

3RD POLICY BRIEF

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INTRODUCTION: DEFINING COMPETITIVE AGRI-FOOD-CHAINS

Generalisations about the competitiveness of the EU's agri-food sector are increasingly difficult to make. Following the 2004 and 2007 waves of EU enlargement, the diversity of the agri-food sector increased significantly. Hence, the assessment of EU competitiveness, and the impact of policy measures, entails heterogeneous considerations across member states. Broadly however, competitiveness can be assessed at the country, firm and supply chain levels in terms of trade performance, productivity, market efficiency and the degree of innovation.

RESULTS

The COMPETE project seeks to build a coherent picture of the competitiveness of the EU agri-food sector, drawing on comparisons across EU member states. The aim is to gain a deeper understanding of competitiveness and its determinants, for better targeted and evidence-based policies. The theoretical and empirical findings of the project's work packages are summarised below and divided into four main sections: trade, enterprise performance, market efficiency and supply chain relationships, policy measures and governance.





■ Trade

The EU remains one of the key players in global agri-food trade, with its exports generally biased toward processed goods and imports geared to semi-processed foods, tropical bulk and horticultural commodities. The agri-food export competitiveness of the EU-27 is driven by a few successful and longstanding member states which reveal significant export advantages for several product groups on the global markets. The intensification of competition from emerging economies in global agri-food trade has led to the EU losing market share. This is not unique to the EU – its traditional competitors, namely the USA, Canada, Argentina, New Zealand and Australia, are also being gradually caught up and replaced by the new emerging countries, i.e. China, and Brazil. These emerging economies pose a strong threat to the EU's export trade position, and thus to the competitiveness of traditional, EU dominated markets. Overall, the exports of EU competitors are often highly specialised and concentrate on a small number of products, with the exception of China and New Zealand. Moreover the trade structures of the latter two countries moved towards higher-value added goods, i.e. towards semi-processed and processed goods.

Despite greater competition from emerging economies, the EU's overall performance in international markets for processed food, and especially high value added food remains robust. The top five EU exporters of processed food, in terms of value, are Germany, France, the Netherlands, Italy and Belgium, and since the year 2000 their performance has remained strong.



■ Enterprise performance

Productivity differences in agricultural production among and within member states remain substantial, with a low rate of convergence or catch-up by the new member states. The EU-15 (i.e. member states of the EU since the 1990s or previously), are further pulling away from the new member states that are lagging behind in terms of productivity. The largest disparities in efficiency and productivity are found within the new member states. Several structural problems hinder competitiveness in these countries, such as low levels of physical capital, weak local purchasing power, a fragmented farm structure and supply base, and imperfections in credit and other input markets. In this respect, their ability to capture added value is limited.

Significant differences in technologies across the member states also characterise the food processing industry. The pronounced heterogeneity in food processing concerns both intra- and inter-sectoral differences, for all four analysed industries, namely slaughtering, fruits and vegetables, dairy and milling. Consistently the EU-15 and, particularly Belgium, Germany, France, Italy and the Netherlands, display the highest levels of total factor productivity calculated for all sectors. Differences in total factor productivity are caused by differences in input quality (labour, land) as well as imperfections on input as well as output markets.

The adoption and spread of innovation constitutes a critical factor that drives growth in total factor productivity. There are several different ways in which innovation in small and medium sized enterprises, which represent an extremely important segment of the EU food industry, can be fostered. Generally, the combination of in-house and outsourcing innovation appear to be the most common strategies in the European agri-food sector, and are found to be substitutes. The results indicate that large and internationalised firms are more likely to pursue in-house strategies, whereas small and medium sized enterprises are more inclined to outsource innovation, which could be due to their difficulties in stimulating innovation based solely on internal resources.



■ Market efficiencies and supply chain relationships

The COMPETE project analysed the efficiency of markets, i.e. their functioning and effectiveness by considering the extent to which market failures exist and market power is exploited.

An analysis of prices reveals a mixed picture regarding the degree to which markets are efficient across sectors and member states. Internal markets are less efficient than expected, with the presence of inefficiencies in price discovery and price coordination in the EU. Domestic agricultural markets are not perfectly integrated. The highest degree of market integration across member states is recorded for pork meat, followed by raw milk, eggs, beef, poultry and sheep meat. In contrast to the low level of integration in prices across domestic agricultural markets in the EU, there is little evidence of differential mark-ups between markets for EU wheat exports.

