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Influence of EU regulations in terms of the international competitiveness of the horticultural sector

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Abstract: *Influence of EU regulations in terms of the international competitiveness of the horticultural sector*. The article presents the support schemes available from EU funds in the horticultural sector contributing to an improvement of the product competitiveness of this sector on the international market. The analysis addresses both the support implemented in the scope of the common organisation of the horticultural market as well as that possible to obtain from the structural funds. The assistance concerns primarily the improvement of the demand concentration of fresh fruit and vegetables by directing the funds to the producers recognised by EU laws and support of the market participants in the scope of the information and promotion activities conducted by them. The article provides an overview of the scale of exploitation of the available funds by the participants of the fruit and vegetable sector, as well as the degree of adaptation of organisations and products of the sector to obligatory and voluntary quality requirements. In Poland, the organisation level of the primary fruit and vegetable market is still relatively low, but the scale of the exploitation of EU funds regarding the support of promotion activities is high. Also the degree of adjustment of organisations and products in the sector regarding the quality requirements is high.

Key words: horticultural sector, European Union regulations, international competitiveness

INTRODUCTION

Competitiveness in definitions regarding international exchange is described as: the ability to produce and sell products whose prices, quality and other advantages are more attractive than the goods offered by foreign competitors (Wierzbołowski 1995); as the ability to effectively sell the manufactured products on the international market, as well as to maintain and extend market share (Poczta 2010); or the ability to offer goods with prices and usage qualities that are better than other offers (Jasiński 2003). An elaboration of these general definitions is the selecting of sources of competitive advantages on the world market in the modern world as well as determining, specifying and clarifying the competitive process based on the revealed advantages as regards particular products and their groups.

Foreign trade practice explicitly confirms the statement by Abbott and Bredahl (1994) that the source of competitive advantages on the world market with reference to resources and semi-processed products is mainly their price. On the international market of products, mainly food products, the countries and companies which dominate are able to offer resources and preserves cheaper than the offers of other producers and exporters. Costs and prices, to a large extent, belong to factors independent of business operators and they are shaped based on the level of production factors and their mutual relations. The competition process in respect of these products mainly comes down to actions aiming at the decreasing of the production costs, particularly by increasing their range and applying modern technologies (Krugman 1992). Widely understood, the quality of products is of little importance, as well as advantages resulting from the position of quasi-monopolist ones in a particular production and export area (Bombińska 2009). A significant share in export does not mean superiority in terms of a product's disposition (Kravis 1956, Lorenz 1967) from the perspective of the possibility of relatively beneficial action conditions for domestic producers and exporters, mainly in terms of the influence on the level of prices accepted by the customers. Relatively low production costs, however, have an essential impact on the relatively high scale of the inflow of production and technological capital, including foreign capital. Large resources of relatively cheap production factors (mainly the workforce) decide about domination in the export of products with a low degree of processing in less economically developed countries.

With reference to finished products, ones ready to use (to consume in the case of food products), the sources of competitiveness are mainly non-price ones and they come down to: widely understood product quality, continuity of supply of even batches of products, and marketing skills. Therefore, the competitiveness factors classified as active and relating to competitiveness instrumentation are the essential ones. Improvement of the product quality, understood not only as production according to requirements on the world market but also as a whole of product characteristics taken into consideration by consumers in particular countries (Gulbicka 2014)[1], demands a high quality of human resources, especially management. It concerns also the ability of brand building, the effectiveness of activities concerning advertising, acquiring new markets, and the ability to obtain and use any support measures in the scope of competitiveness instrumentation, including those supporting the increase of demand on the world market. It is particularly essential as far as growing the sales share in large-scale chains are concerned.

A particular role of active factors, concerning the competitiveness instrumentation, in the case of ready-made products results from the high level of market saturation in most of the economically developed countries, but also from the necessity to break the barrier of accustoming consumers to domestic products.

[1] For the consumers from the southern countries of the EU, the quality of food products is connected with their specific features and with the 'uniqueness' of consumers from the USA, Sweden or Germany with compliance of all the safety requirements and standards in the scope of health care (Jasińska 2003). Quality is also a matter of: the taste, smell and qualities of harvested-by-hand products.

It needs to be explicitly highlighted that the level of prices offered for finished products facilitates the success of activities classed as non-price factors.

