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Agriculture of Ukraine: state and resource development opportunities

Scientific problem. Agricultural production of Ukraine is the industry, which stabilizes national social and economic development, ensures food security and independence of the state. It is especially important during the crisis periods which are followed by consumer demand reducing almost in all spheres. At the same time agriculture along with other industries is also exposed to negative impact of the crisis that is worsening current problems of domestic agromanaging development. This leads to reduction in "safety margin" of production. Thus, it results in decrease of potential of its further development that is based on the principles of economic stability. Furthermore, among other consequences are fixed structural imbalance, monoprodukt export orientation, lack of proper ecological justification in agricultural activity. Under such conditions the

growth of farm-production which on the one hand is represented by the positive phenomenon that comprises the improving of food security state and the strengthening of export currency receipts, on the other hand, bears threats to the state of social and ecological spheres that can finally decrease economic results of such growth substantially.

Analysis of recent researches and publications. The problem of assessing the state of agricultural sector of Ukraine and the resource potential of its development is the subject of many national authors, in particular Lupenko Yu.O., Malik M.J., Shpykuliak O. H. [1], Paskhaver B.J., Moldavan L.V. [2], Sabluk P.T. [3].

The objective of the article is studying the current state of domestic agricultural, resource potential and opportunities for further development in the terms of the growth of constraints of land and water resources on the basis of ecological principles and resource conservation.

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Statement of main results of the study.

The agriculture of Ukraine each year shows the enviable progress especially noticeable comparing to the present difficult economic situation in the country. In 2014 the index of the branch output was 102,8% (including agricultural enterprises - 104,1% and population farms - 101,2%), in 2015 there was a natural reduction in the production (up to 95,2%), due to the difficulty of obtaining high yields for several consecutive years. Expected results 2016 should be the same as last year or slightly higher, because the index of agricultural production for 8 months of current year has made 100,1%. It confirms the tendency of stable increasing of the industry release volumes. Thus, the annual average index of gross output of agriculture of Ukraine in 2001-2005 made 3,5%, in 2006-2010 - 1,7%, and in 2011-2015 – 4,8%. In 2015 because of significant increase in volumes of farm-production against the general falling of national economy the share of the branch in gross value added has reached 14,0%.

Generally such high rates were provided by the increase in production of crop products (mainly due to the growth of crops yields).

Major factors of agricultural production increase in Ukraine were:

- favorable weather conditions which are one of decisive factors of receiving heavy yields;
- growth of the real income of the population which has increased demand for agricultural products;
- growth of economic interest in the development of the sector due to conducted agricultural reforms;
- concentration of production, growth of investment activity of the large nonagricultural capital, activation of the foreign trade activity;
- strengthening of the state support of farm-production;
- dynamic development of the food industry which promoted increase in demand for agricultural raw materials.

In medium-term perspective growth remaining in production of agriculture products is expected (under the condition of creating a favorable economic mechanism) that undoubtedly will promote strengthening of the industry positions both in macroeconomic proportions, and in global measurement.

Agriculture of Ukraine from the 90s of the last century suffered considerable changes in relation to a structure, quality and amount of foregoing inputs. Especially it concerns their distributing between basic producers: agricultural enterprises and households.

Process of concentration of land grounds at units of agrarian managing (mainly by transition of farms of average group in extreme) is increasing, the number of agrarian households is reducing, their average sizes are growing, and not in terms of indicators of security with the land, but also funds and productivity.

In 2015 the quantity of households reduced by 0,7%, and the area of the land plots increased by 0,2%. The average size of the enterprises also increased by 0,9%. In the agrarian enterprises the tendency of further managing intensification remains (e.g. total amounts of cattle and poultry exceeded sale volumes by 3,1%, crops yields and productivity of cattle and poultry increased).

The process of concentration in the livestock enterprises is especially highlighted. In 2015 4,6% of the enterprises contained 64,4% of all pig livestock, and a bit more than a quarter of all poultry-farming enterprises (28,0%) produced 97,6% of poultry population. The concentration intensified. In particular, if in 2013, 24 enterprises or 0,5% manufactured 58,8% of total meat, then in 2015 - 23 enterprises produced 64,5%.

