EU-MOLDOVA TRADE RELATIONS: COMPETITIVE ADVANTAGES OF MOLDOVAN INDUSTRIES ON THE SINGLE MARKET

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Abstract: *Engaging on the long road of implementing the Deep and Comprehensive Free Trade Area with the EU in 2010, Moldova is now closer than ever to being included in the most privileged category of the Eastern neighbouring countries - those who have chosen to deepen the European economic integration. The Vilnius Summit in November 2013 has reinforced the 'more for more' principle for both Moldova and Georgia by emphasizing, at the same time, the role of reactive measures and financial aid in counterbalancing aggressive trade barriers from non-EU states. Not only has Moldova proved to efficiently capitalize the provisions of the ATP agreement since 2008, but it has also consequently received more support from the EU in boosting exports to the single market. The wine industry was the first to benefit from the free-trade regime, as for the EU decision of eliminating quotas from the beginning of 2014. Nonetheless, the progressive liberalisation of trade flows between Moldova and the EU would finally oppose two asymmetric partners. Consequently, Moldova is facing the challenge of asserting its value on the EU market, by yet not undermining the relevance of other important trading partners nearby.*

Keywords: asymmetric partners; cooperation; trade regime

INTRODUCTION

Amongst the most obedient EU apprentices, Moldova has decided to follow the rigorous and long European way. Not only by getting closer to EU standards and policies, but also by implementing and continuously improving the economic and political frame of its partnership with the EU, the country is now part of the most ambitious and wise of the Eastern neighbours.

In the attempt of commercial matching and pursuing the 'more for more' principle, Moldova has started in 2010 negotiations for a Deep and Comprehensive Free Trade Area (DCFTA) with the EU. It is only by its merits that Moldova has been granted this opportunity and although included in the category of poor neighbours, Moldovans have proved their right to equal treatment through determination and hard work.

The balance, some say, is highly disproportioned. However, strong commitment and very good results of past collaboration (ATP agreements) encourage progress and steady growth. We are trying to show that even a small

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feeble state can balance the huge Single Market when competitiveness and liberalization of trade are the engines of specialization.

1. LESSONS OF THE ATP AGREEMENT – MOVING FORWARD TO THE DCFTA

1.1. The frame of the ATP agreement between the EU and Moldova

The ATP (Autonomous Trade Preferences) is a unilateral trade regime granted by the EU on a limited amount of time. As part of the Action Plan for Moldova agreed in 2005 and within the frame of the EU Council Regulation no. 55/2008 (effective starting the 31st of January 2008), the ATP agreement enforces the free access to the EU Single Market of all products originating in Moldova, except for certain agricultural products, with limited concessions:

- Exemption from customs duties within tariff quotas for: fresh, chilled, frozen or preserved meat (bovine, swine, sheep, goats, poultry), dairy products, birds' eggs, common wheat, barley, maize, white sugar, wine of fresh grapes;
- Tariff reductions (exemption of the ad valorem component of the import duty) for: tomatoes, garlic, cucumbers, courgettes, artichokes, grapes, apples, pears, apricots, cherries, peaches, plums, quinces.

This preferential trade regime has been into force until the 31st of December 2012, when the ATP have been renewed until the end of 2015, by also increasing the tariff quotas exemptions for wines of fresh grapes, common wheat and white sugar. These are the products for which Moldova has proved to capitalize the benefits of the ATP to the greatest extent.

1.2. DCFTA – the next step to complete liberalisation

Based on the same free-trade principle between the EU and Moldova, generated through the ATP agreement in 2008, the implementation of the DCFTA covers not only the exemption from import customs duty, but also the removal of non-tariff trade barriers (Radeke, 2012), technical barriers against trade such as the sanitary and phytosanitary measures.

The comprehensive feature of this free-trade area is given by the inclusion of all trade divisions, notably on services, energy and the competition policy. Unlike the ATP agreement, the DCFTA is built on a mutual basis. Consequently, the liberalization is expected to take place both ways, unlimited in time.

For the proper implementation of the DCFTA, Moldova needs to better manage the harmonization of the sanitary, phytosanitary and food safety measures with the EU standards. At present, Moldova operates up to 75% with soviet standards, which makes export for some Moldovan products to EU impossible (Lupuşor, 2013). Moreover, subsidies are always granted to the same restricted group of producers, efficiency criteria not being tested, therefore the need for a consistent and equable support from the state (Chivrigă, 2013).

2. EASTERN PARTNERSHIP: BRIEF HISTORY AND RECENT CHANGES

2.1. Provisions of the Eastern Partnership since its creation

Set in 2009 within the frame of the European Neighbourhood Policy (ENP), a complementary of the EU enlargement Policy, the Eastern Partnership (EaP) was meant to 'accelerate political association, as well as economic integration and approximation towards the EU' (The Eastern Partnership portal, 2009) for the 6 Eastern neighbours: Armenia, Azerbaijan, Belarus, Georgia, Republic of Moldova and Ukraine.

The EaP stipulates a strong political commitment to the EU, by the perspective of signing an Association Agreement and the integration in the economy of the EU through free-trade agreements, but also by a progressive liberalization of the visa regime, the improvement of energetic security and an increase of financial assistance. The last criterion has also been proven by the allocation of 350 million euros (out of the 600 million euros EaP funds for 2010-2013) to the economic integration and convergence with EU policies.