The effective organisation of transactions along agri-food value chains, through vertical coordination, is critical for an efficient allocation of resources and economic performance. However, power asymmetries and high levels of buyer opportunism hinder producers' productivity and competitiveness and should be minimised. Input as well as output food processing markets are characterized by some degree of market imperfections.

Food producers in the EU-15, are better able to meet public and private food safety standards than their counterparts in the new member states. Meeting these private standards, as well as other technical requirements, demands a high degree of asset specificity, and thus may act as a significant barrier to market access and/or exclusion of small-scale producers. This is particularly true for many small-scale producers in the new member states, which are unable to meet the volume and quality standards of multiple retailers and thus can be locked low-value added wholesale and informal markets. Here supplier support measures, such as the

provision of physical inputs, credit, training, guaranteed prices and prompt payments, can stimulate investment by suppliers and so enhance the productivity and quality of primary production. Marketing co-operatives can help small-scale producers improve their bargaining position in agri-food supply chains and receive better prices.

■ Policy measures and governance

COMPETE considered the impact of governance, policy measures and quality policy on competitiveness. In terms of governance indicators, institutions, macroeconomic stability and business sophistication, Germany, Denmark and the Scandinavian countries are among the best performing countries in the world rankings, whereas the new member states and associated countries in the Western Balkans and Eastern Europe continue to lag behind.

Quality policy encompasses a range of initiatives such as organics and geographical indications of which the two most important EU certifications are Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI). Quality policy has the potential to contribute to economic growth and for upgrading the competitiveness of the EU agri-food sector – there are many PDO and PGI designations that add value to approved producers and contribute to wider economic development in rural areas. Such designations act as signals of quality and can be valuable assets in domestic and international markets alike. However, not all PDO and PGI designations have been successful in adding value to producers. Overall, the market development of geographical indications is quite slow in most member states with participation in quality schemes generally being low especially in the new member states. Reasons for the lack of success in the new member states include: weaker local purchasing power; limited consumer awareness of EU quality schemes and time-consuming and complex registration. For organics difficulties surrounding certification or control procedures and the high costs of conversion remain barriers to entry for small-scale producers.

ANALYSIS OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS TO EU AGRI-FOOD-CHAINS

The COMPETE project succeeded to derive a detailed analysis of the strengths, weaknesses, opportunities, and threats to EU agri-food sectors (SWOT-Analysis). Deducing how the various determinants might affect future competitive position of the EU agri-food sectors with special reference to product quality. A SWOT-Analysis was made for the four sectors: pork, fruits and vegetables, milk and dairy and cereals. As brief resume it follows:

PORK



Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ The EU is the world's second biggest producer of pork after China, and also the biggest exporter of pork and pork products. ▪ Developed physical infrastructure in EU-15 as: water supply, sanitation, energy, transportation and good infrastructure in animal shelters. ▪ Despite declining of per-capita consumption, pork remain the favorite meat in the EU. ▪ Technological change has made a significant positive contribution to the production possibilities in the majority of EU countries in the last decade ▪ Pork specialization is highly pronounced mainly in Germany, Netherlands, and Denmark. ▪ The increase in demand for safer food has resulted in the development and introduction of new food safety standards and regulations to reach a higher level of food safety. ▪ High technical efficiency in production and processing in EU-15 	<ul style="list-style-type: none"> ▪ EU is highly dependent on soybeans and maize imported from third countries and any interruption of the supply of these products due to presence of unauthorised genetically modified organisms (GMO) has a very costly impact on the European feed industry. ▪ EU imports about half the oilseed meals used annually in animal feed. This makes the European livestock sector vulnerable to global price volatility. ▪ Small-scale pig producers are mostly found in the new member states. ▪ Domestic production costs in EU are high compared to Brazil and US. ▪ Additional production costs in EU due to the regulation of environmental protection, food safety, and animal welfare. ▪ Speed of adoption product and possessing innovations in new member states is low. ▪ Lack of credit loans (new member states)
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Strong demand on the world market driven by favourable economic conditions. With the current competitiveness of the pig sector, the EU is expected to further expanded export sales to alternative markets. ▪ Global market for high value added salami and processed pork products linked to geographical indications. ▪ Increasing demand for organic products. ▪ Using of vertical product differentiation 	<ul style="list-style-type: none"> ▪ Less strict safety production and processing regulations by major competitors compared to the EU and respectively lower costs ▪ Catching up by emerging countries in terms of technology, production value etc. ▪ Loss of market shares due to higher relative production costs ▪ High volatility in feed prices resulting in high prices for both cereals and compound feeding stuffs. This has created a difficult situation which has forced a significant number of pig farmers to cease production. ▪ Changes in the consumer or sanitary/phyto-sanitary policy of third-countries affect EU agri-food-trade. ▪ Diseases remain a challenge for the industrial growth of pigs with the microclimate conditions in shelters. Zero tolerance of animal disease outbreaks is one of several factors affecting market access. ▪ Changes in food preferences due to ageing of Europe's population, "healthy food", vegan or organic diets as well as sustainable products or "more animal welfare". ▪ Increase of energy prices



