Land, as a bottleneck of the Western Balkans' agriculture

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Abstract
Although Western Balkan countries are quite different, but they can be characterised by their shared goal, which is the quickest possible accession to the European Union. As land is a key production factor, its actual situation is analysed with special attention to the forthcoming EU accession. This paper gives detailed analysis on two major elements of farming issues, farm structure and the actual state of land reform. Beside literature review, desk research, comparative analysis, the major contribution of this paper to the international literature is the reevaluated land reform index for the Western Balkans.

Keywords
Western Balkans' agriculture, agricultural trade, farming structure, land reform index

Introduction

The aim of this paper is to give detailed analysis on one of the key problems of the Western Balkans' agriculture, namely the land issue. It covers farming issues (farm structure and sizes) and the actual state of land reform. Major research questions are the followings:

- What is the present situation of farming issues in Western Balkans?
- What are the major differencies among these countries?
- Has any of them leading position? If yes, what are the reasons behind it?
- Is any of them lagging behind? If yes, what are the reasons behind it?
- What is the actual state of land reform in these countries?

As Croatia already accessed 2013, this country will be excluded from the analysis. At this moment negotiations already started with Montenegro; the former Yugoslav Republic of Macedonia and Serbia is waiting to start, while Albania and Bosnia and Herzegovina need to carry out significant actions in order to open accession talks (EC, 2013).

The Western Balkans has a long history of research carried out by academics or research institutes. The majority of them are basically social and political analyses. The chances of EU accession are also measured on these bases. It reflects to the higher, but not vital role of agriculture in these countries. The World Bank studies focus on specific issues like the state and problems of land and land rental markets (Swinnen et. al., 2006), or the difficulties of the health and pension systems (Bredenkamp et al., 2008). The EBRD and FAO carried out country specific analyses (e.g. EBRD, 2007 and FAO, 2005). In addition to these, the FAO recently published two studies on the agriculture of the region in its regional studies series. The first one was about the new member states of the EU (Csáki – Jámbor, 2009), while the second one was on the Western Balkans (Mizik, 2010).

Academics and research institutes, mostly geographically close to or in these countries, also carried out deep analyses on this region. As a member of a European consortium, the Hungarian Agricultural Research Institute gave a detailed overview of agriculture and food industry of the Western Balkans (Arcotrass, 2006). One of its remarkable results was the lack of consistent and comparable data. In 2010 the IAMO published the results of the Agripolicy project supported by the European Commission under the 7th Framework Programme (Volk, 2010). In this study a detailed picture was given on the actual state of agriculture and agricultural policy of the Western

Balkan countries by national experts and researchers. One of its messages was similar to the above mentioned one, as it was not always possible to gather reliable and precise data even for national actors. Erjavec, the former expert of DG Agri who was the member of this team, has been analysing the integration of the Western Balkan countries for decades, especially with its agricultural aspects (e.g. Erjavec, 2010). Bojnec and Fertő also need to be mentioned for assessing the competitiveness of the agricultural and food industrial products of the region (Bojnec – Fertő, 2009, 2010).

The major methodological tools which will be used are literature review, desk research, comparative analysis based on different datasets (international and national sources). The major contribution to the international literature is the reevaluated land reform index for the Western Balkan countries based on a World Bank's working paper (Csáki – Kray, 2005).

Overview of the Western Balkans' agriculture

Three indicators were used to measure the importance of agriculture: agricultural value added as a share of GDP (%), share of agricultural employment (%) and the size of agricultural production (million USD). The following comparative diagram summarises these indicators (Figure 1.)

