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THE ECONOMIC CONDITIONS OF ENTERPRISE FUNCTIONING

The Tendencies of Strategic Industry Development in Lithuania

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The article analyzes the changing tendencies and carries out the comparative analysis of Lithuania's two major – milk and textile – industries. It is essential for Lithuania to maintain the competitiveness of these two industries in both domestic and foreign markets, promote production growth, and solve the problem of raw material shortages. The milk industry is one of the most important agricultural and food industry sectors producing about 18% of total agricultural output; milk-processing plants employ about ¼ of the total number of employees of the food sector. The textile industry is the 1st largest employer and is the 2nd largest according to the sales volume in the whole of processing industry, with a positive trade balance. This sector is in the leading position of export – makes up about 20% of total exports of Lithuania.

The milk sector is traditionally very important in Lithuania's economy – it employs a large number of people and adds a large value. Lithuania's membership in the EU is going to make a positive impact on this industry. Firstly, it is related to the support for agriculture – the cost of raw materials for the milk industry may go down. Secondly, there are better opportunities for foreign trade – sales barriers within the EU countries have been reduced and opportunities for the export to the third parties increase in connection with export finance. Finally, this industry enjoys a strong position in Lithuania's market.

The SWOT analysis of Lithuania's milk and textile industries demonstrated that they have favourable conditions for development, increase of the markets, but it is essential to pay attention to the arising threats in order to compete in the foreign markets and attract maximum investment. It is also important to compare the import and export change trends of these two industries and foresee the prospects of future development.

While carrying out the import-export analysis of the abovementioned industries, it is obvious that both textile and milk industries remain traditional, with most priorities and being one of the most prospective in Lithuania. Both industries enjoy favourable natural conditions, big experience, well-qualified and inexpensive workforce. As the whole of industry in Lithuania, they are facing a number of difficulties. One of textile industry branches – flax textile is facing a shortage of raw-materials. The amount of flax grown in Lithuania cannot satisfy the needs of textile producers. They are forced to import the necessary amount of flax, and thus they have to deal with the imposed import tariffs. However, the enterprises manage to get the import quotas. The problems of Lithuanian milk industy also start with raw-material production, which is closely related to the quality and output of milk and its products. Relatively low productivity of Lithuanian cows is one of thse problems. Milk production is also seasonal.

While evaluating the export possibilities for different industries, it was noticed that the attractiveness of milk industry largely depends on the possibility to get adequate raw material supplies, while that of garment and textile industries depends on the possibility to compete with the products from the cheap labour countries. The decreasing exports of the recent years demonstrate the inability of the textile industry to compete in the international markets. Regarding export possibilities milk product manufacture looks attractive. Although the export sales of the milk processors are relatively low, Lithuania's membership in the EU increased the industry's possibilities to sell its products in those markets. Besides, milk export subsidies opened new possibilities regarding third countries.

Keywords: *milk industry, textile industry, export, import, comparative analysis.*

Introduction

The international economic relations in Lithuania have recently gained a crucial importance. This could be explained by the fact that Lithuania on preparatory stage to become a member of the EU has been intensively expanding the openness of its economy. And on the 1st of May, 2004 together with the EU member status the new opportunities have emerged for Lithuania.

Therefore, the significance of foreign trade for national economics has been increasing. More than that, the development of export in Lithuania has been considered the most important growth lever.

It should be taken into consideration that the topic of foreign trade is very imperative. The changes of export-import and production activities have been analyzed by Gronskas V., Purlys Č., Bernatonytė, Hazlitt H. However, the scientific debate lacks some relevant comparative analysis of industry branches with the emphasis on general and specific characteristics under the circumstances of entering EU.

The aim of the article is to highlight the development tendencies of strategic branches of industry in Lithuania.

The object of the article – the development of strategic industries in Lithuania.

The subject of the article – the development of milk and textile industries in Lithuania.

The methods of the article – statistical data and document analysis.

In order to compare the abovementioned industries the analysis of *Strengths* and *Weaknesses* as well as *Opportunities* and *Threats* (SWOT) was carried out. As the milk and textile industries in Lithuania are quite different, the SWOT analysis is presented for each separate industry (see Tables 1 and 2).

Table 1

The SWOT analysis of milk industry (Rinkotyra, 2004)

Strengths	**Weaknesses**
1. Favourable conditions to develop milk cattle-rearing and existing sufficient natural resources. 2. Deep traditions of milk production and a large number of professionals with agricultural background. 3. Sufficient production potential. 4. Relatively equal distribution of milk processing plants. 5. Milk industry is most integrated into the EU structures, as compared with other branches of food industry.	1. In the meantime the industry is targeted to the domestic market – about 75% of production is sold in it. 2. Low productivity of agriculture compared with other EU countries.
Opportunities	**Threats**
1. Good trade opportunities in the CIS and the EU countries. 2. Opportunities to export milk products to the USA. 3. Large donations to agriculture from the EU, which results in cheaper raw materials. 4. Favourable tax system to export to the third parties (especially the CIS). 5. Increasing income will increase the domestic market.	1. Possible shortages of raw materials. 2. The industry has close politically grounded ties with agriculture.

