

DEVELOPMENT OF COMPETITIVENESS OF AGRARIAN TRADE IN SELECTED CENTRAL EUROPEAN COUNTRIES*

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The paper analyses the development of the positions and of competitiveness of agrarian foreign trades in Austria, Hungary and the Czech Republic within the framework of the global market and the internal market of the EU countries with a goal of revealing the factors, which have affected competitiveness of agrarian trade over the past ten years (1999–2008). The outcome of the analysis shows that agrarian trade in the above-described countries has to a significant extent change its value and commodity structures. The main causes of the majority of the changes in the individual characteristics of agrarian foreign trades in the individual analysed countries include the EU enlargement process, the adoption of commitments ensuing from the membership in the EU, as well as orientation of the internal markets of the EU countries. The existing changes have resulted in a dominant share of the 27 EU Member States within the framework of agrarian trade in the individual analysed countries (in excess of 80 percent of agrarian trade in the case of the individual analysed countries have taken place within the EU territory). It is possible to say that there are some differences among the analysed countries, as concerns the development of agrarian trade. The relevant results show that while agrarian trade in Austria and in the Czech Republic constantly continues to strengthen its position, certain weakening of the position is recognised in the case of Hungary.

Czech Republic; Hungary; Austria; agrarian trade; comparative advantage; development

INTRODUCTION

Foreign trade is historically the oldest and still important part of the external economic relationships. In harmony with the conclusions of the classical, neo-classical as well as modern foreign trade theories, it can be stated that at present foreign trade belongs to the decisive factors influencing economic growth of both the individual countries as well as the world economy (Jeníček, Krepl, 2009).

Data in real terms show that world gross domestic product (GDP) and world merchandise exports not only move in tandem, but that export growth exceeds GDP growth. Growth of world GDP is associated with an even higher growth in international trade (International Trade Statistics, 2008).

Agrarian foreign trade represents a significant part of the world economy even if its share in world trade is consistently decreasing and currently it moves at the level of about 5% to 7%. For the EU countries, agrarian trade in both forms of intra-trade and extra-trade represents a very important part of the Common Trade Policy and the Common Agrarian Policy. Presently, agrarian trade of the EU countries has become a very significant proportion of the World trade with agrarian production. The share of the EU in the world agrarian export and import value is very high (Svatoš, Smutka, 2009).

The commitment of the Common Agricultural Policy (CAP) led to unprecedented changes in economic environ-

ment – in agriculture as in processing industry. New members lost the possibility to regulate the original price level of agricultural products supported by the national border protection and export subsidies (Tomšík, Rosocháček, 2007).

Medium-term trends in trade in food commodities imply a changing landscape of international trading patterns. With relatively slow growth in agricultural output and stagnating food demand, real net food commodity exports from industrialized countries have been stagnant in recent years, a pattern that is not expected to change in the medium term. As a group, industrial countries will remain excess suppliers, exporting to other countries, while developing countries will remain, as a group, net food commodity buyers (The State of Food and Agriculture, 2008).

The paper analyses the development of competitiveness of agrarian foreign trades within the Central European region in the years 1999–2009. The analysed period of time has witnessed a number of changes, which occurred both at the global and at the regional levels, and affected to a very significant extent the current shape (commodity and territorial structures) of agrarian trade in all countries of the world, including the Central European region. The past ten years have been very rich in changes affecting both global and regional trade. The form of agrarian trade of the Central European countries has been affected by the process liberalisation of global trade; furthermore, agrarian trade has been affected by the accession negotiations conducted between the EU and twelve European

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countries, which accessed the EU in the years 2004 and 2007. The form of trade of the Central European countries has been significantly affected by the process of removal of trade barriers, which culminated at the moment when all candidate countries accessed the EU. Agrarian trade in the above-described countries was further affected by changes, which have resulted from the joint agricultural policies and trade within EU, as well as from their gradual reforms.

Joining the EU brought about a substantial increase in the dynamics of the agrarian foreign trade turnover growth with the high dynamics of growth of agricultural exports and imports. These are obvious implications of the implementation of single market rules enhancing the mutual trade (Bašek, Kraus, 2009). The individual countries' competitiveness is related to the concept of comparative advantage. The theory of comparative advantage predicts that trade flows exist as a result of relative cost differences between trading partners. It suggests that countries are competitive in goods and services in which they have a relative cost advantage (Bojnec, Ferto, 2009).

The concept of competitiveness has been widely used in economic research and economic policy from various points of view over the last decade, but there is little agreement on its definition (Krugman, 1994). Competitiveness can be analyzed at three different levels: national or macroeconomic level, industrial or branch level, and firm or micro-economic level. Another aspect of competitiveness exists with regard to the spatial geographical dimension of the investigation, comparing enterprises or trade within a region of a particular country, or between countries. National competitiveness is related to the concept of comparative advantage. The theory of comparative advantage predicts that trade flows exist as a result of relative cost differences between trading partners. It suggests that countries are competitive in goods and services in which they have a relative cost advantage. In agricultural markets there are policy distortions, and thus competitiveness takes a more realistic view about the world (Barkema et al., 1991).

In recent publications, competitive power of a national economy sector is understood as its ability to create increasing value added on the basis of enhancing factor use efficiency providing the investment attractiveness of business, and development of new markets. Therewith, important conditions affecting the industry competitiveness are as follows:

- world market positioning (level of production export orientation, the share of exports in the output and its dynamics);
- domestic market positioning (the share of market imports and its dynamics as compared with foreign companies);
- technological level of the industry reflected in the volume of accumulated investment and qualitative characteristics of facilities as well as the intensity of investment activity;
- level of market concentration (the presence of large and efficient national companies) sufficient for suc-

cessful competition with world companies in the respective industries;

- resource endowment, availability of developed cooperation ties (inclusion in competitiveness clusters), historical “loyalty” of consumers to producers (Borodin, 2006).

MATERIAL AND METHODS

From the methodological point of view, the paper analyses development of competitiveness of agrarian foreign trades in three selected Central European countries (Czech Republic, Hungary and Austria) with the goal of finding out how the above-described changes have affected development of agrarian trade and its competitiveness within the region. The goal of the paper is to reveal the differences, and/or any compatible trends in the development of agrarian trade within Central Europe and to point out the common determinants affecting the development of the structure and values of agrarian trade in the selected countries.

An important factor, which has decided about the inclusion of the above-described countries in the analysis, is represented by a similar development of the position of the agrarian sectors within their national economies. An important element contributing to the attraction of the selected topic is represented by the fact that an analysis allows for comparing the impact of changes occurring over the past ten years in respect of three different types of economies. First, we can monitor how such occurring changes have affected development of agrarian trade in a state, which has already been a member of the EU for some time, and compare differences in such development against those states, which have acceded to the EU only recently. Furthermore, an analysis conducted in some selected countries allows for the monitoring of the development of the structure of agrarian trade in countries, which belong to the EUROZONE (Austria), and in those countries, which continue to use their own national currencies (Hungary and the Czech Republic). An analysis facilitates our understanding of some development trends, which are currently pending in the Czech Republic and in Hungary. Actually, there are certain development trends identical to Austrian experiences. This finding is based on a comparison of the development of agrarian trade of both of the countries against the Austrian agrarian trade after accession to the EU (Austria has been a member of the EU common market substantially longer than the Czech Republic and Hungary).