The significant share in the foreign sale of highly processed products or those intended to be directly consumed in general export, and the rise of this group of products in the world export, point to the high external competitiveness of organisations and their surroundings – mainly in the scope of the widely understood competitiveness instrumentation.

PURPOSE OF THE ARTICLE

The aim of the article is to present EU regulations that have an impact on improving the position of Polish horticultural products and their preserves on the international market. The aim is also to present the scale of use by the participants of the horticultural sector in Poland of the possibilities specified in EU solutions, concerning both the horticultural sector and those established on a horizontal basis.

MATERIAL AND METHODS

The source of the article was EU regulations regarding the organisation of the horticultural market in the EU and the possibilities of support from structural funds offered to all food sector participants. The database of the Agency for Restructuring and Modernisation of Agriculture, designated for the implementation of payments in Poland from EU funds, information collected by the National Agricultural Support Centre, administering promotion funds, and the Ministry of Agriculture and Rural Development and the Statistics Poland were used. The numerous literature on the issue of competitiveness was also used, including the author's study covering the broadly understood issues of the horticultural sector in Poland, the EU and in the world. Mainly the comparative analysis were used.

RESULTS AND DISCUSSION

European Union regulations regarding the horticultural sector

Support to improve the organisation of the primary market

From the beginning of the common organisation of the horticultural market, EU funds were directed mainly to support the creation and maintenance of groups recognised by EU laws, in particular organisations of producers. Creating wider economic organisations in agriculture is particularly relevant with reference to the direct selling of agricultural products on foreign and domestic markets. Offers of large batches of products (especially dessert fruit and vegetables) with a consistent quality and ensuring a continuity of supplies constitute a necessary condition of the presence of agricultural organisations on both foreign and domestic markets. It is a result of a growing wholesale concentration, in particular retail chains, in most of the countries. It has been estimated that in most countries, not only in the highly developed ones, the share of large commercial networks in the sale of fresh fruit and vegetables fluctuates within the limits of 50–60% (food products 70–80%).

Horizontal connections of agricultural bodies and their common activities enable breaking the barrier of the production scale, especially the supply in agriculture, and the use of wide competitiveness instrumentation, including particularly marketing and sale logistics activities. Agricultural bodies offering products intended for direct selling need to function under the conditions similar to the ones regarding processors, i.e. they need to implement full competitiveness instrumentation, coming to a large extent from the managerial trend. The instrumentation combined with the guarantee of stable, rhythmical supplies, is particularly relevant with reference to fruit and vegetables regarding relatively the short shelf-life of these products. Therefore, support of the creating and functioning of the producer groups and organisations in the horticultural sector have been recognised in separate regulations concerning the sector. Groups and organisations from other sectors of agriculture are supported horizontally from structural funds in the scope of the Rural Development Programme. It needs to be added that breaking the barrier of the demand level with reference to horticultural products, but also other agricultural products, is possible through the creation of strong trade organisations dealing with the purchase and preparing of the products and delivery logistics. However, this solution indicates a decrease of producers' income. What is more, it does not lead to an improvement of marketing and logistics skills, as well as those concerning cooperation and mutual trust rules.

In the EU it is encouraged to create and maintain producers' organisations by incentives from EU funds to the amount of 4.1% of the product production value regarding organisation members and 50% of the organisation's expenses dedicated to the operational programme's realisation. The condition in order to receive the incentives is: a minimum EUR 100,000 of the product's production value, infrastructure enabling the sorting, warehousing and packaging of products, as well as the payment of a membership fee being a source of operational programmes funding developed for 3–5 years (additionally to EU funds). The incentives for producers' groups are determined as a percentage of the production value and as a subsidy to cover the eligible costs contained in the plans of gaining funds developed to a maximum for 5 years. The aim of the support is to increase the economic force of the groups and the conversion into organisations of producers.

Due to the low degree of organisation of the primary market in new member countries since 2008, the support from the EU budget has been doubled in those countries (respectively 10, 10, 8, 6 and 4% of the product production value). Furthermore, as before 2008, producer groups could obtain a refund to the amount of 75% of investment projects' realisation costs, with 50% from EU funds and 25% from the state budget. With regard to irregularities connected with the usage of incentives by producer groups operating in Poland, starting from 2014 this support has been practically suspended. The incentives have been mainly allocated for the modern storage of fruit and vegetables (95% of total incentives received by those producers)[2]. Most of the producer groups have been converted into economically and productively stronger organisations which enable the further increase of the supply concentration in our country.