Therefore, regarding trade and market access, the European Commission has identified for the first part of 2010 an 'intensified evolution of trade relations with the member countries of the ENP, especially with Eastern partners' (Communication from the Commission to the European Parliament and the Council, 207/2010, p. 6). EU exports to the ENP countries have increased by 63% between 2004 and 2008, whereas imports from the ENP countries have increased by 91%.

In order to support a deep economic integration, the EU has decided for Moldova to be granted the extension of the ATP regime until December 2015 and thus Moldova becomes the first country to benefit from this type of preferential trade regime with the EU.

2.2. Recent architecture of the EaP

Recent research regarding the reconfiguration of the EaP after the Vilnius Summit in November 2013 have provided a differentiated approach to the member states by dividing them into two categories:

- Moldova and Georgia – first circle – have chosen to deepen the economic integration towards the EU;
- Belarus, Azerbaijan and Armenia (from September 2013) – second circle – have not been interested in deepening the economic integration with the EU;
- Ukraine has until recently been positioned between the two circles, but political unrest for the past few months has oriented the country to the EU side, not yet consolidated given the continuous external tensions.

Anita Sobják, researcher of the Polish Institute of International Affairs, defines the priorities of each circle by stating that in the case of Moldova and Georgia, signing the Association Agreement and an efficient implementation of its provisions would only reinforce the 'more for more' principle. Moreover, additional financial and technical instruments, as well as 'strategic patience' (Sobják, 2013) are required for supporting the implementation of the DCFTA. Belarus, Azerbaijan and Armenia, as countries of the second circle, would benefit from stimulation of reforms from the EU, without a tendency of isolation in case of failure.

The Russian aggressive measures meant to counterbalance the EaP (such as improper pricing on the energy market or artificial trade barriers) have to be addressed by the EU in a quick-acting and efficient way – for instance by providing financial help for trade restrictions. This has happened for Moldova in December 2013 when the European Parliament has decided full liberalization of Moldovan wines of the Single Market as a response to the Russian embargo on wine imports since September 2013.

3. EU-MOLDOVA TRADE RELATIONS: AN UNBALANCED BALANCE

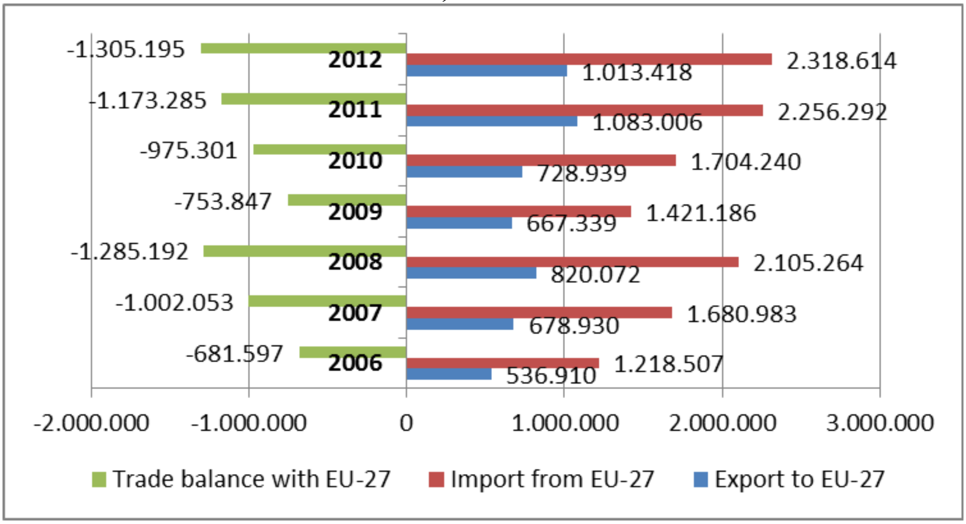
The general assumption is that, in handling relations with poor countries from its neighbourhood: Moldova, Armenia and Georgia – poorer than the poorest EU members – the EU might try to export the acquis which will result in an excessive focus on regulation and the assertion of very high adjustment costs against these partners. A softer approach is required: the EU has to support exporters on complying with the European standards, but also on developing sensitive areas such as the agricultural sector, parts of industry and low-skilled labour force.

Given the above, the present study aims to quantify the benefits Moldova can get from a free access to the Single Market, but also to identify improvements that can increase the competitiveness of Moldovan products on the EU market. Furthermore, the purpose of the following analysis is to determine to what extent the implementation of the DCFTA will reconfigure the trade relations between Moldova and the EU, given that the EU has constantly been the main trading partner of the Republic of Moldova.

3.1. Imports and exports between Moldova and the EU. The evolution of the trade balance

Trade flows between Moldova and the EU intensified considerably after 2000. Exports increased about 6 times, from 182.4 million dollars in 2001 to 1013 million dollars in 2012, whereas imports increased about 5 times, from 431,4 million dollars in 2001 to 2318.6 million dollars in 2012 (the evolution between 2006 and 2012 is represented in Figure 1 below).