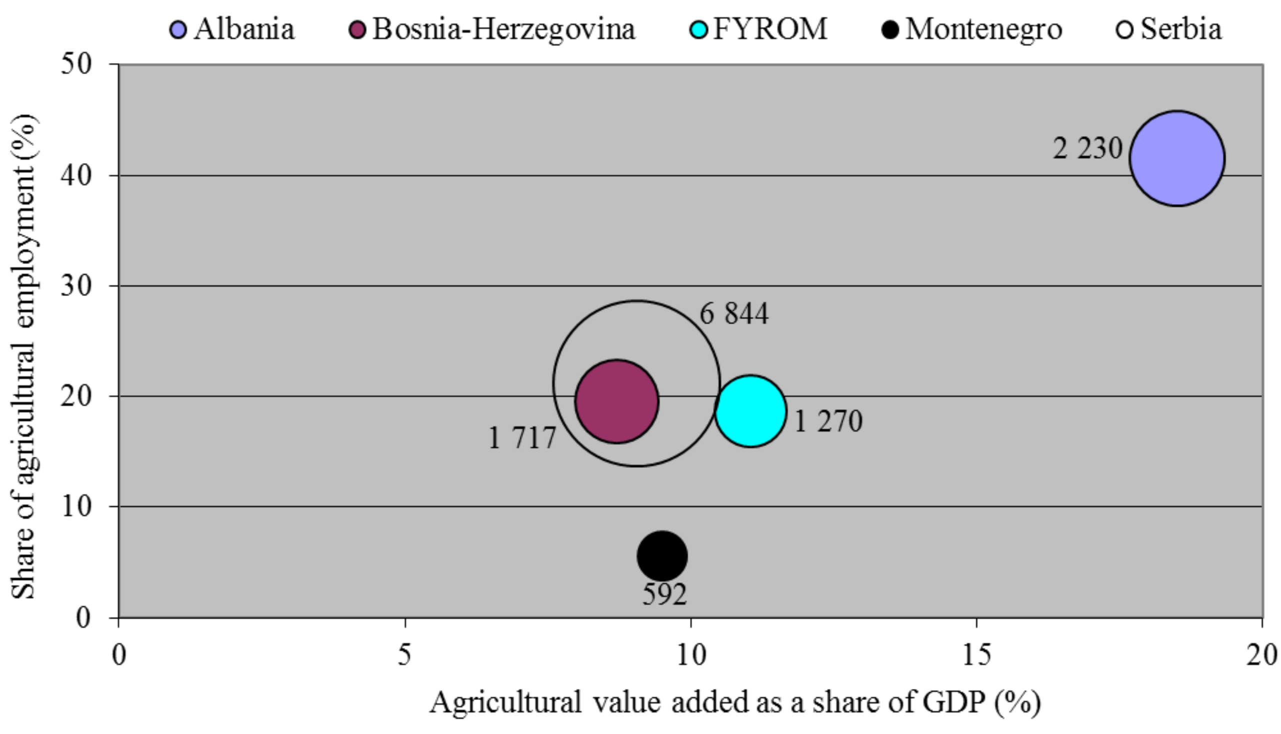

Figure 1. The basic indicators of agriculture, 2011

Source: Author's composition based on World Bank and FAO databases, Monstat (2013) for Montenegro

Basically Albania is an exception with the far highest agricultural sector measured by both agricultural value added as a share of GDP and share of agricultural employment.[1] On the other side Montenegro, in terms of share of agricultural employment, can be found. Regarding agricultural value added as a share of GDP, the other four countries do not show huge differences, they are in the range of 8.7 % (Bosnia and Herzegovina) and 11.1 % (FYROM). In the last 20 years obvious and continuous decreasing trend can not be identified (Mizik, 2011). Even the lowest values are far above the averages of EU, which were 1.7 % (value added) and 5.2 % (employment) in 2011 and these values already contain Romania (6.6 % for value added and 30.0 % for employment), where there is significant agricultural sector (Eurostat database).

Regarding the agricultural output, Serbia is the largest producer of the region. It is represented by the size of the circles on figure 1. Its production was higher than that of the four other countries together in 2011. Contrary to the EU, where agricultural production stagnates, the region shows a slightly increasing trend (FAO database).

Beside the basic indices above, actual state of agricultural trade are worth studying. Generally it can be analysed by export, import and the trade balance. It is demonstrated on figure 2.

