AT 1.1 Study of international trade of agricultural and connected products in Greece

Project funded by EUROPEAN UNION

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Chamber of Commerce and Industry of the Republic of Armenia

CROSS BORDER COOPERATION

Contents

Summary

This study has been developed within the framework of the project titled "Bridges of Trade" and acronym "BRIDGES". BRIDGES is implemented under the Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Greece, Republic of Moldova, Romania and Turkey.

The aim of BRIDGES is to bring forward the high potential that the agricultural sector (including aquaculture, food industry and agro-industry) shows in the partner-regions – Nestos EL, Galati Ro, Yerevan AM, Balti MD, Catalca TR – and to promote trade among SMEs establish strong and permanent trade links in those sectors in the project area.

In the first chapter of the study, European polices and strategies, which the project is totally in line with, are presented in a general context: the Eastern Partnership of the European Neighbourhood area, the Danube Region Strategy, the EU Blue Growth Strategy, the 2020 Europe strategy and the 2030 UN Sustainable Development Goals. All these policies have been integrated in national strategies that reflect the objectives of the EU for sustainable development.

Greece has well integrated EU policies on Agriculture, setting a quite well management and implementation framework for this sector. This is also reflected in the figures and trends that are presented in the second chapter of the study, regarding the presentation of the agricultural sector in Greece, while in the third chapter, the current situation in the Agricultural and agricultural products trade sectors is presented.

Last, a SWOT analysis has been developed to assess the agricultural and trade sectors' strengths, weaknesses, opportunities and threats from a local/regional/national/interregional perspective.

This study constitutes the first part of a sequence of actions within the project, which will lead to the creation and establishment of a Trade Network (BRIDGES Network) of buyers, sellers, producers, cooperatives and SME's of the agricultural sector of the five (5) participating counties. The study's purpose is to identify the most significant products in the project area in order potential beneficiaries to be identified and invited to participate in the project actions.

1. Introduction

This study has been developed within the framework of the project titled “Bridges of Trade” and acronym “BRIDGES”. BRIDGES is implemented under the Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Greece, Republic of Moldova, Romania and Turkey.

This study is the first step of a sequence of actions within the project, which will lead to the creation and establishment of a Trade Network (BRIDGES Network) of buyers, sellers, producers, cooperatives and SME’s of the agricultural sector of the five (5) participating counties. The study identifies the most significant products in the project area in order potential beneficiaries to be identified and invited to participate in the project actions.

The Municipality of Nestos, Greece, developed this study for the identification and presentation of the most significant agricultural products of the Nestos area, with the aim to investigate the trade opportunities that could arise through the Municipality’s participation in the BRIDGES project.

1.1 The BRIDGES objectives

BRIDGES is being implemented under Programme priority 1 “Promote business and entrepreneurship within the Black Sea Basin” and Specific Objective 1.2 “Increase cross-border trade opportunities and modernisation in the agricultural and connected sectors”. Thus, the aim of BRIDGES is to bring forward the high potential that the agricultural sector (including aquaculture, food industry and agro-industry) shows in the partner-regions – Nestos EL, Galati Ro, Yerevan AM, Balti MD, Catalca TR – and to promote trade among SMEs establish strong and permanent trade links in those sectors in the project area.

The project is totally in line with European polices and strategies and by integrating their objectives into the project’s activities, the partnership ensures the achievement of the aim to develop and establish trade links among the partner-countries.

The project contributes to the **Eastern Partnership of the European Neighbourhood area** and more specifically to the following deliverables for 2020: a) 4. Improve the investment and business environment and unlock Small and Medium-sized Enterprises’ (SMEs) growth potential, b) 8. Support intra-regional trade among partner countries and the EU and c) 18. Strengthen investment in young people’s skills, entrepreneurship and employability.

The project also contributes to the **Danube Region Strategy** and to the following Pillars and Priority Areas (PA): PA08 “To support the competitiveness of enterprises”, PA09 “Investing in people and skills” and PA10 “Stepping up institutional capacity and cooperation”.

Moreover, it contributes to the **EU Blue Growth Strategy** by including in the project the Aquaculture sector, which shows high potential for sustainable jobs and growth and by promoting cooperation among partner countries and skill development of people in the aquaculture sector.

BRIDGES, aiming in promoting international trade links, networks and partnerships in the partners' regions and support the internationalisation of exchanges, is also in line with the **Europe 2020 strategy**’s priorities and competitiveness flagship initiatives (CFIs):

- Priority: "Sustainable growth" → CFI: "An industrial policy for the globalisation era, to improve the business environment, especially for SMEs, and to support the development of a strong and sustainable industrial base able to compete globally" → Measure: "Supporting entrepreneurship to make European business fitter and more competitive"
- Priority: "Inclusive growth" → CFI: "Agenda for new skills and jobs, to modernise labour markets by facilitating labour mobility and the development of skills throughout the lifecycle with a view to increase labour participation and better match labour supply and demand" → Measure: "Helping people acquire new skills, adapt to a changing labour market and make successful career shifts"

Last, BRIDGES contributes to the **2030 UN Sustainable Development Goals** (SDGs) and more specifically to the following:

SDG 8 - Decent work and economic growth: To promote high standards for working conditions and actively help the EU partner countries to address informal work, especially in sectors with the strongest multiplier potential for the partner countries' economy, such as agriculture and energy.

SDG 10 - Reducing inequality: To reduce inequality, EU supports actions to:

- empower women and create opportunities for youth and disadvantaged communities
- increase economic inclusion and create decent work and higher incomes
- encourage domestic resource mobilisation and stimulate public and private sector development

SDG 11 - Sustainable Cities and Communities: To support urban and peri-urban areas in EU partner countries and therefore to addresses aspects that can improve the quality of life in cities. It combines diverse efforts related to access to water and sanitation, urban mobility, affordable and sustainable housing, energy efficiency etc. Moreover, given their concentration of people, cities are particularly vulnerable to climate change and disasters, which is why EU also help them build their resilience to minimise potential human and economic losses from future shocks.

SDG 14 - Life below water: Through actions at global, regional, national and local level, the EU development policy supports notably:

- improved fisheries management and the fight against illegal, unreported, and unregulated (IUU) fishing to secure oceans' contribution to food and nutrition security
- conservation of marine and coastal ecosystems notably through the establishment and support of marine protected areas (MPA)

SDG 17 - Partnerships for the Goals: To increase international cooperation and strengthen global partnerships at governmental level, including through public-private partnerships and the involvement of civil society. This should help developing countries to:

- strengthen domestic resource mobilisation, including through international support
- mobilise additional financial resources from multiple sources
- attain long-term debt sustainability through coordinated policies aimed at fostering debt financing

Figure 1: 2030 UN Sustainable Development Goals (https://www.un.org/)

All these policies have been integrated in national strategies that reflect the objectives of the EU for sustainable development. The Agriculture is one of the primary economy sectors, along with forestry and fishing, mining, and extraction of oil and gas, characterised by making direct use of natural resources. Agriculture is usually most important in less developed countries, and typically less important in industrial countries, creating a pattern of product and services exchange between them. Here comes trade, which bridges the gap among countries or/and regions which produce and those which consume. BRIDGES investigates among others, the achievement of a balance, promoting at the same time both production and trade in the participating countries.

Municipality of Nestos, as a rural Municipality with high land productivity, produces specific products which are very indicative for the region. However, the business support organisations of the area need to build further their capacity in order to promote the local products into new markets in the Black Sea Basin area. Understanding of EU and national policies is a first step to understand the needs and trends of the international market and trade, in order SMEs and employed in the agricultural and trade sectors to be able to act collectively and become more competitive to the international market.

1.2 National Strategies on Agricultural production

According to the Ministry of Rural Development and Food, the main goal is to collaborate with farmers and other stakeholders, in order to promote sustainable agriculture, food safety and security, the sector's viability, and the prosperity of Greece's rural areas.

National strategies and policies on agricultural and rural development are constantly changing, always by taking into account ever changing international environment. Without the anchors of historical direct payments, the new revision of the Common Agricultural Policy (CAP) may benefit all Greek producers. The new regime is to enhance rural Greece's productivity, competitiveness, and, ultimately, prosperity. Simultaneously, there is an effort of further protecting natural resources and encouraging sustainable agriculture.

The following Strategies have been created by the Greek government for the agricultural production (Food and Agriculture Organisation of the United Nations, http://www.fao.org/):

- A **Growth Strategy for the future** (July 2018): This Strategy intends to reverse Greece's de-industrialisation and restore productivity growth and competitiveness by building on recent reforms. This will be accomplished in part by concentrating on important creative and high-value-added tradable areas, as well as by cultivating a strong culture of socially and ecologically responsible entrepreneurship and dynamic SME networks. The agri-food sector, according to the Greek government, will play a key part in the new growth model. The objective is to grow the competitiveness by developing the agri-food sector under the following conditions: a) sustainable production of healthy and safe food, b) increased employment opportunities, and c) elimination of economic, social, and spatial inequalities.
- **National Strategy for the Adaptation to Climate Change - NSACC** (April 2016): The main goal of the NSACC is to help the country become more resilient to the consequences of climate change. Its key goals are as follows: a) Systematise and improve the decision-making process for adaptation; b) using regional/local plans to link adaptation to the promotion of a sustainable development model; c) encourage the implementation of adaptation policies and initiatives in all sectors of Greek economy by focusing on the most vulnerable; d) creating a system for tracking, analysing, and upgrading adaptation policies and activities; e) improving Greek society's adaptive capacity through information and awareness-raising activities. The following integrated sectors are included in the associated Adaptation Policies: Agriculture and livestock; Forestry; Biodiversity and ecosystems; Fisheries; Aquaculture; Water resources; Coastal zones; Tourism; Infrastructure and Transportation; Health; Structured environment; Mining; Cultural heritage, etc.
- **Multi-year National Strategic Plan for Aquaculture Development in Greece, 2014-2020**: The Directorate of Aquaculture and Inland Waters of the Ministry of Rural Development and Food, following close cooperation with the relevant public services, research institutes and industry operators, drafted the Multi-year National Strategic Plan for Aquaculture Development in Greece, 2014-2020. The country's strategic goal can only be the sustainable development of the sector with the aim of increasing production, which will lead to an increase in employment and GDP. To achieve this strategic goal, the annual growth of 4%, as set by the EU, is not considered sufficient for the case of Greek aquaculture. The intended increase in Greek aquaculture production should not only meet the above mentioned objectives, but should also be realistic. As a national quantitative target for Greek aquaculture over the next fifteen years, the average annual increase in production is 7%. This increase will mainly concern the production of Mediterranean species of fish, shellfish and any enlargement with new species of seawater, including algae, for human and non-human consumption. It is obvious that is necessary to improve the productivity of the existing units, while expanding the activity and productive innovation as well as establishing new units (pag. 5).
- **National Action Plan on Sustainable Use of Pesticides (Plant Protection Products)** (July 2013): This National Action Plan (NAP) is a cross-sectoral policy document. It seeks to make agriculture more sustainable. The NAP makes provisions for: 1) training on sustainable use of pesticides; 2) procedure for granting certificate which will evidence of sufficient knowledge of sustainable use of pesticides; 3) Information and

awareness-raising and information to the public; 4) Inspection of equipment used for pesticide applications, 5) Specific measures to protect the aquatic environment and drinking water; 6) Reduction of pesticide use or risks in specific areas; 7) Specific measures for handling and storage of pesticides and treatment of their packaging and remnants; 8) Integrated pest management.