Figure 1 - Exports, imports and trade balance Moldova - EU27 between 2006 and 2011, million dollars



Source: Based on Ciucu, C., Chivrigă, V., Toderiţă, A., Tornea, I., *Consecinţele unei Zone de Liber-Schimb Aprofundate şi Cuprinzătoare asupra economiei Republicii Moldova (Consequences of a Deep and Comprehensive Free Trade Area on the Moldovan economy),* European Institute of Romania, 2011, p. 34

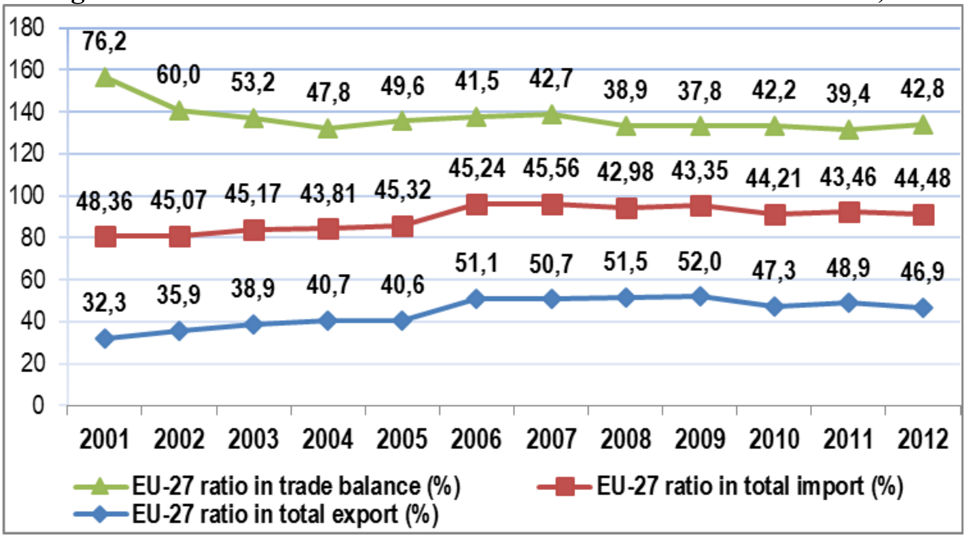
Out of the 1596 million dollars increase in exports for the given period, 52% was represented by the growth of exports towards EU countries, while the increase of imports from the EU contributed by 44% to the total imports of Moldova (4320 million dollars). Trade flows with EU countries, as well as the total trade flows of Moldova have recorded high trade deficits between 2001 and 2012.

Given the more accelerated growth of the country's exports to EU, their ratio in total exportation flows from Moldova increased from 32% in 2001 to 47% in 2012, reaching a peak of 52% in 2008 and 2009 (see Figure 2 below).

The reduced ratio of EU in the total Moldovan exports after 2009 might be explained by the slower recovery of EU economies after the crisis, as compared to other trading partners, thus reflected in a lower increase of demand for Moldovan goods versus other source destinations. Imports, on the other hand, have lessened in ratio over the analyzed period, from 48% in 2001 to 44% in 2012.

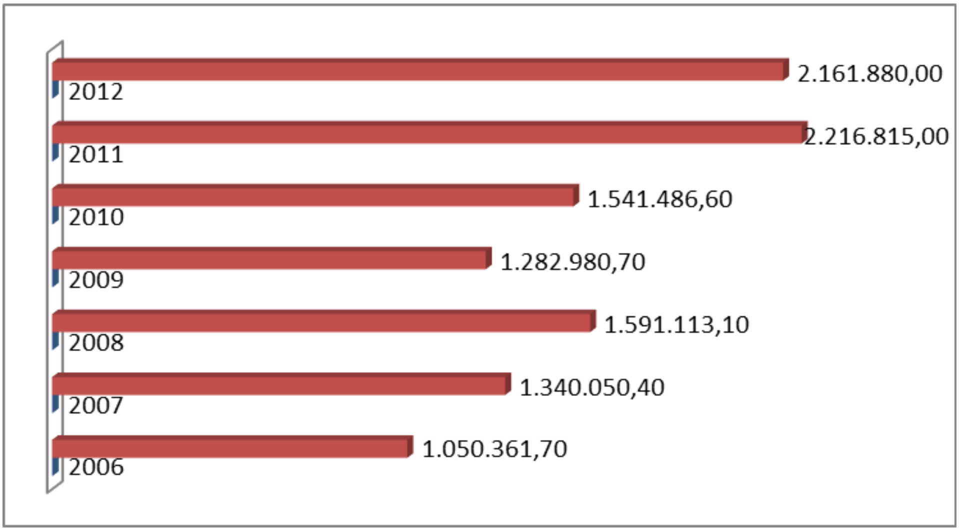
Exports towards EU have inhanced after the introduction of GSP+, in January 2006, by 94.3 million dollars against 2005, their ratio in total exports rising by 10.5 percentage points, from 40.6% to 51.1%. This situation could have been equally due to the Russian embargo (set in 2006 on Moldovan alcoholic beverages, animal and vegetable products) and to the fact that Romania became EU member in 2007. However, the next two years, exports to EU have increased by 140 million dollars, what can be only attributed to the GSP+ liberalisation.