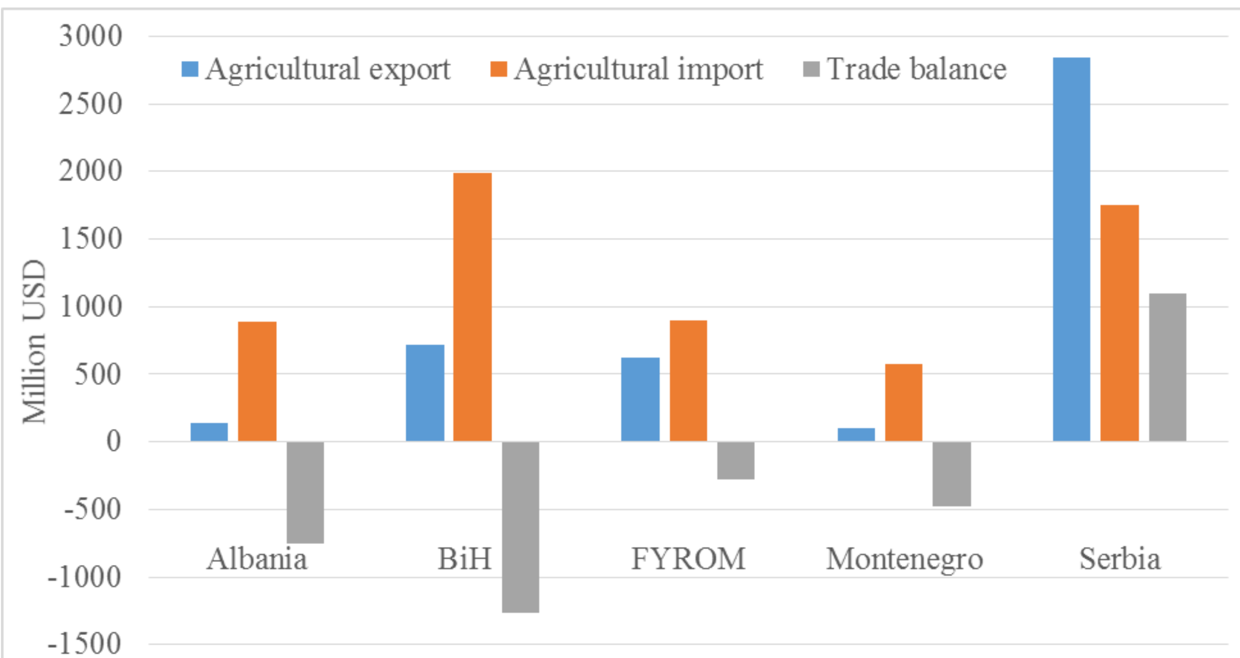

Figure 2. The actual state of agricultural trade, 2012
Source: Author's composition based on WTO database

[1] The agricultural value added as a share of GDP was above the half of the GDP in the 90's and even in 2011 it was higher than the value added of the industry (18.5 % versus 15.7 %) according to the World Bank database. The sector plays the most important role in employment with 41.5 % share, which was also much higher in the past years, and this sector is still the greatest employer.

Serbia is the number one exporter of the region and exported 2 billion USD more (or four times more) than the second greatest exporter, Bosnia and Herzegovina. As a matter of import, the Bosnian one is the largest followed by the Serbian. It can also be seen from the figure above that only Serbia has trade surplus, all the other countries are net importers of agricultural goods. The trade deficit of the region was almost 1.7 billion USD in 2012 including the 1.1 billion Serbian trade surplus.

Regarding both export and import, EU is the most important trading partner of the region. From this aspect it is worth highlighting that out of five Western Balkan countries two is not yet member of the WTO. Bosnia and Herzegovina and Serbia have observer status. The EU pays special attention to the WTO's Sanitary and Phytosanitary Measures, so need to do these countries. Upon the high relevance of the EU, the earliest implementation of the EU rules on food hygiene and official quality control is essential for these candidate and possible candidate countries (Mizik, 2010). It is a question of market access and export competitiveness. A special pricing system, which encourages farmers to produce high-quality products, could be an element of it (EBRD, 2007). However remarkable steps have been made, there are independent food safety agencies in some countries (Bosnia and Herzegovina, the FYROM) and some of them have already been acknowledged by the EU (Mizik, 2010). Serbia seems to be lagging behind. Although EU conform food safety law was accepted, but indepentent food safety agency has not established yet (Campden – Campden, 2013). But it should be kept in mind that the establishment of food safety agency itself can not solve the food safety problems if it does not have sufficient resources like qualified and well-paid staff, financial resources for testing, well-equipped laboratories with satisfactory capacity, etc.

Farming issues

There are two major issues analysed as important elements of farming issues: farm structure and sizes. In most of the cases data for agricultural output by farm categories (agricultural enterprises/private farms) are not available in the national statistics of Western Balkans. Generally it could be stated that majority of utilised agricultural area is in private hands and private sector dominates the agricultural production. Table 1 shows the number of agricultural holdings and the distribution of utilised agricultural area by size groups. There is an interesting characteristic of Western Balkans, that some part of the agricultural land is not cultivated. It is especially typical in Serbia, where around 20% of the available agricultural land is not in use (Njegovan – Bošković, 2006). Its reasons are various starting from land mines to intensive out migration (FAO, 2005).