- **Strategic Forestry Development Plan 2018-2038 (National Forestry Strategy)** (2018): This Forestry Development Strategy - National Forestry Strategy, (NAP) specifies principles and guidelines of the policy on forestry for the period 2018-2038, identifying its specific objectives, the necessary resources and means for its implementation. Within the NAP, a model of Mediterranean forestry is adopted in the country, with the vision aiming at increasing the contribution of forestry ecosystems to the country's economy through sustainability, multifunctionality, adaptability and strengthening the socio-economic role, in the light of climate change.
- **Greek National Plan for Combating Desertification** (January 2001): The most effective measure to prevent and mitigate desertification is land-use planning and the implementation of its principles. This will also have significantly favourable effects on various developmental aspects: economy, demography, and environment. The existing land use status, except from the measures for forest protection and management, remains in most of its part confused and anarchic. The main principle applied for determining land use will be: Permitted land uses and changes will be only those, which ensure sustainability and do not degrade biomass productivity and other land functions and processes. Following this principle, proper land uses for each region should be defined. Effective control of soil erosion will be achieved by applying the principles of sustainable Land Use planning. Irrigation should be spatially, temporally and quantitatively controlled so that water usage does not exceed maximum crop requirements. Applied water should also cover the needs for leaching of soluble salts.
- The following measures will be taken for forest fire control: 1. Promoting public awareness 2. Measures to prevent forest fires and discourage arsonists. These measures could comprise: Clarification of the land ownership status in forests and woodlands according to the current cadastral plan; Restoration of the pre-fire land use in all burned forest lands; Development of an effective system for arresting and punishing the arsonists; Application of special forest management practices and techniques minimizing fires; Establishment of less flammable forest communities; Forest thinning and maintenance of appropriate forest structure; Clearing, pruning, controlled brushwood burning and removal of wood residues; Measures for quick fire detection and control and for keeping damages low.

1.3 National Strategies on International Trade

Trade is a well-known driver for growth. A national export plan harnesses the power of trade to foster long-term economic growth. Trade, on the other hand, does not happen by chance; it is planned. National export strategies offer a well-thought-out method to maximizing the benefits of a country's trade policy and integrating into the global economy. Economic vulnerabilities are being addressed through strategies that aim to establish a more resilient economy. A trade plan establishes priorities, allocates resources, and outlines steps to improve competitiveness, create value, and expand new markets. It brings together stakeholders from the public, private, and civil society to collaborate toward common objectives. Final, a trade development strategy may help countries create jobs, raise incomes, increase foreign exchange revenues, and unlock socioeconomic growth.

In Greece the following strategies have been developed that aim to boost trade and thus economic growth of the country:

- **National Strategy for Sustainable and Fair Growth 2030**: This Strategy is the updated version of the "A Growth Strategy for the Future". In May 2019, the Greek authorities have proceeded to the 1st update of the Strategy. The updated version, which includes a significant number of new goals, policy actions and reforms (Greek Government 2021 https://www.nationalgrowthstrategy.gr/en/):
    - Strengthens its contribution to the achievement of the Sustainable Development Goals by integrating new sections on regional, environmental and social policy, innovation and sustainable investment
    - Defines 40 Key Performance Indicators for supporting the implementation, monitoring, evaluation and public awareness of policies
    - Includes reforms and policies of the 2019 National Reform Program and puts under implementation the priorities of the European Commission's Annual Growth Survey such as delivering high-quality investment, enhancing productivity, promoting inclusive growth, improving institutional quality and ensuring sound public finances.
- **A Growth Strategy for the Future** (July 2018): The Greek government produced a holistic growth strategy, which was presented to the Eurogroup on April 27, 2018. The outcomes of a comprehensive and open cycle of discussions held on many levels, primarily through the process of Regional Development Conferences, have been included into the strategy. It uses a comprehensive planning approach that considers all three elements (economic, social, and environmental) outlined in the Sustainable Development Goals (SDGs).
  The strategy intends to promote social and regional cohesion by moving toward a new, fair, sustainable, and inclusive production paradigm. The Strategy's reforms and policies will strengthen Greece's long-term growth potential, boost investments, support innovative and export-oriented entrepreneurship, create more and better jobs, and contribute to the improvement of the welfare state, which is seen as a factor and an indicator of development (Ministry of Development 2021, http://www.mindev.gov.gr/greece-a-growth-strategy-for-the-future/).
- **National Trade Facilitation Strategy and Roadmap**: A coherent and agile governance scheme to follow through and revamp the Trade Facilitation Strategy launched in 2012 was established in early June 2020, aiming at boosting exports by streamlining procedures and facilitating cross – border trade for companies operating in Greece (Hellenic Republic 2021 "Next Generation EU" - https://primeminister.gr/wp-content/uploads/2021/03/Greece-2_0-April-2021.pdf).

In conclusion, it seems that Greek strategies have well integrated EU policies on Agriculture, setting a quite well management and implementation framework for this sector. This is also reflected in the figures and trends that are presented in the next chapter, regarding the presentation of the agricultural sector in Greece. On the other hand, trade as more complicated sector, which involves international and national legislations and other legal issues, requires knowledge and expertise which is not easily available and employed in the agricultural sector are not familiar with.

In the next two (2) chapters, the current situation in the Agricultural and agricultural products trade sectors is presented. In some cases there is no data available for the Municipality of Nestos. Thus, national or regional information is presented to give a better understanding of the trends.

2. Agricultural Sector in Greece

In this chapter, the trends regarding the state-of-the-art in the Agricultural sector in Greece are presented.

2.1 Agricultural area

Greece is a Mediterranean country with excellent weather conditions for agricultural activities. The climate is mild and warm, with wet winters and hot summers; nonetheless, the hilly and mountainous terrains, as well as low water supplies impose a significant cost and efficiency burden on local agriculture.

Greek agriculture covers a large part of its territory. It constitutes about 30% of the total area, while the forest is 50%. The total area of rural areas is 82% compared to 57.6% of the EU-27, and their population is 43% compared to 23% respectively (European Commission, Agriculture in the EU, 2013). The arable land of Greece amounts to 3,470,000 hectares compared to the 171,603,000 of the EU-27.

The total agricultural land of Greece in 2017 was 5.15 million hectares (Figure 2). The largest percentage (39% or 2.02 million hectares) of the total area was covered by permanent pastures, the area of which increased sharply in 2008, when Community aid was decoupled from production and connected to the area. Arable land, which includes extensive farmingand other crops (cereals, edible legumes, industrial crops, fodder crops, vegetables and potatoes), covered 37% of the agricultural area (1.90 million hectares), with a trend a small decline since 2000. The remaining 24% (1.23 million hectares) is occupied by permanent tree crops and a very small percentage by private gardens.

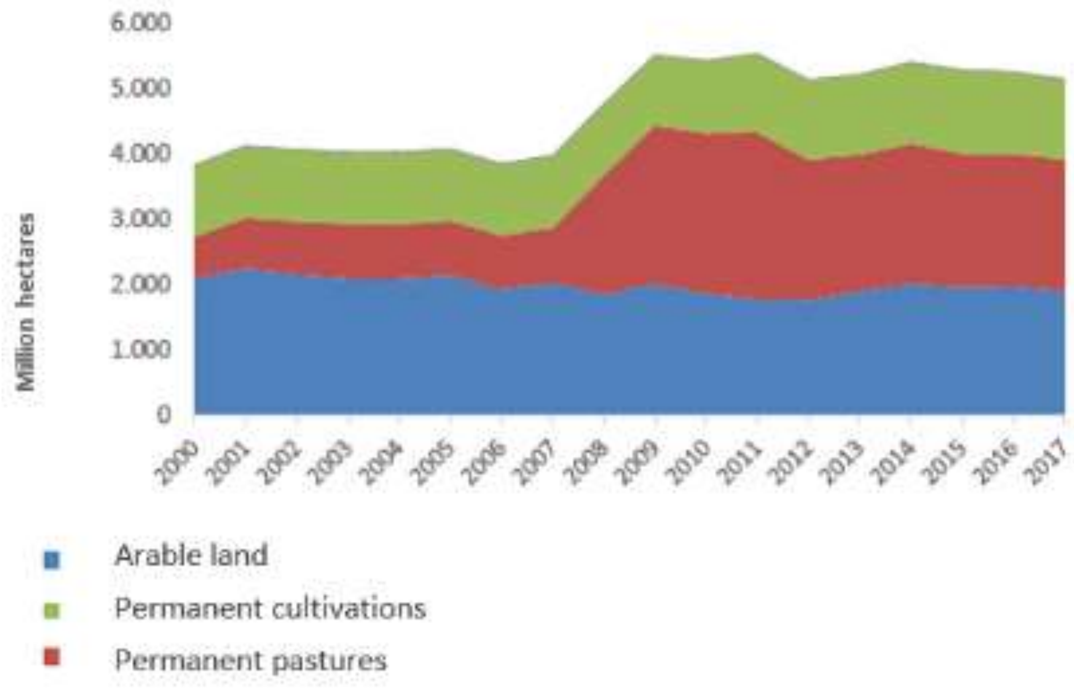


Figure 2: Agricultural land in Greece, 2000-2017 (Eurostat)

2.2 Agriculture and Economy

The agricultural sector in Greece constitutes a significant source of economic activity and employment, accounting for roughly one-third of the country's total exports. The agri-food sector, according to some estimates, can inject up to €12.2 billion into the Greek economy each year. The primary sector is important for Greece's economy, not only because of its contribution to macroeconomic factors, but also because it is a critical element of maintaining socio-economic cohesion in rural and remote areas. Agriculture accounts for 3,7% of total GDP. In particular, in the rural and remote areas it accounts for up to 50% of local GDP and employment. Nearly 5 million hectares of agricultural land are used in Greece, with 57% in plains and 43% in mountainous or semi-mountainous areas.

The Gross Value Added (GVA) of the agricultural sector in Greece (farming and livestock at stable prices in 2010) amounted to € 6.2 billion in 2017 - the highest level recorded since 2005. Thus, the agricultural sector still holds a significant position in the national product. In addition, its share of the GVA of the economy is consistently higher than the EU28 average, confirming the important role of agriculture and livestock in the domestic economy (Figure 3).

However, the gradual structural transformation of the Greek economy is reflected in the reduction of the share of the agricultural sector from 4.9% in 1995 to 3.7% in 2017 - a decrease that was greater than that recorded in the same period in the EU28. It is pointed out, however, that after 2008 the importance of the agricultural sector in Greece increased, as its losses in terms of added value were smaller compared to those of the Greek economy as a whole, but also of most of its sub-sectors.

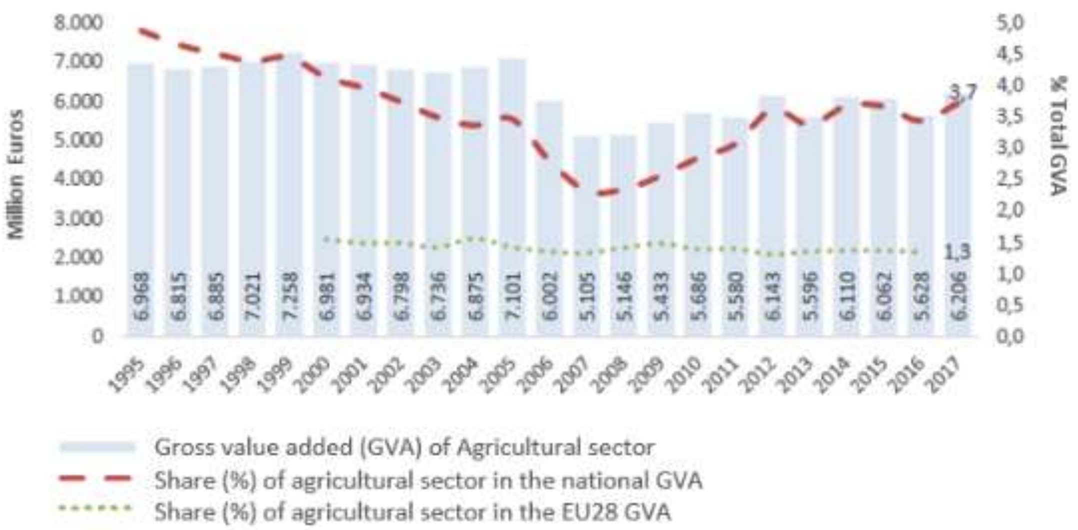


Figure 3: Gross value added (GVA) of the Agricultural Sector (Farming and Livestock), 1995-2017 (Eurostat, IOBE 2020)

Moreover, the total production value of the agricultural sector, which includes: a) agricultural production of goods and services (farming and livestock products and services) and b) non-agricultural secondary activities, which cannot be separated from purely agricultural activities (transformation agricultural products, such as milk production), reached €11 billion in 2018, showing fluctuations around this level from 2015 onwards (Figure 4). The value of production fell sharply after 2006, largely due to the change in the main directions of the Common Agricultural Policy (CAP) and the decoupling of aid from production volume.