The small sizes and low technical equipment cause considerable (by five times) gap between farms of the population and agricultural enterprises in terms of labor productivity indicator. But, for the same reasons, population households exceed the enterprises in terms of land productivity index and capital productivity.

Resource availability and resource efficiency of agricultural production. Achievement of stable growth rates directly depends on availability of resources and their effective use. Results of agrarian sector activity are based on the security and quality of land, technical, labor, water resources, climatic conditions.

Ukraine has considerable reserves of the land suitable for agricultural production. The land fund of Ukraine is around 60,4 million hectares, 41,5 million hectares of which are agricultural lands. Their highest share is formed by arable land (85,4%), and 12,1% of the land is hayfields and pastures. It is obvious that in Ukraine ecologically

permissible ratio between the areas of arable land, natural grounds, woods is broken that negatively influences stability of agrolandscape and conducts to strengthening of erosive processes.

The agricultural development of the land fund in Ukraine forms 68,8% of total land, in particular plowed land is around 53,9% that, according to the standard norms, corresponds to conditionally favorable level. For example, in France the plowed land of the territory composes 33,5%, in Germany – 34%, Poland - 36,5%, Belarus - 27,2%. It should be noted that since 1990 this indicator in all specified countries (except for France) has tended to reduction.

Ukraine is the country with the high level of agrarian wealth. And though during the independence years it was considerably lost (the

general reduction for 1990-2012 was estimated at the level of 32%) [2, pp. 48-72], nevertheless, due to, first of all, the land resource potential, relative attractiveness of the industry for the large capital, and, last but not least – due to mentality of rural toilers, the remained level of resource provision is still sufficient for maintenance of the stated above significant rates of farm-production development.

Efficiency of use of resource components produced by domestic manufacturers is generally low, though it is gradually improving. It may be proved by the reduction of resources quantity, used for production per unit in the conditions of the increase in outputs noted above (since 2000) (Table 1).

Table 1

Availability of resources per 1000 UAH of gross output in the agricultural enterprises of Ukraine

Indicator	Availability of resources per 1000 UAH of gross output in the comparable prices of 2010					% to 1990	
	1990	2000	2010	2013	2015	2000	2015
Agricultural lands, <i>hectares</i>	0,194	0,515	0,219	0,161	0,157	2,7 times	80,9
Fixed assets: tractors, <i>unit</i> *	2,497	5,498	1,608	1,069	0,970	2,2 times	38,8
combines, <i>unit</i> *	0,777	1,576	0,443	0,220	0,224	2 times	28,8
power capacities, <i>kW</i>	0,551	1,203	0,390	0,316	0,235	2,2 times	42,6
Current assets: fertilizers, <i>cwt</i>	0,213	0,048	0,113	0,109	0,107	22,5	50,2
feeds, <i>tons</i>	0,393	0,276	0,125	0,090	0,090	70,2	22,9
concentrated feeds, <i>tons</i>	0,139	0,072	0,084	0,063	0,066	51,8	47,5

* Per 1 million UAH of gross output in the comparable prices of 2010.

Source: it is calculated based on the data of State Statistics Service of Ukraine[4].

Concerning the use of current assets it may be noted that in 2000 the rate of their reduction was above the rate of reduction in production. Data presented in table 1 also testifies that efficiency of land resources use grows at lower rates than other resources.

Growth of resource productivity indicators in the agricultural enterprises of Ukraine, which

confirms some positive dynamics of production efficiency (Table 2). It is worth noting that the growth of labor productivity in the agricultural enterprises of Ukraine is connected primarily to considerable reduction in amount of employees and fixed assets.

Table 2

Dynamics of resource efficiency indicators of Ukrainian agricultural enterprises

Indicator	2000	2005	2009	2010	2013	2015
Production per 1 employed in agriculture, in constant prices 2010, thousand UAH	27,1	72,6	132,7	134,2	201,2	267,4
Production per 100 hectares of agricultural land, in constant prices 2010, thousand UAH	168,1	299,3	443,6	437,3	641,2	649,1
Production per 1 UAH of current assets at current prices, UAH	1,19	1,12	0,90	0,92	0,85	1,14
Production per 1 UAH of fixed assets at current prices *, UAH	0,22	0,48	0,74	0,85	1,09	1,83

*data of 2014

Source: it is calculated based on the data of State Statistic Service of Ukraine [4].