As a result of the suspension of the incentives, their number in Poland has begun to decrease since 2015, and in 2020 (situation as at 31st of March) there have been only three groups in our country. On the other hand, the number of producer organisations has increased. Since 2017, the number of organisations has decreased (the figure), but the economic power and total value of production have increased.

The degree of organisation of the fruit and vegetable primary market in Poland is still significantly lower than in most of the EU countries – mainly in the EU-15. In Poland, in March 2020 the producer organisations gathered about 1% of the total number of fruit and vegetable producers in our country, in comparison to approximately 20% in the EU. The increasing growth of production in most of the organisations indicates, however, an increased share in the value of horticultural production in Poland. According to the Agency for Restructuring and Modernisation of Agriculture data analysed on

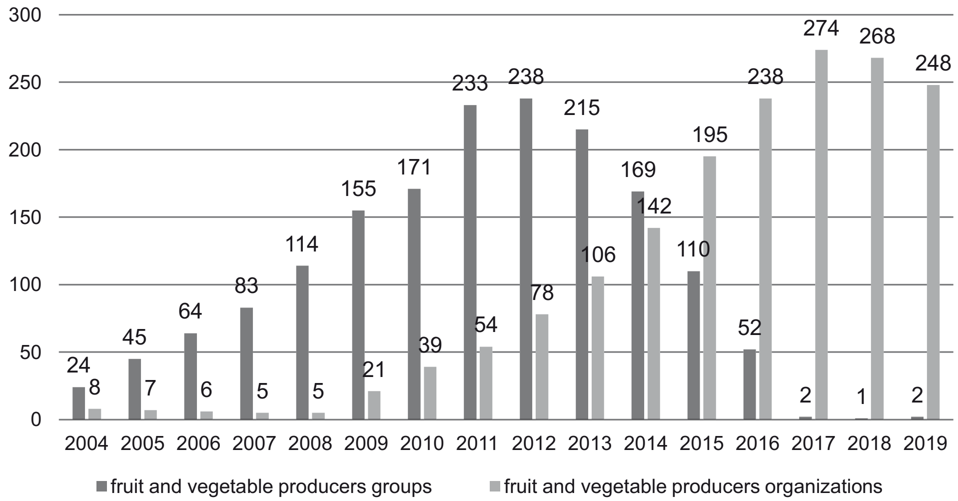

FIGURE. The number of fruit and vegetable producers groups and organisations in Poland (own elaboration based on the Agency for Restructuring and Modernisation of Agriculture data)

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[2] Since the accession day till the end of 2018, groups of producers gained support to the amount of PLN 7.9 million and these were the highest sums in comparison with other countries using this form of support for the horticultural sector.

[3] The analysis was conducted based on the regulation included in Article 8a § 2 of the Commission Implementing Regulation (EU) 2017/892 of 13 Mach 2017, laying down the rules of applying Regulation of the European Parliament and the Council (EU) 1308/2013 with reference to the fruit and vegetable sector and the processed fruit and vegetable sector.

the basis of 2018 data, the share of sold production value by recognised producer organisations exceeds 20% of the total fruit and vegetable production value[3].

It is estimated that in Poland the independent export realised by producer organisations also reaches about 20% of the total foreign sales of fruit and vegetables, whereby, as far as vegetables alone are concerned, the share reaches 5–8%. Sales on foreign markets take place mainly through small, private companies, which usually do not possess a sufficient technical and logistical infrastructure to conduct effective transactions on foreign markets.

In many EU-15 countries the export of fresh fruit and vegetables is provided by foreign companies operating on the basis of producer organisations. For instance, in the Netherlands almost the total foreign sale of fruit and vegetables is conducted by three cooperative export companies obtaining products from about 40 producer organisations. In Italy, one of the biggest apple exporters just like Poland, a few, the biggest producer organisations functioning in the scope of the Federation of Cooperatives, dominate in this respect. In France, the National Association of Apples and Pears deals with the selling of apples and pears (Paszko 2012).