Another traditionally important industry for Lithuania is the garment and textile sector. It employs almost ¼ of total industrial workforce and decline of this sector may become a painful social problem. Although in the meantime most indicators show relatively good competitive positions, they are constantly decreasing. Cheaper production from China builds a rather serious threat, which decreases the country's competitiveness. This is also reflected in the investment into this sector – it is regularly decreasing, while this sector is in need for investment in order to increase productivity (productivity is the lowest among Lithuanian industries) (see Table 2).

Table 2

The SWOT analysis of textile industry (Rinkotyra, 2004)

Strengths	Weaknesses
1. A large number of workforces in the sector. 2. Around 80-85% of production is exported. 3. Export volumes larger than those of import. 4. Work productivity is quite competitive compared with the productivity in the other 10 EU countries. 5. Highly qualified workforce. 6. Big experience and deep traditions. 7. Advanced technologies.	1. Mainly labour is sold. 2. Low profitability. 3. Decreasing volumes of export. 4. Decreasing material investment. 5. The only sector with the decreased direct foreign investment (since 2000). 6. The Lowest work productivity among all Lithuania's industry sectors. 7. Work pay makes a large part in the cost structure.
Opportunities	**Threats**
1. Still favourably evaluated the opportunities of foreign trade with the EU countries. 2. Enterprise flexibility gives the industry certain competitive advantage.	1. The threat of competition from the Chinese producers. 2. Low material and direct foreign investment does not enable the technological upgrade of the production means. 3. The rise of the work pay.

The SWOT analysis of Lithuania's milk and textile industries demonstrated that they have favourable conditions for development, increase of the markets, but it is essential to pay attention to the arising threats in order to compete in the foreign markets and attract maximum investment. It is also important to compare the import and export change trends of these two industries and foresee the prospects of future development.

While carrying out the import-export analysis of the abovementioned industries, it is obvious that both textile and milk industries remain traditional, with most priorities and being one of the most prospective in Lithuania. Both industries enjoy favourable natural conditions, big experience, well-qualified and inexpensive workforce. As the whole of industry in Lithuania, they are facing a number of difficulties. One of textile industry branches – flax textile is facing a shortage of raw-materials. The amount of flax grown in Lithuania cannot satisfy the needs of textile producers. They are forced to import the necessary amount of flax, and thus they have to deal with the imposed import tarifs. However, the enterprises manage to get the import quotas. The problems of Lithuanian milk industy also start with raw-material production, which is closely related to the quality and output of milk and its products. Relatively low productivity of Lithuanian cows is one of thse problems. Milk production is also seasonal. In August 2002 m. the milk supply was 2.4 times higher than in February. While in the EU countries this ratio is about 1.3. Besides, the size of milk farms is irrational, as the milk producing farms are small in size. In May 2001 there were 211.5 thousant milk producers, who kept 464.8 thousand cows, i.e. 2.2 cows per farm. As small size farms prevail in the milk production, their low purchasing power does not allow them to buy modern equipment, cooling facilities, besides these facilities would not be efficient on such small farms. Milk production farms can be characterized by low technical and technological level, conditioning low productivity, and therefore low incomes. The old EU members have 23 cows per milk producing farm. For instance, on avarage there are 44 cows in Denmark, 46 in Holland, 26 in Germany, 7 in Greece and 11 in Spain. Despite of this, the quality of milk produced in Lithuania is increasing. As much as 30% of all milk suplied corresponds to the EU requirements, and as many as 17 milk processing plants have the EU certificates, which allows milk product export to these member-countries (Glinskienė, 2000).

The comparison of production levels of butter production (milk industry) and flax products (textile industry) (see Figure1) shows that the output of both products in 1998 to 2003 was changing differently.

