COMPETITIVE POSITION OF THE FOOD INDUSTRY OF THE EUROPEAN UNION ON THE GLOBAL MARKET

Małgorzata Juchniewicz, Katarzyna Łukiewska

University of Warmia and Mazury in Olsztyn

Abstract. The conducted research is consistent with commercial trend of the research on competitiveness. The main goal was to assess the competitive position of the food industry of the European Union (EU) on the global market in the period 2000–2013. Used indicators are based on the results achieved in foreign trade: global market share, trade coverage ratio and revealed comparative advantage ratio. The food industry was defined on the basis of the aggregation of the departments 01–09, 11, 4 SITC Rev. 3. According to the research, the EU and the USA were the world's largest exporters of the food industry products. Their importance in the world export decreases slightly in favour of such countries, as China and Brazil. A surplus in food trade achieved by the EU was small, especially as compared to Argentina. The conducted analysis demonstrates that the EU as a whole did not have comparative advantages in trade of food products over the countries not belonging to the Community.

Key words: competitive position, food industry, international trade, the European Union

INTRODUCTION

The food industry is one of the most important and most rapidly developing sectors in the EU. In 2013 it comprised 286,000 companies, which was 13% of all production companies. In respect of the value of turnover it is the largest sector of industrial production, reaching annual turnover of EUR 1,048 billion. The food industry is also one of the main employers in the EU. Employment in this sector amounted in the discussed year to 4.2 million people which constituted 15.5% of all the employees in the production sector [Data & Trends... 2014]. Food is a strategic product, therefore the EU aims at maintaining and improving the competitiveness of its own food production. The growth in competitiveness on the international markets is particularly important in conditions of growing liberalisation of trade and globalisation and integration of the economies. Although the

Corresponding author: Katarzyna Łukiewska, University of Warmia and Mazury in Olsztyn, Department of Economics of Business, Oczapowskiego 4, 10-957 Olsztyn, Poland, e-mail: katarzyna.lukiewska@uwm.edu.pl

term of competitiveness is now commonly used both in the theory and in practice of economics, competitiveness is still not a clearly specified term [Siudek, Zawojska 2014]. It stems, e.g. from the fact that it resulted from at least three economic theories: theory of economic growth, international exchange and microeconomics [Wziątek-Kubiak 2003]. Currently the most popular and most developed direction of the competitiveness research is a commercial trend of research, roots of which date back to the classic theories of international trade – Smith theory of absolute advantage, Ricardo theory of comparative advantage, neoclassical theories (Heckscher–Ohlin–Samuelson theory of abundance of the resources), as well as the contemporary theories such as Vernon product life cycle theory, Linder theory of overlapping demands, Krugman theory of benefits of the scale [Pawlak 2013]. Within this trend, the competitiveness is treated as an ability to "achieve and maintain the market share, on the domestic and/or foreign market" [Martin et al. 1991, Pitts and Lagnevik 1997, Fisher and Schornberg 2007]. Such recognition indicates the international resulting competitiveness, referred to as a competitive position. It allows to refer the importance of a given trade, sector or country to the world's economy. Bearing in mind the importance of the food industry in the European economy the research was conducted in order to assess the competitive position of this industry on the global market.

MATERIAL AND METHODS

The study adopted definition of competitiveness presented by the aforementioned authors, centred on the competitive position reached on the foreign markets. From among the measures used to evaluate the level of so understood competitiveness, we distinguish commercial indicators based on the results obtained in international trade. A set of carefully selected indicators was used to assess the competitive position of the EU on the global market, namely export market share (*EMC*), trade coverage (*TC*) and revealed comparative advantage (*RCA*). The global market share is one of the most widely applied competitiveness meters. It has been calculated according to the following formula [Olczyk 2008]:

$$EMS = E_{Fi}/E_{FW}$$

where: E_{Fi} – export of food products of the entity i;
   E_{FW} – world export of food products.

Trade coverage ratio is used for research of the relations of export and import of a given sector and is defined as follows [Verdoorn 1960]:

$$TC = E_{Fi}/I_{Fi}$$

where: I_{Fi} – import of food products of the entity i.

Ratio above 1 means that the country generates a surplus in trade and has relative advantage over partners. Ratio below 1 means a commercial deficit and lack of such advantage.

