Slovenia

Trade Policy Monitoring

Impact of EU Accession on U.S. Exports

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Report Highlights: This report deals with the agricultural trade policy aspects of Slovenia's accession to the European Union. With Slovenia's EU membership, U.S. exporters will see lower tariffs for beans, wine, pet food, and dried fruits. Tariffs will increase for U.S. suppliers of vegetable oil, tobacco, rice, and some seafood. EU-style phytosanitary barriers have been in place for some time and these preclude U.S. suppliers from participating in Slovenia's $60 million meat and poultry import market. As the result of EU membership, up to $5 million more in import duties will be collected on Slovene imports of U.S. agricultural products. Slovene farmers are already heavily subsidized and receive payments that are comparable to those under the EU's Common Agricultural Policy (CAP). Slovenia's EU accession will likely raise the production of beef, maize, sugar beets, and poultry. It could decrease egg, pork, and wheat production.

Section I – General Description of the Accession and Current Policy

In October 1998, the Slovenian government began agricultural policy changes based on the "eco-social model" of agricultural production. The principal elements of this policy are:

- a strategically managed income policy for farmers;
- a switch from market price management to structural policies that support agriculture;
- the introduction of programs for structural aid and development of a new role for rural areas; and
- the redirection of policy to support environmental friendly agriculture.

The policy is based on four pillars:

1. Market-price policy
2. SPELAA direct payments (Slovene Program for Environmental and Landscape Assistance for Agriculture)
3. Programs to restructure the agriculture and food processing industry
4. Rural Development Program

Table 1: Some macroeconomic indicators of Slovene Agriculture

		1993	1994	1995	1996	1997	1998
GDP	% change*	100	113%	119%	113%	109.6%	103.4%
Agricultural Output	% change*	100	98%	119%	110%	106.7%	95%
Share of agriculture on GDP	%	4.5%	3.9%	3.9%	3.8%	3.7%	3.4%
Share of agriculture on employment	%		11.5%	10.4%	10.1%	12.0%	12.0%
Source: Statistical yearbook, 1999							

In 2002, the subsidies paid to Slovene farmers were already at 60% of EU levels and this is expected to increase to 75% in 2003. Slovenia will make supplementary payments from the national budget to 'top up' EU direct payments. EU direct payment will be phased in starting at

10% in 2004, increasing by 5% per year. Payments to Slovene farmers will be equal to other full EU members in 2007.

In 2002, Slovenia started using SAPARD pre-accession funds from the EU, which are mainly used for investments in farms and the food processing industry. The SAPARD funds will be substituted with EU EAGGF support beginning in 2004. For the period 2004-2006, Slovenia will receive EUR 249.8 million which will be supported with EUR 330 million from the national budget and used for LFA payments, agri-environmental programs and organic farming. In 2001, the Slovene agri-environmental program was started. In the first year, 24,000 applications were received and a total sum of $5.6 million was paid to farmers. In addition, EUR 100 million will be available for rural development from EU structural funds.

By all this EU financial support is the main question which arises, if Slovene agriculture is available to provide necessary national financial sources to absorb all available EU money on the programs and measures where national participation is necessary.

Section II – Effects of the CAP on Producers and Production Patterns

A. Arable Crop Assessment – Net producer gains and losses by crop (wheat, barley, oilseeds).

EU membership will likely influence crop production as follows:

- Wheat production will decrease or stay at the same level, which means that still about 50% of demand for wheat will be covered from production outside the country.
- Corn production stays the same or slightly increases, so the level of self-sufficiency will remain on 55%.
- Barley production is expected to increase by 3-8%, which will still cover only 35% of domestic demand.
- Sugar beet production is expected to double in the years after accession because of higher producer prices, but still the domestic production will only cover 70% of domestic demand.