In the individual countries, development of competitiveness is analysed at the European and at the global agrarian commodity structure level. The analysis covers changes within a group of 24 categories of goods, based upon the harmonised customs system methodology: LIVE ANIMALS (HS01), MEAT & EDIBLE MEAT OFFAL (HS02), FISH & CRUSTACEANS (HS03), DAIRY, EGGS, HONEY, & ED. PRODUCTS (HS04), PRODUCTS OF ANIMAL ORIGIN (HS05), LIVE TREES &

OTHER PLANTS (HS06), EDIBLE VEGETABLES (HS07), ED. FRUITS & NUTS, PEEL OF CITRUS/MELONS (HS08), COFFEE, TEA, MATE & SPICES (HS09), CEREALS (HS10), MILLING INDUSTRY PRODUCTS (HS11), OIL SEEDS/MISC. GRAINS/MED. PLANTS/STRAW (HS12), LAC, GUMS, RESINS, ETC. (HS13), VEGETABLE PLAINTING MATERIALS (HS14), ANIMAL OR VEGETABLE FATS, OILS & WAXES (HS15), ED. PREP. OF MEAT, FISH, CRUSTACEANS, ETC (HS16), SUGARS & SUGAR CONFECTIONERY (HS17), COCOA & COCOA PREPARATIONS (HS18), PREPS. OF CEREALS, FLOUR, STARCH OR MILK (HS19), PREPS OF VEGS, FRUITS, NUTS, ETC. (HS20), MISC. EDIBLE PREPARATIONS (HS21), BEVERAGES, SPIRITS & VINEGAR (HS22), RESIDUES FROM FOOD INDUSTRIES, ANIMAL FEED (HS23) and TOBACCO & MANUF. TOBACCO SUBSTITUTES (HS24).

The chief benefit of the paper derives from an analysis of the trends prevailing in respect of the values of agrarian trade in certain individual countries, and furthermore, from the execution of the analysis of development of competitiveness of agrarian trade in the individual countries, both in respect of extrastat and intrastat. An analysis is performed via modifications ensuing from Balassa Index – RCA (Balassa 1965).

The revealed export advantage index RCA_2 (comparative advantage – global/regional level)

$$RCA_2 = (X_{ij} / X_{nj}) / (X_{it} / X_{nt})$$

where: X – represents exports

i – represents analysed country

j – represents the analysed economy sector/commodity/industry

n – represents some set of countries or world

t – represents the sum of all economy sectors/commodities/industries

RCA_2 measures a country's exports of a commodity (or industry) relative to its total exports and to the corresponding exports of a set of countries, e.g. the world. A comparative advantage is "revealed", if $RCA_2 > 1$. If RCA is less than "one", the country is said to have a comparative disadvantage in the commodity/industry. It is argued that the RCA_2 index is biased due to the omission of imports especially when country size is important (S v a t o š , S m u t k a , 2008).

The revealed comparative advantage index RCA_1 (comparative advantage at national level)

$$RCA_1 = \ln (X_{ij} / X_{it}) / (M_{ij} / M_{it}) * 100$$

$$= \ln (X_{ij} / M_{ij}) / (X_{it} / M_{it}) * 100$$

where: X – represents exports

M – represents imports

i – represents analysed country

j – represents the analysed economy sector/commodity/industry

t – represents the sum of all economy sectors/commodities/industries

In the case of RCA_1 , the index ratio ranges from –1 ($X_{ij} = 0$ and revealed comparative disadvantage) to +1 ($M_{ij} = 0$ and revealed comparative advantage). However, regarding RCA_2 , there exist ambiguities around zero values.

The results from any of the individual above-described analyses are confronted against one another, with the goal of identifying both different and – on the other hand – identical trends occurring in all of the analysed countries, for the purposes of understanding the development so far of agrarian trade within Central Europe and of pointing out the probable further trends in agrarian trade, in particular in the case of the Czech Republic.

RESULTS AND DISCUSSION

Position of Agrarian Foreign Trade

In the case of all of the analysed countries, agrarian trade represents a very specific item of their national economy. Although agrarian trade represents only a marginal contribution to the creation of the GDP in respect of its value, it is a very important phenomenon in the case of all analysed countries. In the case of Austria and Czech Republic, it is of essential importance because agrarian production of both of the analysed countries covers less than 70 percent of the local consumption of basic agrarian and food products; in the case of Hungary, the situation is quite opposite, because Hungary, due to its very good soil and climatic conditions, generates substantial agrarian surplus, in particular, in the area of basic industry production. Also, agrarian trade plays an important role due to the fact that the agrarian sectors in the individual countries have been capable of ensuring market supplies only with products of the temperate zone – tropical and subtropical products must be imported in full.

The share of the turnover of agrarian trade in the overall trade turnover was fairly stable in the years 1999–2008. In the case of Austria, the share of the turnover of agrarian trade in the overall turnover amounted approximately to 6 percent, while a moderately increasing trend was noted ever since the share reached the level of approximately 7.2 percent in 2008. This trend results, in particular, from the growing effect of trading in processed products. In the case of Hungary, the share in the turnover of agrarian trade in the overall trade fluctuated between 5 and 6 percent in the years 1999–2008. In the case of the Czech Republic, the share of agrarian trade reached approximately 5 percent.

Table 1 offers a brief review of the development and differences in the commodity structures of exports and imports in the individual analysed countries. Table 1 clearly shows the position of the individual commodity aggregations of the Harmonised Customs Tariffs in both exports and imports implemented within the framework of agrarian foreign trade.

Table 1. The selected countries' development of agrarian export and import commodity structure, in current prices

	Austria		Austria		Czech Republic		Czech Republic		Hungary		Hungary	
	1999	2008	1999	2008	1999	2008	1999	2008	1999	2008	1999	2008
Mil. EURO	Export value		Import value		Export value		Import value		Export value		Import value	
	total				total				total			
HS01	86.39	122.77	61.99	215.33	34.26	196.96	11.67	60.26	90.44	221.04	14.76	115.24
HS02	405.05	931.64	341.67	692.22	26.71	164.12	47.73	564.66	459.68	718.94	19.43	297.62
HS03	5.01	15.44	109.05	167.25	25.13	58.74	35.60	92.44	11.42	4.07	12.75	29.14
HS04	412.89	966.41	317.62	616.86	151.17	587.56	55.43	404.44	85.73	261.23	31.92	295.27
HS05	20.37	40.33	50.72	69.32	6.69	21.36	23.90	46.85	66.85	46.17	19.73	28.32
HS06	12.56	39.71	237.00	310.64	3.48	11.69	40.50	125.40	13.21	28.36	21.51	65.21
HS07	77.65	163.22	275.55	456.51	16.86	80.02	111.51	357.51	132.97	187.91	19.85	124.76
HS08	91.92	327.63	466.42	817.89	25.14	93.42	193.46	470.25	75.53	123.68	58.14	228.89
HS09	85.36	211.83	216.49	363.29	15.44	52.90	71.61	133.23	32.30	44.62	78.36	94.74
HS10	153.91	311.80	83.08	205.40	68.17	301.89	39.14	97.39	238.27	275.96	29.50	118.09
HS11	45.15	125.99	35.56	76.27	40.76	129.88	9.93	44.47	38.83	103.34	3.30	28.62
HS12	48.15	191.83	84.21	303.27	138.73	336.00	41.12	113.50	102.09	500.50	39.89	118.95
HS13	7.37	6.38	18.98	37.60	6.17	37.97	9.90	41.73	0.25	1.50	7.83	10.73
HS14	2.30	2.39	1.64	3.55	0.08	0.19	1.60	1.30	5.51	5.20	0.68	0.79
HS15	61.88	202.27	112.90	462.16	44.33	162.70	68.84	217.70	108.97	226.44	56.24	229.43
HS16	63.47	254.42	151.48	301.80	22.23	109.01	42.28	170.54	95.34	138.00	9.80	120.10
HS17	131.12	198.57	143.15	311.70	33.73	232.44	48.87	152.41	28.92	230.06	18.59	200.63
HS18	176.42	349.03	232.82	361.75	28.89	162.79	82.21	244.50	24.12	69.13	50.22	177.13
HS19	216.86	592.83	328.52	659.11	48.32	224.99	88.87	352.26	30.87	122.48	40.76	229.14
HS20	261.41	618.18	306.61	626.25	32.40	90.17	91.88	262.34	231.62	457.79	44.39	163.26
HS21	119.16	530.64	284.82	694.54	61.01	365.64	168.21	422.96	59.25	284.90	65.74	324.86
HS22	566.96	1865.78	265.04	867.12	112.08	409.31	76.09	390.86	109.50	282.64	27.83	283.66
HS23	109.47	296.61	193.22	341.73	30.87	187.14	137.32	351.52	67.77	418.88	182.70	427.73
HS24	80.01	215.76	80.30	197.51	104.25	281.99	136.36	137.18	41.15	48.46	65.04	165.65
Total	3240.84	8581.46	4398.84	9159.07	1076.9	4298.88	1634.03	5255.7	2150.59	5801.3	918.96	3877.96