Figure 2 - The ratio of trade flows to EU-27 in the total trade flows, %



Source: Based on Ciucu, C., Chivrigă, V., Toderiţă, A., Tornea, I., *Ibidem*

Figure 3 – Total exports from Moldova to EU27 between 2006 and 2012, million dollars



Source: National Bureau of Statistics of the Republic of Moldova

In 2011 Moldova has registered the largest volume of exports for the analyzed period (see Figure 3 below): 2217 million dollars, representing an increase of 44% from the previous year. On a regional scale, this was reflected by an increase of exports to EU-27 countries from 47.3% of the total exports in 2010 to 48.96% of the total exports. As for exports to the Commonwealth of

Independent States (CIS) for the same period, the increase was lower, from 40.48% in 2010 to 41.38% in 2011 (Economic Monitor, 23/2012, p. 35).

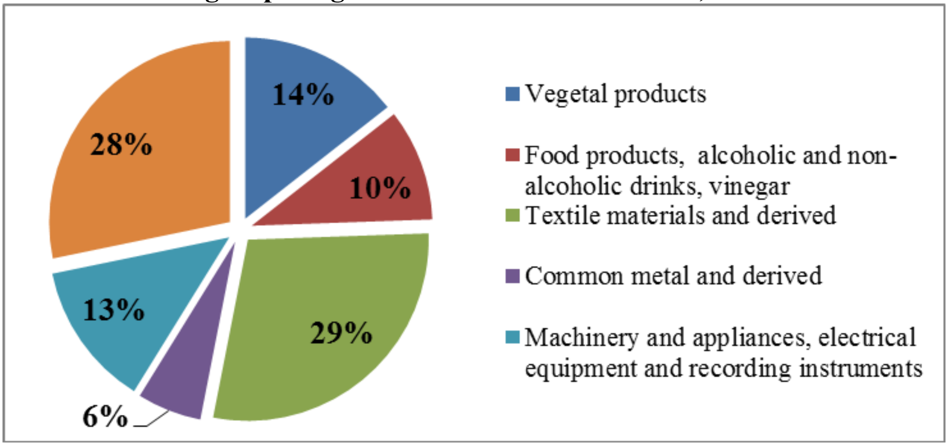
Nonetheless, the higher export volumes (exceeding 200 million dollars) were directed to Russia, Romania, Hungary, Italy, Germany, Turkey, China, Belarus and Poland. Export flows to the EU have increased substantially as a result of the growth rates in the asymmetric trade relations. Regarding trade with the CIS countries, in particular with Russia, the increase was due to the elimination of barriers to the export of food products, vegetables and alcoholic drinks.

3.2. Exports of the Republic of Moldova by groups of goods according to the Nomenclature of Goods (NG)

By analyzing exports of the Republic of Moldova to the EU between 2006 and 2012, we have identified, according to Nomenclature of Goods, the first five groups of the most exported Moldovan goods (Figure 4):

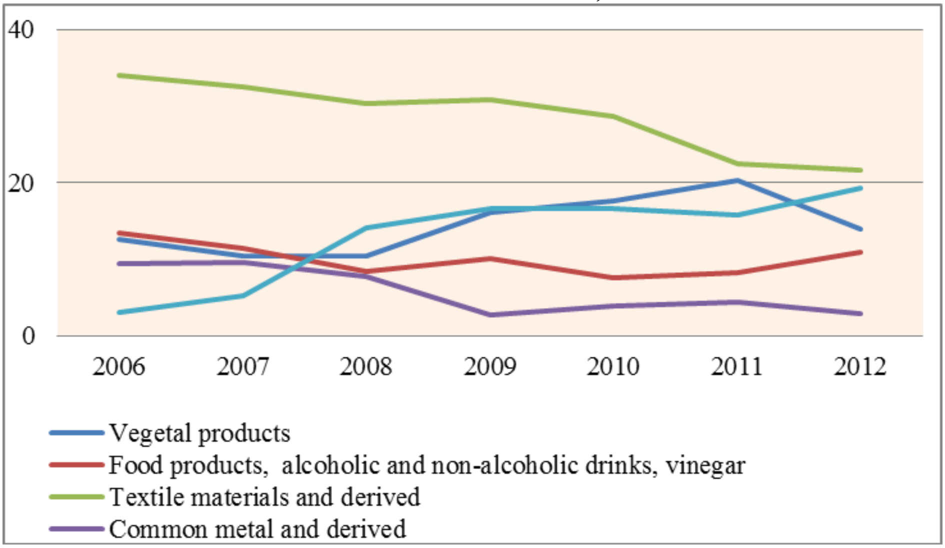
1. Textile materials and derived (29%)
2. Vegetal products (14%)
3. Machinery and appliances, electrical equipment and recording instruments (13%)
4. Food products, alcoholic and non-alcoholic drinks, vinegar (10%)
5. Common metal and derived (6%)

Figure 4 – Exports structure to EU27 in the Republic of Moldova by the main groups of goods between 2006 and 2012, %



Source: National Bureau of Statistics of the Republic of Moldova

Figure 5 – Evolution of the Moldovan exports by the main groups of goods between 2006 and 2012, %