Table 2: Land use in 1000 ha

	1989	1996	1997	1998	1999	2000
Total area	2025.35	2027.25			2027.3	2027.3
Forests	1009.47	1098.84	1109.71	1111.01	1115.66	1115.66
Utilized agricultural	869.83	524.45	494.04	490.86	498.75	508.97
...Arable land	247.06	190.58	172.55	172.09	171.22	171.11
...Permanent	340.38	300.81	289.99	287.47	296.59	308.20
...Vineyards	21.38	17.42	17.42	17.18	16.59	16.60
Fallow land	146.05	142.90				
Share of arable land	38.3	36.3	34.9	35.1	34.3	33.6
Source: Statistical yearbook, 2002						

Table 3: Allocation of arable land to the main crops

		1989	1996	1997	1998	1999	2000
Arable land	1000 ha	247.1	190.6	172.5	172.1	202.2	200.8
Cereals	1000 ha	122.4	98.5	94.9	94.5	91.1	101.9
	% arable*	49.56	51.70	55.01	54.92	45.1	50.7
Protein crops	1000 ha	7.0	2.3	2.3	2.3		
	% arable*	2.84	1.23	1.31	1.32		
Oilseeds	1000 ha	1.8	0.1	...	...		0.122
	% arable*	0.73	0.08	...	...		0.1
Potatos	1000 ha	30.4	9.4	9.2	9.2	9.8	9.0
	% arable*	12.30	4.92	5.32	5.35	4.9	4.4
Sugar beet	1000 ha	3.5	6.3	6.4	7.7	10.8	8.1
	% arable*	1.423	3.33	3.69	4.46	5.4	4.0
Green fodder	1000 ha		18.6	18.8	18.1	17.74	14.48
	% arable*		9.74	10.90	10.53		
Source: Statistical yearbook, 2002							
* % of total arable land							

B. Use of Direct Payments

Regarding the use of direct payments, Slovenia has negotiated a different policy compared to other EU candidate countries. The Slovene government can, because of existing subsidies that are comparable to the EU, pay from the domestic budget the same level of subsidies as in 2003, and the EU will increase its contribution by 10% each year, starting with 10% in 2004. Until 2013, Slovenia will also make contributions from the domestic budget for direct payments for agriculture. With this formula, Slovene farmers should reach the EU level of direct payments in 2007.

The Slovene government has decided to introduce all EU existing measures in the year 2003.

C. Expected Changes in Livestock Production

Table 6: Share of Farm Types on Livestock and meat Production

		State farms	Small farms
Share on animal herd			
...Total cattle	%	5.5	94.5
...Pigs	%	43	57
...Sheep lamb and goats	%	14	86
Share on meat production			
...Total meat	%	44	56
Source: Statistical yearbook, 2002			

In livestock production, Slovenia's producer prices already approach or sometimes even exceed the EU producer prices, so the expectation is that:

• for the main Slovene product - milk - producer prices will decrease, which will probably be

compensated with higher productivity, which will result in an increase of existing product surpluses.

- For pork and poultry the situation is expected to worsen too because of the drop in producer incomes (the existing market protection will be abolished) and also production is expected to decrease. But the level of self-sufficiency will remain mostly unchanged with 70% by pork and 20% surpluses in poultry.

- On the other side, EU accession is expected to be favorable for beef and small cattle producers. In both cases the income situation will improve and production is expected to increase by 10-20%, which will cause the domestic supply to cover or even exceed the domestic demand.

Section III – Post Estimate of U.S. Trade Losses

A. Post estimates of lost trade due to higher tariffs

One simulation based on 2002 data showed that the amount of tariff revenue collected on U.S. agricultural products will increase by about $5 million per year. This is mostly attributed to the fact that many U.S. food imports are transhipped from EU suppliers and are often erronously considered to be of EU origin (and thus subject to lower tariffs). Slovenia currently imports directly mostly those agricultural products that face a higher duty in the EU (see Appendix A). It is realistic to expect that the import structure will change after joining the EU.

Import tariffs will rise for the following products now imported into Slovenia from the United States:

> vegetable oil
> tobacco
> processed fruits
> orange juice
> rice
> sea food (esp. squid and shellfish)

B. Estimates of lost trade due to implementation of EU legislation, including legislation implemented in the last five years

The United States has never had more than a tiny share of Slovenia's $47 million import market for red meats. 'Harmonization' with EU regulations precludes U.S. suppliers from participating in this market due to regulations governing the use of growth promotants. Simiarly, the United States has never had an opprotunity to export poultry to Slovenia's $8 million import market due to the adoption of EU-style regulations.