Source: Eurostat, authors' processing

Analysis of competitiveness of agrarian exports in some selected countries

The above-described development prevailing in the area of agrarian trade of the individual countries is connected with the development of competitiveness rates of export operations implemented in respect of the individual agrarian aggregations. The subsequent portion of the analysis facilitates the comparison of export competitiveness trends as regards the individual aggregations of agrarian trade in the case of those countries subjected to our analy-

ses. In view of competitiveness of agrarian trade (Table 2), which is implemented within the common market of the EU countries, which represents the main market for exports of all analysed countries (80–90 percent of the value of all agrarian exports from the individual analysed countries ends up on the markets of the EU countries), the following can be stated in the case of the individual countries.

Agrarian trade in the individual analysed countries, as a whole, does not possess any competitive advantages within the framework of global trade in agrarian produc-

Table 2. Selected countries' agrarian export competitiveness development in world and EU27 market

RCA2 agro trade		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Austria	ES27	0.61	0.64	0.64	0.64	0.72	0.71	0.74	0.72	0.74	0.76
Czech Republic	ES27	0.36	0.42	0.38	0.36	0.36	0.39	0.45	0.43	0.46	0.45
Hungary	ES27	0.73	0.69	0.73	0.63	0.63	0.64	0.62	0.61	0.73	0.74
Austria	World	0.68	0.70	0.71	0.73	0.83	0.86	0.95	0.97	0.94	0.93
Czech Republic	World	0.48	0.57	0.49	0.44	0.47	0.50	0.60	0.56	0.56	0.55
Hungary	World	1.05	1.05	1.06	0.96	0.94	0.92	0.91	0.89	0.94	0.96

Source: Eurostat, authors' processing

tion, not even as regards trade in agrarian production in the European Union. As far as internal markets are concerned, paradoxically, the competition there has been much stronger as compared to the global markets. The individual analysed countries reach much higher comparative advantage values on the global market as against comparative advantage values, which they achieve in the internal markets of the EU countries. As regards differences among the individual countries in the area of the development of comparative advantages of agrarian trade in the global market, some differences can be seen among the analysed countries. While in the case of Hungary gradual worsening of competitiveness of the Hungarian agrarian exports occurred in the course of the analysed years, which was manifested in time by the fact that Hungary lost its comparative advantage, which it possessed within the framework of the global market in the first half of the monitored period and, currently, it is possible to say that the Hungarian agrarian trade balances upon the edge of comparative advantages and disadvantages, with an inclination towards gradual fading out of such competitive advantage – which again resulted in the current economic and structural issues faced by the Hungarian economy. Hungary constantly fails to achieve comparative advantages in the market of the 27 EU countries in respect of its agrarian trade as a whole, while the value of the obvious comparative advantage (in this case, comparative disadvantage) index has been stable in the long run.

The Czech Republic fails to achieve comparative advantages of agrarian trade both in the global market and in the EU market. As against Hungary, however, we can see a gradual improvement in the Czech Republic of the resulting value of the RCA2 index, in particular, as regards the markets of the 27 EU countries. As far as the global market is concerned, the value of the RCA2 index has been stable in the long run and it is possible to say that the Czech Republic's competitive advantage and/or disadvantage has neither improved nor worsened. This state of affairs results from the fact that the Czech agricultural and food sector, as against the Hungarian segment, has already been duly restructured. Its substantial parts have been controlled by supranational capital. Moreover, as the time passes, a diversion from the trend has been noted under which trade growth has been implemented exclusively via increased volumes of the exported goods. Currently, the structure of the Czech agrarian exports has been changing to a very significant extent as processed food products with higher added value have come to the fore.

In the case of Austria, then, an absolutely different development trend has been noted as against both of the newly acceded countries. Although the Austrian agrarian foreign trade does not reach such comparative advantages either on the global markets or on the EU countries' markets, its competitiveness has been constantly increasing as the time passes. It is interesting to note that the obvious comparative advantages index increases its value step by step, both in the global markets and in the markets of the EU27 countries. A rapid growth of the value of the Austrian agrarian exports, which derives, in particular, from

increased exports of processed products, which take an almost 60 percent share in the resulting value of agrarian trade, make the agrarian trade ever more competitive. The value of agrarian trade is no longer pushed by the volumes of exported products; rather, it is based on increased exports of products with high added value, which bring about a number of positive effects.

The results of the above-described analysis of competitiveness of agrarian trade of the individual analysed countries show that agrarian trade represents a weakness in the structure of exports of all analysed countries. Furthermore, the analysis indicates that the individual countries achieve substantially worse results as regards comparative advantages on the 27 EU countries' markets as compared to the world. This confirms the fact that competition on the internal market of the EU countries has been much harder in comparison to the world markets. This is based, in particular, on fact that the market of the EU countries alone, as regards agrarian production, is characterised by a high surplus of goods. The EU countries themselves share more than one third in the value of exports of agrarian products in the world; at the same time, it is important to stress that more than 70 percent of exports of the individual EU countries has been implemented in the EU internal market. Strong competition on the EU internal market then indicates that the internal market operates efficiently and that obstacles to trade between the individual Member States have been effectively removed.

Furthermore, it needs to be pointed out that, although the individual analysed countries do not possess comparative advantages as regards their agrarian trade as a whole, some commodity items, and/or some commodity aggregations, are capable of achieving at least some comparative advantages in the case of individual countries, and not only on the global markets but also on the EU countries' markets. Detailed information about the development of comparative advantages of the individual aggregations of agrarian trade in the individual analysed countries can be found in Table 3.

Austria implements – within the framework of the EU market – long-term competitive advantages in the case of export of the following commodity aggregations: HS02, HS04, HS05, HS09, HS10, HS11, HS14, HS18, HS19, HS20, HS21, HS22, while competitiveness of commodity aggregation HS17, so to say, threads a thin line. Austria, therefore, achieves competitiveness in the market of the 27 EU countries in respect of 13 pro-export oriented commodity aggregations, which represents a very good result also in view of the fact that the above-described thirteen aggregations represents approximately 76 percent of Austrian exports. As regards competitive advantage on the global markets, Austria holds a long-term comparative advantage in the case of the following aggregations: HS02, HS04, HS18, HS19, HS20, HS21, and HS22. In the case of other commodity aggregations, Austria has no comparative advantages on the world market. It can thus be seen that the number of commodity aggregations capable of achieving comparative advantages on the world market is much lower than the number of items achieving com-

parative advantages on the EU countries' markets. This fact shows that the European agrarian market, as against the world market, is much more deformed, while only some items (some of which, however, have been heavily subsidised) are capable of making it on the world market.

The Czech Republic implements competitive advantages in the market of the 27 EU countries also in thirteen aggregations. They are the following items: HS01, HS04, HS05, HS10, HS11, HS12, HS13, HS17, HS18, HS21, HS23, and HS24. In the case of commodity aggregation HS22, the Czech Republic achieves comparative advantages on the EU countries' markets; however, a certain level of volatility has been noted there. The above-described aggregations represent approximately 75 percent of the Czech exports. The results of the development of the value of competitiveness within the framework of agrarian exports over the past ten years have very significantly changed the nature of the Czech agrarian exports, whose structure has thus started to come nearer to the structure of exports of developed countries, which is a very good piece of news, in particular, as far as we compare the development of the structure in the years 1990–1998 when trade tended to have been dominated, in particular, by exports of raw materials. On the world market, the Czech Republic has achieved comparative advantages in the case of eleven and/or twelve commodity aggregations, which is a relatively very good result as compared to Austria, for example. The Czech Republic has achieved comparative advantages in the following commodity aggregations: HS01, HS04, HS11, HS12, HS13, HS17, HS18, HS19, HS21, HS22, HS24, and also HS05. As regards commodity aggregation HS10 (corn), the Czech Republic achieves comparative advantages as regards its global trade only exceptionally. In view of agrarian trade in the Czech Republic, it can be noted as positive that the majority of exports, which can be linked to comparative advantages, represent aggregations with higher added value.