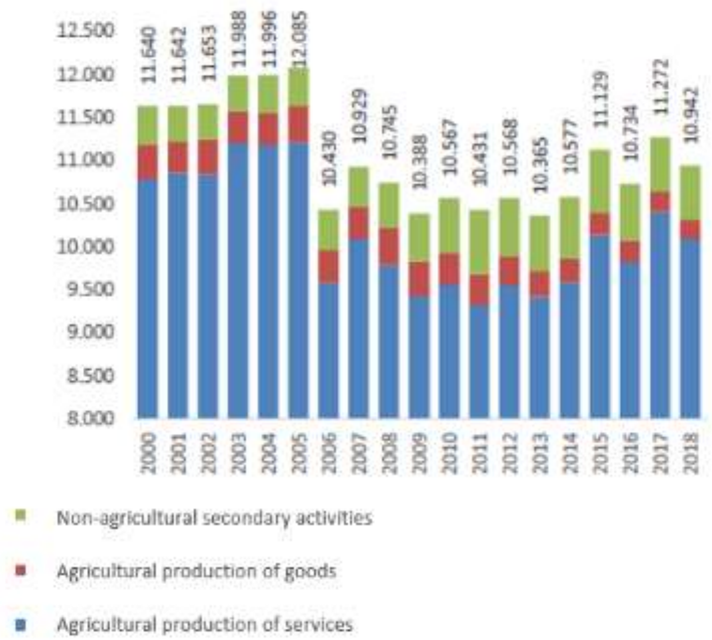


Figure 4: Production value of agricultural activity, 2000-2018 (at current prices 2020) (Eurostat, Economic accounts of Agriculture)

In addition, the total income from agricultural enterprises in Greece (at current prices) amounted to € 4.8 billion in 2018, close to the average for the period 2010-2018 (€ 4.9 billion), but much lower than the average of the previous period 2000-2009 (€ 5.5 billion). The average income per employee in the agricultural sector (in terms of equivalent annual employment) reached € 11.1 thousand in 2018, approximately the same as in the EU28. The average agricultural income in Greece shows a slight upward trend after 2013 (with fluctuations), however the overall picture in terms of the dynamics that followed, compared to the EU28, is not satisfactory.

2.3 Employment

438 thousand people worked in the agricultural sector in Greece during 2017. The rate of employees in the agricultural sector in the total number of employees in the economy decreased from 15.2% in 2000 to 10.6% in 2017 but remains significantly higher than the European Union average (4.4% in 2017) (Foundation for Economic and Industrial Research,2021). This fact underlines the contribution of the agricultural sector to employment opportunities in the Greek economy. However, some concerns about the future course of the sector are raised by the reduction of employees, by almost 80 thousand people, in the period 2009-2017. On **Σφάλμα! Το αρχείο προέλευσης της αναφοράς δεν βρέθηκε.**, the economic accounts of agriculture are depicted by comparing the amounts with the EU27 amounts.

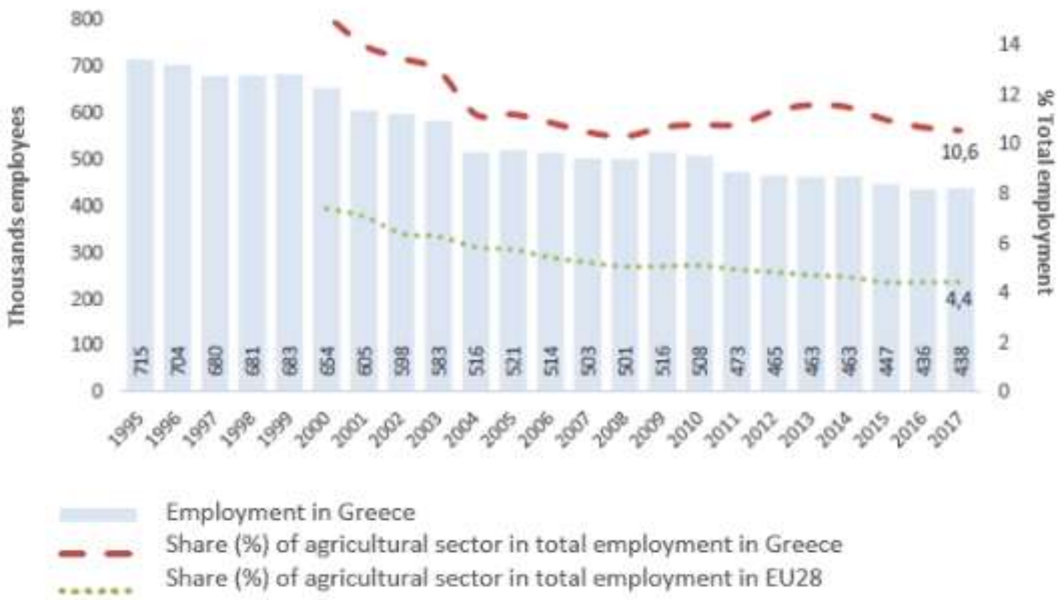


Figure 5: Employment in the Agricultural sector, 1995-2017

In terms of companies that have to do with agri-food sector their number according to a 2016 census ia 15,700, and their employees reach up to 111,000 people. Many of the country's immigrants are employed in the agricultural (among others) sector of the economy. Between 2009 and 2018 there is an increase in the average growth rate of 1.9% of Greece's food business (Greece Investor Guide, 2021).

2.4 Agricultural production in Greece

In Greece, agriculture is mostly crop-oriented, with livestock production accounting for less than a third of overall agricultural output. Fruit and vegetables, as well as cotton, wheat, and tobacco are among the most important crops in Greek agriculture. The fact that fruit and vegetable production accounts for 20% of cultivated land and more than one-third of irrigated land in Greece, as well as approximately 7% of total exports and 30% of agricultural exports, demonstrates its importance for the local agricultural economy.

According to the Food and Agriculture Organisation of the United Nations, out of 3,638.72 thousand ha of cultivated land, in Greece 2,136.60 thousand ha is arable land, 61.89 thousand ha are horticultural land, also 1,085.10 thousand ha are permanent crops and 355.13 thousand ha is fallow land.

In particular, the production of several agricultural products is shown in the following chart (Figure 6) for the reference years 2014-2018. Greece produced in 2018 among others:

- 1.2 million tonnes of maize
- 1 million tonnes of wheat
- 968 thousand tonnes of peach (and ranked 3rd in a worldwide scale)
- 933 thousand tonnes of grape (and ranked 19th in a worldwide scale)

- 630 thousand tonnes of watermelon
- 465 thousand tonnes of potato
- 265 thousand tonnes of kiwi (**and ranked 5th in a worldwide scale**).

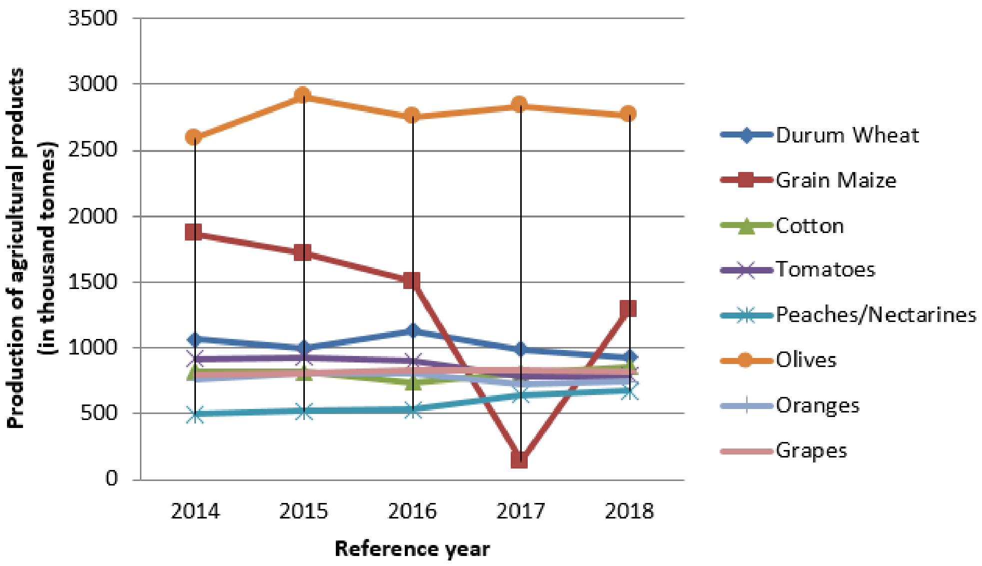


Figure 6: Production of Agricultural products (Hellenic Statistical Authority, June 2020)

Economic accounts of agriculture				
Agricultural output (current basic prices)				
Agricultural output (million EUR), of which:	**2020 (e)**	**11 021**	**2.8%**	**of EU27_2020**
Crop output, of which:		**74.1%**	**3.8%**	**of EU27_2020**
Cereals (including seeds)		6.6%	1.6%	of EU27_2020
Industrial crops		8.8%	5.2%	of EU27_2020
Forage plants		6.1%	2.7%	of EU27_2020
Vegetables and horticultural products		15.1%	2.9%	of EU27_2020
Potatoes		2.0%	1.8%	of EU27_2020
Fruits		28.4%	10.6%	of EU27_2020
Wine		0.2%	0.1%	of EU27_2020
Olive oil		6.1%	18.3%	of EU27_2020
Animal output, of which:		**23.3%**	**1.6%**	**of EU27_2020**
Cattle		1.6%	0.6%	of EU27_2020
Pigs		1.8%	0.5%	of EU27_2020
Sheep and goats		3.2%	9.3%	of EU27_2020
Poultry		3.2%	1.9%	of EU27_2020
Milk		9.7%	2.0%	of EU27_2020
Eggs		2.2%	2.6%	of EU27_2020
Gross value added at current prices (million EUR)	2020 (e)	6 144	3.5%	of EU27_2020

Figure 7: Economic accounts of agriculture (European Commission – Statistical Factsheet Greece, June 2021)

Aquaculture is a rather specialized sub-segment of food production, but it is a rapidly rising sector of the Greek economy -and one in which Greece may exploit its competitive advantages - and where Greece is already a major worldwide exporter. In Greece, two primary fish products, seabass/seabream, account for around 90% of the sector's value, with Greece holding a strong position in global markets (HETCO, 2021).