Table 1. Number of agricultural holdings and distribution of UAA

<table>
<tr><th>Categories</th><th>Albania</th><th>BiH</th><th>Montenegro</th><th>Serbia</th><th>FYROM</th></tr>
<tr><td>Agricultural holdings (ths)</td><td>394.9</td><td>515.0</td><td>48.9</td><td>631.6</td><td>192.4</td></tr>
<tr><td>0 - 2 ha</td><td>354.6</td><td>250.0</td><td>35.9</td><td>308.4</td><td rowspan="2">184.4</td></tr>
<tr><td>2 - 5 ha</td><td>40.0</td><td>150.0</td><td>7.6</td><td>182.5</td></tr>
<tr><td>5 - 10 ha</td><td>0.2</td><td>90.0</td><td>2.7</td><td>89.1</td><td>6.3</td></tr>
<tr><td>10 - 50 ha</td><td>0.05</td><td>20.0</td><td>1.8</td><td>45.3</td><td rowspan="2">1.7</td></tr>
<tr><td><50 ha</td><td>0.0</td><td>0.2</td><td>0.9</td><td>6.2</td></tr>
<tr><td>UAA (ths ha)</td><td>427.3</td><td>2444.0</td><td>221.4</td><td>3437.4</td><td>264.3</td></tr>
<tr><td>0 - 2 ha</td><td>305.1</td><td>N/A</td><td>23.7</td><td>273.6</td><td rowspan="2">188.5</td></tr>
<tr><td>2 - 5 ha</td><td>120.0</td><td>N/A</td><td>23.9</td><td>596.1</td></tr>
<tr><td>5 - 10 ha</td><td>1.3</td><td>N/A</td><td>19.1</td><td>617.3</td><td>42.7</td></tr>
<tr><td>10 - 20 ha</td><td>0.9</td><td>N/A</td><td>38.4</td><td>825.0</td><td rowspan="2">33.1</td></tr>
<tr><td><50 ha</td><td>0.0</td><td>N/A</td><td>116.3</td><td>1125.5</td></tr>
<tr><td>Average size (ha)</td><td>1.1</td><td>4.7</td><td>4.5</td><td>5.4</td><td>1.4</td></tr>
</table>

Source: Arcotrass (2006) for Albania and BiH, MonStat (2011) for Montenegro, SORS (2013) for Serbia and SSO (2007) for FYROM

From the table above it can be seen that the number of agricultural units refers to the size of agricultural area. Generally countries with higher UAA have more agricultural holdings. Beside their number, their distribution is also very important. It seems to be a general phenomena of the agriculture of the Western Balkans that majority of the producers are small ones. One of its most important reasons is the former Yugoslavian agricultural policy which had limited farm sizes. The 10 hectares maximum was in use until the mid-'80s (Njegovan – Bošković, 2006). At least around 50% of the production units belong to the 0-2 hectares size category in each country. Moving toward bigger size categories, the number of holdings is continuously decreasing. According to the latest available data[2], there are no agricultural holdings over 100 hectares in Albania and only a few ones in Bosnia and Herzegovina and Montenegro. The latter one is a bit surprising as the highest share of large holdings can be found in Serbia.[3]

Beside the distribution of agricultural holdings among the size categories, the distribution of utilised agricultural area is also important. However one should note that there is a remarkable correlation between them, but the size categories are different. Despite the huge number of production units in the lowest size category, they use less percentage of the total UAA with the exception of Albania and mostly FYROM where the agricultural production is dominated by small farms. According to the average size, Albanian farms are the smallest among the analysed Western Balkan countries. In the other countries majority of UAA can be found in the middle size categories (2-5 and 5-10 ha). Land structure is similar in Montenegro and Serbia, share of bigger farms in land use is on a relatively high level and showing increasing trend (52.6% and 32.7% share of over 50 ha category in land use respectively).

[2] The final results of the latest Albanian Agricultural Census (2012) are not available yet, while in Bosnia and Herzegovina the Census is postponed.

[3] There is no detailed data on large farms in Serbia and Montenegro, but their average sizes were 1,547 and 347 hectares respectively, while in case of cooperatives these values were 326 and 108 hectares respectively in 2005 (Njegovan – Bošković, 2006).

