

**AGRICULTURAL TRADE BALANCE
BETWEEN GREECE AND POLAND
2005-2008**

The agricultural balance of trade between Greece and Poland was in surplus during the three year period 2005-2007, but since 2007 the first signs of a drastic reduction of the Greek trade surplus appeared.

In fact, the trade surplus was changed significantly to deficit in 2008. More precisely, in 2006 compared to 2005, the retained increase of imports and the perceptible rise of exports led to an impressive increase 37% of trade surplus. 42% of this increase was due to a boom of exports in cereals category and mainly in rice. Then, in 2007, the trade surplus, compared to 2006, shrinks drastically by 86%, due to an explosive rise of agricultural imports by 92%, as compared to an only increase by 10% of exports. The situation worsened further in 2008 when henceforth the trade surplus changed to deficit, with imports being marked a new rise by 21% against a reduction in exports by 1,6%. A decisive role in this negative effect played the ejection of imports in tobacco and its products, in 2007 and in 2008.

In any case, agricultural exports keep a remarkable share compared with the total exports of Greece to Poland. In particular, the agricultural exports were 43% of Greek total exports in 2005, 39.5% in 2006, 34.6% in 2007 and 36.8% in 2008. According to the latest data, Poland stands as the 15th trade partner of Greece in agricultural exports.

In terms of **total trade** with Poland, the balance appears to be negative and this trade deficit has an intense tendency to increase further. In particular, the deficit doubled in 2006 and in 2007 and it was extended further at 73% in 2008. This negative development of total trade balance is due to the tendency of imports to increase during all the examined period.

More precisely, the main **agricultural imports** from Poland are found in the following categories:

1. In **Tobacco**, imports follow a swift tendency as mentioned above, obviously due to the drastic shrinkage of Greek production in Burley and Virginia varieties. In 2006/2005, imports were hyper doubled, in 2007 were ejected 10 times in value as compared to the previous year, while in 2008 they were further increased by 38%. Imports include cigarettes, light air-cured tobacco and flu-cured Virginia type. From 2007 and afterwards, imports include also other types of tobacco and substitutes industrialised.
2. In **Meat and its preparations**, imports appear constant with no essential fluctuations. The main imported products of this category are bovine meats fresh and frozen.
3. In **fruits and vegetables**, imports were doubled in 2007/2006. Basic imported products are the mushrooms (agaricus) fresh and prepared, as well as the beans dried. In 2007, fresh tomatoes were also imported in an adequate percentage.
4. In **coffee, cocoa, tea etc.** category, an increase by 39% realized in 2006/2005. Afterwards imports were stabilised. Basic imported products are the chocolate candies (pralines), cocoa pulps and various other cocoa preparations.
5. Imports of **Live Animals** appear to be stable with the exception of 2007/2006 when they were provisionally decreased by 39.4%. Main imports are on live cattle for reproduction.
6. In **dairy products**, imports appear to increase during all the period in question. In particular, in 2007 and in 2008 they marked a rise by 43% and 63% respectively as compared to years 2006 and 2007. Basic imported products were milk, skimmed milk powder and various fresh cheeses.

Regarding the Greek **agricultural exports**, the main categories appear to be fruits and vegetables, cereals, tobacco, food products and beverages. More precisely:

1. **Fruits and vegetables** appear to be the main category of exports to Poland. The trade balance in this is in surplus and has an important effect in the total surplus configuration. In 2006/2005, exports increased by

5.3%, in 2007/2006 showed a further increase by 8.6%, while in 2008/2007 a small reduction appeared by 1.6%. The main exports include peaches fresh and prepared, oranges and table grapes. Since 2007 exports include fresh orange juices, while in 2008 also include watermelons in an adequate level.

2. In **cereals**, exports presented successive fluctuations; an intense tendency of increase by 51% appeared in 2006/2005, while in 2007 they decreased by 19.5%. In 2008, exports partially recover with a rise by 11.2%. The main exported product of this category were processed rice followed by certain food preparations made out by rice and various pastas.

3. In **tobacco**, an ascendant course of exports also appears, with a swift increase in 2006/2005. In 2008 they were stabilised. Tobacco exports are mainly on sun-cured Eastern type varieties and since 2006, cigarettes and flu-cured type Virginia were included.

