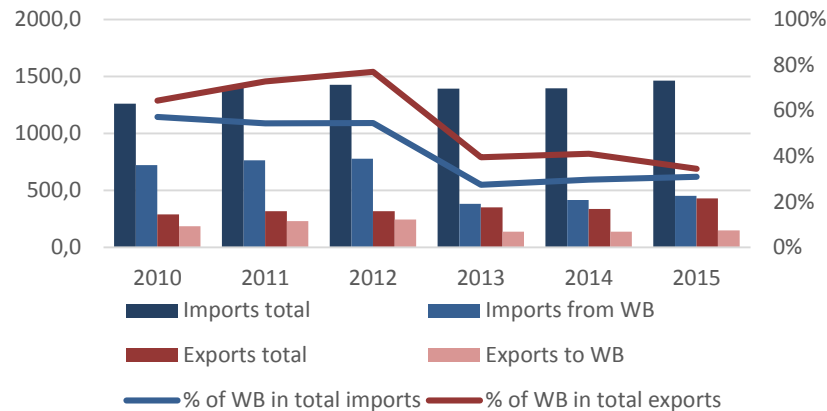


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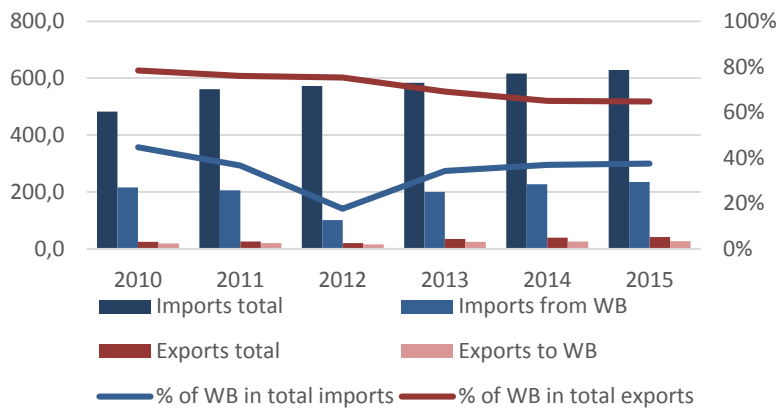
Albania Trade of Agro - food Products, million EUR



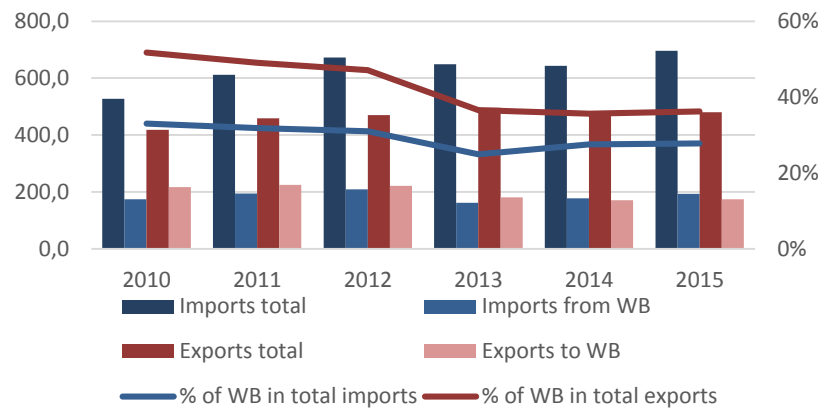
BiH Trade of Agro - food Products, million EUR