Generally speaking the average size of agricultural holdings is low starting form 1.1 (Albania) to 5.4 (Serbia). It is low in itself, but in most of the cases they are formed from small parcels, which make the production more costly and less efficient. The major problem is the geographical distribution of these parcels: they are very often located far from each other. In Albania, despite the lowest average farm size, it means 4.5 parcels on an average and results 0.26 ha average parcel size (MAFCP, 2011). More or less the same values characterize the FYROM: low average farm sizes together with 0.3-0.5 parcel sizes (Angelovska et al., 2012). The fragmented production structure implicates that realistically less than 10 percent of producers have sufficient production surpluses to compete in different markets and to re-invest into new technologies (FAO, 2007).

Land reform

Private ownership of agricultural land is dominant in the region and started after the change of the former regime. However its speed was different from country to country and it was slowed down by the Yugoslav War with the exception of Albania. Private ownership has not restricted by law in any Western Balkan countries. On production side, private farms are dominant but agricultural holdings also play important role. The only exception again is Albania, where the share of agricultural holdings in production is insignificant (Swinnen – Vranken – Stanley, 2006). Legal backgound of private ownership was established around the same time in the region (1991-1992).

Land reforms can be described by some basic components like possibility of private ownership (whether there are any restrictions or not), allocation strategy, transferability (freedom in buying/selling, option for leasing), type of farm organisations (which was analysed earlier) and the watershed date for individualisation. Table 2 summarises these elements for the Western Balkan countries.

Table 2. Differences in implementation of land reform in Western Balkan countries

Countries	Potential private land ownership	Allocation strategy	Transferability	Farm organisation	Watershed date for individualisation
Albania	All	Plots	Buy/sell, lease	Individual	1991
BiH	All	Plots	Buy/sell, lease	Individual + corporate	1991
Montenegro	All	Plots	Buy/sell, lease	Individual + corporate	1992
Serbia	All	Plots	Buy/sell, lease	Individual + corporate	1992
FYROM	All	Plots	Buy/sell, lease	Individual + corporate	1991

Source: Mizik, 2010

As it can be seen from the table, Western Balkan countries have followed the similar way of land reform. There is no limit in potential private ownership, the same allocation strategy was used and it is possible to buy, sell or lease land in every country. In all countries individual farms are dominating in line with the co-existence of former collective (corporate) farms with the exception of Albania. The watershed date for individualization was around early ‘90s even in Bosnia and Herzegovina, where its constitutional background was finalised only after the end of the war in 1998. Since then remarkable changes have happened as the share of privatised land was between 80 (FYROM) and 95% (Albania) even in 2004 (Arcotrass, 2006). The way of privatisation was also the same, as land was given back to its former owners. The only exception was Albania, which adopted “land to tiller” strategy: the land was given to those persons who worked on that without any compensation similarly to the CIS countries, especially to Armenia and Georgia (Lerman et al., 2002).

The presence of agricultural enterprises in the production mix in most of the countries is a general phenomenon in the transition countries and it is called dual production system.[4] This duality is a part of historical heritage of the agriculture from the communist times. But their share in land use shows a continuously decreasing trend over the years. The importance of individual production is the highest in Albania; its share has surpassed 90% even in 2004.

Regarding land reform, these countries have no significant problems. It is reflected by their high land reform indices. It is part of a composite index used by the World Bank. Agricultural reform index refers to not only the state of land reform, but also market conforming, policy environment, privatization process, rural financial systems and institutional framework. The two opposite categories are market economy and command economy. Land reform index is calculated by exact numerical ratings (Table 3.).

Table 3. Key to land reform ratings

Rating	Characteristics
1-2	System dominated by large scale farms.
3-4	Legal framework for land privatization and farm restructuring in place, implementation launched only recently.
5-6	Advanced stage of land privatization, but large scale farm restructuring is not fully complete.
7-8	Most land privatized, but titling is not finished and land market not fully functioning.
9-10	Farming structure based on private ownership and active land markets.

Source: Csáki – Kray (2005: 5)

The next table gives a picture of the status of land reforms in the Western Balkans. According to land reform index most of the analysed countries are on a quite high level and much closer to market economy in every sense than to command economy (state control, state ownership, etc.).

[4] On the one hand, there are lot of individual producers working on small land units and on the other side less number, but much bigger agricultural holdings can be found.