Figure 9: Regional Unit of Kavala and Municipality of Nestos

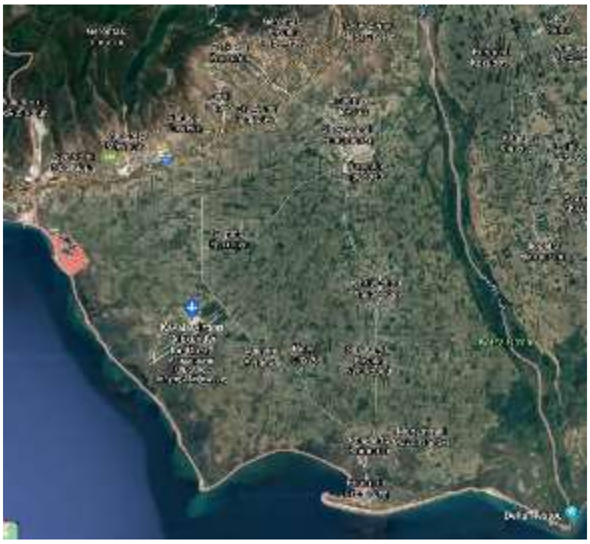


Figure 9: Municipality of Nestos agricultural area

The Greek food and agriculture sector is predicted to contribute significantly to GDP growth and value added in the next years, thanks to a number of key market trends and competitive advantages:

– The recent move in the Greek agriculture industry toward organic, natural materials, which are highly valued and may attract a higher premium and additional value.
– The importance of the Mediterranean Diet as a global model of healthy, natural eating
– One of the primary societal issues of the “Europe 2020” agenda is the rising desire for self-sufficiency and food security
– The potential of creating clusters in various specialized Greek food supply chains by combining EU financing, research, etc. in the implementation of new technologies.

2.5 Agricultural production in the wider area of the Municipality of Nestos

The Municipality of Nestos is located in the Regional Unit (RU) of Kavala, in the Region of Eastern Macedonia and Thrace. The seat of the Municipality is Chrysoupoli. It covers an area of 678,9km^2 and a population of about 22.300 people. The Municipality of Nestos was formed during the 2011 local government reform by the merge of three (3) former municipalities (Chrysoupoli, Keramoti, and Oreino), now known as municipal units (Law no 3852/2011). The Municipal Units of Nestos have the following number of settlements-population:

– Municipal Unit of Chrysoupoli:
  19 Settlements – 15,678 residents
– Municipal Unit of Keramoti:
– 7 Settlements – 6,039 residents
– Municipal Unit of Oreino:
  13 Settlements - 1,769 residents

Table 1: Categories of crop areas - Crop areas (in hectares) and fallow land by category, Region and Regional Units (Source: EL.STAT 2019)

Regions and Regional Unities (NUTS 2)	Total cultivated agricultural and fallow land	Crops				Fallow land (1 - 5 years)	Of which land eligible for the payment of subsidies
		Crops on arable land	Garden area	Areas under trees (compact plantations)	Vines (grapes and raisins)		
Greece Total	**3,216,538.3**	**1,698,854.2**	**59,573**	**1,001,216.7**	**87,013**	**369,881.4**	**195,475.8**
Region of Eastern Macedonia and Thrace	**376,095.2**	**297,193.9**	**6,768.8**	**28,610.5**	**5,109.6**	**38,412.4**	**21,515.2**
Kavala	41,086.4	25,332.4	1,279.2	6,975.5	3,313.6	4,185.7	2,840.9

Table 2: Holdings with irrigated and irrigable areas, by region and department (Source: EL.STAT 2009 Agricultural - Livestock Census)

REGION AND DEPARTMENT	Holdings (in thousand hectares)			Thereof, with irrigated areas (in thousand hectares)			
	Total	**Thereof, with utilised agricultural area (2)**	**Utilised agricultural area (2)**	**Holdings**	**Total utilised agricultural area**	**Irrigable**	**Irrigated**
GREECE	**72,300.7**	**71,426.4**	**3,016.9**	**48,460.7**	**2,289.3**	**1,310.6**	**1,038.6**
REGION OF EASTERN MACEDONIA AND THRACE	**5,314.8**	**5,186.3**	**341**	**4,414.6**	**307.8**	**192.4**	**148**
REGIONAL UNIT OF KAVALA	1, 099.4	1,074.8	42.2	945.2	40.3	34.8	30.8

Agricultural sector in the Regional Unit of Kavala, as in the whole Region of Eastern Macedonia and Thrace, plays an important role in the local economy. 20% of the total area of the RU of Kavala is cultivated agricultural and fallow land. Almost half of the Municipality of Nestos area covers part of the river Nestos delta, meaning that this area is totally arable and also irrigable (Figure 9).

Chrysoupoli is considered to be the centre of agricultural production in the western part of Nestos Delta. The area around the city produces a variety of agricultural products, such as **corn** (10,400 ha), **cereals** (mainly soft), **beans**, and **sugar beets**. There are also around 4,000 ha of **olives** (edible and used for oil making). Horticultural crops, such as **asparagus** (with 500 ha), **almond trees** (1,400 ha) and the **beekeeping** sector (with a total production of 67 tonnes) have a considerable presence. Other common agricultural products are: **rice, watermelon, apricots, peaches and potatoes** (mainly in the Lekani area). Moreover, Nestos's **kiwis** and **asparagus** are considered to be of high quality and are **the most important exported agricultural products**.

The most common products that are cultivated in the RU of Kavala are presented in the following tables:

Table 3: Selected agricultural products - Production of other by-products, by Region and Regional Unit (EL.STAT. 2018)

		***In tonnes**
Regions and Regional Unities (NUTS 2)	**Olive oil**	**Must**
Greece Total	**327.718**	**300.031**
Region of Eastern Macedonia and Thrace	**6.750**	**9.652**
Kavala	4.587	4.682

*Table 4: Selected agricultural products - Production of **peaches**, by Region and Regional Unit (EL.STAT. 2017)*

	HOLDINGS	Area (in hectares)	NUMBER OF TREES
Greece Total	**20,192**	**33,770.47**	**15,891,643**
Region of Eastern Macedonia and Thrace	305	1.233,1	52,765

*Table 5: Selected agricultural products - Production of **apricots**, by Region and Regional Unit (EL.STAT. 2017)*

	HOLDINGS	Area (in hectares)	NUMBER OF TREES
Greece Total	**8.034**	**49.026,8**	**2.145.456**
Region of Eastern Macedonia and Thrace	108	188,3	11.559

Other significant products are **wine** and **honey**. Specifically, near the Avramilia settlement vineyards that produce high quality grapes and wine (Chardonnay, Syrah, Merlot, Malagouzia, Agioretiko, Assyrtiko, and Sauvignon) are cultivated, while in Monastiraki settlement honey of high quality is produced.

Aquaculture is also present in the Nestos area. In the Keramoti lagoons (Vassova, Erateino, Agiasma) the hatcheries of fish with sea bream, crabs, mussels, sardines, and mullets are the ones that stand out.

Finally, it is worth mentioning that the Municipality of Nestos holds the exploitation rights for 1,400 ha of geothermal field in Eratino – Chrysoupoli, with the aim of supplying geothermal thermal energy to the rural areas in Eratino – Chrysoupoli, for the creation of greenhouses. Future plans include the use of thermal energy in fish farms of species that require high water temperatures (e.g. shrimp). In addition to greenhouses, geothermal energy can be used in open crops for the early harvest of certain species (e.g. asparagus). As far as livestock in the area, there are no significant activities on this kind of production.

Figure 10: Kiwi field in Nestos (Chrysoupoli News)

Figure 11: Asparagus field in Nestos (Kavala News)

3. International trade of agricultural products in Greece

3.1 International trade trends in Greece

According to Enterprise Greece (Invest & Trade), in 2020, Greece's overall foreign trade in goods transactions (imports + exports) totaled €79,327.1. Although goods exports are lower than imports, the export of services, such as shipping, tourism, and financial services, covers a major portion of the balance of trade (which reduced by 18.5 percent in 2020).

3.1.1 Exports

In Greece, according to the Hellenic Statistical Authority's most recent (provisional) data, the total value of exports in 2020 was €30,705.3 million, down from €33,866.9 million in 2019. Thus, there was a reduction of 9.3%, which could be due to the COVID-19 pandemic effects. Excluding petroleum products, exports increased by 3.2 percent to €24,047.5 million in the same time (from €23,308.7 million in 2019), while excluding petroleum products and shipping, the growth was 2.9 percent (from €23,215.3 million to €23,890.3 million). Fuel (21.9%) accounts for the highest percentage of exports in 2020, followed by food (17.3%), chemicals (16.4%), and industrial goods categorised by raw material (15.9 %).

The total value of exports-dispatches, for the 5-month period from January to May 2021 amounted to 15,201.0 million euros in comparison with 12,233.6 million euros for the corresponding period of the year 2020, recording an increase of 24.3%. The corresponding value excluding oil products recorded an increase of 1,832.7 million euros or 19.4% and the corresponding value excluding oil products and ships recorded an increase of 1,815.7 million euros or 19.2%, in comparison with the period from January to May 2020 (Enterprise Greece Invest & Trade, 2021).

In 2020, exports to the European Union accounted for 57.5% of total exports, indicating the EU's importance in Greek export trade. The following nations saw a dynamic increase in Greek exports in 2020: France, Libya, Poland, Austria, and others. The following are the primary partners:

- Italy (10.6%)
- Germany (7.8%)
- Cyprus (6.4%)
- France (5.8%)
- Bulgaria (5.0%)
- Turkey (4.4%)
- United Kingdom (3.8%)
- Spain (3.7%)

In terms of **food and beverage exports** in 2020, Germany takes first place among the country's main trading partners with a 16%. It is followed by Italy, whose participation in 2020 is limited to 14%, the United Kingdom 9%, the United States 8%, and Cyprus 6% EU countries, including the Netherlands, Bulgaria, France, Romania, and Poland, round up the top 10 countries to which the country exports processed food. In 2020, the top ten nations receiving processed food exports accounted for 70% of total exports. As for the **processed food sector**, 65% of Greece's total exports are made within the EU-27 and 35% outside EU.

3.1.2 Imports

In terms of imports, the overall value of imports in 2020 was €48,621.7 million, down from €55,847.3 million in the same period last year, meaning there was a decline of 12.9%. Without petroleum products, the decline was 4.9 percent (from €41,351.8 million to €39,325.4 million) during the same time, while it was 4.4 percent (excluding petroleum products and shipping) (from €40,880.3 million to €39,092.3 million) (Enterprise Greece Invest & Trade, 2021). Chemicals account for the highest share of imports in 2020 (about 20.4%), followed by transportation material and machinery (20.1%), and petroleum (19.9%).

The total value of imports-arrivals, for the 5-month period from January to May 2021 amounted to 23,470.0 million euros in comparison with 19,733.5 million euros for the corresponding period of the year 2020, recording an increase of 18.9%. The corresponding value excluding oil products recorded an increase of 2,699.4 million euros or 17.4% and the corresponding value excluding oil products and ships recorded an increase of 2,707.1 million euros or 17.5%, in comparison with the period from January to May 2020 (Enterprise Greece Invest & Trade, 2021).

The deficit of the trade balance, for the 5-month period from January to May 2021 amounted to 8,269.0 million euros in comparison with 7,499.9 million euros for the corresponding period of the year 2020, recording an increase, in euros, of 10.3%. The corresponding deficit excluding oil products recorded an increase of 866.7 million euros or 14.3% and the corresponding deficit excluding oil products and ships recorded an increase of 891.4 million euros or 14.9% (Enterprise Greece Invest & Trade, 2021).

The European Union plays an important role as an import trade partner of Greece with a share of approximately 57%. In Greece, during 2020 imports were decreased by 12.9%, meaning to €48,621.7 million, down from €55,847.3 million the previous year (2019). The main countries for imports were:

- Germany (12.4%)
- Italy (9.0%)
- China (7.7%)
- Netherlands (6.3%)
- Russia (6.0%)
- France (4.4%)
- Iraq (4.1%)
- Ireland (3.6%)

In terms of **imports of processed food and beverage products**, Germany and the Netherlands, which import 29% of the products, are the country's top trade partners in 2020, along with Italy (10%), France (9%), Spain (6%) and Bulgaria (6%). Denmark, Belgium, Poland and Argentina, round up the top ten importers of processed foods and beverages. In all, the top ten nations supplying processed foods to Greece account for 75% of all imports. As for the **processed food sector**, 85% of Greece's processed food imports are made inside the EU-27 and 15% from countries outside it.