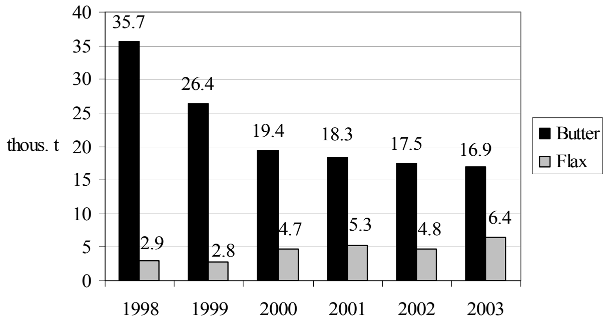
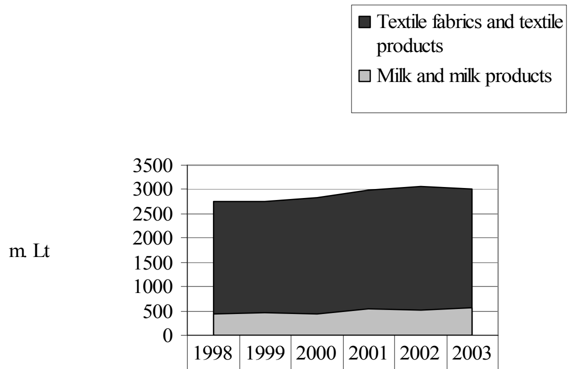


Figure 1. Comparison of butter and flax threads production in the period 1998-2003.,(thous. t) (Rinkotyra, 2004)

The volumes of butter production were constantly decreasing. It is necessary to note that the production of milk production in the period of 1998 to 2000 constantly decreased, and the largest decrease was in 1999. Besides, the consolidation of some and bankruptsies of others in the years 1998 to 2000 resulted in a lower number of enterprises. The milk sector of Lithuania is experiencing a concentration of industrial operations, which is encouraged by the following reasons: the problems of production assortment balance, high level of comercial vulnerability, the capacity of domestic market and the seasonal character of production.

The production of flax threads has been enjoying an increase since 2000. Due to different measuring units it is impossible to demonstrate the curve of flax textile production.

The analysed industries are one of the most integrated into the EU. More than 70% of textile products are exported to the EU. The export of milk products in 2002 made about 1/3 of all agricultural and milk product exports. Figure 2 compares the volumes of textile and milk industry exports.



	1998	1999	2000	2001	2002	2003
Textile fabrics and textile products	2762	2743	2836	2994	3058	3020
Milk and milk products	428.9	464.9	444.0	528.0	517.0	569.0

Figure 2. Lithuanian exports of milk and textile industries in 1998 to 2003, m Lt (Rinkotyra, 2004)

As the chart demonstrates there are a lot more textile products exported than there are milk industry products. Comparing the export volumes of 2003, there were 5.3 times more textile products exported than there were Lithuanian milk products. However, it is important to remember that a container of yoghurt costs far less than one flax sewing. If we analyze the exports according to their product groups and volumes in tonnes the situation will change. The export of textile products in the period of 1998-2002 gradually grew and increased by 257.3 m Lt, and in 2003 decreased by 1.3%, i.e. 38.6 m Lt. The export of milk products was unequal, increased in one year and decreased in another, but in the period of 1998-2003 it grew and increased by 32.6%, i.e. by 139.8 m Lt. In 2003 Lithuanian milk industry earned 569 m Lt. In the structure of the products exported cheese and curds made up the largest part (64%), milk powder (11%) and butter (6%). In 2003, compared with 2002, the export of cheese and curds decreased by 7% and butter by 13%. At the same time the export of concentrated milk products increased (milk powder and condensed milk by 2.3 times), as well as of raw milk (4.8 times). On the whole, the export of milk products increased by 10%.

The volumes of textile industry products are larger than those of milk industry (in million Lt) Also the majority of textile products are exported, and only about 20% sold locally. However, the export of in this sector decreased by 38 m Lt, while the sales in the domestic market in 2003 were 35.6% higher than in 2002 (See. Figure 3).

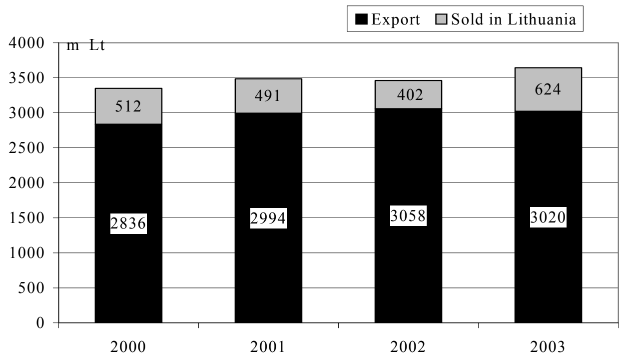
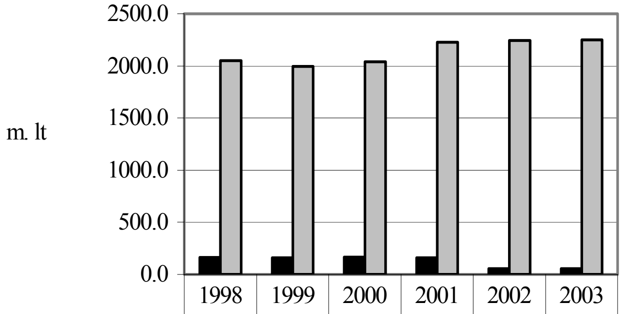