Source: National Bureau of Statistics of the Republic of Moldova

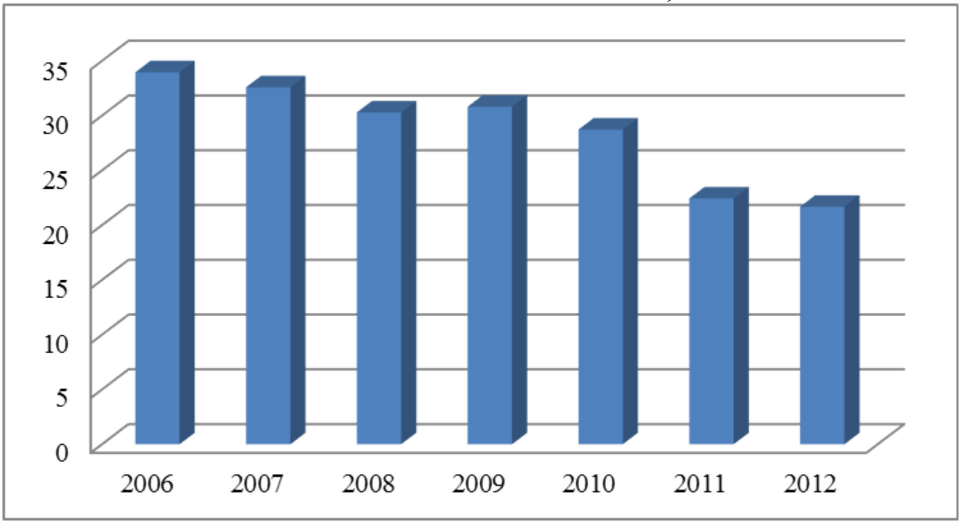
Figure 5 above depicts the evolution over time of the ratio that these products have had in the export flows of Moldova to the EU between 2006 and 2012. Machinery and appliances, electrical equipment and recording instruments have been more and more exported to the EU reaching a peak of almost 20% in 2012, almost equaling the exports of textiles in the EU for the same year.

The vegetal products registered a significant increase in exports to EU countries until 2011 from 10.35% in 2008 to its peak of 20.3%. This is mainly related to the same period of the first ATP regime 2008-2012. Common metal and derived have been less exported since 2008, while the focus is now more on the propensity to export food products and alcoholic drinks.

3.2.1. Exports of Moldovan textile materials and derived to the EU

Exports of textile materials and derived to EU countries recorded a slightly declining trend between 2006 and 2012 (see Figure 6 below). Nonetheless, we consider that the removal of tariff protection as well as of non-tariff barriers brought about by the implementation of the DCFTA with the EU will not significantly affect the industry. This is mainly due to the fact that textiles for domestic consumption are generally imported, whereas production intended exclusively for export purposes is carried out by foreign companies relocated in Moldova.

Figure 6 – Evolution of the Moldovan exports of textile materials and derived to the EU between 2006 and 2012, %



Source: National Bureau of Statistics of the Republic of Moldova

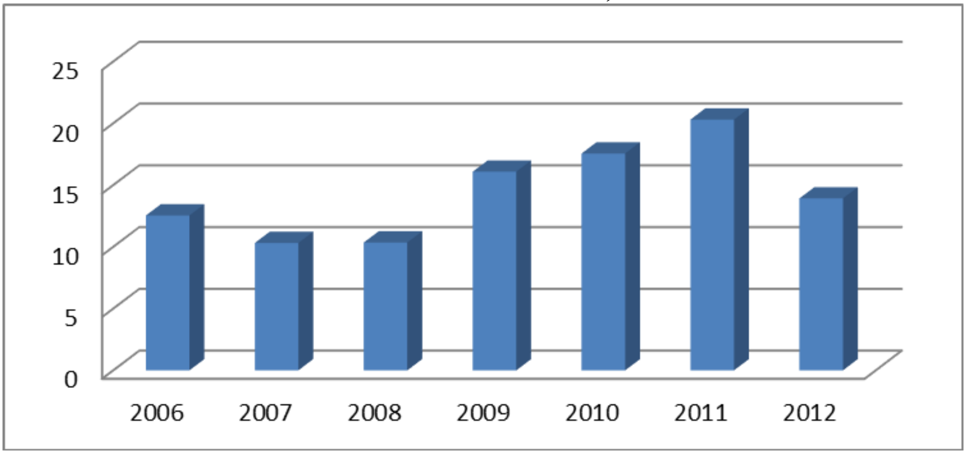
3.2.2. Exports of Moldovan vegetal products to the EU

Exports of vegetal products recorded an increase in the total exports of the Republic of Moldova to the EU, particularly between 2009 and 2011 (Figure 7), due to the extension of free trade facilities through the ATP agreement, entering into force on the 31st of January 2008. Thus, according to the ATP provisions, Moldova has benefited from the exemption of customs duties within the limit of tariff quotas to common wheat, barley and maize, as well as tariff reductions for: tomatoes, garlic, cucumbers, zucchini, artichokes, grapes, apples, pears, quinces, apricots, cherries, peaches and plums.

Notwithstanding, we should take into account that the sharp increase in exports of vegetal products to the EU until 2011 was largely influenced by the expansion of tillage grounds, as well as a modest yield growth for some cultures (Economic Monitor, 23/2012, p. 21).