Increase of the number of organisations, the creation of associations and export companies acting on their behalf, and dealing with sales promotion and logistics, is a priority in the scope of activities aiming at the increase of the export of fruit and vegetables intended for direct consumption and improvement of their non-price competitiveness towards other exporter countries. Consequently, it is necessary/vital to strive to use EU funding dedicated to the functioning of producer organisations and their associations in a maximum way (subsidies to the operational fund). However, it needs to be added that the preparation of an operational programme, being a basis of obtaining support from EU funds, requires a very precise definition of objectives, including among others: production planning, improvement of the product quality, the marketing and withdrawal of products from the market to avoid an overproduction crisis, but also protection of the environment. Fulfilment of these criteria requires a wide knowledge and preparation of the organisation members and accounting departments in this respect. This knowledge is broader in Western European countries than in Poland.

Other regulations in the scope of the mutual organisation of the horticultural market

Regulations of the EU include compliance with the requirements of the trade quality of fruit and vegetables intended for direct consumption. Detailed requirements of the trade quality include: apples, pears, lettuce, broad-leaf endives, strawberries, tomatoes, citrus fruit, kiwifruit, peaches, nectarines, table grapes and peppers (Commission Implementing Regulation (EU) 543/2014). The requirements include minimum standards, the degree of acceptable defects and damages in a particular class, and provisions regarding the sorting, packaging and marking of products. The requirements concern both internal trade in particular countries and in international trade. According to the research of the Food and Agricultural

Product Quality Inspection in Poland, almost 100% of fruit and vegetables, being subject to the requirements of the fruit and vegetables trade quality, meet the EU trade quality requirements, and therefore, it is not possible to seek sources of improvements of the competitiveness of horticultural products manufactured in our country.

Until 2008, the mutual organisation of the horticultural sector included the possibility to obtain export subsidies with reference to some fruit and vegetables and their preserves. Funds acquired in the process of phasing-out export subsidies were directed to support the creation and functioning of the groups and organisations of producers.

Other ways of regulation regarding the organisation of the horticultural market include: the application of the so called entry price regarding the import of some fruit (among others: citrus fruit, apples, pears, peaches and apricots) and preferential customs with reference to products with a fixed transit contingent (currently it concerns the transport of garlic). The regulations do not affect the export volume, but they allow for the maintenance of the price competitiveness of products manufactured in the EU.

Common organisation of the fruit and vegetable market in the EU regards particularly support of the supply concentration of fruit and vegetables and increase of the economic and technological power of the agricultural farms of the organisation's members. The success of these actions in particular countries, especially in the new member countries, greatly determines the competitiveness of fresh horticultural products on the world market, including the EU market. Common organisation of the horticultural market does not include, however, regulations and support regarding the manufacturers of fruit and vegetable preserves.

Support of the horticultural sector in the scope of horizontal regulations

Improvement of the quality of fruits, vegetables and their preserves

Accession to the EU and domestic quality systems is supported from the funds of the Rural Development Programme, among others by cost refunds for the controls preceding the issuing of certificates. To the greatest extent, the support has been utilised to adjust the products to domestic systems: Integrated Plant Production (82% in 2018). Adjustment of products included in the system has also been supported, with Protected Designation of Origin, Protected Geographical Indication and Traditional Speciality Guaranteed. It needs to be added that in 2018 the highest percentage of the granting of payments (about 72%) referred to fruit and vegetables.

The Rural Development Programme funds support also the voluntary commitments of agriculturists who decide to maintain or use ecological agriculture methods and practices laid down by the relevant provisions. In order to obtain these payments, it is necessary not to use agricultural chemicals in the food production. Both as far as the payments in the period of conversion to ecological agriculture as well as the ones realised in order to maintain ecological agriculture are concerned, the share of incentives to horticultural crops was relatively high (24%).

Despite the EU support and increase of producers who benefit from subsidies, the share of ecological fruit and vegetables (as well as their preserves) in the total market turnover of those products in Poland amounts to 0.1–0.2%, as compared to Denmark and Germany with 5–7% (Nosecka 2017). An increase of the ecological products share, but also adjustment to EU requirements, may indicate a need for an improvement of the competitiveness of horticultural products and their preserves on the markets of developed countries with a growing demand for 'unique' products, including ecological ones.