Hungary – within the framework of the market of the 27 EU countries; the Hungarian export achieves competitive advantage, in particular, in respect of the following commodity aggregations: HS01, HS02, HS05 (although this item has been relatively unstable in time), HS10, HS12, HS14, HS17, HS20, and HS23. In the case of aggregations HS07 and HS16, however, we witness gradually fading off competitive advantages. Hungary holds its competitive advantages in respect of exports of nine aggregations, while only four of them represent exports of products with high level of processing and high added value. The share of competitive aggregations in the overall agrarian exports has been at the level of 66 percent. In view of such developments, we could say that Hungarian export – in view of its structure – has been in the worst state out of the selected countries because its structure of exports has been strongly dominated by basic industry products. The Hungarian exports achieve comparative advantages in trading at the world level in the case of the following commodity aggregations: HS01, HS02, HS05, HS10, HS11, HS12, HS14, HS17, HS20, HS21, HS23,

and/or comparative advantages have also been alternately achieved in the case of commodity aggregations HS07 and HS16 during the monitored period.

What concerns comparative advantages at the global level, there is a substantial difference among the individual analysed countries between Austria on the one hand and the Czech Republic and Hungary on the other hand. While Austria has been in the EU already since 1995, i.e., 15 years, the Czech Republic and Hungary joined the EU as late as in 2004. The Austrian agrarian trade has re-focused in the course of the past years more-or-less on the territories of the EU Member States where a number of its exported aggregations have achieved comparative advantages; on the other hand, however, Austria's comparative advantages have gradually faded off in relation to the world market as a whole. This is due to a too narrow specialisation when Austria, as a result of the applied common policies of the EU Member States, prefers the EU internal market to the markets outside the EU.

In the case of Hungary and the Czech Republic, their membership of the EU did not bring about such significant changes in view of the structure of agrarian foreign trade as in the case of Austria. Both countries (in particular, the Czech Republic which, as early as prior to its accession to the EU, preferred the current EU27 market as its chief commercial destination) were capable of maintaining their comparative advantages in respect of their exports, in spite of certain protectionist measures, which were applied against them by the Member States of the EU in the years when those countries were not yet members of the EU. Therefore, the Czech Republic and Hungary can maintain their comparative advantages in a number of traded aggregations also after their accession to the EU. The accession to the EU represents a certain advantage for them because both countries obtained the opportunity of penetrating markets protected by way of their previous protectionist policy. (It needs to be pointed out at this moment that – at the period prior to the accession of the individual countries to the EU – the level of protectionism in respect of the EU15 markets and the markets of the countries, which accessed the EU in the years 2004 and 2007, was fairly high in relation to Czech and Hungarian exports. Furthermore, it needs to be noted that the process of liberalisation of agrarian trade, for example, was the most difficult matter within the framework of CEFTA, and as regards liberalisation of agrarian trade between the Czech Republic and Hungary on the one hand and then the EU15 on the other hand, it needs to be stressed here that the process has occurred in an asymmetrical manner since both countries have liberalised their agrarian markets in relation to the EU15 market to a higher degree than the case was the other way round.)

Looking at the individual items, which achieved comparative advantages in the case of the individual analysed economies, both at the global and at the European levels, it is possible to say that the individual aggregations possess the following positions within the framework of agrarian trade in the individual countries (Table 4 – Information for 2008).

Table 3. The analysis of selected countries' agrarian trade comparative advantage

AGRO	ES27 2007				World				AGRO				ES27 2007				World			
	1999	Average 1999-2008	2008	H1-22	1999	Average 1999-2008	2008	H1-22	RCAI In	1999	Average 1999-2008	2008	H1-22	1999	Average 1999-2008	2008	H1-22			
Austria	2.47	2.17	1.96	H1-09	2.17	2.45	2.31	H1-22	Austria	0.87	0.79	0.65	H1-22	0.87	0.79	0.65	H1-22			
Austria	1.41	1.53	1.43	H1-04	2.05	2.05	1.84	H1-04	Austria	0.33	0.48	0.46	H1-04	0.33	0.48	0.46	H1-04			
Austria	1.35	1.33	1.43	H1-19	1.86	1.65	1.69	H1-10	Austria	0.61	0.54	0.4	H1-10	0.61	0.54	0.4	H1-10			
Austria	1.31	1.28	1.37	H1-20	1.76	1.54	1.59	H1-09	Austria	0.32	0.39	0.26	H1-02	0.32	0.39	0.26	H1-02			
Austria	1.66	1.6	1.3	H1-21	1.01	1.24	1.57	H1-02	Austria	0.06	0.14	0.18	H1-24	0.06	0.14	0.18	H1-24			
Austria	1.47	1.23	1.19	H1-18	2.44	1.73	1.48	H1-20	Austria	-0.16	0.01	0.09	H1-11	0.31	-0.03	0.06	H1-11			
Austria	0.92	1.08	1.15	H1-02	1.31	1.19	1.27	H1-24	Austria	-0.03	0.29	0.01	H1-18	-0.36	-0.2	-0.03	H1-18			
Austria	1.06	1.01	1.12	H1-01	1.4	0.93	0.98	H1-11	Austria	0.09	-0.18	0	H1-20	-0.21	-0.1	-0.06	H1-20			
Austria	0.5	0.72	1.07	H1-09	0.78	0.9	0.92	H1-14	Austria	1.22	0.78	-0.02	H1-19	-0.54	-0.32	-0.12	H1-19			
Austria	1.41	1.16	1.04	H1-24	0.51	0.95	0.89	H1-23	Austria	-0.87	-0.6	-0.14	H1-23	-0.74	-0.49	-0.16	H1-23			
Austria	2.21	1.77	1.03	H1-16	0.54	0.62	0.88	H1-16	Austria	-1.45	-0.83	-0.18	H1-16	-1.23	-0.74	-0.2	H1-16			
Austria	0.93	0.9	1.01	H1-23	0.83	0.79	0.76	H1-18	Austria	-0.42	-0.31	-0.19	H1-21	-1.13	-0.54	-0.29	H1-21			
Austria	1.12	1.14	1.01	H1-05	0.8	0.65	0.69	H1-19	Austria	-0.66	-0.43	-0.19	H1-12	-0.79	-0.62	-0.46	H1-12			
Austria	0.73	0.89	1	H1-11	1.18	0.82	0.68	H1-05	Austria	-1.22	-0.9	-0.32	H1-09	-1.2	-0.56	-0.56	H1-09			
Austria	0.83	0.89	0.92	H1-17	1.31	0.84	0.66	H1-12	Austria	-0.89	-0.71	-0.58	H1-01	0.43	-0.23	-0.58	H1-01			
Austria	0.46	0.93	0.81	H1-12	0.34	0.36	0.41	H1-21	Austria	-1.27	-0.75	-0.66	H1-14	0.45	-0.04	-0.58	H1-14			
Austria	1.33	1	0.8	H1-14	0.98	0.66	0.41	H1-01	Austria	0.3	-0.44	-0.94	H1-05	-1.28	-1.01	-0.61	H1-05			
Austria	1.11	0.75	0.65	H1-10	0.65	0.51	0.4	H1-08	Austria	-2.07	-1.35	-0.94	H1-17	-0.12	-0.52	-0.74	H1-17			
Austria	0.43	0.42	0.47	H1-08	0.28	0.31	0.37	H1-17	Austria	-0.42	-0.78	-0.95	H1-15	-1.03	-0.84	-0.87	H1-15			
Austria	0.27	0.35	0.44	H1-07	0.33	0.29	0.3	H1-15	Austria	-1.23	-1.13	-1.11	H1-08	-2.63	-1.79	-1.33	H1-08			
Austria	0.25	0.24	0.29	H1-15	0.3	0.29	0.3	H1-07	Austria	-2.17	-1.86	-1.43	H1-07	-2.1	-1.71	-1.38	H1-07			
Austria	0.36	0.38	0.2	H1-06	0.18	0.18	0.23	H1-13	Austria	-1.75	-1.55	-1.9	H1-13	-1.75	-1.53	-1.92	H1-13			
Austria	0.08	0.08	0.14	H1-13	0.34	0.29	0.17	H1-06	Austria	-4.37	-3.8	-2.78	H1-06	-3.92	-3.04	-2.34	H1-06			
Austria	0.02	0.02	0.03	H1-03	0.01	0.01	0.01	H1-03	Austria	-4.91	-4.08	-3.33	H1-03	-4.99	-3.86	-3.16	H1-03			
CZE	8.36	4.59	3.03	H1-01	1.78	2.09	2.94	H1-10	CZE	1.32	1.02	1.4	H1-01	1.74	1.86	1.47	H1-01			
CZE	3.53	3.56	2.75	H1-24	2.12	1.71	2.3	H1-12	CZE	2.07	1.23	1.36	H1-10	0.87	0.91	1.38	H1-10			
CZE	1.34	2.43	2.35	H1-04	2.4	2.25	2.23	H1-01	CZE	1.47	1.66	1.29	H1-11	2.26	2.06	1.38	H1-11			
CZE	2.38	1.76	2.14	H1-11	3.4	3	2.2	H1-11	CZE	1.49	1.59	1.17	H1-12	1.92	1.14	1.38	H1-12			
CZE	1.41	1.64	1.99	H1-21	1.66	2.04	2.14	H1-24	CZE	0.69	0.54	1.17	H1-24	-0.44	-0.13	0.93	H1-24			
CZE	1.14	1.7	1.88	H1-17	1.07	2.03	1.97	H1-17	CZE	-0.6	0.2	0.5	H1-17	-0.6	0.38	0.51	H1-17			
CZE	1.84	2.08	1.8	H1-13	1.38	1.83	1.73	H1-03	CZE	0.39	0.54	0.33	H1-04	1.59	0.89	0.48	H1-04			
CZE	1.87	1.58	1.73	H1-12	3.39	1.86	1.38	H1-04	CZE	0.33	0.2	0.29	H1-22	0.61	0.3	0.05	H1-22			
CZE	0.82	1.06	1.36	H1-18	1.27	1.49	1.33	H1-22	CZE	0.54	0.24	0.09	H1-21	-1.63	-0.73	-0.23	H1-21			
CZE	0.97	1.26	1.11	H1-19	1.31	1.17	1.25	H1-21	CZE	-1.21	-0.42	-0.16	H1-13	-0.79	-0.01	-0.42	H1-13			