On the other hand, for 2012 agricultural production decreased twice of the 2011 amount, especially in cereal crops. The production of wheat, for instance, was lower that the one of 2007. Moreover, the bulge in fuel prices and consequently, in prices of chemicals and fertilizers for agriculture, has led to the loss of competitiveness of Moldovan agricultural products.

Figure 7 – Evolution of the Moldovan exports of vegetal products to the EU between 2006 and 2012, %



Source: National Bureau of Statistics of the Republic of Moldova

The capitalization of tariff quotas when exporting cereals in the EU is reflected by comparing exported amounts (according to export licenses issued by the relevant authorities) to the ones included in the ATP regime (see Table 1 below).

Table 1 – Tariff quotas for exports of cereals to the EU according to ATP 2008-2012 and ATP 2012-2015 (tons)

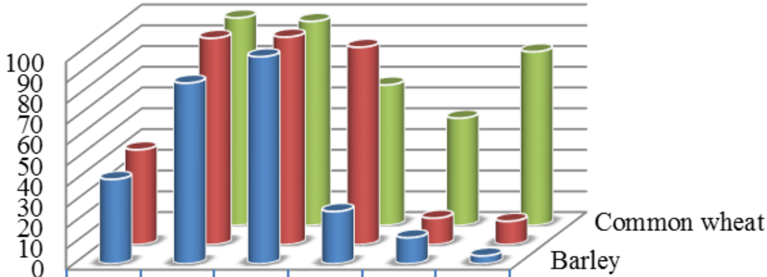
NG code	Description of goods	2008	2009	2010	2011	2012	2013	2014	2015
1001 90 91	Common wheat	25,000	30,000	35,000	40,000	50,000	55,000	60,000	65,000
1003 00 90	Barley	20,000	25,000	30,000	35,000	45,000	50,000	55,000	60,000
1005 90	Maize	15,000	20,000	25,000	30,000	40,000	45,000	50,000	55,000

Source: Chamber of Commerce Licensing of the Ministry of Economy - the Republic of Moldova: (http://www.licentiere.gov.md/pageview.php?l=ro&idc=265&)

Thus, for 2008 the Ministry of Economy and Commerce has issued export licenses for barley of 8,141 tons (as of July, 143 licenses), the 20,000 tons quota being used of only 40.71%. Similarly, for maize, the 15,000 tons quota was used of 45.72% (Figure 8). Common wheat could not be exported under preferential regime in 2008.

The poor performance of the cereal exports in 2008 was a result of profound drought in 2007 affecting the national food safety, so that exports were possible only starting September. The international financial and economic crisis has affected international relations of cereal traders. In addition, one should take into account that the introduction of the ATP for Moldova was achieved since March 2008, when the EU Council Regulation nr. 55/2008 of 21 January 2008 became effective.

Figure 8 – Tariff quota yield evolution for cereals through the ATP agreements until 2013, %



	2008	2009	2010	2011	2012	2013
Barley	40,71	87,06	99,73	25,20	12,60	3,81
Maize	45,72	99,42	100,00	95,09	12,73	11,26
Common wheat		100,00	98,29	67,65	51,66	83,65

Source: Chamber of Commerce Licensing of the Ministry of Economy - the Republic of Moldova

In 2009 and 2010 tariff quotas have been used more than 80% for all three cereal products exported through the preferential regime: common wheat, maize and barley. However, although the quota for wheat in 2008 was 100% used (30,000 tons) according to data recorded by the EU authorities, the Government Assembly on the 14th of April 2009 proved that the Ministry of Economy was not legally entitled to issue such authorizations for this group of goods. Starting the 1st of November 2010, this function is transferred to the Chamber of Licensing of the Republic of Moldova.

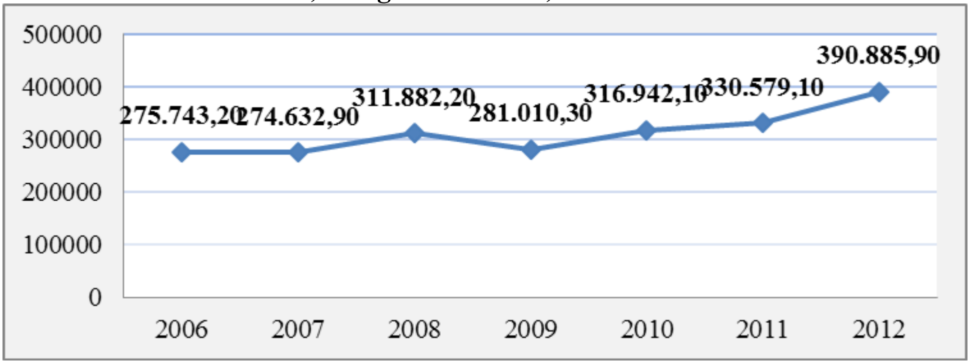
For 2011, the export quota for maize has been almost entirely used (95.09%), whereas for common wheat and barley, lower values have been recorded as compared to previous years, namely: 67.65% and 25.2% respectively. In 2012 were issued 4 export licenses for barley and maize, with similar use of tariff quotas i.e. around 13%. In both cases the export destination was Romania. Export quotas for wheat were distributed by 51.66% (28 licenses), the main destinations being the United Kingdom, Romania and Italy.