Revealed comparative advantage ratio determines the share of the food industry in the entity's total export with regard to share of that sector in total global export. It has been calculated in accordance with the formula [Balassa 1965]:

$$RCA = (E_{Fi}/E_i)/(E_{FW}/E_W)$$

where: E_i – total export of the entity i;

E_{FW} – world export of food products;

E_W – total world export.

Ratio above 1 indicates that entity has a comparative advantage in trade of food products. Ratio below 1 means, on the other hand, that entity does not demonstrate this advantage. Hinloopen and Marrwijk [2001] suggested division of the value of RCA ratio into four classes:

- Class a: $0 < RCA \leq 1$ no comparative advantage of the sector;
- Class b: $1 < RCA \leq 2$ poor comparative advantage of the sector;
- Class c: $2 < RCA \leq 4$ average comparative advantage of the sector;
- Class d: $RCA > 4$ strong comparative advantage of the sector.

The food industry was defined on the basis of the aggregation of the following sections of the Standard International Trade Classification (SITC) Rev. 3: 01 – meat and meat preparations; 02 – dairy products and birds' eggs; 03 – fish, crustaceans, molluscs and aquatic invertebrates, and their preparations; 04 – cereals and cereal preparations; 05 – vegetables and fruit; 06 – sugars, sugar preparations and honey; 07 – coffee, tea, cocoa, spices and their manufactures; 08 – feeding stuff for animals; 09 – miscellaneous edible products and preparations; 11 – beverages, 12 – animal and vegetable oils, fats and axes. The UN Comtrade base was the source of data (http://comtrade.un.org/).

RESULTS OF RESEARCH AND DISCUSSION

The importance of the results of foreign trade in the assessment of competitive advantage of the industry on the international markets is emphasised in works of many authors [Hinloopen and Marrewijk 2008, Haar 2010, Vasta 2010, Vanitha et al. 2014, Vassileva et al. 2014]. The starting point of these deliberations is share of a given country (groups of countries) in the global value of export and import. In the years 2000–2013 the largest exporters of food products in the world, were the USA and the EU (Fig. 1). The value of export of all the member states beyond the Community market increased in this period from USD 41.68 billion in 2000 to 131.35 billion in 2013, namely over three times. From among the factors determining the development of export of food products from the EU, Pawlak [2013] identifies: growth in prices of agricultural products on the global markets (caused by a greater dynamics of growth in the global demand than in the global supply), formation of mutual exchange rate of euro to United States dollars, reduction in internal price support and the rates of export refunding and customs tariffs in third countries, modulations and introduction of decoupled payment, departure from the requirement of mandatory set-aside of the arable lands and increase in access to the European Single Market for the countries less developed. However, it should be emphasised that in spite of systematic growth in export of food products, the EU global market share of this industry
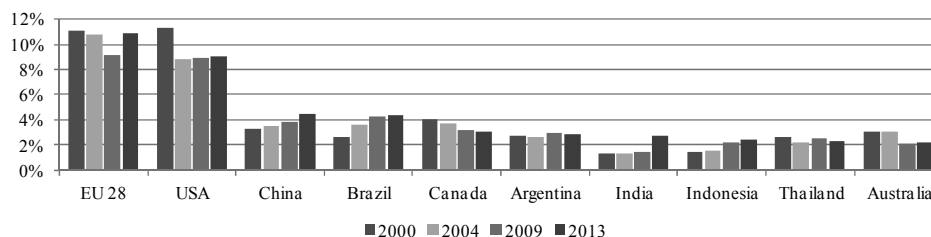
Fig. 1.   The global market share of the largest exporters of the food industry
Source: Own study based on UN Comtrade (accessed: 17.01.2015).