FRUITS & VEGETABLES

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ The infrastructure is developed in EU-15. ▪ Successful farmers from EU-15 improved their efficiency by using modern technology and capital intensively ▪ High productivity at farm level in Belgium, Germany, France, Italy and Netherlands ▪ High technical efficiency of the top 10% of fruits and vegetables processors is a common feature in all EU member countries. ▪ Quality control measurements assure food safety in the supply chain by introducing traceability. ▪ Supply chain coordination has shifted from episodic trade relations to strictly organized vertical coalitions in EU-15 ▪ Comparative export advantage has slightly increased following EU enlargement. ▪ EU member states achieved a trade surplus in fruit and vegetable products with higher export than import prices. ▪ EU-15 (Netherlands, Spain and Italy) are self-sufficient and contribute to exports. ▪ Intra-EU competition is strong. ▪ Innovation is very strong in some EU-15 like the Netherlands, which developed so-called Greenports (concentrations of knowledge-intensive horticulture and agribusinesses with a strong position on the global market; positioned close to the main infrastructure like roads, ports, neighbouring countries). 	<ul style="list-style-type: none"> ▪ Large number of small fruits and vegetables farms with fragmented farm structure and production in new member states. ▪ Vegetable producers are highly dependent on weather conditions especially in new member states. ▪ The organization of producers in new member states is weak. ▪ Contractual relationships are not sufficiently consolidated and the level of trust is quite low in new member states. ▪ Farmers' reluctance to cooperate in marketing is high especially in the new member states with negative consequences for their negotiation power. ▪ Insufficient knowledge transfer and innovation at farm level especially in new member states ▪ Inadequate market information is a barrier for exporters, mainly in the new member states. ▪ Weak access to capital markets in new member states. ▪ The supply of organic fruits and vegetables is still low. ▪ The EU quality schemes are not sufficiently used especially in the new member states due to time-consuming and complex registration, control procedures, high costs of conversion, limited awareness of the benefits, and insufficient information about schemes.
Opportunities	Threats
<ul style="list-style-type: none"> ▪ New markets for export due to the development of the demand in emerging countries ▪ Increase in EU demand due to changes in consumer preferences (changes in diet, animal health, GMO free) and income (product quality) ▪ The short food supply chain is an alternative (more prevalent in countries like Italy and Greece and parts of new member states). ▪ Increase in demand for organic products. ▪ There is a tendency towards shifting to value added products in the fruits and vegetables sector. ▪ Increase in sales via e-platforms for on-line selling. ▪ Using new production and storage technologies and new varieties can help farmers to extend the harvest season, with a longer shelf life. ▪ Better access to new technology, equipment, seeds, etc. for farmers in new member states. 	<ul style="list-style-type: none"> ▪ Increasing export quantities from competing countries for high quality products. ▪ Changes in trade policy of third countries (the Russian embargo, import restrictions in some countries/products (ex. China for peaches). ▪ Exchange rate volatility affects the trade competitiveness in the short run. ▪ The increase of energy price can lead to an increase in the price of processed products. ▪ Globally elongated and fragmented supply chains increase the risk of food hazards ▪ Difficulty to ensure traceability along the fruits and vegetables supply chain: accountability is obscured in the case of fruits and vegetable safety problems especially in the new member states.