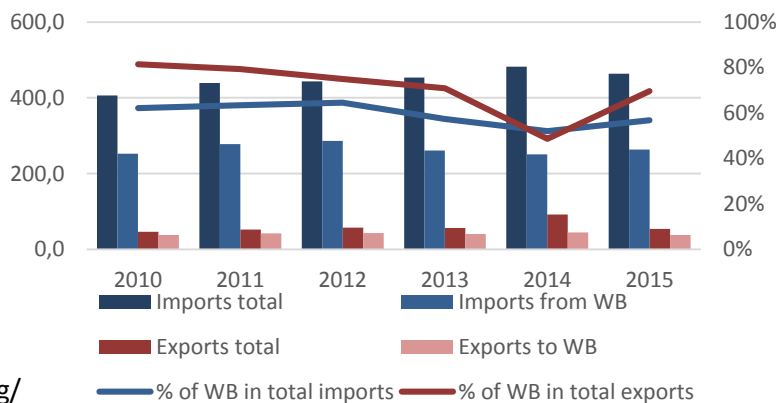
Kosovo* Trade of Agro - food Products, million EUR



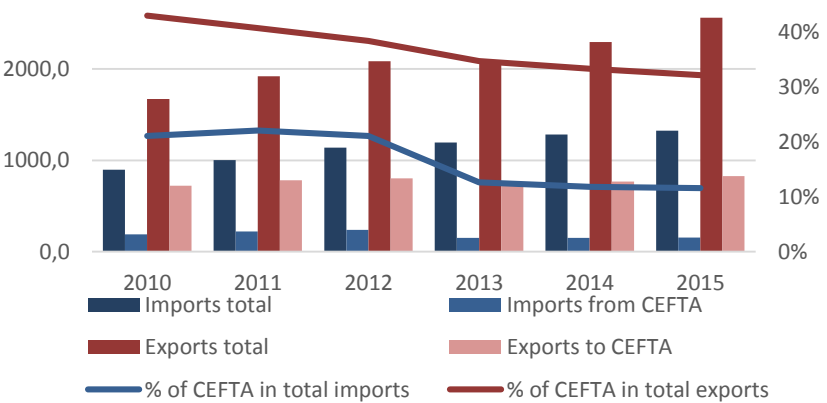
Macedonia Trade of Agro - food Products, mil EUR



Montenegro Trade of Agro - food Products, m. EUR



Serbia Trade of Agro - food Products, million EUR



EC document, 16.09.2016

- **Liberalisation and facilitation of trade** among the CEFTA Parties and their integration in the EU single market - key priority in the enlargement agenda;
- Major issues - **trade facilitation and reduction and eventual removal of Non-Tariff Measures to Trade (NTMs)**;
- Trading with Western Balkans requires **more documents and a higher number of samples and physical controls in all clearance stages** than trading with EU Member States;
- **Inter-agency cooperation** at national level missing;
- **Lack of systematic detection** of the existing market access barriers and comprehensive analyses for their elimination (as a result of limited capacity of the public authorities or as a deliberate political decision to protect vested interests).