Figure 3. The volumes of textile products sold (m Lt.) (Lietuvos ūkio sektorių apžvalga, 2004)

Worse business expectations (the decrease of of textile industry exports and total sales volumes) are demonstrated by the fall of material investment into this activity: in 2003 their ratio with the value added was 2.5 times lower then the same in the whole of processing industries. The interest of foreign investors in also decreasing – light industry was the only one among the analyzed operations where direct foreign investment in 2003 was lower than in 2000. The need for investment is of crusial importance – in 2003 garment and textile sectors were the last according to the work productivity.

The other industry under discussion is mainly directed to domestic market, most of its products are sold and consumed inside the country and only a minor part is exported (see Figure 4).

Figure 4. The volumes of milk sector products sold (m Lt.) (Lietuvos ūkio sektorių apžvalga, 2004)



	1998	1999	2000	2001	2002	2003
■ Milk and milk products	162.3	158.6	167.2	160.7	54.7	54.2
□ Textile fabrics and textile products	2049.3	1995.4	2038.4	2226.7	2244.8	2250.4

Figure 5. Lithuanian milk and textile product imports (1998-2003, m Lt) (Lietuvos ūkio sektorių apžvalga, 2004)

In the period analyzed the export of milk industry grew and increased by 21% (120 m Lt). In 2003, compared with 2002, both the export of milk and the volumes of products sold in the domestic market was increasing.

The consumption of milk and milk products regularly increased in the period of 2000 to 2003. Rising economic living standard should promote the consumption of these products, while the consumption of cheaper ones will decrease.

It is also important to analyze and compare the import of milk and textile industries. The value of imported textiles is much higher than that of milk products. With more liberal trade the import of milk products is even decreasing. The import of textiles is growing anyway whether trade is more liberal or there are certain barriers (Figure 5).

As it can be seen from the chart presented, the value of textile products imported is much higher than that of of milk products. If we compare the import volumes of 2003, the imports of textile products are 41.5 times higher than the imports of milk products. Although, we should bear in mind that, as in exports, one milk product costs less than one finished textile product. The import of textile products in the period of 1998 to 2003 constantly grew and increased by 201.1 m Lt, i.e. 8.9 %. The import of milk products was unequal: in 1999, compared with 1998 it decreased by 3.7 m Lt, in 2000 most amount of milk products was imported (during the period analyzed) – 167.2 m Lt. However, in 2001 the import started to decrease and in 2003 Lithuanian milk industry only received 54.2 m Lt income, i.e. 1081.1 m Lt less than in 1998. In the import product structure most value was constituted by yogurt (54%) and cheese (24%). Most yogurts were imported in 2002 (3722 tonnes).

When we compare milk and textile sectors according to the trade partners, we can see that the main partners in textile industry are the EU countries, while the milk industry mainly co-operates with the US, the EU and the CIS countries being in the 2nd and 3rd places. (Figure 6).

The leading trade partner in the export and export volumes of textile industry Germany was overtaken by the UK. If the exports from Germany in the period from January to October 2003 totaled 462.97m Lt, and imports were the total of 384.96m Lt; the export value to the UK was 472,84m Lt, while the imports were considerably lower – 242.71m Lt. Considerably increased garment export to this country makes up 18.6% of total textile and garment export (to Germany – 18.2%). To reach such a result was helped by the Lithuanian garment and textile enterprise association (LATIA), which organized trade missions of Lithuanian entrepreneurs to this country, and implemented a modern information system; also active collaboration of Lithuanian sewing enterprises with the partners in the UK. Alongside with Germany and the UK, the traditional textile and garment export markets could be Scandinavian countries (Sweden and Denmark), also Italy and France.