CEREALS

Strengths	Weaknesses
<ul style="list-style-type: none"> ■ Climatic and geographic conditions are favourable. ■ Infrastructure is well developed. ■ EU farms are specialised in cereals. ■ Intra-EU competition is strong. ■ Export markets are integrated for wheat. ■ EU exports are competitive, based on lower transport costs and EUR/USD exchange rate. ■ Technological changes in agriculture have a positive impact on production. ■ The management ability of producers and processors has a positive impact on production and its impact is accelerating. ■ Enlargement had a positive impact on the development of the sector in new member states. ■ The use of information and communication technologies is advanced in comparison with other analyzed food chains. 	<ul style="list-style-type: none"> ■ Heterogeneity chain is pronounced within countries, with huge differences in productivity between the best and the worst producers at each stage of the supply chain. ■ Still a gap in cereal production and quality between EU-15 and new member states (farmers in the latter overall do not exploit sufficiently their production possibilities). ■ The lack of own farm storage and easy access to financial instruments for small and medium sized farms (especially in new member states). ■ Weak negotiation power in selling production for small and medium sized farms in new member states. ■ Differences in productivity in milling between EU-15 and new member states, as well as among regions within the countries (especially new member states). ■ The economic crisis negatively influenced technical efficiency.
Opportunities	Threats
<ul style="list-style-type: none"> ■ Increasing demand from developing and emerging countries. ■ Support of farmers and processors in new member states during 2014-2020 by special EU or national funds allocated through national rural development programs. ■ Potential of growth for exports from new member states stimulated by foreign direct investments, technologies and management practices from EU-15 ■ The present evolution of EURO/US Dollar exchange rate is favourable for good export prices. ■ Increasing maize production might exceed internal use, with possibilities for export. ■ Regulations for GMO production (new markets can be developed by member states which can enter in direct competition with USA). 	<ul style="list-style-type: none"> ■ The main competitors for EU on world markets are: USA, Canada, Argentina, New Zealand, Australia; the new competitors for EU could be emerging countries such as: Brazil, China, Russia. ■ Rise in oil prices political tensions and international conflicts (Russia, Syria). ■ Bankruptcy of processors in new member states due to low productivity and insufficient technical change ■ Low ability to innovate at all stages of the food chain. ■ Poor balance in negotiation power along the food chain. ■ GMO (sub)-products penetration on EU market.

MILK & DAIRY



Strengths	Weaknesses
<ul style="list-style-type: none"> High specialization of dairy farms. High level of total factor productivity in dairy farms in EU-15. Positive impact of scale efficiency on productivity gains in dairy farming. Lower price volatility (milk production compared to other sectors at EU level). Positive impact of technical change and adoption of innovation on production growth in both milk production and processing. High technical efficiency of the dairy processing sector in most of EU countries High horizontal market integration for dairy Strong export position of EU on international markets for dairy products EU possesses market leader status for global cheese market High and stable revealed comparative export advantage for dairy products in global markets Increasing organic dairy production Increasing product differentiation for cheese under quality schemes (PDO, PGI and TSG). 	<ul style="list-style-type: none"> Large differences in size, productivity, technology development within EU Low level of total factor productivity in milk production in some new member states as compared to EU-15 Low milk yields in some new member states. Low technical efficiency of dairy processors in the new member states. No catching up in terms of productivity in the new member states compared with EU-15 Low convergence of raw material prices within EU Capital market imperfections in new member states. Large gap in adoption of information and communication technologies along the dairy chain in most member states. Market imperfections on the dairy input and output markets identified which hinder competitiveness Low level of chain integration (in some new member states). Low demand for high quality products in new member states, due to low income.
Opportunities	Threats
<ul style="list-style-type: none"> Increased demand for milk due to new markets and expansion of skim milk powder exports. Higher efficiency of EU dairy supply due to cross-border processing and marketing. Growing international market for organic food, PDO, PGI and TSG products. Fostering the success of high quality products through promotion of consumers' education and awareness. Expanding markets for EU exports of butter, skim milk powder, whole milk powder and butter oil (China, other Asian and Northern African countries). Increasing demand for organic products in USA. Improved EU export performance due to depreciation of EURO against US Dollar. 	<ul style="list-style-type: none"> Milk oversupply in the EU on medium term and fall in milk prices due to quota abolishment. Low profitability of dairy farming will lead to widespread contraction in terms of number of dairy farms. The Russian embargo resulted in severe reduction of dairy exports and increased community expenditures due to introduction of aids to dairy processors. Loss of market share on the Russian dairy market to international competitors. Strong position of major competitors on organic dairy markets (New Zealand, Australia) High transport costs due to distance from growing export markets (e.g. East Asia). High tariff protection of major export markets for high quality products (USA and Canada). Increased uncertainty on international agri-food markets due to unexpected trends in oil prices. Significant changes (volatility) in the EURO/US Dollar exchange rate are affecting EU competitiveness, export capacity and forecasts.

