



ЕКОНОМСКИ ИНСТИТУТ
ECONOMICS INSTITUTE

1947

Agricultural Forum

FOOD FOR EUROPE

AGRO-ECONOMY OF SERBIA IN THE PRE-ACCESSION PERIOD

Subotica, October 13-15, 2011

ROUND TABLE: HOW TO INCREASE COMPETITIVENESS AND EXPORT PERFORMANCE OF SERBIAN AGRICULTURE AND FOOD INDUSTRY TO THE EU MARKET

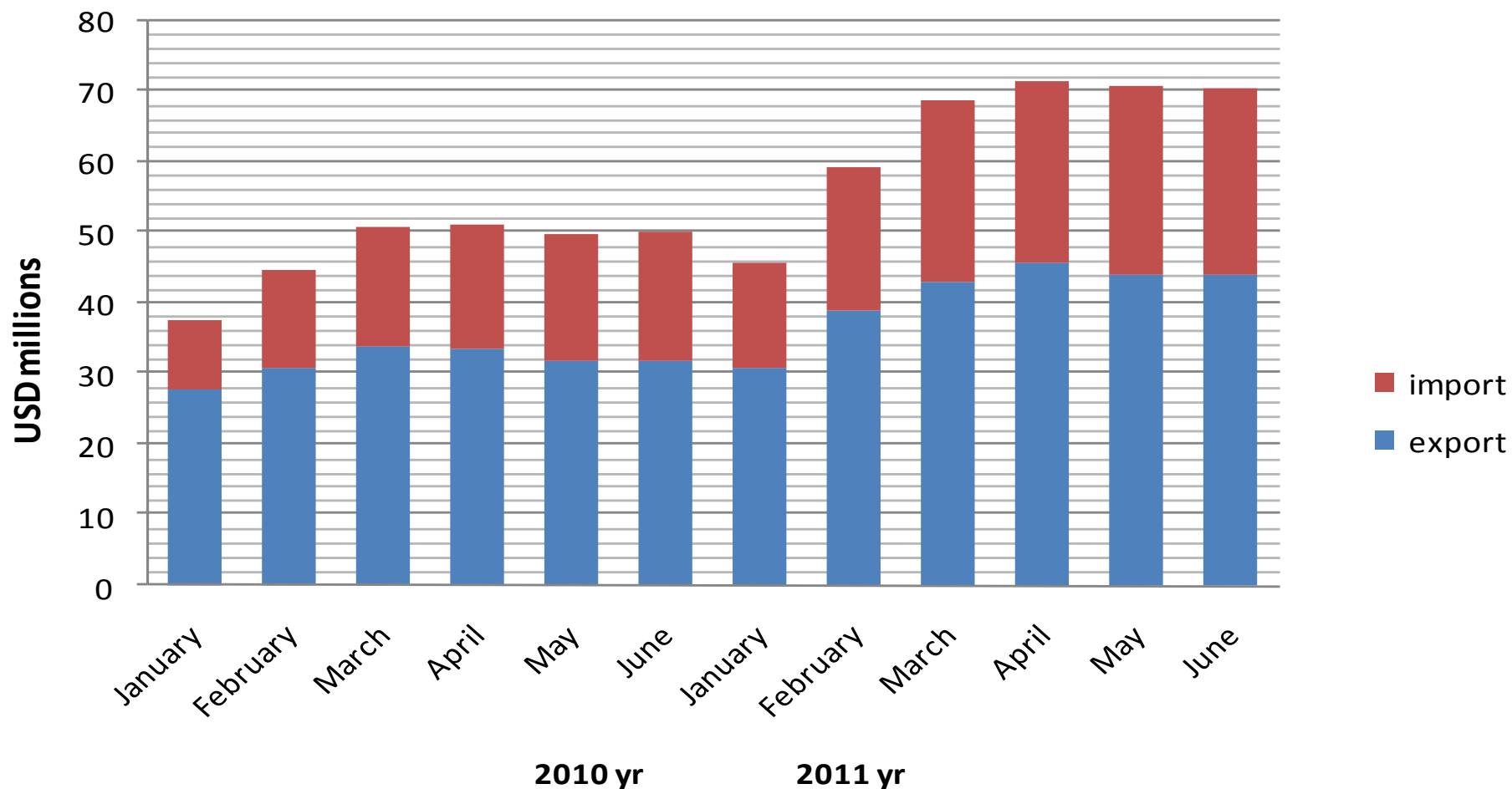
Russian market as a chance for Serbian agro-products