decreased in the years 2000–2013 from 11.13 to 10.83%. At the same time, the USA re-
corded almost a triple increase in export (from USD 42.39 billion to 114.84 billion) and,
at the same time, the reduction in global market share from the level of 11.32 to 9.08%.
As a result, in 2013 the Community's global market share exceeded the share of the USA
by 1.31%. Subsequent position in the ranking of the largest food exporters in the world
was occupied in 2013 by China and Brazil which role on the international food market
was substantially increasing since 2000. The value of China's export of the food industry
increased from USD 12.46 billion in 2000 to 57.06 billion in 2013, namely more than 4.5
times and the share in export increased from 3.32 to 4.51%. On the other hand, Brazil
recorded increase in export from USD 9.77 billion to 55.13 billion (more than 5.5 times)
and increase in the share in the world export from 2.61 to 4.36%. Despite these favourable
changes the share of the food industry within the structure of export was, however, ap-
proximately twice smaller than of the EU and the USA. The group of the world's largest
food exporters includes also subsequently: Canada, Argentina, India, Indonesia, Thailand
and Australia. Their global market share was, however, definitely smaller (from 3.04 to
2.20%). Among these countries the greatest growth in the importance on the international
arena was recorded in India where export of food products in the period 2000–2013 in-
creased from USD 5.02 billion to 34.92 billion, almost seven times. The share of India
in the global food export increased at the same time from 1.34 to 2.76%. Increase in this
ratio was also recorded in Indonesia (by 1.04%) and Argentina (by 0.12%). On the other
hand, in Canada, Thailand and Australia the reduction of global market share was ob-
served by 1.02, 0.32 and 0.92%, respectively. The presented changes indicate relatively
geographically sustainable structure of the world's export of the food industry. It results
from the following premises. Countries characterised by a small market share of the food
industry achieved a high growth rate but still remains at the position of "the small export-
ers". Insignificant reduction of growth rate in export of the large exporters does not af-
fect their dominant competitive position. Similar conclusions resulted from the research
conducted before [Wijnands et al. 2008].

    Export of the EU countries was directed to the different geographic markets. The
largest recipients of the EU food products include: USA, Russia, Switzerland, Norway
and Brazil, which together absorbed 40% of the total EU export directed from to the third
state markets (Table 1). Beverages were dominant within the material structure of the
export being exported primarily to the USA, Russia, Switzerland, Singapore and Canada.
The second position included cereals and cereal products that have been exported prima-

Table 1.   Material structure of the export of food industry products outside the EU, as well as main directions of the export in 2013.

Industry/Sector	Sector share in industry (%)	The main directions of export
In total	100.00	USA, Russia, Switzerland, Norway, Brazil
Meat and meat preparations	8.47	Russia, Japan, China, Switzerland, USA
Dairy products and birds' eggs	9.85	Russia, USA, China, Switzerland, Saudi Arabia
Fish, crustaceans, molluscs and aquatic invertebrates, and preparations thereof	3.89	USA, Switzerland, China, Japan, Russia
Cereals and cereal preparations	14.06	Saudi Arabia, Algeria, USA, Switzerland, Iran
Vegetables and fruit	11.06	Russia, Switzerland, USA, Norway, Japan
Sugars, sugar preparations and honey	2.03	USA, Switzerland, Norway, Israel, Russia
Coffee, tea, cocoa, spices, and manufactures thereof	6.66	USA, Russia, Switzerland, Australia, Canada
Feeding stuff for animals (not including unmilled cereals)	4.28	Russia, Norway, Suriname, Trinidad and Tobago, Tunisia
Miscellaneous edible products and preparations	10.77	Russia, China, USA, Saudi Arabia, Switzerland
Beverages	24.13	USA, Russia, Switzerland, Singapore, Canada
Animal and vegetable oils, fats and waxes	4.80	USA, China, Russia, Norway, Brazil

Source: Own study based on UN Comtrade (accessed: 17.01.2015).

rily to Saudi Arabia, Algeria, the USA, Switzerland and Iran. Another important export item comprised vegetables and fruit which were transported mostly to Russia, Switzerland, the USA, Norway and Japan. The lowest importance in the EU export to third party countries was attributed to sugars, sugar products and honey, fish, crustaceans, molluscs and water invertebrates and their products, food for animals and animal and vegetable oils, fats and waxes.