POLICY RECOMMENDATIONS

Policy recommendations can be derived at the national and EU levels. In some countries significant overarching, regulatory reforms are required. These concern especially countries' institutional environments, as documented in the assessment of governance and business indicators. However, the competences and reach of the EU in this sphere are rather limited and it is the countries' responsibility to develop and implement corresponding reform programs. These national policies measures should follow the principle of subsidiary.



Patterns of international trade and indicators of competitiveness

At the EU level access to global markets, especially in developed and emerging market economies, should be improved. This includes coherent global trade policy and special bilateral trade agreements which are consistent with WTO requirements. Trade liberalization spurs improvements in firm level productivity.

In the fruits and vegetable sector, local and organic production should be better integrated into mainstream food supply chains. An improved level of organization in the new member states is necessary as well as increased support for investments and the establishment of functioning producer groups and producer organizations. Thus the gap between the level of organization in new and EU-15 member states will diminish and the supply chain become less fragmented.

In the meat sector realizing economies of scale is necessary to reduce fixed costs and bolster price competitiveness. In addition, initiatives to increase product value are desirable, so brand name development for specific products and their promotion in value chains should be supported.

In the dairy sector the position of the EU on global dairy markets can be strengthened through utilizing vertical product differentiation, and the development of niche

products with brand names. Marketing promotion for smaller dairy processors on regional and international markets for specific dairy products and organic products is required.

Private producer associations should play a greater role in production, extension and marketing. Cross-national cooperation between EU-28 member states in promotion of good practices in international competitiveness should be supported.

Trade and supply chains in major EU competitor countries

Investment in research and development (R&D) is essential for maintaining an edge in quality based competition. Beyond that policy makers should ease the access to capital for agri-food businesses and should invest in the improvement of market infrastructure that can help to remove bottlenecks and barriers in different parts of supply chains. Particular attention should be paid to export and import barriers – overcoming agricultural trade barriers requires market liberalization and harmonization of quality standards either on a bilateral or multilateral level.



Policy interventions and impact on supply chains

Due to globalization and internationalization of agri-food production, competition is moving from individual firms operating on spot food markets towards complex food chains and networks. Food chains are now fundamentally retailer-driven, giving retailers the potential power to extract more favourable terms than other food chain stakeholders. Policy makers should be aware of the restructuring process in the supply-chain, and avoid power asymmetries. Effective competition policy that does not permit actors at a particular stage of the supply chain to exploit their power is vital.

Even if farmers can add value to their products by using the high value added schemes, without sufficient bargaining power they cannot keep the value for themselves. Stimulating marketing co-operatives can help improve the fortunes of small-scale producers.

The success of EU quality policy especially its PDO and PGI schemes have to date largely been judged in terms of the number of designations. However, there is little to be gained in stimulating the registration of new designations that fail to add value to producers' output. Quality policy requires a shift toward a focus on how schemes can add value to the members of producer consortiums, so that registration is accompanied by an appropriate strategy for reaching target markets and implementation of marketing actions.

Technology, specialization, productivity

Imported intermediate inputs are crucial in determining the gains from trade in the food industry. Indeed, although, import competition at both output and inputs levels spur firm-level productivity growth, the productivity growth effect attributable to imported intermediate inputs is significantly stronger than the competitive pressure at the industry level. Moreover, the productivity growth effect of an increase in the level of trade integration tend to be asymmetric, namely larger and more productive firms gain more from the increase in trade integration due to trade liberalization. Hence, greater competition from abroad both at the input and output level is good for firm-level productivity, but this is especially true for large and more productive firms.

EU trade policy should encourage productivity growth in the food industry by exploiting the productivity growth effect of trade liberalization. Hence, further trade integration due, e.g., to new multilateral and bilateral trade agreements, has the potential to significantly increase firm-level total factor productivity. However, as not all import competition affects all firms to the same extent, public policies should be tailored to the real needs of heterogeneous firms, in such a way that the adjustment costs to globalization can be exploited more efficiently.



The EU should extend research on the overall impact of globalization on the EU food industry productivity to get to sound evidence-based policy recommendations. Thus, further efforts should deserve particular attention to understand whether the impact of intermediate imports in the EU food industry works through better complementarities of imported inputs, lower input prices, or access to higher quality of inputs.