Simultaneously, it needs to be underlined that in the tested fruit and vegetables, the share of products with an exceeded level of residuals of crop protection chemicals according to EU regulations is very low in Poland (about 2%). It is a result of the continuously decreasing scale of industrialisation of Polish agriculture in comparison with many higher economically developed countries. This constitutes a significant competitive advantage of Polish fruit and vegetables, and it should be emphasised in marketing and promotional actions. It is worth mentioning that Poland meets obligatory EU norms regarding some of the fruit and vegetable preserves (juices, nectars, drinks and jams). These norms specify the fibre composition and acceptable food additives as far as the health of consumers is concerned. Also, the adjustment of domestic fruit and vegetable plants to EU quality management systems in force is increasing, i.e. Good Hygiene Practice, Good Manufacturing Practice and Hazard Analysis and Critical Control Points (HACCP). The share of fruit and vegetable processing plants applying voluntary preserves quality systems i.e. mainly quality management systems according to ISO norms – primarily ISO 9001 and ISO 22000 – is still lower by about 10% of their total number (Mroczek 2015). The share of horticultural farms possessing the Global GAP certificate developed by the Working Group of Traders for Fresh Horticultural Products stands at 1%.

Subsidies of the EU are not dedicated to the producers and processors launching most of the quality requirements, both obligatory as well as voluntary. Nevertheless, with reference to fruit and vegetables, assistance in the process of producers' functioning in strong producer organisations does foster adjustment processes, as well as a series of subsidies from structural funds (in the scope of the Rural Development Programme), including among others: knowledge transfer, advisory services and the modernisation of agricultural holdings. In the case of undertakings of the fruit and vegetable industry, support in the scope of processing and marketing of agricultural products is of fundamental importance. The impossibility to classify the activity of producers and their surroundings as well as the economic situation of market members is of great importance too.

Support of information and promotion activities

Regarding the significant saturation of outlet markets with agro-food products, including horticultural ones, effective promotion actions as well as demand concentration constitute the basic factor affecting the export level and competitiveness of direct consumption products.

Appreciating the significance of promotion, the EU has mobilised funds supporting actions in this respect in the member countries. The promotion of products, not the operator of the market, is supported.

Organisations gathering producers, processors and distributors representative for a particular branch may apply for a subsidy for one, two or three-year information and promotion programmes. The subsidies are realised from the funds of the Rural Development Programme in the scope of support regarding information and promotion actions on given agricultural products' markets. The support may regard both fresh and processed products located on the internal markets of particular countries as well as on foreign markets, separately to non-EU markets. The support includes among others: public relations, taking part in trade fairs and missions, and the production and broadcast of TV and radio commercials.

In the period of May 2004 till the end of 2019, 14 information and promotion campaigns regarding fruit, vegetables and juices were and still are being conducted. The aim of almost all the campaigns is to make Polish products recognisable on the foreign markets. With reference to horticultural products and their preserves, most of the promotion projects on foreign markets concern apples and juices[4]. Over 70% of the budget of all the campaigns concerning fruit, vegetables and juices was devoted to the promotion campaign of apples and juices realised till the end of 2019.

Increase of exports, the maintenance of a presence on the foreign markets and the increase of the significance of Polish products on 'new' markets are also included in the objectives of most of the projects in the scope of the Fruit and Vegetable Promotion Fund. It is one out of nine funds promoting agro-food products created from branch funding (apart from fruit and vegetables, they include: milk, pork meat, beef, horse-meat, sheep meat, cereal grains, cereal preserves, poultry meat and fish). The material scope of projects regarding fruit and vegetables and preserves is very wide, and apart from apples, it concerns many other fruits and vegetables (among others: tomatoes, mushrooms, peppers, blueberries, potatoes). Many projects (e.g. Fruit and Vegetables – for good luck, Promotion on the Czech market, Polish marketplace, Independent Poland tastes, Polish flavours, Fruit and Vegetables, Europe full of flavours – tradition and quality) are not dedicated to particular fruits and vegetables. Each year, a dozen information and promotion projects are conducted in the scope of the Fruit and Vegetable Promotion Fund.

[4] European two-coloured apples (campaign realised in China and the United Arab Emirates). Apples every day (Russia and Ukraine), Time for apples from Europe (Algeria, Egypt), Just Health – apples with PGI designation (Germany, Sweden, Denmark), Power of vitamin taste and colours – discover the quality of apples from Europe (the United Arab Emirates). With reference to juices: Carrot (promotion of carrot juices and nectars in Bulgaria and Romania), Juices, Mousses and vitamins in a comfortable form (Lithuania, the Czech Republic, Slovakia, Romania and Poland).