3.1.2 Trade Balance

In terms of trade balance in Greece, the country shows a trade deficit in the years 2019 to 2021, meaning that Greece imports a greater value than it exports. The table below shows and explains these trends.

Table 6: Trade Balance: January - May 2019-2021 (EL.STAT. Commercial Transactions of Greece, June 2021)

*Million €					
	January - June			Changes %	
	2019	2020	2021	2020/2019	2021/2020
A. Imports - Arrivals					
I. Total Imports - Arrivals	27,940.6	23,749.9	28,854.0	-15.0	21.5
II. Excluding the value of ships	27,777.2	23,645.9	28,765.8	-14.9	21.7
III. Excluding oil products and including the value of ships	20,547.6	18,975.8	22,451.2	-7.6	18.3
IV. Excluding oil products and the value of ships	20,384.2	18,871.8	22,363.0	-7.4	18.5
B. Exports - Dispatches					
I. Total Exports - Dispatches	16,845.8	14,807.0	18,591.9	-12.1	25.6
II. Excluding the value of ships	16,796.8	14,774.5	18,537.0	-12.0	25.5
III. Excluding oil products and including the value of ships	11,559.3	11,538.8	13,819.1	-0.2	19.8
IV. Excluding oil products and the value of ships	11,510.3	11,506.3	13,764.2	0.0	19.6
C. Trade Balance (=B.I-A.I)	-11,094.8	-8,942.9	-10,262.1	-19.4	14.8
D. Trade Balance Excluding the value of ships (=B.II - A.II)	-10,980.4	-8,871.4	-10,228.8	-19.2	15.3
E. Trade Balance Excluding oil products and including the value of ships (=B.III-A.III)	-8,988.3	-7,437.0	-8,632.1	-17.3	16.1
F. Trade Balance Excluding oil products and the value of ships (=B.IV-A.IV)	-8,873.9	-7,365.5	-8,598.8	-17.0	16.7

The main trading partners of Greece according to the Hellenic Statistical Authority in terms of trade balance are shown in the following table:

Table 7: Processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data (EL.STAT.)

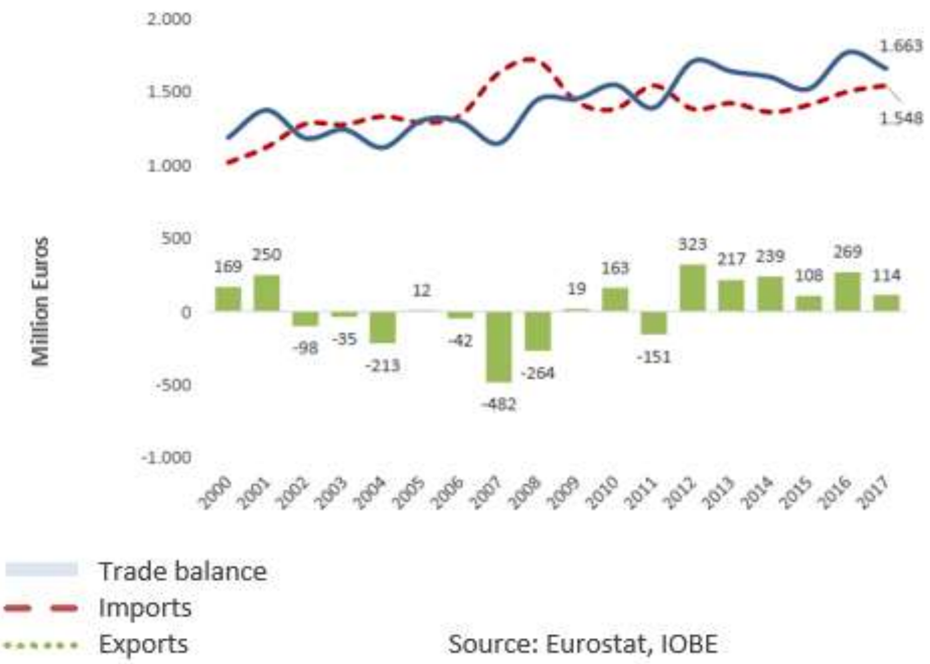
S/N	COUNTRY	IMPORTS	EXPORTS	TRADE BALANCE
1	Germany	6,030,706,806	2,394,718,580	8,425,425,386
2	Italy	4,397,595,685	3,255,878,498	7,653,474,183
3	China	3,742,875,509	853,768,976	4,596,644,485
4	France	2,147,700,815	1,785,671,365	3,933,372,180
5	Netherlands	3,087,064,105	698,049,025	3,785,113,130
6	Bulgaria	1,724,533,597	1,535,398,734	3,259,932,331
7	Russia	2,920,752,698	161,164,107	3,081,916,805
8	Turkey	1,551,210,063	1,338,209,427	2,889,419,490
9	Spain	1,690,084,998	1,138,474,231	2,828,559,229
10	Cyprus	358,772,134	1,979,987,169	2,338,759,303
11	Great Britain	1,033,193,910	1,179,312,489	2,212,506,399
12	U.S.A.	975,396,296	1,136,769,540	2,112,165,836
13	Iraq	1,999,249,040	60,653,792	2,059,902,832
14	Belgium	1,641,900,532	391,504,862	2,033,405,394
15	Ireland	1,751,214,492	100,875,514	1,852,090,006
16	Romania	668,429,882	1,117,741,011	1,786,170,893
17	Kazakhstan	1,573,404,930	9,021,518	1,582,426,448
18	Poland	893,869,482	577,716,361	1,471,585,843
19	Egypt	612,524,120	497,014,244	1,109,538,364
20	Austria	577,127,094	349,934,668	927,061,762

3.2 International trade of agricultural products in Greece

Agricultural trade is the backbone of sustained social and economic development in many emerging and transition economies, as in Greece. The total value of Greek exports of agricultural products (products of plant and animal production) amounted to € 1.6 billion in 2017 (Figure 12). Although fluctuating, the general trend of the value of agricultural exports after 2008 is slightly upward, contributing to the creation and maintenance of a positive trade balance, as in recent years exports have systematically exceeded imports.

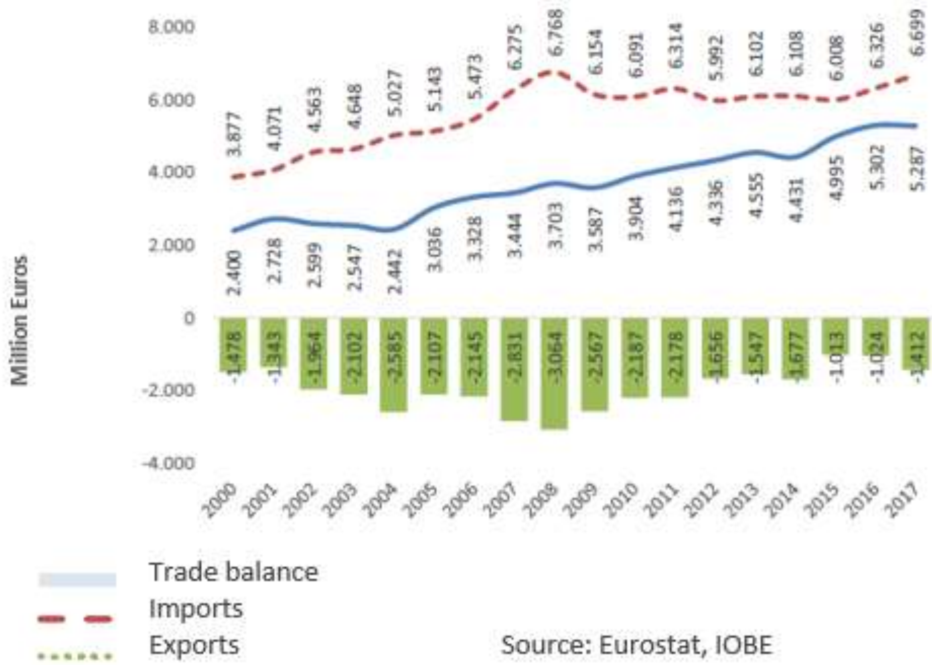
On the other hand, Greek foreign trade in **agricultural and agri-food products** is consistently in deficit, although the relative deficit has narrowed considerably since 2008. The value of agri-food exports has been steadily rising since the beginning of the last decade, reaching € 5.3 billion in 2017. On the other hand, agri-food imports have declined after 2008 and until 2016, to strengthen in 2017 (Figure 13).

Figure 12: Foreign trade in plant and animal products, 2000-2017



Source: Eurostat, IOBE

Figure 13: Foreign trade in agri-food products, 2000-2017



Source: Eurostat, IOBE

The exports of vegetables in the first four (4) months of 2021, while they decreased by 4.3% compared to the same period of 2020, amounting to 104,563 tonnes, increased by 12.2% in value, with 95.5 million euros. (Enterprise Greece Invest & Trade, 2021)

Respectively, fruit exports increased in volume compared to the same period of 2020 by 8.3% amounting to 481,533 tonnes, while the value increased by 14.7% and amounted to 383.72 million euros. (Enterprise Greece Invest & Trade, 2021)

The increase in the value of exported fruits by 14.7% is impressive and shows the increased average unit price of Greece's products, mainly due to tangerines and strawberries that set an export record.

The indications from the export until the 25/6/2021 based on temporary data of the Ministry of Regional Development and Infrastructure show that there is an increase of 6.6%. It is estimated, taking into account the reduced production of nuts due to losses, that the total exports of 2021, due to adverse weather conditions for the kernels, will be reduced in volume but increased in value due to the improved average unit price at record levels.

At the same time, there was a decrease in imports in the corresponding first four (4) months of 2021 in Greece by 17.5% in value to 240 million euros and by 16.5% in volume, with a significant decrease in imports mainly in vegetables 22.6% (by volume).

The trend of increasing exports of agricultural products does not seem to be cyclical, since our products withstand demanding markets and their quality is recognised.

The main products that were exported and imported during the first four (4) months of 2021 in comparison to the first four (4) months of 2020 were the following, as shown in Table 6.

Table 8: Exports-Imports of Fruit and Vegetables during the first four (4) months of 2021 (Naftemporiki.gr 2021)

Exports of Fresh Fruit & Vegetables							
A/A	**PRODUCTS**	**2021**		**2020**		**% CHANGE 2021/2020**	
		VALUE IN €	QUANTITY (IN TONNES)	VALUE IN €	QUANTITY (IN TONNES)	IN €	IN TONNES
1	VEGETABLES (FRESH, FROZEN, ETC.)	95,514,979	104,563	85,143,626	109,252	12.20%	-4.30%
2	FRUITS & NUTS FRESH OR DRIED	383,724,822	481,533	334,422,183	444,709	14.40%	8.30%
	TOTAL	479,239,801	586,096	419,565,809	553,961	14.20%	5.80%
PRODUCTS EXPORTS							
1	Potatoes	3,949,244	10,382	7,829,031	25,394	-49.60%	-59.10%
2	Tomatoes	7,105,708	22,162	6,044,709	19,585	17.60%	13.20%
3	Cucumbers	28,344,958	31,275	17,232,438	21,561	64.50%	45.10%
4	Peppers	12,911,547	7,514	13,555,819	7,930	-4.80%	-5.30%
5	Oranges	97,105,821	212,985	96,256,642	202,271	0.90%	5.30%
6	Tangerine	24,668,823	47,689	16,304,149	28,769	51.30%	65.80%
7	Lemons	6,269,064	10,236	8,065,614	10,557	-22.30%	-3.00%
8	Apples	16,518,262	32,972	13,152,563	25,732	25.60%	28.10%
9	Strawberries	73,322,564	39,042	41,595,617	32,419	76.30%	20.40%

10	Fresh Kiwis	95,053,981	78,841	87,299,115	84,340	8.90%	-6.50%
Imports of Fresh Fruit & Vegetables							
1	VEGETABLES (FRESH, FROZEN, ETC.) Total	84,752,475	153,717	110,940,965	198,702	-23.60%	-22.60%
2	FRUITS & NUTS FRESH OR DRIED Total	113,640,206	113,867	129,487,182	121,853	-12.20%	-6.60%
	TOTAL	198,392,681	267,583	240,428,147	320,555	-17.50%	-16.50%

3.3 Bilateral trade of Greece with other BRIDGES project countries

This chapter presents the bilateral trade trends between Greece and the BRIDGES project countries: Romania, Armenia, Moldova and Turkey.