Better access to capital for farmers and primary processors in the new member states where the production is still in farms and companies with low level of technologies.

Domestic and international market efficiencies

Price transmission asymmetries prevail in the analysed EU markets and depend on the market structure at the different stages of the agri-food chain. Therefore, policy actions that seek to correct asymmetric pricing should target both upstream and downstream sectors. This appears to be particularly important for countries where considerable structural changes are still expected.

The degree of horizontal market integration, producer price and inflation rate convergence point to the existence of inefficiencies in price discovery and price coordination within the EU. The price discovery mechanism could be relatively easily enhanced by better price monitoring and dissemination.

Further it is evident that national prices are highly biased aggregates not reflecting real (regional/cross-border) prices. This in turn hinders market analysis whilst their use produces spurious results. Thus policies aiming to develop and make widely available databases collecting regional prices, not necessarily constrained by national borders, could greatly enhance both market integration analysis and market integration.



Vertical integration, institutions and market performance

Policy makers should be aware that breaking up supply chain relationships can lead to substantial reductions in agricultural production. But also that increasing resilience of the supply chain may spell giving up other goals such as strengthening farmers' position vis-à-vis other sectors. Whereas farmers' subjective perception of their position in the chain is positively correlated with prices received from the buyers of their products and prices sold for inputs to suppliers.

EU policy should create a policy framework that allows firms to adopt competitive strategies in agri-food markets, with respect to price and quality competition. Improvements in quality are strongly correlated with total factor productivity growth. Policy makers should be aware of the fact that an increase in quality does not implicitly correspond to an equivalent increase in prices, but a strategy of lower competitive prices can be accompanied by higher qualities. However, this is not a guarantee that firms will succeed. Hence, the gap in prices between countries may not necessarily reflect differences in quality, but rather suggest different export strategies or different production and transportation costs.

Innovation, research and development, strategies

Policy makers interested in stimulating innovation in the EU agri-food sector should recognize that financial performance and strategies for innovation activities are interrelated.

Innovation activities are observed most in agri-food firms with a high proportion of fixed assets, while firms with already high levels of debt are less likely to innovate. These observations show the importance of firms' financial structure – access to financial resources and decreasing indebtedness spurs innovation. From a policy perspective, this supports arguments in favour of innovation investment funds.

RESEARCH PARAMETERS AND PROJECT IDENTITY

The EU-funded collaborative research project “International comparisons of product supply chains in the agri-food sectors: determinants of their competitiveness and performance on EU and international markets” (COMPETE) addresses this problem. COMPETE gains a more comprehensive view on the different elements which contribute to the competitiveness of the European agri-food supply chain in order to provide better targeted and evidence based policies on the EU as well as on the domestic level. The Consortium of COMPETE is coordinated by: LEIBNIZ-INSTITUT FÜR AGRARENTWICKLUNG IN TRANSFORMATIONÖKONOMIEN (IAMO), Germany, and brings together academics, trade bodies, NGOs, agricultural co-operative, industry representative advisory services. In addition, the project will be supported by the group of societal actors, incorporating farmer, food processing and consumer associations, providing in-depth knowledge on the agri-food sector and speeding up the achievement of the project goals. The COMPETE project partnership consist of the following organizations:

Institute of Agricultural Economics, IAE/Romania

Wageningen University, WU/The Netherlands

Univerza na Primorskem Univerza del Litorale, UP/Slovenia

Ceska zemedelska univerzita v Praze, CULS/Czech Republic

Università degli Studi di Milano-DEMM, UMIL/Italy

University of Newcastle upon Tyne, UNEW/UK

Ekonomiski Fakultet, Univerzitet u Beogradu, BEL/Serbia

Magyar Tudományos Akadémia Kozgazdaság - és Regionális Tudományi Kutatóközpont, CERS-HAS/Hungary

Uniwersytet Warszawski, UNIWARSAW/Poland

Vod Jetrichovec, DRUZSTVO, VODJ/Czech Republic

Potravinarska Komora Ceske Republiky, FFDI/Czech Republic

Balkan Security Network, BSN/Serbia

Asociatia Romana de Economie Rurala si Agroalimentara Virgil Madgearu, ARERA/Romania

Bundesvereinigung der Deutschen Ernährungsindustrie e.V., BVE/Germany

Federazione Italiana dell'Industria Alimentare, FED/Italy



For further information about the project, please visit the official website:

www.compete-project.eu

or refer to the projects' most recent **newsletter**.

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