In recent years concentration of production, growth of investment activity of the large non-agricultural capital, activation of the foreign

trade activity have enabled improving of the fixed and current assets quality. It reflected in productivity index (Table 3).

Table 3

Productivity of some agricultural products in 2014

Indicator	Ukraine		Poland	Germany	USA	France
	2014	2015				
Yield, cwt per 1 ha						
– grain	44,0	41,0	42,7	80,5	76,4	75,6
– potatoes	176,4	161,4	277,7	474,2	471,5	479,4
– sugar beets	476,5	435,8	682,5	798,6	613,3	924,3
– sunflower seeds	19,4	21,6	17,1	23,0	16,5	23,7
Milk yield per cow, kg	4508	4644	5388	7293	9902	6414

Source: it is calculated based on the data of State Statistic Service of Ukraine and FAOSTAT [6].

Important growth factor of labor productivity in agriculture and providing sustainable rural development is the level of technical equipment and opportunity to apply the most updated technologies in the agricultural industry, i.e. provision with fixed assets. The insufficient financing of agricultural activity noted above has an effect on its procurement with material resources. Thus, provision of funds in the industry is almost ten times below average.

Procurement of the Ukrainian agricultural enterprises with combine harvesters has decreased to 4 units per 1000 hectares of grain crops. Regarding the tractors this number is 8 per 1000 hectares of arable land. Meanwhile, for example, in Poland security with tractors, according to the World Bank, are 126 units, in Germany - 84 units, France - 64, the USA - 27, Canada - 16, Argentina and Belarus - 9 units [14]. The lack of the corresponding equipment

leads to considerable losses of crops. According to experts, such losses were 10-11% in last years.

External trade of agricultural products and positions of Ukraine in the world food market. Despite low efficiency and low capital-labor ratio of agrarian sector takes significant place on gross indicators of production Ukraine in world economic proportions. This finally resulted in not only increase in quantitative indices, but also their stabilization.

During the entire independence period Ukraine has been steadily included in the top ten countries - world leaders in production of barley (6,3% of world production), buckwheat (8%), sunflower, potatoes, sugar beet and in the top twenty countries - producers of wheat, corn, rapeseed, milk. The role of Ukraine in the world market of sunflower oil and grain (Table 4, 5) is especially noticeable.

Table 4

Share of Ukraine in world market indicators of sunflower seeds and sunflower oil, %

	Production			Export		
	2011/2012	2014/2015	2015/2016 (expect.)	2011/2012	2014/2015	2015/2016 (expect.)
Sunflower seeds	24,7	25,8	28,8	14,7	2,7	3,4
Sunflower oil	26,5	29,1	30,9	61,0	52,6	54,2

Source: Estimated according to the United States Department of Agriculture, 2016 [5].

Table 5

Share of Ukraine in world indicators of grain market, %

	2009/2010	2010/2011	2011/2012	2013/2014	2014/2015	2015/2016 (expect.)
Wheat						
Production	3,0	2,6	3,2	3,1	3,4	3,7
Export	6,9	3,2	3,5	6,0	6,9	9,3
Corn						
Production	1,3	1,4	2,6	3,1	2,8	2,4
Export	5,5	5,5	13,0	15,4	13,9	13,2
Barley						
Production	7,8	6,9	6,8	5,2	6,7	5,9
Export	33,3	16,1	12,1	16,0	15,4	14,6

Source: Estimated according to the United States Department of Agriculture, 2016 [5].

In 2013 in world trade of agrifood products the export share of Ukraine was 1,2% [6]. In 2014 Ukraine had the 6th place in world export of wheat, corn - 3, barley - 4, sunflower oil - 1, soy - 6, poultry - 7. By 2024, according to the expert estimates of OECD-FAO, Ukraine will have increased production the rough grain - by 9%, oilseeds - by 13,6%, vegetable oil - by 11%, poultry - by 27%. It may allow to increase export of rough grain crops - by 7%, oilseeds - by 15%, vegetable oil - by 8%, poultry - by 1,5 times [7].