Import is as important basic category as export when assessing the competitive position of the sector. A surplus of export over import proves export specialisation and relative advantage over the competitors. The value of food products imported to the EU in 2013 amounted to USD 132.57 billion, almost three times more than in 2000 (USD 48.26 billion). The major import partners include: Brazil, the USA, Argentina, Norway and Indonesia (Table 2). The imported goods were dominated by vegetables and fruit which constituted nearly 25% of total expenses under import. They came mostly from Turkey, the USA, Brazil, South Africa and China. Second, in terms of value, place in the structure of the EU import of the food products was occupied by fish, crustaceans, molluscs, water invertebrates and their products, which value of import corresponded to 19.27% of total EU import expenses in 2013. In the case of this product group the most important partners include: Norway, China, Ecuador, Iceland, Morocco. An important assortment position

Table 2. Material structure of the EU import of food industry products from outside the EU market, as well as main directions of import in 2013

Industry/Sector	Sector share in industry (%)	The main import destinations
In total	100.00	Brazil, USA, Argentina, Norway, Indonesia
Meat and meat preparations	5.14	Brazil, New Zealand, Thailand, Argentina, Uruguay
Dairy products and birds' eggs	0.72	Switzerland, New Zealand, USA, Norway, Australia
Fish, crustaceans, molluscs and aquatic invertebrates, and preparations thereof	19.27	Norway, China, Ecuador, Iceland, Morocco
Cereals and cereal preparations	5.64	Ukraine, Brazil, Canada, USA, India
Vegetables and fruit	24.03	Turkey, USA, Brazil, South Africa, China
Sugars, sugar preparations and honey	3.40	Brazil, Mauritius, Swaziland, China, Cuba
Coffee, tea, cocoa, spices, and manufactures thereof	14.20	Brazil, Switzerland, Ivory Coast, Vietnam, Ghana
Feeding stuff for animals (not including unmilled cereals)	10.48	Brazil, Argentina, USA, Russia, Ukraine
Miscellaneous edible products and preparations	2.70	USA, Switzerland, China, Thailand, Turkey
Beverages	4.93	USA, Chile, Switzerland, South Africa, Australia
Animal and vegetable oils, fats and waxes	9.48	Brazil, USA, Argentina, Norway, Indonesia

Source: Own study based on UN Comtrade (accessed: 17.01.2015).

in import from outside of the Community was also: coffee, tea, cocoa, spices and their products, which were imported mostly from Brazil and then Switzerland, Ivory Coast, Vietnam and Ghana. The lowest importance in the material structure of import was attributed dairy products and birds' eggs.

When analysing the relations of export to import, it was observed that the beginning years of the analysis was a period of a negative balance in the EU exchange of food products with third countries. Commercial deficit in 2000 amounted to USD 6.58 billion and trade coverage ratio was 0.86 (Fig. 2). It means that income from the export of food products covered the expenses for the import in 86%. In the next years, as a result of greater increase in import than in export, commercial deficit increased both in the absolute and relative perspective. In 2004, the TC ratio amounted to 0.80 and deficit amounted to USD 15.17 billion. In 2009, as a result of the worldwide economic crisis, commercial deficit increased to the level of USD 28.34 billion and the TC ratio decreased to 0.74. In subsequent years the improvement of commercial balance was observed. As a result, in 2013 the export value of the food industry exceeded the import value by 3% (TC = 1.03).

When analysing particular sectors of food industry, the highest relative surplus of the EU export in 2013 was observed in the case of dairy products and birds' eggs section (TC = = 14.09). A favourable ratio of export to import was also recorded in trade of beverages (TC = 5.06), cereals and cereal products (TC = 2.57), meat and meat products (TC = 1.70)
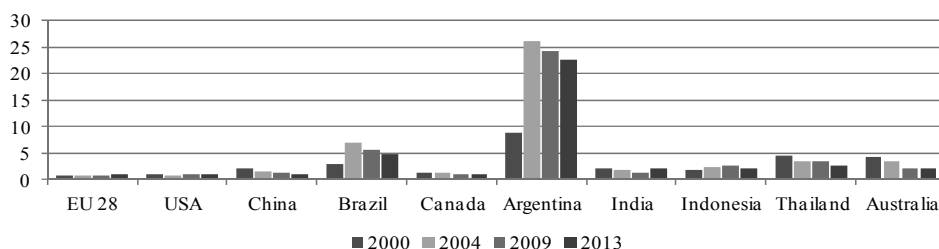
Fig. 2.   Trade coverage ratio in the food industry in EU 28 and selected countries
Source: Own study based on UN Comtrade (accessed: 17.01.2015).

and in the case of different food products and preparations section (4.12). On the other hand, trade coverage ratio below 1 was observed in 2013 in the following product groups: fish, crustaceans, molluscs and water invertebrates and their products (TC = 0.21), food for animals (TC = 0.42), vegetables and fruit (TC = 0.48), coffee, tea, cocoa, spices and their products (TC = 0.48), animal and vegetable oils, fats and waxes (TC = 0.52), sugars, sugar products and honey (TC = 0.62).