CZE	H1-23	0.96	1.05	1.08	H1-22	1.36	1.3	1.22	CZE	H1-13	-1.45	-0.29	-0.18	H1-15	-0.71	-0.98	-0.46
CZE	H1-05	1.39	1.69	1.03	H1-23	0.75	0.86	0.92	CZE	H1-16	-1	-0.76	-0.3	H1-18	-1.69	-0.88	-0.53
CZE	H1-22	1.14	1.12	0.97	H1-05	0.95	1.12	0.78	CZE	H1-15	-0.8	-0.89	-0.44	H1-16	-1.03	-1.04	-0.6
CZE	H1-19	1.01	0.91	0.91	H1-10	0.93	0.79	0.74	CZE	H1-18	-1.22	-0.62	-0.5	H1-19	-0.99	-0.92	-0.62
CZE	H1-09	1.42	1.07	0.85	H1-16	0.7	0.56	0.74	CZE	H1-19	-1.01	-0.87	-0.56	H1-03	-0.57	-0.56	-0.76
CZE	H1-16	0.63	0.61	0.8	H1-20	0.7	0.6	0.47	CZE	H1-05	-1.43	-0.55	-0.6	H1-23	-2.4	-1.66	-0.85
CZE	H1-15	1.21	0.91	0.74	H1-15	0.84	0.58	0.46	CZE	H1-23	-1.89	-1.37	-0.69	H1-05	-2.05	-1.28	-1.05
CZE	H1-20	0.63	0.54	0.4	H1-07	0.36	0.32	0.44	CZE	H1-09	-0.73	-0.7	-0.73	H1-09	-2.47	-1.69	-1.21
CZE	H1-07	0.33	0.28	0.38	H1-09	0.45	0.44	0.44	CZE	H1-20	-1.09	-0.98	-1.08	H1-20	-1.68	-1.41	-1.43
CZE	H1-08	0.44	0.37	0.38	H1-02	0.31	0.4	0.43	CZE	H1-08	-2.15	-1.83	-1.25	H1-02	-0.96	-1.21	-1.62
CZE	H1-02	0.32	0.37	0.37	H1-08	0.39	0.34	0.36	CZE	H1-14	-3.24	-2.38	-1.37	H1-07	-3.04	-2.87	-1.98
CZE	H1-03	0.67	0.5	0.34	H1-03	0.31	0.25	0.2	CZE	H1-02	-0.39	-0.9	-1.4	H1-08	-3.3	-2.83	-2.1
CZE	H1-14	0.25	0.26	0.17	H1-06	0.17	0.18	0.15	CZE	H1-07	-2.61	-2.54	-1.65	H1-14	-4.72	-3.63	-2.53
Hungary	H1-10	2.54	4.09	5.48	H1-01	2.27	2.58	2.62	Hungary	H1-14	0.89	2.18	3.13	H1-14	0.86	1.5	2.33
Hungary	H1-12	3.18	4.15	3.99	H1-10	1.6	2.1	2.46	Hungary	H1-10	0.72	1.34	1.76	H1-10	0.89	1.31	1.61
Hungary	H1-14	9.48	8.4	3.76	H1-20	2.44	2.37	1.85	Hungary	H1-12	0.43	0.96	1.39	H1-12	0.36	0.66	0.93
Hungary	H1-11	1.05	1.37	1.93	H1-23	0.85	1.51	1.57	Hungary	H1-11	0.5	0.56	0.98	H1-11	1.06	0.8	0.9
Hungary	H1-23	0.87	1.73	1.69	H1-14	3.55	2.92	1.49	Hungary	H1-01	0.53	0.61	0.63	H1-01	0.77	0.78	0.8
Hungary	H1-17	0.36	0.88	1.61	H1-12	1.16	1.38	1.47	Hungary	H1-17	-0.07	0.19	0.63	H1-20	0.69	0.72	0.71
Hungary	H1-01	1.68	1.93	1.52	H1-02	2.54	2.14	1.45	Hungary	H1-20	0.57	0.61	0.61	H1-02	1.38	0.94	0.65
Hungary	H1-20	1.84	1.68	1.38	H1-11	1.57	1.25	1.34	Hungary	H1-02	1.01	0.79	0.55	H1-05	0.52	0.59	0.29
Hungary	H1-02	2.36	1.85	1.15	H1-21	0.89	0.91	1.32	Hungary	H1-07	0.61	0.52	0.39	H1-07	0.8	0.5	0.29
Hungary	H1-21	0.82	0.86	1.13	H1-17	0.45	0.71	1.31	Hungary	H1-16	0.81	0.69	0.07	H1-16	0.97	0.68	0.14
Hungary	H1-16	1.68	1.29	0.8	H1-05	4.64	3.34	1.15	Hungary	H1-15	-0.09	-0.3	-0.12	H1-17	0.19	0.19	0.07
Hungary	H1-05	6.84	4.22	0.79	H1-07	1.4	1.08	0.81	Hungary	H1-21	-0.02	-0.22	-0.16	H1-15	0.25	-0.01	0.02
Hungary	H1-15	0.6	0.56	0.78	H1-16	1.45	1.08	0.72	Hungary	H1-05	0.43	0.39	-0.17	H1-23	-0.4	-0.15	0
Hungary	H1-07	1.26	1.01	0.69	H1-04	0.67	0.75	0.7	Hungary	H1-23	-0.02	-0.04	-0.19	H1-21	0.01	-0.14	-0.06
Hungary	H1-09	1.62	1.12	0.6	H1-19	0.41	0.43	0.53	Hungary	H1-04	0.13	-0.13	-0.23	H1-04	0.43	0.18	-0.08
Hungary	H1-04	0.25	0.35	0.46	H1-15	0.84	0.53	0.51	Hungary	H1-22	0.37	0.06	-0.29	H1-22	0.57	0.2	-0.19
Hungary	H1-22	0.51	0.45	0.42	H1-22	0.64	0.5	0.46	Hungary	H1-08	0.3	-0.12	-0.43	H1-19	-0.12	-0.36	-0.37
Hungary	H1-08	0.67	0.53	0.41	H1-18	0.52	0.53	0.43	Hungary	H1-19	-0.12	-0.5	-0.52	H1-08	0.1	-0.24	-0.38
Hungary	H1-19	0.33	0.33	0.41	H1-08	0.57	0.43	0.37	Hungary	H1-09	0.5	0.13	-0.58	H1-09	-0.38	-0.39	-0.48
Hungary	H1-18	0.34	0.44	0.38	H1-06	0.33	0.32	0.3	Hungary	H1-18	-0.26	-0.5	-0.75	H1-06	-0.2	-0.45	-0.55
Hungary	H1-24	0.57	0.18	0.27	H1-09	0.46	0.39	0.28	Hungary	H1-06	-0.2	-0.69	-0.9	H1-18	-0.28	-0.39	-0.59
Hungary	H1-06	0.21	0.18	0.15	H1-24	0.41	0.18	0.27	Hungary	H1-24	0.33	-0.67	-0.91	H1-18	-0.22	-0.76	-0.82
Hungary	H1-13	0.02	0.05	0.07	H1-13	0.03	0.05	0.06	Hungary	H1-03	0.27	-0.65	-1.43	H1-03	-0.02	-0.79	-1.29