Table 4. Status of land reforms in the Western Balkans

Countries	**World Bank's land reform index (2004)**	**Author's evaluation**
Albania	8	8
BiH	7	7
Montenegro	7	8
Serbia	7	8
FYROM	7	8
Average point	7.2	7.8

Source: Csáki – Kray (2005)

The countries average was 7.2 in 2004, which was very high and all the countries could be found in the first half of World Bank's analysis on CEE[5] and CIS countries. In the last 10 years all these countries made remarkable steps in the field of land reform with quite high differencies among the countries. However precise and up-to-date land register is still missing, but majority of land is in private hands and land markets are more or less functioning. From this aspect, regular and available agricultural census are essentials. It is postponed in Bosnia and Herzegovina[6] and not yet available in Albania. The latest Macedonian one was done 7 years ago. According to my latest study on this region (Mizik, 2012), Montenegro made the most significant progress. The latest agricultural census was conducted and published in 2010, so information on farming issues and farms sizes can be analysed.

Generally the present situation of land reforms and especially land privatisation is not an important issue any more for the Western Balkans as all the countries have reached a quite high level. But there are some other problems which have to be treated: first of all the high level of land fragmentation, the earlier analysed low size averages in line with the huge number of parcels. Low-scale production seems to be the bottleneck of the Western Balkan's agriculture. It is closely related to competitiveness. Consolidation of farm parcels should be a key issue of the agricultural policies. Although average land sizes are increasing continuously, but it seems to be a very slow process, especially in Albania. One of the most significant obstacles is the lack or insufficient level of land registers which is an unavoidable part of a well functioning land market.

As the accession to the EU is a main aim of these countries, it is inevitable to build up an EU conform, relatively up-to-date land database, especially in Bosnia and Herzegovina. The key agricultural area of the EU membership is the implementation of CAP[7] which requires not only sufficient institutional background but also available and reliable data sources (for example the FADN[8] system). From this aspect FYROM and Serbia made remarkable steps by introducing EU conform FADN pilot systems in 2010 and 2011 respectively.

Regarding land reform index, Albania, the former leader of this group, has made only small steps ahead. According to the author's evaluation, it was not enough to qualify for 9 points. Bosnia and Herzegovina is absolutely lagging behind which is underlined by the postponed agricultural

[5] Central and Eastern European
[6] The last one was conducted in 1991.
[7] Common Agricultural Policy
[8] Farm Accountancy Data Network

census and lack of reliable data. It can not be valued by more than 7 points. Montenegro, Serbia and the FYROM carried out important changes and were able to raise their land reform points. They reached the Albanian level and with little efforts they can be evaluated by 9 points (finalizing privatization process, solving the problem of state owned land and land registering problems, etc.).

Conclusions

Based on the indicators used to demonstrate the relevance of the sector (agricultural value added, share of agricultural employment), agricultural sector plays an important role in this region compared to the EU. Serbia is the most significant producer and only this country has trade surplus, all the other countries are net importers of agricultural goods. Due to the location of the other countries, it is a great opportunity for the Serbian agriculture in order to increase its production and trade surplus. Since the most significant trading partner of the Western Balkans is the EU, it is a very important task for the WTO observer countries, especially Serbia, to become members and to implement the EU's regulations on food hygiene and quality control into their national systems.

Regarding farming issues, it can be stated that majority of the agricultural producers of the Western Balkans are small ones. According to the average sizes, Albanian farms are the smallest with 1.1 ha, while Serbian ones are the biggest with 5.4 ha. The size problem of these countries is expressed by the huge number of parcels, which make the production more costly and less efficient. Making it higher requires strong political commitment. Moreover, this type of land distribution is one of the most important barriers of a well functioning lease market.

As a matter of land reforms, Western Balkan countries have followed the similar way with no limit on private ownership, used the same allocation method and allowed both buying and leasing of the land. The dominancy of individual farms in line with agricultural enterprises results in the dual production system with the exception of Albania. Based on the results of privatization and the World Bank's land reform index, land reform is not an important issue. On the other hand land policy still has a lot of work to do starting with the extremely fragmented land structure and setting up EU-conform, reliable and available land register and information system. Reaching this FADN pilot projects are essetials. However they are open for every country, but only Serbia and the FYROM started them yet. Beside it, the key information sources can be national agricultural census, but up-to-date information can be found only for Montenegro and Serbia. Macedonian results are 7 years old, while there are no relevant data on Albania and Bosnia and Herzegovina. Therefore the first three countries can be characterized by land reform rating of at least 8, while Albania did not reach higher than its previous value and Bosnia and Herzegovina is lagging behing (land reform value of 7).

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