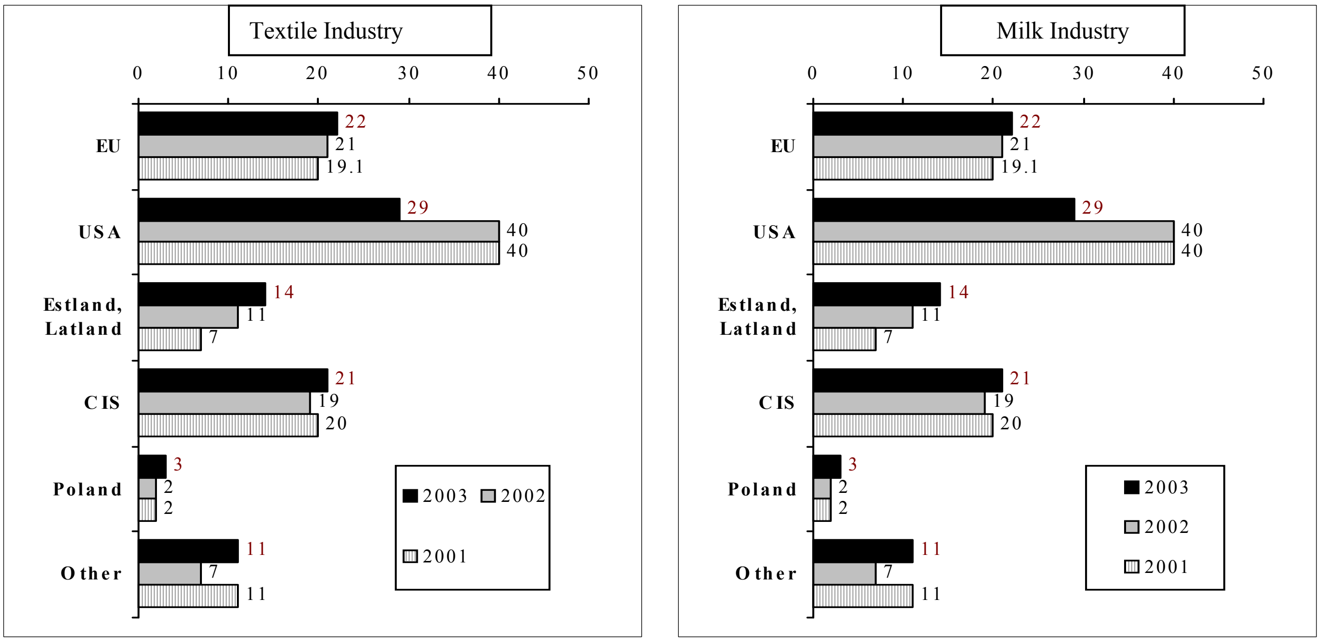


Figure 6. The exports of Lithuanian and textile sectors according to the trade partners in 2001 to 2003 (%). (Department of Statistics, 2004)

Most of milk products in 2003 were exported to the USA (29%) and the CIS (21%). In the period of 2002 to 2003 in the general export structure the part of products exported to the US and the CIS decreased (by 13 and 1 points correspondingly). The abovementioned structural changes were mainly predetermined by the prices (in the US dollar zone) in the US dollars. The cheap US dollar decreased the export prices of the Lithuanian enterprises to those countries. Although milk export to the US dollar zone countries decreased, the low value of the US dollar, however, made a big influence on the average export prices. The world prices for milk products slightly increased in 2003, but if we calculate in Lits, the prices remain at almost the same level or slightly lower, as the US dollar got cheaper in relation to the Lit. In 2004 a slight increase in milk prices was forecast, although this price increase due to the unstable currency exchange rate may not have any influence to the income from export. Lithuania's membership in the EU may result in export prices reaching the EU price level, i.e. it may increase. However, it will also depend on how Lithuanian milk processors will manage to use the export subsidies. In 2004 the EU started the milk and milk product regulation reform, which abolished the purposive price for milk. Since 2004 the intervention price for milk products started to decrease. In the period of 2004 to 2007 the intervention price for butter is being decreased by 25% and skimmed milk powder by 15%. Since 2004 buying up into the intervention funds has been limited.

Integration into the EU and willingness to maintain positions in the EU markets, also in the conditions of liberalized agricultural and milk product trade, Lithuanian milk industry is inevitably coming and will come across with increasing competition in both domestic and foreign markets. The share of costs for sales and processing is increasing, while the cost share for farmers is decreasing. The processor keeps up the quality levels and controls the whole production chain from the supplier to the seller. As a reaction to this phenomenon in order to strengthen their position against the retailers, a tendency of uniting of the milk processors into larger units can be observed. A high level of specialization and production concentration characterizes the EU milk industry. For instance, in Denmark one processor controls 90% of the market, in Sweden the largest processor controls 65% of the whole market. This is also inevitable in Lithuanian milk processing companies. The variety of the consumers' tastes, demand for cheap but high quality food needs a high degree of specialization, at the same time more capital investment, that is why it is essential to get maximum economical effect from large production volumes.