Source: UN Comtrade, authors' processing

Table 4. Selected characteristics of individual analysed countries agrarian trade, 2008

Trade Flow	Reporter	Code	Share in total exports realized within the frame of EU (intrastat, only analysed group of products)	Share in total country's agrarian exports in EU market	Share in total world exports (only within the frame of analysed group of products)	Share in total country's agrarian export in world market	Share in total agrarian exports realized within the frame of EU market (all agrarian products, intrastat)	Share in total world agrarian trade (all agrarian products)
Export	Austria	H1-01	1.57%	1.57%	0.80%	1.61%	0.04%	0.01%
Export	Austria	H1-02	2.72%	13.06%	1.14%	12.21%	0.32%	0.11%
Export	Austria	H1-03	0.06%	0.11%	0.01%	0.10%	0.00%	0.00%
Export	Austria	H1-04	3.46%	15.40%	1.87%	12.73%	0.37%	0.13%
Export	Austria	H1-05	2.46%	0.54%	0.66%	0.48%	0.01%	0.00%
Export	Austria	H1-06	0.34%	0.42%	0.20%	0.42%	0.01%	0.00%
Export	Austria	H1-07	0.70%	1.66%	0.30%	1.41%	0.04%	0.01%
Export	Austria	H1-08	1.07%	2.96%	0.38%	2.45%	0.07%	0.02%
Export	Austria	H1-09	4.75%	3.17%	0.87%	2.81%	0.08%	0.03%
Export	Austria	H1-10	2.45%	4.73%	0.39%	4.12%	0.11%	0.04%
Export	Austria	H1-11	2.52%	1.26%	0.68%	1.06%	0.03%	0.01%
Export	Austria	H1-12	2.43%	2.66%	0.36%	2.54%	0.06%	0.02%
Export	Austria	H1-13	0.47%	0.07%	0.12%	0.08%	0.00%	0.00%
Export	Austria	H1-14	2.50%	0.03%	0.43%	0.02%	0.00%	0.00%
Export	Austria	H1-15	1.13%	2.60%	0.25%	2.61%	0.06%	0.02%
Export	Austria	H1-16	2.60%	3.95%	0.88%	3.31%	0.10%	0.03%
Export	Austria	H1-17	1.95%	1.99%	0.56%	1.96%	0.05%	0.02%
Export	Austria	H1-18	2.89%	4.68%	1.26%	4.64%	0.11%	0.04%
Export	Austria	H1-19	3.33%	8.77%	1.62%	7.69%	0.21%	0.07%
Export	Austria	H1-20	3.48%	8.30%	1.44%	7.71%	0.20%	0.07%
Export	Austria	H1-21	2.79%	5.72%	1.11%	6.81%	0.14%	0.05%
Export	Austria	H1-22	3.16%	13.19%	1.27%	20.14%	0.32%	0.11%
Export	Austria	H1-23	2.23%	4.19%	0.68%	3.91%	0.10%	0.04%
Export	Austria	H1-24	1.97%	3.00%	0.78%	2.87%	0.07%	0.03%
Export	CZE	H1-01	2.88%	4.85%	1.47%	4.85%	0.07%	0.02%
Export	CZE	H1-02	0.54%	4.37%	0.23%	4.13%	0.06%	0.02%
Export	CZE	H1-03	0.49%	1.41%	0.11%	1.32%	0.02%	0.01%
Export	CZE	H1-04	1.97%	14.69%	1.06%	15.43%	0.21%	0.07%
Export	CZE	H1-05	1.49%	0.55%	0.40%	0.53%	0.01%	0.00%
Export	CZE	H1-06	0.13%	0.28%	0.08%	0.26%	0.00%	0.00%
Export	CZE	H1-07	0.55%	2.16%	0.23%	2.02%	0.03%	0.01%
Export	CZE	H1-08	0.56%	2.59%	0.20%	2.39%	0.04%	0.01%
Export	CZE	H1-09	1.23%	1.38%	0.23%	1.35%	0.02%	0.01%
Export	CZE	H1-10	2.51%	8.13%	0.40%	7.61%	0.12%	0.04%

