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## Foreign Trade in Agricultural Goods of Ukraine in the Context of the Association Agreement with the European Union

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► **Abstract.** Foreign trade plays an essential role in the economy of Ukraine. The leading role of agro-industrial export for Ukraine is gaining the level of national, in particular, food security of the state. Thus, changes in foreign trade in agricultural products should be based on both the fundamental principles of sectoral production and the shifts in modern production. The purpose of the study – identify, based on the analysis, trends in foreign trade and areas for improving the competitiveness of agricultural products of Ukraine with the European Union (EU) in the context of the implementation of the Association Agreement. The following methods were used: analysis and synthesis, analytical generalisations – in the process of analysing foreign trade in agricultural goods; tabular – for a visual representation of the results of the study; economic and statistical – to assess the trends in foreign trade; abstract and logical – in the development of conclusions. The volumes, dynamics, and structure of exports and imports of agricultural goods of Ukraine with the EU countries are analysed, changes in the foreign trade regime are assessed, and trends and impact of the implementation of the Association Agreement between Ukraine and the European Union on the development of foreign trade of Ukraine are established. The place and importance of the agricultural sector in European markets are explored. The foreign trade turnover of agricultural goods in Ukraine is determined. The algorithm for assessing the level of competitiveness of agricultural products is summarised. It is established that with the strengthening of the export orientation of raw materials to the EU market of crop production, therewith, there is a high import dependence on finished food products, and the structure of imports is more diversified. Adaptation of Ukrainian legislation in the field of agriculture, sanitary and phytosanitary measures are incomplete and do not correspond to the planned pace. Ways to diversify exports and increase the profitability of foreign trade in agricultural products from Ukraine in the EU market are proposed

► **Keywords:** agriculture, foreign trade, agricultural goods, export-import, competitiveness, Association Agreement between Ukraine and the European Union

### ► Problem statement

Agriculture plays an important role in the economy of every country. It provides the population with food products, is the foundation of food security of the state and is an important element of world trade. International trade as a form of international economic relations is a component of balanced economic development and contributes to strengthening the competitiveness of the national economy and raising the living standards of peasants.

The involvement of the Ukrainian agrarian sector in the global food chains contributes to the expansion of Ukraine's trade opportunities in international markets. Along with unfavourable external conditions for export development, there are internal obstacles, i.e. military-political conflict in the east of the country, deterioration of economic relations with Russia, crisis state of the state economy, etc. The changes that have occurred today in

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Ukraine's foreign trade indicate the beginning of the process of transformation of the model of established trade relations and the development of new foreign economic relations in the world space, where other rules of the game apply [1].

Recently, the agricultural sector provides about 40% of foreign exchange earnings to the country [2]. Ukraine ranks first in the world in terms of production and export of sunflower oil and sunflower cake, second among exporters of rapeseed and barley seeds, fourth among exporters of corn in 2019 and rose from fifth to fourth place among exporters of wheat [3]. The development of the domestic economy will be influenced by the European integration of Ukraine and the establishment of the Deep and Comprehensive Free Trade Area (hereinafter – DCFTA) with the European Union.

### ► Analysis of recent studies and publications

Based on the results of the literature analysis, the conclusion is substantiated that the Association Agreement between Ukraine and the European Union and its implementation, in particular in terms of agriculture, has become the subject of research for many Ukrainian and European scientists. Among them, in particular: Ya. Hadzalo [1], B. Dukhnytskyi [4, 5], M. Emerson [6], Yu. Luzan [2], Ju. Lupenko [3], V. Movchan [7, 8], M. Pugachov [5, 9] and others. Therewith, the impact of the implementation of the provisions of the Deep and Comprehensive Free Trade Area Agreement between Ukraine and the EU on foreign trade in agricultural products, the state and prospects of further adaptation of Ukrainian legislation on sanitary and phytosanitary measures to the EU legislation, the possibility of increasing the competitiveness of agricultural products in the market of the countries were not sufficiently studied.

*The purpose of the study* – identify, based on the analysis, trends in foreign trade and areas for improving the competitiveness of agricultural products of Ukraine with the European Union (EU) in the context of the implementation of the Association Agreement.

### ► Results and Discussion

In the context of the ongoing economic crisis, the importance of foreign trade in agri-food products is growing for Ukraine. Domestic entrepreneurs are trying to expand their trade activities outside the ter-

ritory of Ukraine. Therefore, the European market, which is quite capacious and with a high-paying population, is considered promising.