At the same time, despite noted positive trends, international experts estimate low efficiency of agrarian policy of Ukraine. So, according to WEF in 2016/2017 the rating of global competitiveness of Ukraine was 85. Furthermore, the state has taken the 69th place among 138 countries in terms of agrarian policy value index (agricultural policy costs) [8].

Agrifood production of Ukraine plays an important role in improvement of condition of the state payments balance. Export of agrifood products provides more than 38% of all foreign trade receipts in recent years (in 2009-2012 this number was 22% on average, in 2013 - 27%, and in 2014 - 31%) and steadily exceeds the corresponding import. Volumes of the latter are almost four times smaller. That creates substantial positive balance of the agrifood products foreign trade balance (around 10 billion dollars on average in 2012-2014, and 11,1 billion dollars in 2015).

The structure of Ukrainian agrifood export during its independence was transformed towards the dominance of plant products share, firstly, grain and seeds of oil-bearing crops that has caused preservation of high specific weight (more than 50%) of raw products in agrifood export of the country.

The domestic food market of the country is mostly saturated with domestic production, which share according to our estimates is around 87%. The official statistics confirms it. Particularly, in 2013-2015 the share of sales of foodstuff made on the territory of Ukraine through distribution network of the enterprises was 85%. Products of not competing import usually have the highest specific weight, namely: tea, coffee, fish and fish products, tropical fruit, etc.

In section of crop products the import share in the domestic market is insignificant except for fruits, berries and grapes (here the corresponding indicator reaches half of internal consumption). However, as it was noted, mostly it is connected with import of products which are not produced in Ukraine.

Ecological component of agricultural development of Ukraine. Agrifood production around the world is a crucial consumer of natural resources. In Ukraine the situation in the field of farm-production resources use is very adverse. In addition to the high levels of agricultural development and plowing of the farmland stated above on the territory of Ukraine the steady tendency of deterioration of qualitative composition of soil is observed: their acidulation, salinization, destructurization and dehumification. Thus, around 43% of total area is subjected to dehumification and about 39% - to soil reconsolidation [9].

Agriculture in Ukraine is placed mainly on black soil and soil of black soil type (60% of total arable lands area), and potential ability of the Ukrainian lands to supply food is estimated within 150-500 million people [10]. However, soil fertility in Ukraine constantly decreases: annually because of water and wind erosion from 450 to 600 million tons of fertile layer of earth is lost, 30 million hectares of agricultural purpose lands are recognized as degraded, and from 14 to 17 million hectares – erosion-dangerous [11].

Besides, agrarian land use in Ukraine is recognized as ecologically unbalanced. It is considered acceptable when the share of natural forage grasslands form from 30 to 50% share in the structure of farmlands. In Ukraine this number is only about 19%.

Ecological issue of the land use remains unstable in the territory of Ukraine. In six regions of the country (Dnepropetrovsk, Donetsk, Zaporozhye, Kirovograd, Nikolaev and Odessa, i.e. in the main regions of grain and oily production) land use is unstable.

Agriculture of Ukraine is responsible for formation of 3% of total waste. Though this figure looks rather insignificant, however recycling of the main production waste is one of the efficient solutions for energy efficiency increase and emissions of the carbonic gas reduc-

tion. The latter is also promoted by nitric fertilizers and pesticides use rationalization.

One of factors of agricultural production growth ensuring is irrigation. However large-scale use of irrigation is thought to be unreasonable, as Ukraine is the water scarce country. During dry years 0,67 thousand CBM of river drain is accounted per person (procurement with water resources decreases from the West to the East of Ukraine). At the same time according to the definition of the UN in case if this figure do not exceed 1,5 thousand CBM, such country is considered to be water scarce.

Due to the current and expected climatic changes in Ukraine the problem of water resources rational use for overcoming the effects of droughts will become aggravated further. To solve this problem it is necessary to expand use of moisture saving technologies, to develop selection and use of drought-resistant cultures seeds, and also to recover the irrigation system that was operating earlier in the country. However it is known that farming irrigation consumes up to 80% of global fresh water supply, from half to 2/3 of which it is lost during surface irrigation [12]. Therefore many countries, especially water scarce ones develop systems of more economical drip irrigation. In Ukraine the areas under such systems have grown almost by 9 times during the last decade and in 2013 the area was more than 76 thousand hectares.