3.3.1 Trade in Nestos

In the Municipality of Nestos, there are two (2) major agricultural cooperatives that are responsible for exporting their products. In particular, these cooperatives are:

- NESPAR Agricultural Cooperative of Chrisochori
- NESTOS Agricultural Association

These agricultural cooperatives standardize and export a large number of agricultural products to foreign markets.

NESPAR Agricultural Cooperative of Chrisochori (https://nespar.gr/about-us/)

In the Municipality of Nestos, NESPAR was founded in 1994 by a group of Chrissochori farmers. The cooperative originally comprised of 40 asparagus growers with only 762 acres of planted land. The major purpose of Nespar was to improve the smooth management and distribution of the producers' fresh asparagus.

After 8 years, the board council decided to broaden their horizons by introducing the production of NESPAR kiwi fruits, having created a well-known name for NESPAR Asparagus in the EU market as well as several experimental crops in the area. Experiments have indicated that the soil and environment in the Nestos Valley are appropriate for this type of cultivation.

The tremendous demand for NESPAR's high-quality products prompted its members to introduce two new products to the market in 2011. These are apricot and plum fruits that have been freshly picked.

In 2013, 2.414.683 kg of fresh fruits and vegetables were produced. The NESPAR network of exports covers markets such as the European Union, Ex-Soviet Union, Africa and Asia even Canada.

NESTOS Agricultural Association (https://asnestos.gr/en/asnestos/)

The first asparagus producing cooperative was established in Kavala, Nestos, in 1988. The cooperative was formed with the goal of developing and promoting asparagus cultivation. NESTOS is a dynamic group of growers who have expanded their operations to include additional crops such as kiwis, apricots, and plums. The cooperative was able to earn international recognition for the quality of its goods due to the commitment of its members to quality and the application of best farming methods.

In 2015, 3,500,000 kg of products were produced and exported to several countries. In particular, these countries were:

- Poland 23.17%
- Georgia 18,93%
- Germany 14.86%
- Spain 8.44%
- Ukraine 5.88%
- China 3.95%
- Egypt 2.52%
- United Arab Emirates 1.60%
- Italy 1.16%
- Bulgaria 1.02%

Asparagus was sold in Germany at a rate of 99 percent and in Italy at a rate of 1%. In terms of Kiwi, AS NESTOS is attempting to expand in third nations, as seen by 2016 sales, which were primarily produced in China and Dubai. Summer fruits (Peaches, Apricots, Plums and Nectarines) started to being exporting to Germany, Poland, and Egypt.

3.3.1 Greece-Romania bilateral trade

Romania is the 16th main trading partner of Greece, as the volume of bilateral trade amounted to 1.8 billion euros in 2020 (decrease compared to 2019 by 5.5%), with exports amounting to 1.1 billion euros (increase compared to 2019 by 7.2%) and imports amounting to 0.7 billion euros (decrease compared to 2019 by 21.2%). Regarding the total bilateral trade balance of Greece - Romania in the last four years, it presented in the following table.

Table 9: Greece-Romania bilateral trade balance (Values in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data)

	2017	2018	2019	2020*
Exports	875.040.539	969.537.567	1.040.425.928	1.117.741.011
Imports	901.005.659	978.299.645	830.996.040	668.429.882
Trade Volume	1.776.046.198	1.947.837.212	1.871.421.968	1.786.170.893
Trade balance	-25.965.120	-8.762.078	209.429.888	449.311.129

Greek exports to Romania

Greece's exports of goods have been steadily increasing over the past four years as in 2017 they reached 875 million Euros, in 2018 at 970 million Euros, in 2019 at 1 billion Euros and in

2020 at 1.1 billion Euros. Regarding the main Greek products exported to Romania in 2020 * these were:

Table 10: Main Greek products exported to Romania (CN4) (value in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data)

S/N	CN4	Product	2019	2020*	Increase/ decrease %
1	9503'	Toys for children	86,663,370	93,646,796	8
2	7213'	Coarse iron wire	73,479,731	83,939,277	14
3	7408'	Copper wires	51,377,205	50,505,453	-2
4	0805'	Citrus fruits, fresh or dried	41,893,685	47,960,005	14
5	7214'	Iron bars	31,534,952	42,301,328	34
6	8471'	Data processing machines, automatic, and units thereof.	28,440,884	29,964,542	5
7	2713'	Petroleum coke	19,208,671	26,677,972	39
8	2005'	Prepared vegetables	21,702,616	25,252,345	16
9	0809'	Apricots, cherries, peaches,	23,512,031	25,217,156	7
10	7305'	Iron or steel pipes	144,425	23,446,745	16,135
11	0803'	Bananas	24,004,785	20,190,510	-16
12	3105'	Mineral or chemical fertilizers	22,940,549	20,165,228	-12
13	3903'	Styrene polymers	24,339,138	19,889,924	-18
14	7606'	Aluminum sheets and bands,	11,389,480	19,167,657	68
15	3402'	Organic surfactants	17,259,142	18,209,679	6
16	3901'	Polymers of ethylene	19,790,616	15,555,822	-21
17	0810'	Strawberries, raspberries, blackberries,	13,651,705	15,353,384	12

From the 17 main exported products with a value of more than 15 million Euros, in 12 of them there was an increase in exports and in 5 there was a decrease in exports.

The most significant increase is recorded in the products: Iron pipes (+ 16.135%), Aluminum plates-strips (+ 68%), Petroleum coke (+ 39%), Iron bars (+ 34%) and Citrus fruits (+14%).

The most significant decrease is recorded in the products: Ethylene polymers (-21%), Styrene polymers (-18%), Bananas (-16%) and Fertilizers (-12%).

Greek exports of agri-food products to Romania

Regarding the total exports of agri-food products to Romania and after processing the relevant data of EL.STAT. it appears that in 2020 they amounted to a value of 267.7 million euros, marking an increase of 10% compared to 2019 (where they had reached a value of 243.3 million euros). It is also noted that the total value of agri-food exports represents about 24% of the total value of Greek exports to Romania.

As it results from the processing of the data of EL.STAT., The main exported agri-food products (export value 2020 more than 2.5 million Euros) in Romania are:

Table 11: Main exported Agri-food products to Romania (CN4) (values in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data)

S/N	CN4	Product	2019	2020*	Increase/decrease %
1	0805'	Citrus fruits, fresh or dried	41,893,685	47,960,005	14
2	2005'	Prepared vegetables	21,702,616	25,252,345	16
3	0809'	Apricots, cherries, peaches	23,512,031	25,217,156	7
4	0803'	Bananas,,	24,004,785	20,190,510	-16
5	0810'	Strawberries, raspberries, blackberries,	13,651,705	15,353,384	12
6	0302'	Fish, edible, fresh	9,653,606	12,199,685	26
7	1905'	Bakery, confectionery or biscuit products,	7,915,477	7,413,414	-6
8	0406'	Cheeses and curd	3,618,410	6,312,373	74
9	0807'	Melons, watermelons,	3,010,045	6,196,336	106
10	2106'	Food preparations	4,374,450	5,020,922	15
11	0806'	Grapes, fresh or dried	4,691,785	4,991,603	6
12	1901'	Malt extracts,	4,657,973	4,774,536	3
13	0707'	Cucumbers,	4,265,767	4,762,989	12
14	2009'	Fruit juices,	4,148,797	4,389,958	6
15	0701'	Potatoes, fresh or chilled	7,219,860	4,089,669	-43
16	2008'	Prepared or preserved fruit and nuts,	2,723,687	3,909,012	44
17	1902'	Pasta	2,242,858	3,833,513	71
18	0710'	Vegetables, uncooked or boiled frozen	4,331,275	3,629,859	-16
19	1511'	Palm oil,	3,232,835	3,600,884	11
20	0405'	Butter,	2,692,676	3,461,235	29
21	0602'	Plants	2,703,872	3,426,585	27
22	2203'	Malt beer	501,494	3,342,560	567
23	1509'	Olive oil	2,481,547	2,627,178	6

The most important export increases 2020/2019, 2020/2019, they were presented in Beer (+ 567%), Melons-Watermelons (+ 106%), Pasta (+ 71%), Canned peaches (Code .2008 + 44%), in Butter (+ 29%) and in Plants (+ 27%).

Greek imports from Romania

They are constantly decreasing during the previous three years (due to a significant decline in the value of imports of the first imported product, which is Petroleum Oils), as in 2018 they reached 978.3 million Euros, in 2019 at 850.2 million Euros and in 2020 668.4 million euros. As for the main products imported from Romania in 2020 * these were:

Table 12: Main products imported from Romania (CN4) (values in Euros) (CN4) (values in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data)

S/N	CN4	Product	2019	2020*	Increase/ decrease %
1	2710'	Oils from petroleum or bituminous minerals	184,541,214	67,491,840	-63
2	2402'	Cigars, cigarillos and cigarettes,	39,866,591	33,661,894	-16
3	7208'	Flat rolled iron products	34,292,779	27,628,666	-19
4	8544'	Wires and cables for electrotechnical use,	24,670,662	25,955,850	5
5	1005'	Corn	22,316,916	17,738,204	-21
6	0104'	Sheep and goats, live	22,485,979	16,989,792	-24
7	8517'	Electrical appliances for wired telephony	13,972,774	15,725,207	13
8	2202'	Waters, including minerals and aerated	16,352,486	15,174,640	-7
9	0406'	Cheese	12,506,342	13,553,532	8
10	9028'	Gas, liquid or electricity meters,	13,126,192	12,892,928	-2
11	8703'	Passenger cars	18,738,055	12,170,890	-35
12	1001'	Wheat and semolina	15,849,035	10,696,487	-33
13	4805'	Paper and cardboard for recycling	10,343,177	10,595,576	2
14	1905'	Bakery, confectionery or biscuit products,	10,245,470	10,594,990	3

From the 14 main imported products with a value of more than 10 million Euros, in 5 there was an increase in imports and in 9 there was a decrease in imports.

The most significant increase is recorded in the products: Electrical appliances for wired telephony (+ 13%) while the most significant decrease is recorded in the products: Petroleum or bituminous mineral oils (-63%), Passenger cars (-35%) and Wheat and semolina (- 33%).

Greek imports of Agri-food products from Romania

Regarding the total imports of agri-food products from Romania and after processing the relevant data of EL.STAT. It appears that in 2020 they amounted to a value of 147.8 million Euros, recording a decrease of 16.3% compared to 2019 (where they had reached a value of

176.7 million Euros). It is also noted that the total value of imports of agri-food products represents approximately 22.1% of the total value of Greek imports from Romania. As it results from the processing of the data of EL.STAT., The main imported agri-food products (value of exports in 2020 over 3 million Euros) from Romania are:

Table 13: Table …..: Main imported Agri-food products from Romania (CN4) (value in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office, 2020 Provisional Data)

S/N	CN4	Product	2019	2020*	Increase/ decrease %
1	2710'	Oils from petroleum or bituminous minerals	184,541,214	67,491,840	-63
2	1005'	Corn	22,316,916	17,738,204	-21
3	0104'	Sheep and goats, live	22,485,979	16,989,792	-24
4	2202'	Waters,	16,352,486	15,174,640	-7
5	0406'	Cheeses and curd	12,506,342	13,553,532	8
6	1001'	Wheat and semolina	15,849,035	10,696,487	-33
7	1905'	Bakery, confectionery or biscuit products,	10,245,470	10,594,990	3
8	0402'	Milk and cream (non-condensed milk) which are not concentrated or containing added sugar	6,797,728	8,957,037	32
9	0401'	Milk and cream (non-condensed milk) not containing sugar	8,865,474	6,736,028	-24
10	0207'	Edible meat and offal of poultry carcasses	7,369,422	5,458,073	-26
11	0204'	Meat of sheep or goats, fresh, chilled or frozen	4,323,693	5,061,340	17
12	1512'	Sunflower, safflower or cotton oils	6,172,316	4,578,615	-26
13	0102'	Live cattle	5,605,600	3,946,023	-30

As can be seen, from the above 13 products, in 4 of them there is an increase in imports 2020/2019, with the main ones in Milk and cream and Sheep-Goat Meat, while in the remaining 9 products there is a decrease, with the main ones in Wheat and Semolina, Live Cattle, Cattle Meat and Sunflower Oils.