The further consolidation of Lithuanian milk processors against increasing competition is an inevitable, although positive, phenomenon. Only strong and specialized producers with financial resources to invest into the development of new products and marketing have a chance to compete in foreign and the EU markets. Lithuanian flax textile manufacturers have to compete with the flax producers – competitors of the domestic market- of neighbouring countries (Byelorussia and Latvia), also with foreign markets where the number of competitors is much larger. This includes the CIS, Eastern European countries (Poland, Czech Republic, Slovakia and Romania), Central and Western Europe (England, Germany, Italy and Austria), also Asian countries, such as China and Hong Kong. Flax processors should increase their competitive advantage by developing new products, mastering new design techniques and increasing the quality of their products. This would enable to gradually introduce new products into the market. Having carried out the comparative analysis of the abovementioned industries, it was noticed that both, milk and textile industries, in the period under discussion remain traditional and have the priority character. They are one of the most prospective, have favourable natural conditions, long traditions, big production expertise and highly qualified labour. One positive factor for both industries is a favourable geographical location, which can be characterized by the closeness of the EU and Russian markets.

While evaluating the export possibilities for different industries, it was noticed that the attractiveness of milk industry largely depends on the possibility to get adequate raw material supplies, while that of garment and textile industries depends on the possibility to compete with the products from the cheap labour countries. The decreasing exports of the recent years demonstrate the inability of the textile industry to compete in the international markets. Regarding export possibilities milk product manufacture looks attractive. Although the export sales of the milk processors are relatively low, Lithuania's membership in the EU increased the industry's possibilities to sell its products in those markets. Besides, milk export subsidies opened new possibilities regarding third countries.

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Strateginių pramonės šakų vystymosi tendencijos Lietuvoje

Santrauka

Straipsnyje analizuojama dviejų stambių – pieno ir tekstilės – Lietuvos pramonės šakų užsienio prekybos kitimo tendencijos, atliekama šių šakų lyginamoji analizė. Lietuvai svarbu išlaikyti šias dvi pramonės šakas konkurencingas vidaus bei užsienio rinkose, skatinti jų gamybos augimą, spręsti žaliavos trūkumo problemą. Pieno pramonė yra viena svarbiausių Lietuvos žemės ūkio ir maisto pramonės sričių pagaminanti apie 18 proc. visos žemės ūkio produkcijos; pieno perdirbimo įmonėse dirba apie ¼ visų maisto pramonės darbuotojų. Tekstilės pramonė – pirmas pagal darbuotojų skaičių ir antras pagal parduotos produkcijos apimtį apdirbamosios pramonės sektorius, kurio prekybos balansas yra teigiamas. Šis sektorius ne vieneri metai užima eksporto lyderio pozicijas – apie 20 proc. viso šalies eksporto.

Tarptautiniai ekonominiai santykiai Lietuvoje dabar įgyja itin aktualią reikšmę. Tai galima paaiškinti tuo, kad Lietuva, jau rengdamasi narystei Europos Sąjungoje, aktyviai didino šalies ekonomikos atvirumą ir, 2004 m. gegužės 1 d. jai tapus ES nare, atsivėrė visiškai naujos galimybės, susijusios su šiuo nauju statusu.

Todėl šiame kontekste ypač didėja užsienio prekybos reikšmė nacionalinei ekonomikai. Juolab kad eksporto plėtra Lietuvoje yra svarbiausias šalies ekonomikos augimo svertas.

Užsienio prekybos tema labai aktuali ir populiari. Plačiai apie eksporto ir importo ir gamybos pokyčius rašo V. Gronskas, Č. Purlys, D. Bernatonytė, H. Hazlitt. Tačiau nedaug pavyksta rasti darbų, kuriuose būtų atlikta pramonės šakų lyginamoji analizė, išskiriant bendruosius ir specifinius bruožus integracijos į ES sąlygomis.

Straipsnio **tikslas** – išryškinti strateginių Lietuvos pramonės šakų vystymosi tendencijas.

Straipsnio **objektas** – strateginių pramonės šakų vystymasis Lietuvoje.

Straipsnio **subjektas** – pieno ir tekstilės pramonės šakų vystymasis Lietuvoje.

Mokslinio straipsnio **metodai** – statistinių duomenų ir dokumentų analizė.

Siekiant palyginti minėtąsias pramonės šakas, atliktas stipriųjų ir silpnųjų savybių, galimybių ir grėsmių (toliau SSGG) įvertinimas. Kadangi Lietuvos pieno ir tekstilės pramonės šakos gerokai skiriasi, pateikiamos kiekvienos pramonės šakos SSGG analizės.