Section IV Market Access Opportunities (tied to Appendix A)

A. Products with lower tariffs after EU accession.

The U.S. product groups that will benefit because of lower customs tariffs are:

    beans
    cocoa
    dried fruit
    fruit juices (excluding orange juice)
    wine
    whisky
    pet food

B. Products where EU accession will remove a non-tariff barrier.

    None known.

C. Discussion of the effect increasing incomes will have on selected U.S. products

    See Appendix B

Appendix A - Tariff Comparison

Current national versus EU tariff rates for commodities imported from the United States to Slovenia in 2002.

CN Code	Quantity in KG	Value in $US	Customs tariff SI	duty rate SI /100 kg	Customs tariff EU	duty rate EU _/100 kg	Difference in rates SI/EU
01011010	2,452	$16,176	0		0		0
03042031	1,920	$7,273	2		7.5		-5.5
03062100	39	$864	2		12.5		-10.5
03062210	4,992	$92,855	0		8		-8
03062390	0	$53	2		12		-10
03062490	305	$1,982	2		7.5		-5.5
03074931	1,022	$1,200	2		6		-4
03074938	9,650	$10,682	2		6		-4
04021019	3,368	$10,845	10.9	121.51	0	118.8	10.9
04022119	2,268	$9,551	10.9	93.49	0	130.4	10.9
05119190	105	$12,048	5		0		5
05119990	647	$79,882	5		0		5
05119990	48	$7,660	0		0		0
06031080	723	$5,894	24		8.5		15.5
06041090	7,096	$24,662	10		5		5
06049190	17,185	$101,876	10		2		8
07129019	8,796	$7,521	16		0	9.4	16
07129090	149	$7,655	30		12.8		17.2
07131090	2,667	$1,883	12		0		12
07132000	4,752	$5,677	10		0		10
07133200	23,021	$16,605	12		0		12
07133390	148,814	$102,417	10		3.2		6.8
07134000	13,111	$11,218	5		5.6		-0.6
07139090	11,250	$11,976	5		3.5		1.5
08021190	522	$1,556	5		4		1
08021290	65,245	$256,393	5		5.1		-0.1
08023100	1,675	$3,838	7		1.6		5.4
08023200	15,117	$52,698	7		0		7
08025000	176	$1,137	5		7.7		-2.7
08029020	313	$3,193	5		2.4		2.6
08041000	817	$6,058	2		9.6		-7.6
08062011	5,248	$10,413	5		2.4		2.6
08132000	23,845	$77,212	10		8		2
08134095	1,823	$30,871	10		9.6		0.4
08135091	5,034	$24,028	10		0		10
08135099	299	$1,598	10		0		10
10051015	233,824	$749,585	5		0	264	5
10059000	110,827	$71,045	8.3		0	416	8.3
10062017	5,208	$4,367	0		0	416	0
10063063	4,440	$3,011	0		0	416	0
10063067	162,716	$101,104	0		0	416	0