In 2013 the situation was similar to 2012, so that, although barley and maize registered low yields, common wheat quotas reached 83.65% of use.

3.2.2 Exports of Moldovan food products, alcoholic and non-alcoholic drinks, vinegar to the EU

Regarding this group of goods, significant changes have occurred, so that they reached 391 million dollars in 2012 as opposed to 276 million dollars in 2006, mainly due to the positive developments in the export of granulated sugar and wines.

Figure 9 – Exports of Moldovan food products, alcoholic and non-alcoholic drinks, vinegar to the EU, million dollars

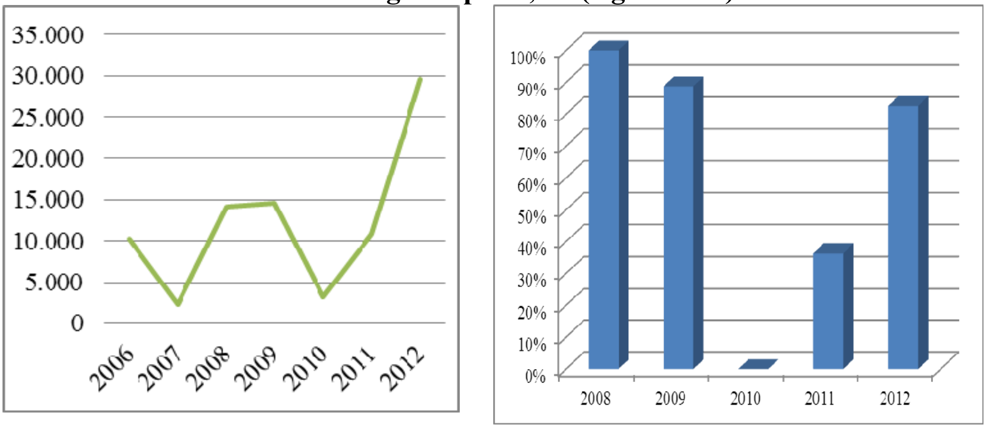


Source: National Bureau of Statistics of the Republic of Moldova

In 2009 the most exported goods to the EU market were the agri-foodstuff products: sugar, seeds and sunflower oil, wheat, alcoholic drinks, coconut, fruit juices and dried fruit (Perju, Chivrigă and Fală, 2010). For Moldova, increased exports of white sugar and sugar confectionery to the EU countries in 2008-2009 was directly related to the capitalization of tariff quotas granted by the EU of 100% and 88.77% respectively (Figure 10 below). Since the beginning of 2010 there were no more requests for export licenses in this group of goods, therefore it have not been registered any exports of sugar under preferential regime. This development was due to the scarcity of sugar in 2010, which led to the entire production being directed to cover demand on the domestic market.

For the first part of 2011, the export tariff quota has not bee used, domestic demand being insured through imports from the EU. However, towards the end of the year, the export of white sugar has improved, so that domestic producers have exported 9,439 tons of white sugar, making use of 36.3% of the tariff quotas. In 2012, the Moldovan white sugar was exported mainly to Romania, Poland and Belgium, covering 82.58% of the EU set quota. In the next 3 years (2013-2015) provisioned quota remains the same, i.e. 34,000 tons.

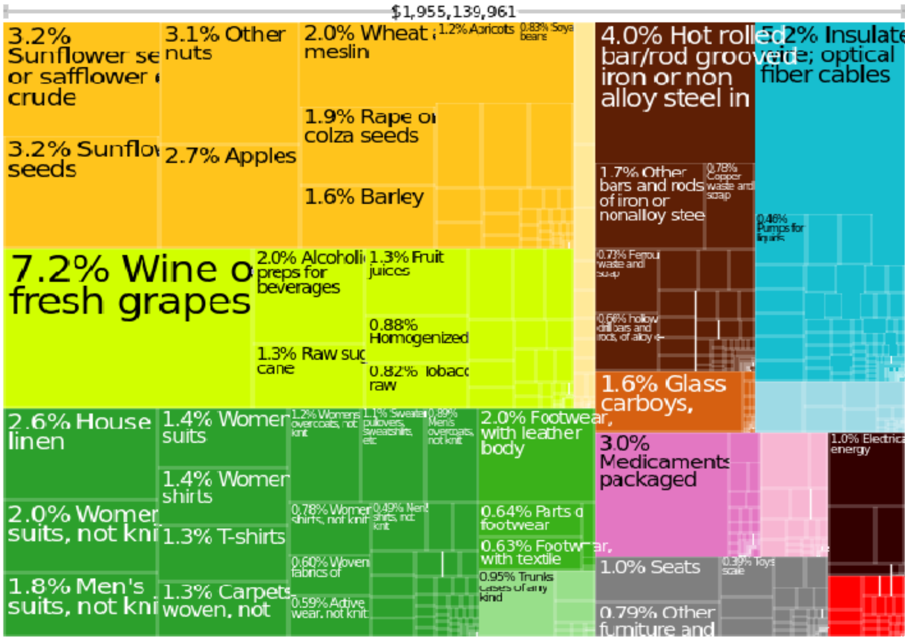
Figure 10 – Exports of Moldovan white sugar and sugar confectionery to the EU, million dollars (left chart) and tariff quota yield evolution of white sugar exports, % (right chart)



Source: National Bureau of Statistics of the Republic of Moldova

The analysis of Moldovan export structure in 2010 shows that in the first product to be exported was the wine of fresh grapes: 7.2% of total Moldovan exports (140 million dollars) - Figure 11 below.