Pieno pramonė tradiciškai yra labai svarbi Lietuvos pramonei – čia dirba daug žmonių, sukuriama didelė pridėtinės vertės dalis. Lietuvos prisijungimas prie ES teigiamai paveiks šios pramonės rezultatus. Pirmiausia tai sietina su parama žemės ūkiui – gali atpigti pieno pramonės žaliavos. Antra, stipriai pagerėja užsienio prekybos galimybės – sumažėja prekių realizavimo barjerai ES viduje bei pagerėja eksportavimo į trečiąsias šalis galimybės dėl eksporto finansavimo. Be to, ši pramonės šaka užima stiprias pozicijas Lietuvos rinkoje.

Kita tradiciškai svarbi Lietuvai pramonės šaka – aprangos ir tekstilės pramonė. Čia dirba beveik ketvirtadalis visos pramonės dirbančiųjų – šios pramonės smukimas gali virsti skaudžia socialine problema. Nors dauguma rodiklių rodo gana neblogas konkurencines pozicijas esamu momentu, tačiau jos nuolatos prastėja. Ganėtinai rimtas pavojus dėl pigesnės produkcijos iš Kinijos mažina šalies konkurencines galimybes. Tai atsiliepia ir investicijoms į šią šaką – jų nuolat mažėja. Tuo tarpu šiai pramonės šakai investicijos itin reikalingos, norint padidinti darbo produktyvumą (darbo produktyvumas mažiausias tarp Lietuvos pramonės šakų).

Atlikta Lietuvos pieno ir tekstilės pramonės šakų SSGG analizė parodė, kad jos turi palankių galimybių vystytis, plėsti rinkas, tačiau reikia atkreipti dėmesį ir į kylančias grėsmes, norint sėkmingai konkuruoti užsienio rinkose, pritraukti kuo daugiau investicijų. Taip pat svarbu palyginti šių dviejų šakų importo bei eksporto kitimo tendencijas ir numatyti vystymosi perspektyvas.

Atliekant minėtų pramonės šakų rinkos ir importo bei eksporto analizes, krinta į akis, nesunku pastebėti, kad tiek tekstilės, tiek pieno pramonės išlieka tradicinėmis, prioritetinėmis ir vienos perspektyviausių Lietuvos pramonės šakų. Abiejų šitų pramonės šakų šalyje palankios gamtinės sąlygos, sukaupta didelė patirtis, geros kvalifikacijos ir nebrangi darbo jėga Šios pramonės šakos, kaip ir visas Lietuvos ūkis, išgyvena ne patį lengviausią laikotarpį. Viena tekstilės pramonės šakų – linų tekstilės pramonė jaučia žaliavos stygių. Lietuvoje nebeišauginama tiek linų, kad būtų visiškai patenkinti tekstilininkų poreikiais. Trūkstamą žaliavą tenka įsivežti iš kitur, tuo tarpu yra nustatyti tam tikri importo muito tarifai. Tačiau įmonės kasmet išsikovoja importo kvotas. Lietuvos pieno pramonės problemos taip pat prasideda nuo žaliavos gamybos, nes nuo to priklauso pieno ir jo produktų kokybė bei kiekis. Kaip vieną tokių problemų galima pažymėti palyginti žemą Lietuvos karvių produktyvumą. Pieno gamyboje ryškus sezoniškumas.

Analizuojamos šakos yra vienos iš labiausiai integruotų į ES. Tekstilės pramonės gaminių į ES išvežama daugiau negu 70 proc. Pieno produktų eksportas 2002 m. sudarė apie trečdalį visos žemės ūkio produkcijos ir maisto produktų eksporto. Tekstilės gaminių eksportuojama kur kas daugiau nei pieno pramonės gaminių. Lyginant 2003 m. eksporto apimtis, tekstilės gaminių išvežama net 5,3 karto daugiau nei lietuviškų pieno produktų. Tačiau nepamirština, kad, pavyzdžiui, indelis jogurto žymiai pigesnis, nei vienas siūtas lino gaminys. Nagrinėjant eksportą pagal prekių grupes ir kiekį tonomis, situacija keičiasi. Tekstilės gaminių eksportas 1998-2002 m. palaipsniui augo ir nagrinėjamu laikotarpiu padidėjo 257,3 mln. Lt, o 2003 metais sumažėjo 1,3 proc., t.y. 38,6 mln. Lt. Pieno produktų eksportas buvo netolygus – vienais metais didėjo, o kitais mažėjo, bet 1998-2003 m. augo ir padidėjo net 32,6 proc., t.y. 139,8 mln. Lt. 2003 m. Lietuvos pieno pramonė iš pieno produktų eksporto gavo 569 mln. Lt pajamų. Eksportuojamų pieno produktų struktūroje vertine išraiška didžiausią dalį sudarė sūriai ir varškė (64 proc.), pieno milteliai (11 proc.), sviestas (6 proc.). 2003 metais, palyginti su 2002-aisiais, sūrių ir varškės eksportas sumažėjo 7 proc., sviesto – 13 proc. Tuo tarpu padidėjo koncentruotų pieno produktų (pieno miltelių, kondensuoto pieno – 2,3 karto) ir nekoncentruoto pieno (4,8 karto) eksportas. Iš viso pieno produktų eksportas išaugo 10 proc.