10063092	10,713	$9,196	0		0	416	0
10063096	300	$161	0		0	416	0
10063098	43,248	$36,787	0		0	416	0
10089090	1,331	$6,002	5		0	37	5
11063090	1,065	$4,377	10		8.3		1.7
12010010	4,000	$1,864	0		0		0
12010090	3,876	$2,774	0		0		0
12021090	250	$344	0		0		0
12060091	29,022	$29,165	0		0		0
12060099	73,932	$99,027	0		0		0
12079190	3,500	$3,652	0		0		0
12079998	18,001	$31,579	0		0		0
12092980	1,000	$3,528	5		2.5		2.5
12119098	30	$1,931	5		0		5
12122000	1,530	$50,968	5		0		5
12129980	90	$1,425	5		0		5
13012000	138	$1,860	0		0		0
13021300	215	$3,567	25		3.2		21.8
13021998	5,048	$83,816	5		0		5
13023100	32	$1,702	0		0		0
15042090	1,290	$48,450	5		0		5
15131999	11,940	$16,795	2		9.6		-7.6
15159015	450	$7,413	3		0		3
15159059	175	$1,370	5		6.4		-1.4
15159099	3,794	$15,197	27		9.6		17.4
15162096	804	$7,942	2		9.6		-7.6
15179099	608	$8,886	20		16		4
17023051	6,426	$33,707	5		0	26.8	5
17025000	108,000	$88,206	5		16	50.7	-11
17049051	650	$2,640	22		9	18.7	13
17049071	756	$2,577	22		9	18.7	13
17049099	329	$4,504	22		9	18.7	13
18062095	812	$3,548	27		8.3	18.7	18.7
18063290	3,084	$6,073	17		8.3	18.7	8.7
18069070	2,150	$9,932	27		8.3	18.7	18.7
18069090	267	$2,323	27		8.3	18.7	18.7
19052090	598	$1,875	27		10.1	31.4	16.9
19059020	5,225	$14,446	10		4.5	60.5	5.5
20055100	253	$515	22		17.6		4.4
20055900	2,032	$5,622	25		19.2		5.8
20059080	2,900	$7,924	20		17.6		2.4
20079998	3,635	$10,388	35		24		11
20081110	6,758	$21,454	6		12.8		-6.8
20081196	9,961	$19,323	6		12		-6
20081913	300	$1,498	5		9		-4
20081919	1,200	$2,703	5		11.2		-6.2
20081993	3,546	$14,552	5		10.2		-5.2
20081995	685	$1,605	5		12		-7
20082099	142	$406	8		18.4		-10.4
20089978	1,008	$2,366	6		18.4		-12.4
20089985	14,069	$51,211	6		5.1	9.4	0.9

20091111	13,464	$15,297	27		33.6	20.6	-6.6
20098079	12,803	$19,700	30		16.8		13.2
20099059	46,046	$448,000	30		17.6		12.4
21011292	5,068	$15,257	10		11.5		-1.5
21032000	5,541	$15,778	23		10.2		12.8
21039090	14,307	$106,062	20		7.7		12.3
21061020	6,842	$44,719	10		12.8		-2.8
21069010	15,791	$44,702	12		0	35	12
21069092	30,787	$579,622	12		12.8		-0.8
21069098	73,424	$806,605	12		9		3
21069098	4,418	$25,770	0		0		0
22029010	73,351	$235,424	25		9.6		15.4
22042138	395	$1,404	17.3	310.48	0	13.1	17.3
22042179	5,850	$9,446	17.3	310.48	0	13.1	17.3
22042180	13,128	$25,946	17.3	310.48	0	13.1	17.3
22042181	746	$3,397	17.3	310.48	0	15.4	17.3
22042182	2,141	$12,877	17.3	310.48	0	15.4	17.3
22042183	45	$1,852	17.3	310.48	0	15.4	17.3
22042184	117	$7,554	17.3	310.48	0	15.4	17.3
22042194	27	$2,276	17.3	310.48	0	18.6	17.3
22071000	93,160	$54,811	10		0	19.2	10
22083011	49,888	$337,333	27		0		27
22083019	6	$67	27		0		27
22083082	21,267	$36,878	27		0		27
22087010	4,391	$20,979	40		0		40
22089069	12,170	$77,187	40		0		40
23031011	1,488,924	$654,810	3		0	320	3
23031019	714,576	$304,811	3		0		3
23061000	500	$3,730	5		0		5
23091011	31,471	$70,660	7		0		7
23091031	1,521	$2,276	7		0		7
23091051	53,988	$66,660	7		0	102	7
23091090	250,056	$364,774	7		9.6		-2.6
23099010	100	$3,299	15		3.8		11.2
23099051	963	$4,263	25		0	102	25
23099093	10,345	$52,080	25		0		25
23099095	15,000	$11,978	25		9.6		15.4
23099097	2,029	$7,301	25		0		25
24012010	140,500	$143,319	0		18.4	22	-18.4
24012020	4,680	$49,703	0		18.4	22	-18.4
24013000	105,430	$78,897	0		11.2	22	-11.2
24021000	640	$33,215	15		26		-11
24022090	24,121	$250,909	45		57.6		-12.6
24031010	839	$17,006	45		74.9		-29.9