It proves the great commitment of producers when it comes to promotion actions, but also their conscientiousness concerning the role and meaning of promotion in the process of building a competitive position on outlet markets[5]. It is hard to assess the influence of promotion actions on the export level of horticultural products and preserves from Poland. This influence is certainly clear as far as the export of apples is concerned. Promotion campaigns have significantly contributed to the increase of sales of the fruit to Northern Africa countries, mainly to Egypt, but also the Middle East generally (especially the United Arab Emirates) and to some Asian countries, including mainly India. It needs to be added that the influence of the campaigns is not substantial in the case of processed fruit and vegetables ready for direct consumption. On the one hand, it results from the lack of representative, strong branch organisations gathering processors, and on the other hand, the very strong link between consumers in particular countries and domestic products with well-known and recognised brands.

CONCLUSIONS

European Union solutions regarding the development of export and strengthening of the horticultural products' position on the world market are directed mainly to plants producing fruits and vegetables. Position strengthening on outlet markets and/or an increase of the importance on the 'new' markets is not possible without a growth of the demand range and the delivery of large, uniform batches of products. Groups of holdings, mainly organisations of producers, constitute a chance for the increase of demand concentration. Furthermore, it is crucial to increase the level of producers' 'independence' in the scope of the production and export of horticultural products, including, inevitable in the global world, promotion actions and the adjustment of products to obligatory and voluntary quality requirements. The necessity of conducting promotion and marketing actions has been reflected in support from EU funds. Processing firms locating their products on foreign and internal market also have the opportunity to benefit from the EU support.

Most of the actions included in the operational programmes of product organisation (functional effectiveness, introduction of innovative solutions, modernisation) contribute to the improvement of the competitiveness of fresh horticultural products on foreign markets. Small and medium processing firms from the fruit and vegetable sector may strengthen their competitive position on foreign and domestic markets through support granted on a horizontal basis from structural funds.

In Poland there is still far to go to obtain the fruit and vegetable primary market level of organisation present in the EU. Clearly, it is a result of the shorter term of the functioning in the Community structure, but also still the low scale of

[5] Promotion activities are also supported horizontally from the Smart Growth Operational Programme.

the cooperative attitude among fruit and vegetable producers and the necessity to meet a number of administrative requirements connected with the preparation of operation programmes and reports regarding the use of the operational funds. Due to a low degree of organisation, the use of promotion funds by small and medium size enterprises of the fruit and vegetable industry is low. The funds are used mainly by large companies manufacturing juices, nectars and drinks.

Relatively low use of EU support regarding direct consumption products determines the domination of horticultural semi-products in the Polish export (mainly concentrated juices, frozen fruit and vegetables sold in bulk packaging). The share of semi-products or products intended for further processing in the recipient country exceeds 50% of the export value of horticultural products. It implies that the main competitive advantage of our country is still based on the price competitiveness resulting from relatively low prices of production factors. The slow loss of this advantage without use of EU funds may mean a decrease of significance concerning the total export of domestic horticultural products on the world market. It needs to be underlined that increased use of EU funds will allow the exploitation of the Polish horticultural sector's assets i.e. its specific taste and most of all health benefits.

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Streszczenie: *Wpływ regulacji unijnych na międzynarodową konkurencyjność sektora ogrodniczego.* Celem artykułu było przedstawienie regulacji unijnych mających wpływ na poprawę pozycji polskich produktów ogrodniczych i ich przetworów na rynku międzynarodowym. Celem było też przedstawienie skali wykorzystania przez uczestników sektora ogrodniczego w Polsce możliwości określonych w rozwiązaniach UE dotyczących sektora ogrodniczego, a także ustalonych na zasadzie horyzontalnej. Wspieranie tworzenia i funkcjonowania organizacji producentów owoców i warzyw, akcji promocyjnych i informacyjnych. Przedstawiono też poziom dostosowania owoców i warzyw do unijnych wymogów jakościowych. W Polsce stopień organizacji rynku owoców i warzyw jest wciąż niski, ale skala wykorzystania funduszy przeznaczonych na akcje promocyjne jest duża. Dostosowanie produktów ogrodniczych do obowiązujących w UE wymogów jakościowych jest także znaczące.

Słowa kluczowe: sektor ogrodniczy, regulacje unijne, międzynarodowa konkurencyjność

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