Tekstilės pramonės produkcijos apimtys (mln. Lt) didesnės nei pieno pramonės. Didžioji dalis tekstilės pramonės produkcijos irgi eksportuojama į kitas šalis, šalies viduje parduodama tik apie 20 proc. produkcijos. Tačiau pastaraisiais metais šios šakos eksportas sumažėjo 38 mln. Lt, tuo tarpu Lietuvos vidaus rinkoje 2003 m. tekstilės pramonės produkcijos parduota 35,6 proc. daugiau nei 2002 metais.

Lietuvos pieno pramonės įmonių konsolidacija konkurencingumo stiprinimo atžvilgiu yra teigiamas ir neišvengiamas reiškinys. Užsienio, taip pat ir ES rinkoje turi galimybių konkuruoti stiprios, specializuotos pieno perdirbimo įmonės, turinčios finansinių išteklių investuoti į naujų produktų kūrimą, rinkodaros vystymą. Lietuvos linų tekstilininkams tenka konkuruoti su artimiausių šalių (Baltarusija, Latvija) linų produkcijos augintojais (tai vidaus rinkos konkurentai) bei užsienio rinkose, kuriose konkurentų kur kas daugiau. Tai NVS, Rytų Europos (Lenkija, Čekija, Slovakija, Rumunija), Centrinės ir Vakarų Europos (Anglija, Vokietija, Italija, Austrija), taip pat Azijos šalys (Kinija, Honkongas). Linų perdirbimo bendrovės savo konkurencinį pranašumą turėtų didint, kurdamos naujus produktus, geriau įvaldydamos dizaino techniką ir gerindamos gaminių kokybę. Tai įgalintų palaipsniui pradėti gaminti naujus produktus.

Palyginus pieno ir tekstilės pramonės šakas pagal prekybos partnerius, matyti, kad pagrindinės prekybos partnerės tekstilės pramonėje yra ES šalys, tuo tarpu pieno pramonė daugiausia bendradarbiauja su JAV, antroje vietoje – ES ir NVS šalys.

Tekstilės pramonės šalį partnerę pagal eksporto ir importo apimtis lyderės pozicijas turinčią, jau ilgą laiką pirmavusią Vokietiją, aplenkė Jungtinė Karalystė. 2003 m. sausio-spalio mėn. į Vokietiją eksportuota gaminių už 462,97 mln. Lt, iš šios šalies importuota už 384,96 mln. Lt, o į Jungtinę Karalystę tekstilės ir aprangos gaminių minėtuoju laikotarpiu eksportuota už 472,84 mln. Lt; tuo tarpu importo apimtys iš šios šalies kur kas mažesnės nei iš Vokietijos – importuota gaminių už 242,71 mln. Lt

Daugiausia pieno produktų 2003 metais eksportuota į JAV (29 proc.), ES (22 proc.) ir NVS (21 proc.). Per 2002-2003 m. laikotarpį eksportuojamų į JAV ir NVS šalis pieno produktų dalis bendroje eksporto struktūroje sumažėjo (atitinkamai 13 ir 1 punktu). Minėtus struktūrinius pokyčius daugiausia lėmė pakitusios įmonių eksporto į šalis, kuriose atsiskaitoma JAV doleriais, kainos.

Vertinant atskirų pramonės šakų galimybes parduoti produkciją už Lietuvos ribų, pastebėta, kad pieno pramonės šakos patrauklumas labai priklauso nuo galimybės apsirūpinti žaliavomis, o aprangos ir tekstilės pramonės – nuo galimybės konkuruoti su pigesnę darbo jėgą turinčių šalių produkcija. Pastaraisiais metais mažėjantis eksportas rodo tekstilės pramonės šakos nesugebėjimą konkuruoti tarptautinėje rinkoje. Eksporto galimybių požiūriu patrauklūs atrodo pieno produktų gamyba. Nors pieno pramonė realizuoja palyginti mažai savo produkcijos užsienio rinkose, tačiau, Lietuvai prisijungus prie ES, padidėjo šakos galimybės parduoti savo produkciją šioje rinkoje. Be to, pieno pramonės eksporto subsidijavimas atvėrė naujų galimybių trečiųjų šalių atžvilgiu.

Raktažodžiai: *pieno pramonė, tekstilės pramonė, eksportas, importas, lyginamoji analizė.*

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