Appendix B - Consumption Trends for Major Food Items
Average annual quantity of purchased food and beverages per household member

Product	Unit	1990	1994	1995	1996	1997
Bread and pastries	kg	63.8	69.3	67.5	69.5	66.5
Flour, all kinds and grits	kg	14.5	17.0	16.0	17.5	24.6
Pasta	kg	6.5	7.7	8.0	9.3	8.0
Rice	kg	3.4	3.8	5.0	4.7	5.0
Potatoes	kg	28.1	27.2	32.6	31.4	46.1
Bean, peas and horsebean	kg	1.5	1.3	1.8	1.7	1.5
Onion and garlic	kg	3.0	3.6	3.8	3.5	5.0
Tomatoes	kg	3.4	3.1	4.9	4.8	5.0
Red pepper	kg	2	2.0	3.3	3.2	3.3
Garden lettuce	kg	7.8	7.2	7.2	7.0	5.6
String-beans and green peas	kg	1.1	0.6	1.3	1.1	0.4
Other fresh vegetables	kg	2.7	3.3	2.7	2.7	2.6
Sour and preserved vegetables	kg	4.6	5.0	4.9	5.0	5.9
Apples	kg	17.8	14.1	14.9	16.0	13.6
Plums	kg	0.6	0.5	1.0	0.8	0.6
Grapes	kg	1.7	1.7	2.3	3.2	1.7
Peaches and apricots	kg	2.5	2.4	3.2	3.1	2.1
Other fresh fruits	kg	1.3	0.4	0.8	0.8	1.1
Oranges and lemons	kg	8.6	10.5	8.3	9.4	14.1
Other southern fruits	kg	3.8	6.7	7.2	7.8	13.2
Processed and preserved fruit	kg	2.0	2.7	2.5	3.2	2.2
Beef	kg	13.5	12.9	11.1	11.0	14.7
Pork	kg	7.4	5.8	6.0	6.6	6.8
Poultry	kg	8.5	9.0	9.2	8.4	9.8
Other fresh meat	kg	1.3	1.6	1.1	1.4	1.3
Dried bacon	kg	0.5	0.4	0.5	0.4	0.4
Ham, smoked ham and other	kg	1.6	1.4	1.2	1.3	2.2
Processed and preserved meat	kg	0.8	0.7	0.5	0.7	1.8
Lard and row bacon	kg	1.2	0.8	0.8	0.7	0.4
Edible oils	l	11.3	12.0	12.1	12.0	17.3
Milk (sweet and sour)	l	98.8	94.8	94.3	92.0	74.5
Cheese (all kinds)	kg	4.1	5.0	5.4	5.8	6.4
Butter	kg	0.5	0.6	0.7	0.6	0.7
Other milk products	kg	2.0	2.8	2.9	3.0	5.4
Eggs	pcs	107.1	110.3	104.8	98.6	116.1
Sugar and honey	kg	13.2	12.2	13.1	13.5	20.5
Coffee	kg	2.5	2.8	3.0	3.0	3.5
Chocolate and cocoa	kg	2.2	2.1	1.8	2.3	3.6
Biscuits, teacakes and waffles	kg	3.3	3.0	2.6	2.9	5.1
Wine	l	12.1	10.6	9.7	9.7	8.8
Beer	l	15.6	20.6	19.2	16.5	27.5
Other alcoholic beverages	l	0.4	0.5	0.4	0.4	0.7
Cider, must and mead	l	0.1	0.1	0.1	0.1	0.1

Appendix C - Survey of EU Accession Econometric Models

After the decision to apply for EU membership was made in 1995, significant research and economic modeling was conducted to see what the implications of the CAP would be on Slovene agriculture. The first basic analysis on different scenarios was published in 1997 by Erjavec et al: *Slovene Agriculture and the European Union*, where several scenarios were analyzed with the use of a general equilibrium model:

• Effects only in the framework of association agreement with EU
• Effects of full CAP payments (with Agenda 2000 reforms)

The result of the simulation was that, for Slovene agriculture, only the full implementation of CAP payments would be beneficial. All other variations would actually decrease farm income compared to the mix of prices and subsidies that Slovene farmers faced in 1997.