3.3.2 Greece-Armenia bilateral trade

According to the statistical data by the Hellenic Statistical authority (EL.STAT), the bilateral trade relations between Greece and Armenia for 2020 moved at low levels, with the volume of bilateral trade showing a decrease of 27%. Reductions were recorded in both Greek exports and Greek imports from Armenia, mainly due to the problems caused by the pandemic in freight flows. The volume of trade between the two countries remains low over time despite their good level of cooperation and the positive balance over time.

The main Greek exportable products are: aluminum sheets and thin strips, rods and items with a definite form of aluminum, cigars, coating paints and varnishes, glues and other prepared adhesives and citrus fruits.

The main products imported from Armenia to Greece are: liqueurs, wine and jewelry.

Table 14: Greece-Armenia trade balance (Data by Hellenic Statistical Authority) (value in Euros) (ELSTAT, processing Economic & commercial affairs Erevan Office)

	2017	2018	2019	2020	Change 20/19 %
Exports	12.153.942	13.774.800	13.557.536	10.106.300	-25,45
Imports	186.000	447.868	398.414	66.648	-83,2
Trade volume	12.339.942	14.222.668	13.955.950	10.172.948	-27,1
Trade balance	11.967.942	13.326.932	13.159.122	10.039.652	-23,7

The official data by the Hellenic Statistical Authority show a remarkable discrepancy as compared with the data by the Statistical Service of Armenia for bilateral trade between Greece and Armenia:

Table 15: Greece - Armenia trade balance (Data by Armenian Statistical Authority) (values in Euros) (National Statistical Service of Armenia, processing Economic & commercial affairs Erevan Office)

	2017	2018	2019	2020	20/19 %
Exports	43.955.474	54.718.882	15.631.475	21.009.900	34,4
Imports	162.521	229.889	395.587	43.900	-88,9
Trade volume	44.117.995	54.948.772	15.579.582	21.053.800	35,3
Balance	43.792.953	55.904.835	15.235.887	20.966.000	37,6

Specifically, for 2020, the trade volume in bilateral trade between Greece and Armenia amounted to € 21 million, showing an increase of 35.3% compared to 2019, due to the significant increase in exports (34.4%) .

The 54.7 million euros of our exports in 2018, are the largest exports of all previous years since 2004. The significant discrepancy in relation to the data of EL.STAT, which is presented over time, concerns oil and oil products.

3.3.3 Greece-Moldova bilateral trade

Exports to EU (European Union) countries in 2020 account for 66.7% of Moldova's total exports with a value of 1.45 billion euros, while exports to CIS (Commonwealth of Independent States) countries amounted to $ 330.06 million, or 15, 2% of the total. The main customer countries for Moldovan products are Romania, followed by Germany, Russia, Italy, Turkey, Poland, the Czech Republic, Ukraine, Belarus and Switzerland. We notice that despite the unfavorable increase in exports to Turkey, which multiplied by 1.6 times as well as those to the Czech Republic (+ 150%).

Moldova's imports in 2020 amounted to 4.74 billion euros, down 7.3% compared to the previous year. Imports from EU countries account for 45.6%, with a value of 2.16 billion euros while 24.3% came from CIS countries. The top 10 suppliers to Moldova are China, Romania, Russia, Ukraine, Germany, Turkey, Italy, Poland, France and Belarus. Imports from China (7.3%), Poland (7.7%) and Greece (12.8%) increased. In contrast, imports from Romania decreased significantly by 25% and imports from Russia decreased by 13%. The following tables present the most important export (Table 16) and import (Table 17) partners of Moldova.

Table 16: 10 most important export destinations of Moldova and the position of Greece (Values million Euros) (National Statistical authority of Moldova, BNS, Comert Exterior 2020)

S/N	Country	Exports	%	Change 2020/2019 %
1	Romania	618,72	28,4%	-7,7%
2	Germany	197,51	9,1%	-8,3%
3	Russia	189,81	8,7%	-13,2%
4	Italy	187,10	8,6%	-20%
5	Turkey	150,32	6,9%	-2,2%
6	Poland	96,13	4,4%	-2,9%
7	Czech republic	70,48	3,2%	24,1%
8	Ukraine	60,85	2,8%	-13,3%
9	Belarus	57,70	2,7%	-18,1%
10	Switzerland	53,76	2,5%	-28,1%
		…		
16	Greece	23,64	1,1%	-31,2%

Table 17: most important suppliers of Moldova and the position of Greece (Values million Euros) (National Statistical authority of Moldova, BNS, Comert Exterior 2020)

S/N	Country	Exports	%	2020/2019 %
1	China	565,58	11,9%	7,3%
2	Romania	552,97	11,7%	-24,9%
3	Russia	528,10	11,1%	-12,9%

4	Ukraine	461,92	9,8%	-7,3%
5	Germany	395,99	8,4%	-6,6%
6	Turkey	339,87	7,2%	-3,1%
7	Italy	303,62	6,4%	-14,7%
8	Poland	190,16	4,0%	7,7%
9	France	106,20	2,2%	-17,5%
10	Belarus	99,72	2,1%	-13,1
		…		
29	Greece	21,98	0,5%	12,8%

As it derives from the following data, the bilateral trade with Moldova, presents the following 2 main characteristics:

- It shows a continuous decrease, as the main Greek exported product to Moldova, which until 2017 was Petroleum oils, presents a continuous and significant decrease (2016 export value 46.8 million Euros, 2020 export value 713 thousand Euro).
- Bilateral trade with Moldova is based mainly on trade in agricultural products, where fruits and vegetables are exported from the Greek side and cereals are exported from the Moldovan side. In more detail:

Table 18: Trade balance of Greece - Moldova in the last 5 years (values in Euros) (EL.STAT, processing Economic & commercial affairs Bucharest Office)

	2016	2017	2018	2019	2020*
Exports	55.339.320	35.144.232	16.489.160	12.162.421	12.851.493
Imports	47.581.736	46.117.301	41.290.981	44.510.642	31.234.800
Trade volume	102.921.056	81.261.533	57.780.141	56.673.063	44.086.293
Trade balance	7.757.584	10.973.069	24.801.821	32.348.221	18.383.307

More specifically, Greek exports to Moldova are as follows:

Table 19: Greek exports to Moldova, 2020 (values in Euros) (EL.STAT , processing Economic & commercial affairs Bucharest Office)

CN4	Product	Exports in Euros
0805'	Citrus fruits, fresh or dried	1,512,040
2005'	Vegetables prepared or preserved without vinegar, not frozen	1,305,162
0810'	Strawberries, raspberries, blackberries, gooseberries of all kinds, hare cherries and other edible fruits and berries, fresh	1,299,157
0809'	Apricots, cherries, peaches	1,082,456
2710'	Oils from petroleum or bituminous minerals	713,427

9406'	Buildings prefabricated, whether incomplete or not yet assembled	677,901
8433'	Machines and apparatus for harvesting or threshing agricultural products	488,149
	Total value	7,078,292
	% of total exports	55,1
	Total exports	12.851.493

While, the Greek imports from Moldova are as follows:

Table 20: Greek imports from Moldova, 2020 (EL.STAT , processing Economic & commercial affairs Bucharest Office)

CN4	Product	Imports in Euros
1005'	Corn	10,844,693
1001'	Wheat and semolina	7,219,085
2207'	Undenatured ethyl alcohol, with an alcoholic strength by volume> = 80% vol. Ethyl alcohol and spirits, denatured, of any title	5,844,878
7010'	Bottles, vials, vials, jugs, vases, tubular bottles, cartridges and other glass containers, for commercial transport or packaging,	3,564,799
0802'	Nuts, fresh or dried, whether or not shelled or peeled	1,131,580
1003'	Barley	1,085,843
2306'	Pies and other solid residues, whether or not broken or in the form of pellets, from the extraction of vegetable fats or oils	673,810
Total value		2,891,233
%of total imports		97,2
Total imports		31.234.800

3.3.4 Greece-Turkey bilateral trade

Turkey's most important supplier country in 2020 was China (23 billion, + 20.4%), surpassing Germany (21.7 billion, + 12.6%). The top ten is completed by Russia, the United States, Italy, Iraq, Switzerland, France and Korea. According to the Statistical Institute, Greece ranked 33rd among the countries of origin of products imported to Turkey.

Among other things, the impressive increase in imports from Iraq (+ 206.2%), Switzerland (+ 130.2%) and Libya (+ 245.6%) is noted, mainly due to the increase in imports of gold from those countries. Specifically, imports of gold from Iraq amounted to 7.9 billion in 2020, which means a 230.8% increase, and from Switzerland amounted to 4.7 billion, that means 170% increase. Also, imports from Libya marked an impressive increase that reached 1.3 billion (+498%).

Table 21: TURKISH IMPORTS - TOP 10 COUNTRIES (Value in thousands of dollars) (TUIK- Turkish Statistical Institute, Processing Ankara Embassy ACA Office)

	2019	2020	% Change 2020/2019
Total	**210.345.203**	**219.397.191**	**4,30**
China	19.128.160	23.019.929	20,35
Germany	19.280.399	21.713.934	12,62
Russia	23.115.236	17.858.830	-22,74
USA	11.847.373	11.517.948	-2,78
Italy	9.349.593	9.189.770	-1,71
Iraq	2.678.193	8.201.651	206,24
Switzerland	3.374.800	7.769.167	130,21
France	6.760.064	6.977.925	3,22
South Korea	5.777.022	5.731.773	-0,78
United Arab Emirates	4.388.996	5.603.729	27,68

The products imported by Turkey, other than petroleum (29 billion), are: precious stones, boilers/mechanical appliances, electrical equipment, vehicles, and iron / steel products. Particularly important was the increase in imports of precious stones (+ 99%), as well as vehicles (+ 53%). Imports of petroleum products decreased (-31%).

Table 21: TURKISH IMPORTS - FIRST 10 PRODUCTS (Value in thousands of dollars) ((TUIK- Turkish Statistical Institute, Processing Ankara Embassy ACA Office)

CODE	DESCRIPTION	2019	2020	% change 2020/2019	% on total
	TOTAL	210.345.203	219.397.191	4,30	100,00
	FIRST 10 PRODUCTS	144.941.001	155.661.204	7,40	70,91
27	Fossil fuels	41.731.207	28.925.039	-30,69	13,18
71	Precious stones and metals	13.366.642	26.590.853	98,93	12,11
84	Boilers, mechanical equipment	22.160.243	25.272.011	14,04	11,51
85	Electric machines	15.443.768	17.139.620	10,98	7,81
87	Vehicles	10.007.711	15.291.567	52,80	6,97
72	Iron and steel	15.049.677	15.102.954	0,35	6,88
39	Plastics and parts them	11.800.081	11.738.900	-0,52	5,35
29	Organic chemicals	5.965.253	5.888.524	-1,29	2,68
30	Pharmaceuticals	4.911.312	4.958.092	0,95	2,26
90	Photographic and surgical devices, etc.	4.505.107	4.753.641	5,52	2,17

Regarding the destination countries of Turkish exports, Germany maintained the first place, although there was a slight decrease compared to 2019 (16 billion, -3.9%). The other places are filled by the United Kingdom, the United States, Iraq and Italy. Greece took the 23rd place. It is noted that as early as the end of 2020, the effects of the unofficial Saudi boycott on Turkish products began to be felt in Turkish exports. Overall, in 2020 Turkish exports to Saudi Arabia (18th place) decreased by 23.9% (2.5 billion) and further decline is expected in 2021.