4. In **food products** and their preparations, successive fluctuations appear; reduction by 14,6% in 2006, triplication in 2007 and reduction again by 31.3% in 2008. Various food preparations not specified are exported.

5. Finally, in **beverages**, a remarkable increase of exports by 35% appeared in 2007. In 2008 they were stabilised. Basic exporting products were various wines and raki distillations, as well as several red table wines.

AN ANNEX OF TABLES FOLLOWS

2005, GREECE – POLAND: AGRICULTURAL TRADE DATA in Euro

| ITCodes | PRODUCTS | IMPORTS | TOTAL AGRICULTURAL IMPORTS (%) | EXPORTS | TOTAL AGRICULTURAL EXPORTS (%) | BALANCE |
|----------------|------------------------------------|--------------------|---|--------------------|---|--------------------|
| 00 | Live animals | 2.516.251 | 7,53% | 0 | 0,00% | -2.516.251 |
| 01 | Meat & preparations | 12.934.449 | 38,71% | 1.789 | 0,00% | -12.932.660 |
| 02 | Milk & Eggs | 2.135.758 | 6,39% | 109.789 | 0,19% | -2.025.969 |
| 03 | Fish & preparations | 73.640 | 0,22% | 156.619 | 0,27% | 82.979 |
| 04 | Cereals & preparations | 1.017.256 | 3,04% | 12.897.132 | 22,12% | 11.879.876 |
| 05 | Fruit & vegetables | 5.488.324 | 16,42% | 36.477.279 | 62,56% | 30.988.955 |
| 06 | Sugar & Honey | 363.293 | 1,09% | 419.105 | 0,72% | 55.812 |
| 07 | Coffee, cocoa, tea, spices | 6.479.083 | 19,39% | 80.122 | 0,14% | -6.398.961 |
| 08 | Animal feed | 109.240 | 0,33% | 0 | 0,00% | -109.240 |
| 09 | Food products | 312.602 | 0,94% | 2.064.243 | 3,54% | 1.751.641 |
| 11 | Beverages | 406.692 | 1,22% | 1.718.707 | 2,95% | 1.312.015 |
| 12 | Tobacco | 892.480 | 2,67% | 2.530.257 | 4,34% | 1.637.777 |
| 21 | Hides & skins Unprocessed | 127.444 | 0,38% | 643.626 | 1,10% | 516.182 |
| 22 | Oilseeds | 127 | 0,00% | 154.873 | 0,27% | 154.746 |
| 231 | Natural rubber | 0 | 0,00% | 0 | 0,00% | 0 |
| 24 | Timber & cork | 396.656 | 1,19% | 5.355 | 0,01% | -391.301 |
| 261-265 & 268 | Natural textile fibres | 336 | 0,00% | 154.625 | 0,27% | 154.289 |
| 29 | Agricultural raw material | 117.436 | 0,35% | 3.957 | 0,01% | -113.479 |
| 4 | Oils & fats | 22.224 | 0,07% | 886.828 | 1,52% | 864.604 |
| 592-11/12 | Starches, insuline | 22.000 | 0,07% | 0 | 0,00% | -22.000 |
| | TOTAL AGRICULTURAL PRODUCTS | 33.415.291 | 20,87% | 58.304.306 | 43,08% | 24.889.015 |
| (0-9) | TOTAL TRADE | 160.074.861 | 100% | 135.353.538 | 100% | -24.721.323 |