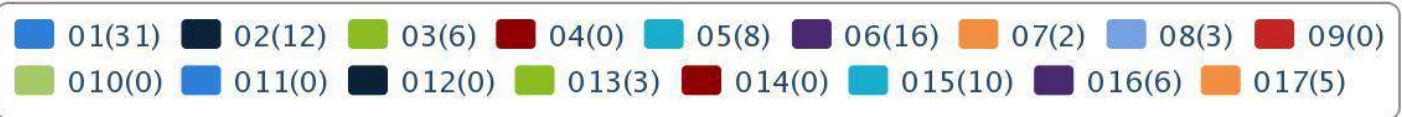
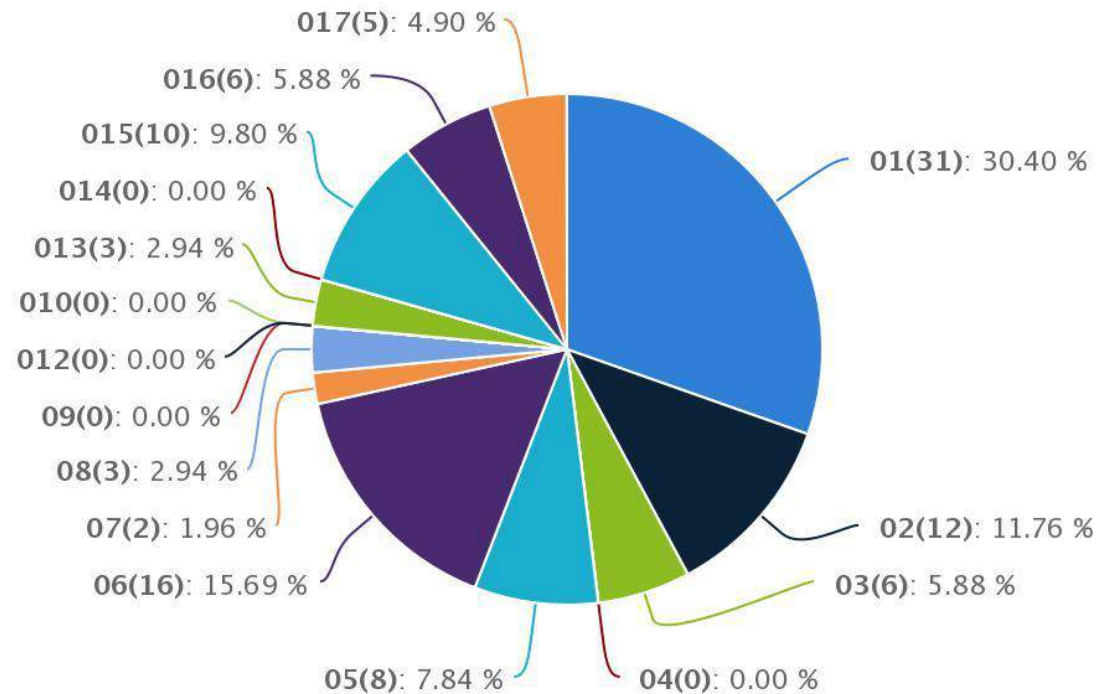
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Market access barriers in the CEFTA region (2009 – 2016)

Cases By Problem Category(ALL) (in Percentage)



Highcharts.com

- 01 - A Sanitary and phytosanitary measures
- 02 - B Technical barriers to trade
- 03 - C Pre-shipment inspection and other formalities
- 05 - E Non-automatic licensing, quotas, prohibitions and quantity control measures other than for SPS or TBT reasons
- 06 - F Price control measures including additional taxes and charges

- 07 - G Finance measures
- 08 - H Measures affecting competition
- 013 - M Government procurement restrictions
- 015 - O Rules of origin
- 016 - P Export related measures
- 017 - N/A

Source: Transparency Pack - CEFTA

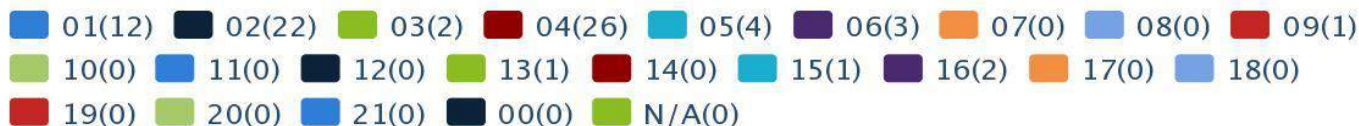
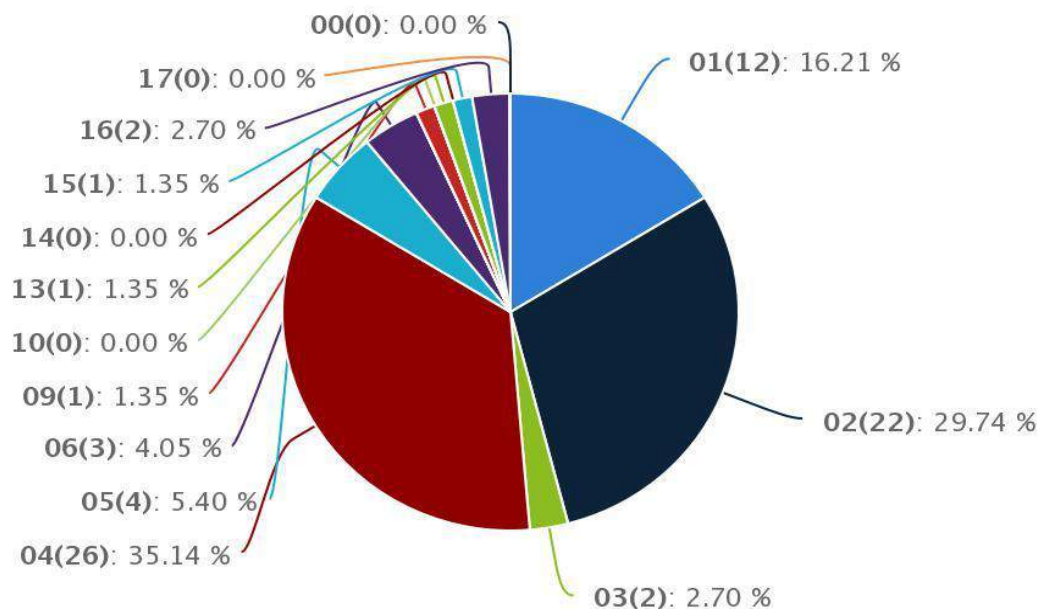
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Cases of market access barriers in CEFTA region by sector (2009 – 2016)