USA was a net importer of the food in all analysed years. In 2000, the TC ratio amounted to 0.89, which means that income from the export of food products covered the expenses on account of import in 89%. In subsequent years decrease of this ratio took place and then its increase. In 2013 the ratio was 0.99. Other analysed countries belonged to the net exporters of food. Definitely the greatest relative surplus of export over import was recorded in Argentina. In 2013, the TC ratio amounted to 22.63, which means that the export value exceeded the import value of food nearly 23 times. It suggests a specialisation of Argentina with regard to food processing and allows concluding that the manufacturers from this country have relative dominance over partners from other states. The largest relative advantage was achieved by Argentina in trade of cereals and cereal products and food for animals. A significant relative surplus of export over import of the food was also recorded in Brazil, in which export in 2013 exceeded import almost five times. It is also worth mentioning that from among the analysed entities Brazil achieved in 2013 the greatest surplus of export over import in the absolute perspective (EUR 43.66 billion). The TC ratio above 2 was observed in 2013 in India, Indonesia, Thailand and Australia and ratio above 1 in Canada and China. From among the net exporters of the food increase in TC ratio in the years 2000–2013 occurred in Argentina (159%), Brazil (71%) and Indonesia (16%). On the other hand, a decrease of this ratio occurred in China (by 52%), Australia (by 46%), Thailand (by 42%), Canada (by 13%) and in India (by 4%).

Research on foreign trade often analyses a comparative advantages, especially in the context of evaluation of trade structure [Ischukova, Smutka 2014]. The concept of revealed comparative advantage, on the basis of Ricardo comparative advantage theory [1817], assumes identification of the product groups particularly important to the export of a given country. The conducted research implies that the EU as a whole did not have comparative advantages in trade of food products over countries not belonging to the Community (Fig. 3). In the analysed years, RCA ratio was variable and ranged from 0.7 to 0.9. This means that the participation of the food industry in the whole EU export was
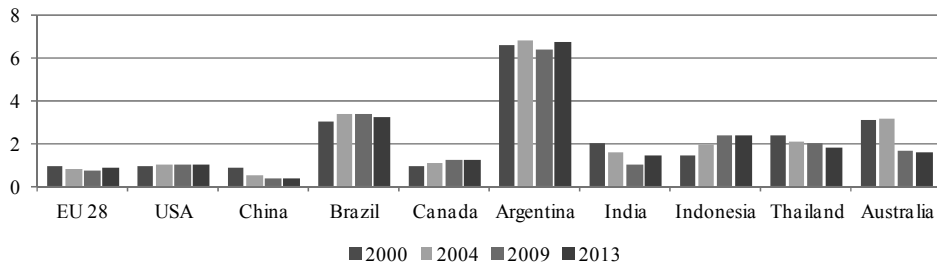
Fig. 3.   RCA ratio in the food industry in EU 28 and selected countries
Source: Own study based on UN Comtrade (accessed: 17.01.2015).

lower than the world's average. Different was the situation in the case of the particular groups of food products. The EU achieved in 2013 comparative advantages in the case of the following departments: beverages (RCA = 2.50), dairy products and birds' eggs (RCA = 1.11) and other food products (RCA = 1.47). The lowest RCA ratio was recorded on the other hand in trade of fish, crustaceans, molluscs and water invertebrates and their products (RCA = 0.32). From the analysed countries, also China did not achieve any comparative advantage in food trade. Level of RCA was systematically decreasing in this country. It means that importance of this industry in the whole export of the country was smaller and smaller. RCA ratio in the USA was close to 1, and in 2009 and 2013 slightly exceeded this value. It indicates achievement of poor comparative advantages. In other countries comparative advantages in trade of food products were present in all the years analysed. Strong comparative advantages over other countries were achieved only by Argentina (RCA from 6.39 up to 6.89). Brazil and Indonesia achieved average comparative advantages and Canada, India, Thailand and Australia – poor. From among the mentioned countries the greatest increase in comparative advantages was observed in Canada (by 23%), and the biggest decrease in Australia (by 97%), India (by 36%) and Thailand (by 33%).