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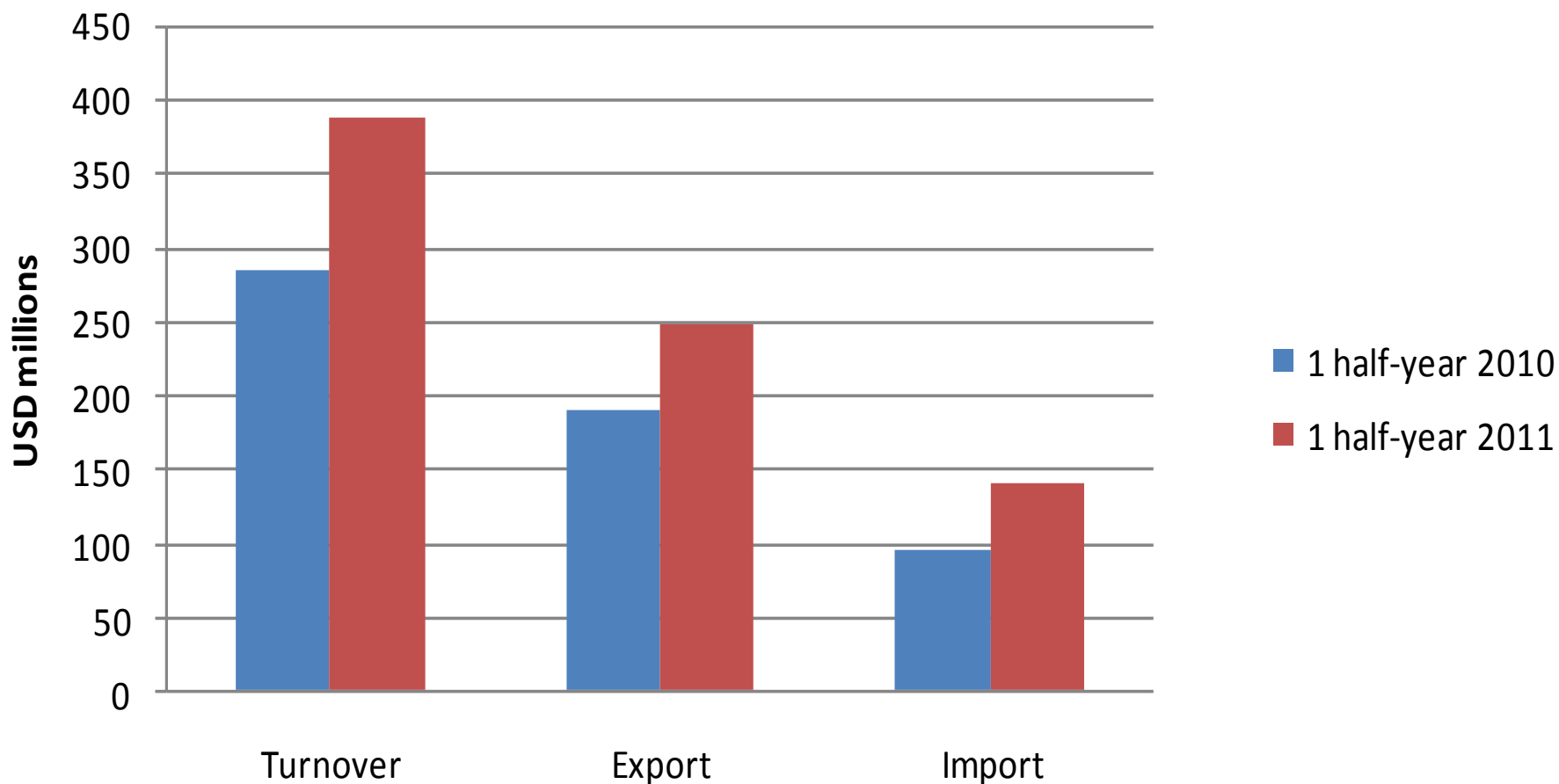
Introduction