Further analysis of the EU Commission's January 2002 reform proposal (Erjavec et al, 2002) was made with the help of sectoral APAS -PAM (Agricultural Policy Analysis Simulator in Policy Analysis Matrix) model (Stoforos et al, 2000).

The simulation analysis was done on 4 scenarios:
1. Basic: continuation of existing Slovene agricultural policy set in year 2000, with corrections made because of price trends and expected currency rates changes (BS 2000).
2. Full implementation of existing CAP from day one (EU+++)
3. Agenda 2000 proposal for candidate countries: the same price level as in the EU but no direct payments, and reduced structural and environmental payments (EU+-o)
4. Pessimistic: it presumes insufficient competitiveness of the Slovene food processing industry – the price level of product prices is from 5-35% level of the EU+-o scenario (EU- -o).

The results of this simulation showed that compared to basic assumption, the EU+++ scenario as the most favorable would increase production of beef, maize, sugar beet, poultry and small cattle for meat. The decrease would be the highest in egg production and to some extent also in pig fattening and wheat production. The Eu+-o scenario is the most favorable for sugar beet production and partly for poultry and beef. For all other products the production would decrease most for wheat (20%). The most unfavorable scenario (EU- -o) would cause all but sugar beet production to decrease for another 4-8% regarding the EU+-o scenario. The sugar beet production on the other side would increase 6%.

The described scenarios would have an important influence on agricultural product imports, where with the EU+++ (full implementation) scenario, it is expected that the trade deficit will decrease for corn, poultry, beef and sugar beets. On the other hand, milk surpluses would remain and wheat imports would increase. Under the most pessimistic scenario, imports would increase substantially and milk surpluses would be reduced by half.

The conclusion was drawn that the aggregate income situation for Slovene agriculture would only improve if Slovenia were allowed to participate fully in existing CAP programs. If this were allowed, income on an aggregate level would increase by 44%. In all other cases income

decreased, and in the case of the pessimistic scenario, by almost 52%.

After the January 2002 Commission proposal, new analysis using the same model (APAS-PAM) was conducted (Erjavec et al, 2002). In this analysis, two model scenarios analyzing the effect of EU membership between 2004 and 2006 were developed:

1. DCP: the actual position of Commission from April 2002 and
2. NP: the best realistic negotiation outcome for Slovenia

Table 4: Scenarios parameters

Scenario elements	DCP	NP
EU direct payments	25, 30 and 35%	25, 30 and 35%
National direct payments	Difference to the level of payments in 2001	Difference to 100% CAP
Quotas and reference quantities	January 2002 Commission proposal	Best possible realistic negotiation outcome
Other expenses for I pillar	1.5% of all money allocated to candidate countries	3.0% of all money allocated to candidate countries
Rural development	2.1% of all money allocated to candidate countries	5.0% of all money allocated to candidate countries

All analysis predicted a substantial fall of product prices in Slovenia for a majority of agricultural products (except maize and sugar beets) due to existing high price levels and increased competition.

The simulated effects of different scenarios on the agricultural budget are shown in table 5.

Table 5: Financial effects of different scenarios for Slovenia (in Mio _)

	DCP			NP		
	2004	2005	2006	2004	2005	2006
EU	61.2	73.1	80.9	119.8	140.8	153.1
SLO	52.0	48.7	45.4	102.2	101.7	100.3
Total	113.2	121.8	126.3	221.9	242.5	253.4

(source: Erjavec at all, 2002:49)

In regard to production, the increase can only be expected for products that are going to be eligible for relative high direct payments (cereals, small cattle and beef). A major decrease is, under the simulation, expected to occur in dairy production.

The effects on aggregate income under the DCP scenario is a decrease of 13%. An increase of income is only possible if the most optimistic NP scenario is realized (30%). When the non-competitivness of the Slovene food processing industry is also considered, then even the best (NP) scenario does not predict an increase in income.

Appendix D - **Other Information Sources**

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