Export	CZE	H1-11	3.99%	3.33%	1.08%	3.40%	0.05%	0.02%
Export	CZE	H1-12	4.39%	8.04%	0.65%	8.61%	0.12%	0.04%
Export	CZE	H1-13	2.72%	0.65%	0.70%	0.81%	0.01%	0.00%
Export	CZE	H1-14	0.25%	0.01%	0.04%	0.00%	0.00%	0.00%
Export	CZE	H1-15	1.07%	4.13%	0.24%	4.01%	0.06%	0.02%
Export	CZE	H1-16	1.16%	2.96%	0.39%	2.78%	0.04%	0.01%
Export	CZE	H1-17	3.41%	5.82%	0.98%	5.89%	0.08%	0.03%
Export	CZE	H1-18	1.61%	4.36%	0.70%	4.17%	0.06%	0.02%
Export	CZE	H1-19	1.33%	5.85%	0.65%	5.70%	0.08%	0.03%
Export	CZE	H1-20	0.58%	2.32%	0.24%	2.26%	0.03%	0.01%
Export	CZE	H1-21	2.61%	8.98%	1.04%	9.25%	0.13%	0.05%
Export	CZE	H1-22	1.41%	9.84%	0.57%	10.61%	0.14%	0.05%
Export	CZE	H1-23	1.56%	4.93%	0.48%	4.78%	0.07%	0.02%
Export	CZE	H1-24	3.10%	7.91%	1.22%	7.45%	0.11%	0.04%
Export	Hungary	H1-01	2.46%	3.70%	1.26%	4.33%	0.06%	0.02%
Export	Hungary	H1-02	1.87%	13.45%	0.79%	13.93%	0.22%	0.08%
Export	Hungary	H1-03	0.03%	0.08%	0.01%	0.08%	0.00%	0.00%
Export	Hungary	H1-04	0.75%	5.00%	0.40%	4.86%	0.08%	0.03%
Export	Hungary	H1-05	1.27%	0.42%	0.34%	0.79%	0.01%	0.00%
Export	Hungary	H1-06	0.24%	0.45%	0.14%	0.54%	0.01%	0.00%
Export	Hungary	H1-07	1.12%	3.99%	0.48%	3.74%	0.06%	0.02%
Export	Hungary	H1-08	0.66%	2.76%	0.24%	2.44%	0.04%	0.02%
Export	Hungary	H1-09	0.97%	0.97%	0.18%	0.86%	0.02%	0.01%
Export	Hungary	H1-10	8.87%	25.72%	1.41%	25.19%	0.42%	0.14%
Export	Hungary	H1-11	3.13%	2.34%	0.85%	2.07%	0.04%	0.01%
Export	Hungary	H1-12	6.46%	10.57%	0.95%	9.21%	0.17%	0.06%
Export	Hungary	H1-13	0.11%	0.02%	0.03%	0.03%	0.00%	0.00%
Export	Hungary	H1-14	6.09%	0.11%	1.04%	0.09%	0.00%	0.00%
Export	Hungary	H1-15	1.26%	4.36%	0.28%	4.46%	0.07%	0.02%
Export	Hungary	H1-16	1.30%	2.95%	0.44%	2.70%	0.05%	0.02%
Export	Hungary	H1-17	2.61%	3.98%	0.75%	3.90%	0.06%	0.02%
Export	Hungary	H1-18	0.61%	1.49%	0.27%	1.34%	0.02%	0.01%
Export	Hungary	H1-19	0.66%	2.62%	0.32%	2.41%	0.04%	0.01%
Export	Hungary	H1-20	2.24%	8.01%	0.93%	8.95%	0.13%	0.04%
Export	Hungary	H1-21	1.84%	5.65%	0.73%	5.70%	0.09%	0.03%
Export	Hungary	H1-22	0.68%	4.27%	0.27%	4.02%	0.07%	0.02%
Export	Hungary	H1-23	2.74%	7.74%	0.84%	8.11%	0.13%	0.04%
Export	Hungary	H1-24	0.44%	1.00%	0.17%	0.88%	0.02%	0.01%

Source: UN Comtrade, authors' processing

In the case of Austria, the share of the items, which achieved comparative advantages both on the world market and on the EU market, reached approximately 72 percent of the overall agrarian export. In the case of agrarian exports designed for implementation exclusively on the markets of the 27 EU countries, the share of the commodity aggregations reaching comparative advantages within the framework of the resulting value of the Austrian agrarian exports was approximately 85 percent. Another interesting fact resulting from the analysis is that the items reaching comparative advantages include not only traditional large-volume aggregations, but that Austria manages to achieve comparative advantages also in the case of exports of certain small-volume aggregations, such as HS14. It is interesting to compare the differences in the individual aggregations in respect of the overall Austrian exports, and within the framework of exports to the markets of the EU countries, against the share of Austrian exports of individual aggregations in the overall agrarian trade implemented in the world, or within the framework of the common market of the EU countries (Table 4).

In the Czech Republic, the items that have reached comparative advantages both within the framework of global trade and within the framework of internal trade within EU share approximately 70 percent of the overall value of exports. The share of export items, which achieves comparative advantages within the framework of the EU market, equals 82 percent of the EU internal markets. It is again obvious that although the Czech agrarian trade has been described as non-competitive, the best part of the agrarian export value is implemented within the framework of competitive commodity aggregations.

In the case of Hungary, the items that have achieved comparative advantages both within the framework of global trade and within the framework of the EU internal trade shared approximately 84 percent of the overall value of exports. The share of export items, which has achieved comparative advantages in the EU market, in the resulting value of exports implemented in the EU internal markets, also equals approximately 84 percent. In the case of Hungary, then, it is clearly visible that as the only state among the analysed countries, it has a high share of basic industry production in the area of implemented agrarian exports. The share of aggregations with lower added value (HS1–HS14) equals approximately 70 percent of the resulting value of exports while it is only 52 percent in the case of the Czech Republic and even less, 42 percent, in the case of Austria.

In view of the achievement of comparative advantages, it also is interesting to review in detail the results of the analysis of the RCA1 index – i.e., an analysis of the comparative advantage of the individual items of agrarian exports within the framework of the overall agrarian trade in the individual analysed countries.

In the case of Austria, only the following items have comparative advantages as regards agrarian exports as such: HS22, HS04, HS10, HS02, HS24, and HS11. Those items then represent approximately 53 percent of the value of the entire Austrian agrarian exports. The results show

that – although Austria possesses substantially more comparative items in view of both global and European agrarian trade, only a limited number of aggregations possess competitive advantages within the framework of the specific commercial structure. Those aggregations, however, hold a key share within the framework of implemented exports. Furthermore, the results of the review show that – as regards Austria – not only aggregations with high levels of finalisation but also aggregations covering basic industry production are competitive. In the case of the Czech Republic, comparative advantages of the specific structure of agrarian exports can be traced in respect of the following aggregations: HS01, HS10, HS11, HS12, HS24, HS17, HS04, and HS22. The share of those aggregations in the resulting value of agrarian exports equals 64 percent. In the case of Hungary, comparative advantages of its specific structure of exports of agrarian trade have been possessed by HS14, HS10, HS12, HS11, HS01, HS20, HS02, HS05, HS07, HS16, HS17, HS15, and HS23. The share of the above-described aggregations in the Hungarian agrarian export equals approximately 87 percent. In the case of Hungary, a high dominance of exports covering agrarian basic industry production over processed finalised products can be noted.

CONCLUSIONS

Agrarian foreign trade represents a complex mechanism. It comprises a system of commercial relations, which exceeds regional dimensions. Although all of the analysed countries perform most of their agrarian foreign trade in the internal market of the EU countries, it needs to be pointed out that foreign trade with non-Member States of the EU represents a definitely not negligible part of agrarian trade in Austria, the Czech Republic and Hungary.

In order to be able to maintain their long-term prosperity in agrarian trade, the individual analysed countries need to preserve their competitive advantages as regards the structure of their agrarian exports. Although, beside Hungary, the analysed countries do not possess preconditions facilitating for export-oriented agriculture, they still can compete in a number of commodities and commodity aggregations. They are capable of achieving comparative advantages, not only within the framework of the substantially deformed internal market of the EU countries but also – as regards a number of commodities – in global agrarian trade.

As far as the results of the analyses relating to the development of values of comparative advantages are concerned, it can be declared that all analysed countries implement most of their exports in respect of commodity aggregations where they achieve comparative advantages, both in respect of their own specific structures of exports and in view of agrarian trade implemented in the EU market and in the global market.