Ukraine the territory of which, by estimates, consists of 8 million hectares of environmentally friendly black soil, has extremely favorable conditions for organic production expansion. That may allow increasing outputs and export of the food without increasing of the negative impact on environment.

Organic production in Ukraine has obviously expressed export focus, however domestic market develops dynamically too. During 2007-2014 it grew by 29 times (to 14,5 million euros) [13]. Besides, both the number of farms manufacturing organic products and their arable Land area increased (from 31 in 2002 to 250 in 2015 and from 164 to 400 thousand hectares respectively). However, this area is 1% of total area of farmlands of the country. Nowadays Ukraine takes the 11th place in Europe in terms of the certified organic lands area.

Taking into account the environment which is available in Ukraine for the organization of organic production, in medium-term perspective the share of organic lands in their total quantity can reach 5% [2, p. 150]. At present stage development of the agricultural production organic direction, according to the Ukrainian farmers, is mostly restrained by the absence of products certification national system that consists of the certification authorities recognized in the world, the high cost of the certification procedure operating in the country (now often carried out by foreign certification authorities), lack of support from the state (both financial, information and consulting) upon transition from traditional to organic production.

Conclusions. Level of providing agriculture in Ukraine with land resources is rather high, however the dominance of extensive agriculture technologies, lack of high quality material and current assets reduce efficiency of its usage. The main problems are the following: increase of land resources use and protection efficiency based on the reduction of their plowing and widespread of agriculture modern systems, the termination of soils degradation and promoting to growth of their fertility; achievement of the farmland balanced ratio in zone systems of land use.

Labor force of the agricultural enterprises of Ukraine tends to reduction. Thus the technical potential of the farm worker is mainly insufficient for intensive conducting production and considerably lags behind the level of advanced countries. At the same time, despite fast reduction of the employees occupied in agriculture, there is simultaneous production and value added increasing that testifies to growth of labor use efficiency.

Long reduction of capital investments worsened quantitative and qualitative condition of industry production means that finally led to decline in labor productivity and growth of resource intensity. However gradual recovery of fixed assets in Ukrainian agrarian sector is yielding some positive results.

The main task of agrarian sector is increase in production of the food in the conditions of economical land use, labor, capital, water resources. In the near future during the assessment of resources use efficiency and their procurement not factors of economic efficiency,

but the principles of environmental friendliness and resource-saving will be crucial. Growth of land, water resources and energy consumption limitation, owing to intensification, will lead to methodological approaches update to define the priority directions of resources use.

The powerful growth of Ukrainian farm-production observed during the last years is fol-

lowed by increase in anthropogenous influence on surrounding environment. In this context implementation of "organic agriculture" system is believed to be very perspective. Ukraine has considerable opportunities for development of this agriculture direction, however to implement thus sufficient support of the state is necessary.

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Новини АПК

Український аграрний експорт перевищив 9 млрд дол. США

З січня по серпень 2016 року, за даними Держстату, Україна експортувала аграрної продукції на суму 9,1 млрд США, що становило 40,1% національного експорту за цей період.

У структурі аграрного експорту лідирують зернові культури (3,6 млрд дол. США), готові харчові продукти (1,4 млрд дол. США), насіння і плоди олійних рослин (0,7 млрд дол. США) та залишки і відходи харчової промисловості (0,6 млрд дол. США).

За 8 місяців поточного року Україна імпортувала аграрної продукції на 2,5 млрд дол. США, або 10,3% від усього імпорту до країни. Основою аграрного імпорту стали готові харчові продукти (1,1 млрд дол. США), продукти рослинного походження (0,9 млрд дол. США) та риба і ракоподібні (0,2 млрд дол. США).

У період з січня по серпень 2016 року зовнішньоторговельне сальдо аграрної продукції сягнуло +6,6 млрд дол. США.

Прес-служба Мінагрополітики України