Cases By Sector(ALL) (in Percentage)



Highcharts.com

- 01 - Live Animals; Animal Products
- 02 - Vegetable Products
- 03 - Animal or Vegetable Fats and Oils and Their Cleavage Products; Prepared Edible Fats; Animal or Vegetable Waxes
- 04 - Prepared Foodstuffs; Beverages, Spirits and Vinegar; Tobacco and Manufactured Tobacco Substitutes

Source: Transparency Pack - CEFTA

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Addressing Market Access Barriers in Selected Supply Chains in CEFTA

- GIZ/ORF;
- Regional study: Trade Facilitation and Non-Tariff Measures in beverages and Auto-Parts Supply Chains in CEFTA (June 2016);
- Beverages (wine and beer) and auto-parts;

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Issues related to non-tariff measures (NTM)

- **Non recognition of certificates** for wine and beer, creating a problem of double testing of consignments, in all CEFTA parties;
- **Discriminatory and high excise duties** (in BiH, Albania and Kosovo*);
- **Labelling** issues (in Serbia, BiH and Albania);
- **Radioactivity** Tests on beer barrels (in Montenegro).

**This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo declaration of independence. This footnote applies to the entire document*

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Trade facilitation (TF) issues

- Delays in clearance and release of goods
- Transparency, lack of consultations and time to adapt to new laws and regulations

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Recommendations related to NTM

Parties should agree on:

- **what to test:** common risk assessment criteria for wine, adopt 7 basic analysis parameters for quality of wine required by EU;
- **how often to test:** allow present regime of intraregional wine trade that allows testing of wine products every 6 months rather than individual shipments;
- **who can test:** laboratory on the EU list;
- adapt regulations in accordance with an explicit **definition for “small and independent”** companies, in line with its own market size and structure, and EU regulations.
- adapt legislation to **simplify fiscal stamping** process.

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Recommendations related TF issues

- Advance Rulings – written decision prior to the import, on the treatment of the good regarding: tariff classification and origin
- Pre-arrival Processing – submission of the relevant declaration data prior to arrival
- Post-Clearance Audit – examination of relevant books, records, business systems and commercial data
- Authorised Economic Operators (AEO) – party involved in international movement of goods, approved by national customs administration
- Single Window – system that allows one entrance for the submission and handling of all data

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Other recommendations

- **Harmonization of national legislation**, building similar schemes or systems to the EU (e.g. for determining origin of goods);
- **Regional synergies** to implement different TFA measures at regional level (i.e. publication of trade-related information);
- **Pilot projects** to implement few TFA measures with most relevant products
- **Capacity building** for the private sector, especially SMEs
- **National Trade Facilitation Committees** functional in all CEFTA parties to implement necessary TF reforms in a coordinated manner.

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