2006, GREECE – POLAND: AGRICULTURAL TRADE DATA in Euro

| ITCodes | PRODUCTS | IMPORTS | TOTAL AGRICULTURAL IMPORTS (%) | EXPORTS | TOTAL AGRICULTURAL EXPORTS (%) | BALANCE |
|----------------|------------------------------------|--------------------|---|--------------------|---|--------------------|
| 00 | Live animals | 2.318.556 | 5,82% | 0 | 0,00% | -2.318.556 |
| 01 | Meat & preparations | 12.464.901 | 31,28% | 66.799 | 0,09% | -12.398.102 |
| 02 | Milk & Eggs | 2.981.097 | 7,48% | 310.981 | 0,42% | -2.670.116 |
| 03 | Fish & preparations | 128.721 | 0,32% | 245.669 | 0,33% | 116.948 |
| 04 | Cereals & preparations | 1.036.785 | 2,60% | 19.449.954 | 26,29% | 18.413.169 |
| 05 | Fruit & Vegetables | 6.064.897 | 15,22% | 38.952.505 | 52,66% | 32.887.608 |
| 06 | Sugar & Honey | 350.429 | 0,88% | 301.213 | 0,41% | -49.216 |
| 07 | Coffee, cocoa, tea, spices | 8.985.698 | 22,55% | 44.514 | 0,06% | -8.941.184 |
| 08 | Animal feed | 138.824 | 0,35% | 750 | 0,00% | -138.074 |
| 09 | Food products | 988.173 | 2,48% | 1.762.042 | 2,38% | 773.869 |
| 11 | Beverages | 396.830 | 1,00% | 1.617.310 | 2,19% | 1.220.480 |
| 12 | Tobacco | 3.099.895 | 7,78% | 9.413.770 | 12,73% | 6.313.875 |
| 21 | Hides & skins unprocessed | 191.594 | 0,48% | 102.002 | 0,14% | -89.592 |
| 22 | Oilseeds | 0 | 0,00% | 620.413 | 0,84% | 620.413 |
| 231 | Natural rubber | 0 | 0,00% | 0 | 0,00% | 0 |
| 24 | Timber & cork | 351.095 | 0,88% | 13.982 | 0,02% | -337.113 |
| 261-265 & 268 | Natural textile fibres | 290 | 0,00% | 69.062 | 0,09% | 68.772 |
| 29 | Agricultural raw material | 210.535 | 0,53% | 3.541 | 0,00% | -206.994 |
| 4 | Oils & fats | 136.489 | 0,34% | 996.895 | 1,35% | 860.406 |
| 592-11/12 | Starches, insuline | 0 | 0,00% | 0 | 0,00% | 0 |
| | TOTAL AGRICULTURAL PRODUCTS | 39.844.809 | 16,24% | 73.971.402 | 39,58% | 34.126.593 |
| (0-9) | TOTAL TRADE | 245.422.924 | 100% | 186.884.112 | 100% | -58.538.812 |

2007, GREECE – POLAND: AGRICULTURAL TRADE DATA in Euro

| ITCode | PRODUCTS | IMPORTS | TOTAL AGRICULTURAL IMPORTS (%) | EXPORTS | TOTAL AGRICULTURAL EXPORTS (%) | BALANCE |
|---------------|------------------------------------|--------------------|---------------------------------------|--------------------|---------------------------------------|---------------------|
| 00 | Live animals | 1.405.301 | 1,84% | 0 | 0,00% | -1.405.301 |
| 01 | Meat & preparations | 12.491.716 | 16,32% | 71.010 | 0,09% | -12.420.706 |
| 02 | Milk & eggs | 4.261.697 | 5,57% | 458.176 | 0,56% | -3.803.521 |
| 03 | Fish & preparations | 123.155 | 0,16% | 298.854 | 0,37% | 175.699 |
| 04 | Cereals & preparations | 1.766.866 | 2,31% | 15.651.143 | 19,24% | 13.884.277 |
| 05 | Fruit & Vegetables | 12.378.441 | 16,17% | 42.289.736 | 51,97% | 29.911.295 |
| 06 | Sugar & Honey | 401.626 | 0,52% | 399.042 | 0,49% | -2.584 |
| 07 | Coffee, cocoa, tea, spices | 9.731.636 | 12,71% | 9.299 | 0,01% | -9.722.337 |
| 08 | Animal feed | 450.077 | 0,59% | 0 | 0,00% | -450.077 |
| 09 | Food products | 1.924.487 | 2,51% | 5.539.550 | 6,81% | 3.615.063 |
| 11 | Beverages | 512.847 | 0,67% | 2.184.524 | 2,68% | 1.671.677 |
| 12 | Tobacco | 30.552.995 | 39,91% | 10.976.582 | 13,49% | -19.576.413 |
| 21 | Hides & skins unprocessed | 80.733 | 0,11% | 187.934 | 0,23% | 107.201 |
| 22 | Oilseeds | 0 | 0,00% | 1.566.090 | 1,92% | 1.566.090 |
| 231 | Natural rubber | 0 | 0,00% | 0 | 0,00% | 0 |
| 24 | Timber & cork | 288.836 | 0,38% | 8.816 | 0,01% | -280.020 |
| 261-265 & 268 | Natural textile fibres | 231 | 0,00% | 0 | 0,00% | -231 |
| 29 | Agricultural raw material | 159.822 | 0,21% | 18.196 | 0,02% | -141.626 |
| 4 | Oils & fats | 31.885 | 0,04% | 1.708.150 | 2,10% | 1.676.265 |
| 592-11/12 | Starches, insuline | 0 | 0,00% | 0 | 0,00% | 0 |
| | TOTAL AGRICULTURAL PRODUCTS | 76.562.351 | 20,12% | 81.367.102 | 34,64% | 4.804.751 |
| (0-9) | TOTAL TRADE | 380.593.117 | 100% | 234.874.418 | 100% | -145.718.699 |