Table 22: TURKISH EXPORTS - TOP 10 COUNTRIES (Value in thousands of dollars) (TUIK- Turkish Statistical Institute, Processing Ankara Embassy ACA Office)

	2019	2020	% Change
Total	**180.832.722**	**169.481.945**	**-6,28**
Germany	16.617.244	15.974.660	-3,87
UK	11.278.615	11.237.198	-0,37
USA	8.970.658	10.183.902	13,52
Iraq	10.223.292	9.135.058	-10,64
Italy	9.753.018	8.075.449	-17,20
France	7.945.607	7.193.355	-9,47
Spain	8.138.744	6.686.430	-17,84
The Netherlands	5.761.921	5.189.852	-9,93
Israel	4.463.820	4.701.252	5,32
Russia	4.152.137	4.494.830	8,25

Turkey's most important export products in 2020 were vehicles, boilers / Mechanical appliances, electrical equipment, iron / steel products, clothing and plastics. However, there was a decrease in Turkish vehicle exports (-18%).

Table 23: TURKISH EXPORTS - FIRST 10 PRODUCTS (Value in thousands of dollars) (TUIK- Turkish Statistical Institute, Processing Ankara Embassy ACA Office)

CODE	DESCRIPTION	2019	2020	% change 2020/2019	% on total
	TOTAL	**180.832.722**	**169.481.945**	**-6,28**	**100,00**
	FIRST 10 PRODUCTS	**105.917.175**	**96.850.100**	**-8,56**	**57,09**
87	Vehicles	26.900.878	22.097.987	-17,85	13,03

84	Boilers, mechanical equipment	17.761.642	16.797.374	-5,43	9,90
85	Electrical equipment	9.748.319	9.307.072	-4,53	5,49
72	Iron / steel	10.019.007	8.803.101	-12,14	5,19
61	knitted clothing	9.200.169	8.386.796	-8,84	4,94
39	Plastic	6.804.501	6.971.178	2,45	4,11
71	Precious stones and metals	7.333.011	6.693.436	-8,72	3,95
62	Clothes - not knitted	6.870.714	6.599.880	-3,94	3,89
73	Iron / steel crafts	6.689.479	6.362.963	-4,88	3,75
8	Fruits and nuts	4.589.456	4.830.312	5,25	2,85

Regarding the trade balance of the Greek exports and imports to and from Turkey there is a dramatical decrease of 687,10%, between the years 2019 and 2020. Both exports and imports seem to be at the same levels of 2017, even though there was an increase in the years 2018 and 2019.

Table 24: Trade balance of Greece-Turkey transactions (EL.STAT. processing Office of Economic and Commercial Affairs Embassy of Ankara)

	2017	2018	2019	2020	% μεταβολή 2020/2019
EXPORTS	1.952	2.035	1.974	1.338	-32,22
IMPORTS	1.429	1.848	1.943	1.551	-20,17
TRADE BALANCE	523	187	31	-213	-687,10
TRADE VOLUME	3.381	3.883	3.917	2.889	-26,24

Table 25: Food and beverage exports in Turkey (in million €) (EL.STAT. processing Office of Economic and Commercial Affairs Embassy of Ankara)

PRODUCT	2016	2017	2018	2019	2020	% μεταβολή
Total exports excluding petroleum products	721.811	878.563	746.732	874.632	855.701	-2.16
Total food products & drinks	61.141	57.044	44.031	56.742	38.748	-31.71
%	8.47	6.49	5.9	6.49	4.53	-30.20

4. SWOT Analysis

The main goal of the SWOT analysis is to assess the agricultural and trade sectors' strengths (characteristics that give the agricultural and trade sector an advantage over others), weaknesses (factors that put the agricultural and trade sectors at a disadvantage in comparison to others), opportunities (aspects that the agricultural and trade sectors can take advantage of), and threats (factors that could impact negatively on the agricultural and trade sectors) from a local/regional/national/interregional perspective.

Strengths	Weaknesses
• Strategic geographical position of Greece • Existence of a significant number of quality agricultural products • Appropriate climatic and land conditions, as well as abundant and diversified biological resources, which constitute the foundation for healthy and profitable farming. • Agricultural tradition which helps toward the strategic development planning • Many quality controls available (institutions, standards)	• Small and fragmented agricultural holdings • High costs on the establishment and agricultural production • Lack of understanding about specific market needs • Lack of interest among young people to work in agriculture
Opportunities	**Threats**
• Promoting sustainable economic development • Maximasing market exposure • Encouraging the creation of new jobs • Diversification of exports • Identifying international buyers • Contributing to the achievement of the Sustainable Development Goals • Defining performance indicators to aid policy implementation, monitoring, and assessment, as well as public awareness. • Farmers' awareness of the need for professional and technical training. • Available EU funds	• Negative impact of COVID-19 pandemic on Greece's economy • Negative impacts of climate change (fires, floods, extreme weather conditions, etc.) • Risk of increased pollution, due to an increase in tourism and agricultural activities • Increasing pressure on biodiversity by the uncontrolled use of pesticides • Geopolitical issues • Shifting patterns of consumer demand • Importing products that are cheaper •

1. Conclusions

Greek strategies have well integrated EU policies on Agriculture, setting a quite well management and implementation framework for this sector. On the other hand, trade as more complicated sector, which involves international and national legislations and other legal issues, requires knowledge and expertise which is not easily available and employed in the agricultural sector are not familiar with.

The agricultural sector in Greece constitutes a significant source of economic activity and employment, accounting for roughly one-third of the country's total exports. It still holds a significant position in the national product, as its share of the GVA of the economy is consistently higher than the EU28 average, confirming the important role of agriculture and livestock in the domestic economy. However, the gradual structural transformation of the Greek economy is reflected in the reduction of the share of the agricultural sector between the years 1995 and 2017 - a decrease that was greater than that recorded in the same period in the EU28.

In Greece, agriculture is mostly crop-oriented, with livestock production accounting for less than a third of overall agricultural output. Fruit and vegetables, as well as cotton, wheat, and tobacco are among the most important crops in Greek agriculture. Aquaculture is a rather specialized sub-segment of food production, but it is a rapidly rising sector of the Greek economy -and one in which Greece may exploit its competitive advantages - and where Greece is already a major worldwide exporter. Greek food and agriculture sector is predicted to contribute significantly to GDP growth and value added in the next years, thanks to a number of key market trends and competitive advantages:

- The recent move in the Greek agriculture industry toward organic, natural materials, which are highly valued and may attract a higher premium and additional value.
- The importance of the Mediterranean Diet as a global model of healthy, natural eating
- One of the primary societal issues of the “Europe 2020” agenda is the rising desire for self-sufficiency and food security
- The potential of creating clusters in various specialized Greek food supply chains by combining EU financing, research, etc. in the implementation of new technologies.

In the Regional Unit of Kavala, as in the whole Region of Eastern Macedonia and Thrace, agricultural sector plays an important role in the local economy. 20% of the total area of the Kavala area is cultivated agricultural and fallow land. Almost half of the Municipality of Nestos area covers part of the river Nestos delta, meaning that this area is totally arable and also irrigable. Chrysoupoli is considered to be the centre of agricultural production in the western part of Nestos Delta. The area around the city produces a variety of agricultural products, such as corn, cereals, beans, sugar beets and olives. Asparagus, almond trees have a considerable presence, while other common agricultural products are rice, watermelon, apricots, peaches and potatoes. Moreover, Nestos’s kiwis and asparagus are considered to be of high quality and are the most important exported agricultural products. Other significant products are wine and honey. In the Nestos area, there are vineyards that produce high quality grapes and wine (Chardonnay, Syrah, Merlot, Malagouzia, Agioretiko, Assyrtiko, and Sauvignon), while also honey of high quality is produced.

Aquaculture is also present in the Nestos area. In the Keramoti lagoons the hatcheries of fish with sea bream, crabs, mussels, sardines, and mullets are the ones that stand out.

Regarding trade, in Greece, exports show significant increase, even though there was a decline in exports between 2019 and 2020, most probably due to the COVID-19 pandemic effects. However there is an increase of 19.2% from January 2021 to May 2021 in comparison with the same period in 2020. Same happened in imports. Greek foreign trade in agricultural and agri-food products is consistently in deficit, although the relative deficit has narrowed considerably since 2008. The value of agri-food exports has been steadily rising since the beginning of the last decade. In terms of food and beverage exports in 2020, Germany takes first place among the country's main trading partners followed by Italy. Same in terms of imports of processed food and beverage products, Germany takes first place, followed by the Netherlands. Regarding vegetables and fruit trade, even though exports of vegetables in the first four (4) months of 2021, decreased compared to the same period of 2020, showed increase in value. On the other hand, decrease showed the imports.

Romania is the 16th main trading partner of Greece, while Greece's exports of goods have been steadily increasing over the past four years. Among the products that showed significant increase in exports are citrus fruits, while exports of bananas decreased significantly. In the food sector, the most important export increases in 2020/2019 and 2020/2019, concern export of beer, Melons-Watermelons, Pasta, Canned peaches, Butter and Plants. Among the imported products from Romania that showed increase in 2020/2019, are Milk and cream and Sheep-Goat Meat, while decrease show Wheat and Semolina, Live Cattle, Cattle Meat and Sunflower Oils.

Regarding export in Armenia, among the products that showed significant increase were citrus fruits. The main products imported from Armenia to Greece are liqueurs, wine and jewelry.

As for Greek exports to Moldova, main products that are exported are citrus fruits, fresh or dried vegetables prepared or preserved without vinegar (not frozen), strawberries, raspberries, blackberries, gooseberries of all kinds, hare cherries and other edible fruits and berries, apricots, cherries, peaches, as well as machines and apparatus for harvesting or threshing agricultural products. Greek imports from Moldova concern Corn, Wheat and semolina, Nuts (fresh or dried), barley undenatured ethyl alcohol, Ethyl alcohol and spirits, bottles, vials, vials, jugs, vases, tubular bottles, cartridges and other glass containers, for commercial transport or packaging.

Regarding Turkey, the country is a major international exporter of Fruits and nuts.

Regarding all the above, it seems that Nestos has great potential to strengthen its trade relations with the BRIDGES project partners, as the existence of a significant number of quality agricultural products as well as the abundant and diversified biological resources, constitute the foundation for healthy and profitable farming. The Identifying international buyers will be a great challenge for the Municipality, but at the same time a great opportunity for the establishment of strong trade links, contributing to the areas sustainable development and resilience.

However, specific attention have to be paid in the negative impacts of climate change and the increasing pressure on biodiversity. Geopolitical issues might also be a threat for the region’s trade relations which could easily affect exports and imports. Some of the issues that have to be tackled in national level in the near future are the organisation of the small and fragmented agricultural holdings, the high costs on the establishment and agricultural production, the lack of understanding about specific market needs and the lack of interest among young people to work in agriculture.

Towards this direction, local and regional authorities, along with the local agricultural cooperatives and agricultural and trade institutions could manage to form a strong network to tackle all those issues and strengthen the agricultural sector in the area of Nestos. BRIDGES is a first step to expand their knowledge, expertise and experiences in matching the trade needs and offer of the five (5) participating countries.

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