- Russian foreign-trade turnover for first half-year of 2011 achieves 386,9 USD billions (including trade with Kazakhstan and Belorussia) – a growth to compared with first half-year of 2010 on 36,6%, including a growth of foreign-trade with far abroad (e.g. EU, USA, China and so on) on 34,4% and a growth of trade with near abroad (e.g. Ukraine, Kazakhstan, Belorussia) on 46,1%.
- Balance of foreign-trade now is positive in total sum of 107,0 USD billions, 12,6 USD billions more in comparison with first half-year of 2010. Balance of foreign-trade with far abroad – 89,6 USD billions (plus 7,4 USD billions); balance of foreign-trade with near abroad – 17,4 USD billions (plus 5,2 USD billions).
- A growth of export was due to a rising of prices of gas and petroleum-main Russian export products, a growth of import due to a real increasing of volume import products on 23,4%, including foodstuffs – 15,8%.

Volume of Russian foreign-trade turnover for first half-year of 2010-2011



Dynamics of Russian foreign-trade turnover for first half-year of 2010-2011



Import dynamics of main foodstuffs to Russia, thousands tons

Indicator	2006 yr	2007 yr	2008 yr	2009 yr
Meat (beef, pork)	1411,3	1489,4	1710,9	1463,3
Poultry meat	1282,5	1294,9	1224,0	985,9
Milk	297,3	250,9	238,9	252,4
Butter	165,0	129,4	140,1	125,3
Sunflower oil	100,0	132,0	111,9	43,4
Cereals	2313,4	1066,6	958,5	431,3
Sugar	2981,9	3709,4	2585,0	1512,2
Flour and grain	82,2	87,8	98,8	64,2
Oil plants	111,5	237,6	692,9	1071,5

Consumption potential of foodstuffs at Russia in 2000-2010 yrs

- During 2000-2010 yrs purchasing power of average incomes per capita significantly increased to main foodstuffs. For instance: to wheat flour and grain in 3,3-3,4 times; to sunflower oil-3,2; to bread and bread products-2,9 times; to sugar-2,7 times; to beef-2,4 times; to potatoes-2,4 times; to dairy products-1,7 times.
- In 2010 compared with 2009 real available incomes of population increased on 4,1%; average monthly wages increased on 4,2% and reached 21090 rubles (about 680 USD); average monthly pension enlarged in real amount on 34,8%.
- According statistics, consumption of households in 2010 yr in comparison to 2000 yr increased for dairy products in 1,3 times; for fruits and berries in 2,5 times; fish and fish products-1,5 times and so on.

Russian import of some products from far abroad (August 2011), USD millions

Name of product	August 2011	In % to Total import	In % to August 2010	August 2010 in % to August 2009
Total import	24600,0	100,0	126,8	165,9
Foodstuffs and raw materials for foodstuff production, including:	2490,9	10,1	113,6	115,0
beef	209,5	0,8	118,7	80,4
pork	160,8	0,6	101,2	106,6
poultry meat	50,0	0,2	87,7	52,4
dairy products	130,5	0,5	92,8	198,0
fruits and nuts	358,6	1,4	113,1	150,2
vegetables	61,2	0,2	126,2	158,5

Foreign trade of Russian Federation with main countries of far abroad , USD millions