2008, GREECE-POLAND: AGRICULTURAL TRADE DATA in Euro

| ITCode | PRODUCTS | IMPORTS | TOTAL AGRICULTURAL IMPORTS (%) | EXPORTS | TOTAL AGRICULTURAL EXPORTS (%) | BALANCE |
|---------------|------------------------------------|--------------------|---------------------------------------|--------------------|---------------------------------------|---------------------|
| 00 | Live animals | 2.384.418 | 2,45% | 0 | 0,00% | -2.384.418 |
| 01 | Meat & preparations | 12.690.337 | 13,07% | 36.442 | 0,05% | -12.653.895 |
| 02 | Milk & Eggs | 6.953.005 | 7,16% | 530.997 | 0,66% | -6.422.008 |
| 03 | Fish & preparations | 1.090.265 | 1,12% | 358.654 | 0,45% | -731.611 |
| 04 | Cereals & preparations | 2.252.094 | 2,32% | 17.408.217 | 21,73% | 15.156.123 |
| 05 | Fruits & Vegetables | 12.875.561 | 13,26% | 41.600.466 | 51,94% | 28.724.905 |
| 06 | Sugar & Honey | 389.206 | 0,40% | 636.332 | 0,79% | 247.126 |
| 07 | Coffee, cocoa, tea, spices | 9.192.109 | 9,46% | 11.620 | 0,01% | -9.180.489 |
| 08 | Animal feed | 1.425.342 | 1,47% | 0 | 0,00% | -1.425.342 |
| 09 | Food products | 2.481.649 | 2,55% | 3.808.624 | 4,75% | 1.326.975 |
| 11 | Beverages | 1.929.067 | 1,99% | 2.498.167 | 3,12% | 569.100 |
| 12 | Tobacco | 42.205.098 | 43,45% | 10.629.954 | 13,27% | -31.575.144 |
| 21 | Hides & skins unprocessed | 44.751 | 0,05% | 228.554 | 0,29% | 183.803 |
| 22 | Oilseeds | 0 | 0,00% | 1.270.087 | 1,59% | 1.270.087 |
| 231 | Natural rubber | 0 | 0,00% | 0 | 0,00% | 0 |
| 24 | Timber & cork | 393.515 | 0,41% | 0 | 0,00% | -393.515 |
| 261-265 & 268 | Natural textile fibres | 46 | 0,00% | 67.012 | 0,08% | 66.966 |
| 29 | Agricultural raw material | 793.712 | 0,82% | 7.678 | 0,01% | -786.034 |
| 4 | Oils & fats | 30.744 | 0,03% | 1.005.490 | 1,26% | 974.746 |
| 592-11/12 | Starches, insuline | 0 | 0,00% | 22 | 0,00% | 22 |
| | TOTAL AGRICULTURAL PRODUCTS | 97.130.919 | 20,68% | 80.098.316 | 36,87% | -17.032.603 |
| (0-9) | TOTAL TRADE | 469.723.386 | 100% | 217.250.091 | 100% | -252.473.295 |