Comparative advantages of the industry result from having relative abundance of some resources and their use in process of international work division. However, presented results suggest a limited usefulness of this measure in the assessment of the competitive position of the food industry on the international market. The entities with a high market share, namely the EU and USA, are characterised by low or poor comparative advantages. A similar tendency was recorded in China. It indicates smaller share of the food industry in the economic structure of these associations/countries, but does not mean lower competitive position on the international market. Comparative advantages, observed especially in the case of Argentina, Brazil and Australia, suggest that the articles of the food industry are important products in export market of these countries, but they do not translate into a significant share of these countries in the international trade.

CONCLUSIONS

Globalisation and internationalisation processes occurring in the world's economy result in need for evaluation of competitiveness analysis on international markets at all its levels. The conducted research indicates that in the years 2000–2013 the EU and the

USA were the largest exporters of the food industry products. In 2013 the EU became a leader of the ranking, surpassing the USA ranked on the second place. The EU exported mainly beverages, cereals and cereal products, as well as vegetables and fruit, while the most important partners include: the USA, Russia, Switzerland, Norway and Brazil. The group of the largest food exporters included also subsequently: China, Brazil, Canada, Argentina, India, Indonesia, Thailand and Australia. In spite of systematic growth in export value, the share of the EU (and USA) in the global export was decreasing for the benefit of smaller exporters, such as: China, Brazil, India and Indonesia. It did not cause, however, a significant change in the geographical structure of export of the food products. In the studied period the EU evolved from a net importer into the net exporter. Achieved relative trade surplus was, however, small, especially in comparison with such countries, as Argentina and Brazil. The conducted research implies also that the EU as a whole did not have comparative advantages in trade of food products over countries not belonging to the Community. All the other countries recorded such advantage, except for China. In spite of increasing meaning of the food industry of China in the global food export, its share in the country's total export was low as compared to the world's average and was decreasing in the analysed years. The strongest comparative advantages was observed in Argentina which, combined with the greatest relative trade surplus, indicates on high specialisation of Argentina with regard to food processing. Maintenance of and growth in the competitive position of the European food industry on the global markets will undoubtedly constitute a serious challenge in the future, especially in the context of good results achieved in foreign trade by the third party countries such as China, Brazil, and Argentina.

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POZYCJA KONKURENCYJNA PRZEMYSŁU SPOŻYWCZEGO UNII EUROPEJSKIEJ NA RYNKU ŚWIATOWYM

Streszczenie. Przeprowadzone badania wpisują się w handlowy nurt badań nad konkurencyjnością. Celem głównym była ocena pozycji konkurencyjnej przemysłu spożywczego Unii Europejskiej (UE) na rynku światowym w latach 2000–2013. Zastosowano wskaźniki bazujące na wynikach osiąganych w handlu zagranicznym: udział w światowym eksporcie, wskaźnik pokrycia importu eksportem oraz wskaźnik ujawnionych przewag komparatywnych. Przemysł spożywczy został zdefiniowany na podstawie agregacji działów 01–09, 11, 4 SITC Rev. 3. Z badań wynika, że UE i USA były największymi eksporterami produktów przemysłu spożywczego na świecie. Ich znaczenie w światowym eksporcie maleje nieznacznie na korzyść takich krajów, jak Chiny i Brazylia. Uzyskiwana przez UE nadwyżka w handlu żywnością była niewielka, zwłaszcza w porównaniu do Argentyny. Przeprowadzona analiza wskazuje ponadto, że UE jako całość nie posiadała przewag komparatywnych w handlu artykułami spożywczymi nad krajami nienależącymi do Wspólnoty.

Słowa kluczowe: pozycja konkurencyjna, przemysł spożywczy, handel międzynarodowy, Unia Europejska