Countries	January-July 2011			Share In Turnover (%)	Speed of growth (%) to January-July 2010		
	Turnover	Export	Import		Turnover	Export	Import
All world	453642,5	287968,3	165674	100,0	135,5	130,7	144,9
EU, including:	221094,3	152357,8	68736	48,7	132,8	127,1	147,7
Germany	39535,3	19694,5	19840,8	8,7	145,2	138,7	152,2
Italy	23936,3	16931,9	7004,4	5,3	116,1	107,7	143,4
France	17710,4	9925,9	7784,5	3,0	152,2	139,9	171,3
Belgium	7022,6	4751,3	2271,3	1,5	151,4	160,5	135,3
Netherlands	37693,7	34489,2	3204,5	8,3	115,1	113,0	143,8
Poland	14923,4	11350,4	3572,9	3,3	128,7	130,3	123,7

Import of some products to Russian regions (1 quarter of 2011), USD millions

Indicator	Far abroad trade	Near abroad trade	Total trade	Share In turnover (%)
Total import	50742,2	4693,8	55436,0	100,0
Moscovskaya oblast (region)	5329,6	224,5	5554,1	9,9
Moscow	22859,9	715,8	23575,4	42,5
St. Petersburg	5949,5	101,9	6051,4	10,8
Leningradskaya oblast (region)	1031,7	4,3	1036,0	1,8
Tambovskaya oblast (region)	100,1	4,5	104,6	0,2
Volgogradskaya oblast (region)	145,9	82,1	228,0	0,4

Structure of foreign-trade turnover of Volgogradskaya oblast (region), USD millions

Indicator	2005 yr	Share in %	2007 yr	Share in %	2009 yr	Share in %
Total import, including:	555,5	100,0	862,2	100,0	772,9	100,0
Foodstuffs and raw materials for foodstuff production	34,4	6,2	72,8	8,4	70,9	9,8
Oil-gas industry	11,0	2,0	26,5	3,1	25,1	3,5
Chemistry industry	46,0	8,3	69,0	8,0	165,2	22,9
Wood and cellulose industry	23,2	4,2	58,3	6,8	26,6	3,7
Clothes and footwear	2,9	0,5	1,6	0,2	0,9	0,1
Machinery	134,3	24,1	285,9	33,1	194,1	26,8

Foreign-trade partners of Volgogradskaya oblast (region), USD millions

Country	Export			Import		
	2007	2008	2009	2007	2008	2009
Belgium	22,1	15,9	8,6	2,9	5,1	1,6
Bulgaria	5,0	25,7	2,5	3,8	2,7	0,3
Hungary	2,4	3,2	1,6	6,0	5,9	3,2
Germany	99,6	79,3	29,8	82,2	145,6	181,4
Serbia	2,7	-	1,6	0,4	-	0,5
Slovenia	29,5	21,6	0,3	1,1	-	0,0
Finland	23,2	30,1	8,8	7,5	5,2	22,6
Czech Republic	10,9	12,2	5,4	94,3	81,9	12,0
Croatia	4,7	0,2	12,1	0,9	0,4	0,4

Organizational forms of expansion of agro-production and foodstuffs

1. Organization of Agro-business clubs (like mutual statement about setting up Russian-Dutch Agro-business club which was signed in presence of president RF (Dmitri Medvedev) and Queen of Dutch (Margrite II) 06.09.2011 at Moscow-level of first persons of states).
2. Civic and professional organizations in assistance to establish a direct business links in Agrobusiness (Serbia has many friends in RF-level of professionals and citizens).
3. Participation in latest program of scientific-technical development between Serbia and Russia relatively Agriculture and trade of Foodstuffs (Till now Trade chamber of Russia in Belgrade can not clarify main positions in this document-level of official interstate agreements).
4. Development of cooperation with Russian regions – particularly with high import potential (e.g. Moscow region) or friendly orientated (e.g. Volgograd region) (subfederal level).



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Thanks for attention.
The presentation is over.