As regards the development of the structure of trade and of competitiveness of individual items, strong orienta-

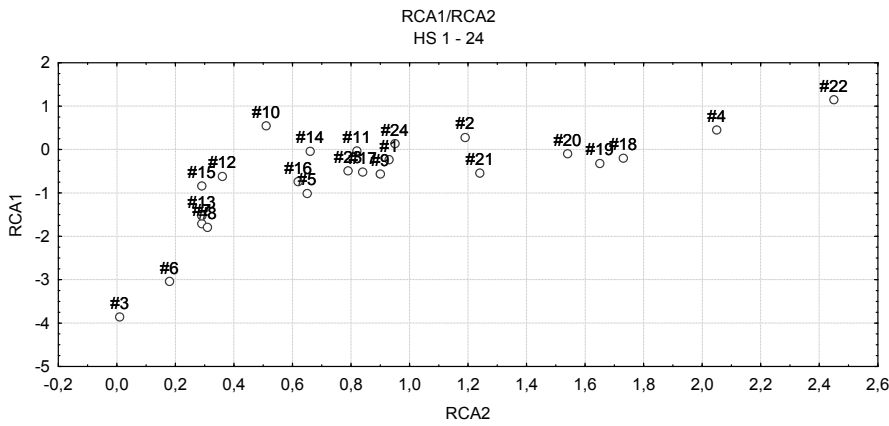


Fig. 1. Austria – Individual agrarian export commodity groups – the average values of RCA1 and RCA2, period 1999–2008
Source: authors' processing (to understand numbers – please see methodology)

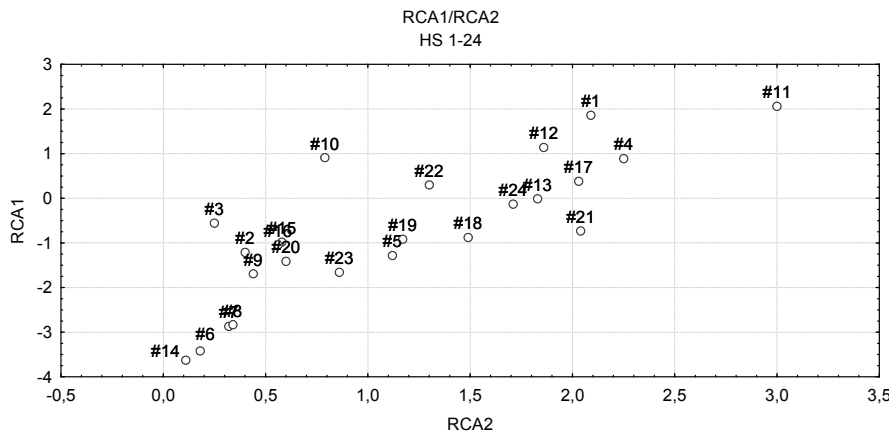


Fig. 2. The Czech Republic – Individual agrarian export commodity groups – the average values of RCA1 and RCA2, period 1999–2008
Source: authors' processing (to understand numbers – please see methodology)

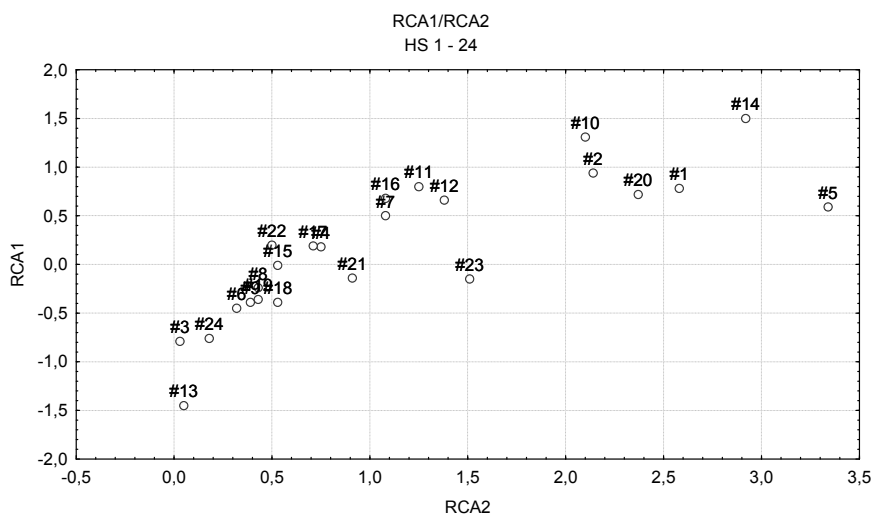


Fig. 3. Hungary – Individual agrarian export commodity groups – the average values of RCA1 and RCA2, period 1999–2008
Source: authors' processing (to understand numbers – please see methodology)

tion on the EU countries' markets is noted in the case of all countries and it seems that both the Czech Republic and Hungary would follow the Austrian way – which means that the importance of the EU as a trade partner will be increasing, processed food and agrarian products with higher added value as against products of basic industry will be getting more and more the upper hand in view of the structure of agrarian exports trade.

The countries will tend to narrow their segments of exported products and aggregations so that the export backbone is created by a limited number of aggregations where – thanks to their specialisations – the individual

countries will obtain competitive advantages, both in view of the comparative advantages existing on the global market and in view of the comparative advantages within the framework of the structure of their specific agrarian exports. Figs 1, 2 and 3 offer information about the values of the RCA1 and RCA2 indices for the years 1999–2008. The charts carry average values of the individual indicators. The data shown in the charts indicate that, for example, Austria has been long competitive, in particular, in the case of exports of aggregations HS22, HS04, HS02. Then, aggregations HS20, HS19 and HS18 operate near the limits of competitiveness. The share of the above-de-

scribed aggregations in the value of agrarian exports in Austria reached approximately 65 percent in 2008.

The Czech Republic has long achieved comparative advantages, both in view of its own specific structure of exports and in respect of the global trade, in the case of a large number of aggregations: HS11, HS01, HS04, HS12, HS17, and HS22. Aggregations HS13 and HS24, though, fluctuate near the borderline of competitiveness. The share of the previously discussed aggregations in the value of agrarian exports in the Czech Republic reached approximately 57 percent in 2008.

Hungary has achieved comparative advantages both as regards its own specific structure of exports and in respect of global trade in the case of an absolutely largest number of commodity aggregations among all analysed countries. That means that Hungary possesses a high potential in the area of agrarian production and trade while, on the other hand, it also indicates major fragmentation and low level of specialisation of the Hungarian agriculture, which – along a lack of capital investments and high rate of competition on the EU countries' markets – causes major difficulties to the Hungarian agrarian sector, including agrarian trade. The following aggregations have achieved comparative advantages in the long run: HS05, HS14, HS01, HS20, HS02, HS10, HS12, HS11, HS16, and HS17. The share of those aggregations in the value of agrarian exports in Hungary reached approximately 71 percent in 2008.

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Vývoj konkurenceschopnosti agrárního obchodu vybraných zemí střední Evropy.

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Příspěvek analyzuje vývoj postavení a konkurenceschopnosti agrárního zahraničního obchodu Rakouska, Maďarska a České republiky v rámci světového trhu a vnitřního trhu zemí EU s cílem odhalit faktory, které měly vliv na konkurenceschopnost agrárního obchodu v posledních deseti letech (1999–2008). Z výsledků analýzy vyplývá, že agrární obchod výše zmíněných zemí velmi výrazně změnil svou hodnotovou a komoditní strukturu. Hlavní příčiny, které způsobily většinu změn jednotlivých charakteristik agrárního zahraničního obchodu jednotlivých analyzovaných zemí, jsou proces rozšíření EU, přijetí závazků vyplývajících z členství v EU a dále pak orientace na vnitřní trh zemí EU. Změny, ke kterým došlo, vyústily v dominantní podíl členských zemí EU27 v rámci agroobchodu jednotlivých analyzovaných států (přes 80 % agrárního obchodu je v případě jednotlivých analyzovaných zemí realizováno v rámci teritoria EU). V případě změn v oblasti konkurenceschopnosti je vidět pokles dynamiky růstu obchodu s komoditami s nízkou přidanou hodnotou, a naopak nárůst obchodu se zpracovanými potravinářskými produkty, a to jak v případě exportů, tak i v případě importů. Lze konstatovat, že mezi analyzovanými zeměmi existují určité rozdíly, co se vývoje agroobchodu týká. Z výsledků vyplývá, že zatímco agrární obchod Rakouska a ČR neustále posiluje svou pozici, v případě Maďarska je vidět určité oslabení pozice.

Česká republika; Maďarsko; Rakousko; agrární obchod; komparativní výhoda; vývoj

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