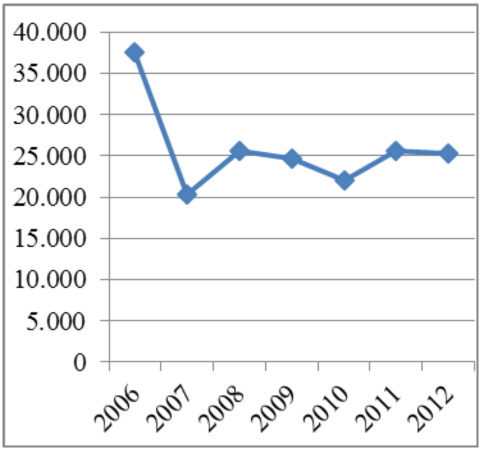
Figure 11 – Moldovan export structure 2010

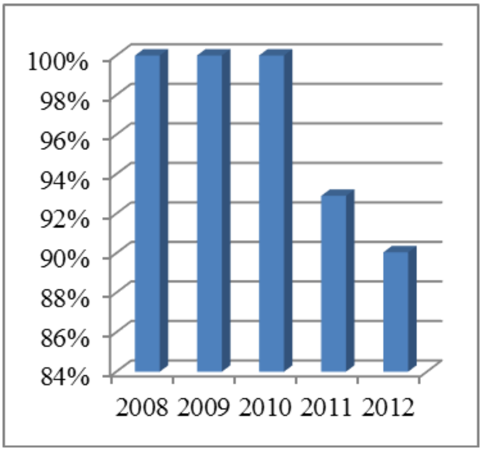


Source: The Observatory of Economic Complexity: http://atlas.media .mit.edu/., according to the CAEN classification.

The main export destinations for Moldovan wines are Russia (34%), Belarus (25%) and Ukraine (11%). Romania, Poland and the Czech Republic register 9.8% of the Moldovan exports of wine. Even though Russia remains the classic market for Moldovan wines, EU facilities for the export of wine through the ATP agreements: 2008-2012 and 2012-2015 have been successfully used by the Republic of Moldova. This led directly to an increase in tariff quotas from 100,000 hectoliters initially to 150,000 hectoliters in 2011 and from 120,000 hectoliters initially to 180,000 hectoliters in 2012.

Figure 12 – Exports of Moldovan alcoholic drinks, non-alcoholic drinks and vinegar to the EU, million dollars (left chart) and tariff quota yield evolution of exports of fresh grapes wine, % (right chart)





Source: National Bureau of Statistics of the Republic of Moldova

For 2013-2015 proposed tariff quota amounted 240,000 hectoliters per year. Therefore, the extension of free trade facilities (removal of tariff quotas) on very important products of importance to Moldova's exports to the EU such as wines from fresh grapes will positively influence trade on medium and long term.

In September 2013, shortly after the public announcement of Moldova's intention of signing the association agreement with the European Union in Vilnius, the health service of the Russian Federation decided to ban imports of Moldovan wines, claiming irregularities of processing and storage of wine products.

As a result, tariff quotas for Moldovan wine exports to the EU have been removed starting the 1st of January 2014, by fully liberalizing the Single European Market to Moldovan wine production (Radiografia anului economic 2013 şi aşteptări pentru anul 2014, 2013, p. 6). This decision supports the Moldovan wine producers and helps them counteracting the effects of the Russian embargo. However, proper use of this opportunity will be possible only by extending the market share in EU countries where Moldova is already an exporter: Poland, the Czech Republic, Romania, the Baltics and launching wine products on other local markets in Europe, where traditional producers such as France, Italy and Spain provide fierce competition.

CONCLUSIONS

Although the trade balance between Moldova and the EU has registered negative values for 2001-2012, the EU ratio in total exports has increased especially after 2006, due not only due to the Russian embargo to alcoholic and agricultural products from Moldova, but also to the admission of Romania as EU member. The peak was reached in 2008-2009, when 52% of total Moldovan exports were heading towards the EU.

Tariff quotas introduced by the ATP agreements 2008-2012 and 2012-2015 have significantly improved exports to the EU countries for essential Moldovan goods, such as cereals (common wheat. barley and maize), alcoholic drinks (wines of fresh grapes), white sugar and sugar confectionery. The threshold being used each year in a more efficient way, the amount for the next year has often been increased.

The main groups of goods in Moldovan exports to the EU are textile materials, vegetal products, machinery and appliances, food products and alcoholic drinks, as well as common metal and derived. Whereas after the full implementation of the DCFTA no significant changes are expected to the textile industry, for cereals, alcoholic drinks and white sugar we assume that a complete liberalization will largely contribute to the country's exports.

Aggressive measures such as artificial trade barriers and embargo from the Russian market are to be addressed by the EU in an objective and practical way, by providing financial support to the affected neighbours and by enforcing new regulations towards trade liberalization.

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