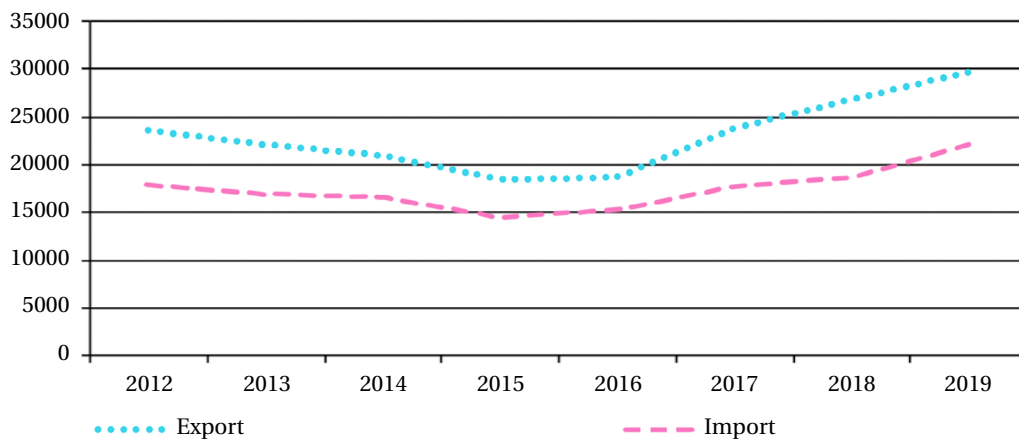
Therewith, notably, foreign trade is both a priority area of the national policy (improvement of the investment climate, establishment of the foundation for the development of competitive goods) and one of the most important sources of state budget revenues. It affects the establishment of conditions for the implementation of, first of all, environmental protection programmes, stimulation of scientific and technological progress, solving structural problems, and ensuring the country's defence capability.

After signing the Association Agreement between Ukraine and the European Union, Ukraine has undertaken to approximate its national legislation to the European one, in particular, in the field of agriculture. In 2017-2018, the agricultural sector of Ukraine provided about 4 and 19% of the gross domestic product of the state, respectively, and was determined as the leading export sector in Ukraine. In 2017, exports of agri-food products reached 17.8 billion USD, which is 16.3% more than in 2016 (15.3 billion USD), in 2018 it increased to 18.6 billion USD – by 4.5%, and in 2019 the volume increased to 22.1 billion USD, or 18.8% compared to the previous year. Therewith, during these years, the volume of imports of agricultural commodities was significantly less than the volume of exports. Import volumes are lower compared to 2012, 2013 and 2014: in 2016, import volumes amounted to 3.8 billion US dollars, in 2017 they were already 4.3 billion US dollars, which indicates an increase of 9.3%, in 2018 they reached 5.0 billion US dollars, that is, an increase of 17%, in 2019 this figure was 5.7 billion US dollars, an increase compared to last year – 3.6% [3, 9]. All this is evidenced by the dynamics of exports and imports of agricultural goods (Fig. 1).

The volume of agricultural exports increased by 23.6%, while imports decreased by 23.7%. According to Ukrainian statistics, in 2019, plant products in the export structure reached the level of 12.9 billion USD, which is 31.6% more than in the previous year, and accounted for 58.4% of the value of agricultural exports. Most of all, they exported grain – 43.5% and seeds – 11.6%. Fats and oils in the structure of exports constituted 21.4% or the value of USD 4.7 billion. Compared to the previous year, the growth was 5.3%. Finished products account-

ed for 14.5% of the value of agricultural exports (or USD 3.2 billion), with a growth rate of 6.7% compared to 2018. The main volume of exports of fin-

ished products was represented by residues and waste of the food industry – 6.7% of total exports of agricultural products.



**Figure 1.** Volumes of Ukrainian exports and imports of agricultural products, USD billion

**Source:** Calculated based on [10, p. 63-65; 11, p. 29-31]

In turn, animals and animal products in 2019 were exported for the amount of USD 1.2 billion, with a share of 5.8%, which was the smallest in the total export of agricultural products of Ukraine. Among the goods of animal origin, Ukraine in 2019 exported meat and edible offal (3.2% of total exports of agricultural products), milk and dairy products, poultry eggs; natural honey (2.05% of total exports of agricultural products) [3].

Scientists note the importance of the development of foreign trade in agri-food products, in addition to the abolition of tariff barriers (including gradual for individual product groups), to ensure cooperation on the approximation of Ukrainian legislation to the legislative provisions of the EU Member States in matters of non-tariff regulation and the introduction of common standards in agriculture [5, 12].

According to the provisions of the Agreement, Ukraine and the EU will eliminate import duties on about 97 and 96.3% of tariff lines respectively [13, 14]. Since the provisional application of the Agreement by the EU and its ratification by Ukraine, duties for agricultural commodities have been abolished for 35.2% of tariff lines in Ukraine and 83.1% – in the EU. As for other goods, Ukraine introduces transitional periods lasting from 1 to 7 years for 52% of tariff lines, partial liberalisation for 9.8%, and duty-free tariff quotas for 3.0%. It means that for particularly sensitive sectors, the DCFTA gives Ukrainian agricultural producers more time to adapt to a more competitive environment while

providing consumers with more food choices at lower prices. In its turn, the EU established transitional periods for 2.0% tariff lines (lasting 3 and 7 years), and for the most sensitive products offered market access within duty-free tariff quotas. They were granted to Ukraine for grains, pork, beef and poultry, and some other food products [15; 16, p. 35-39, 5].

After the signing of the Association Agreement between Ukraine and the EU, the majority of trade flows of agricultural goods were reoriented to the European food market. Thus, in 2019, 41.5% of Ukraine's total exports and 41.1% of imports were sent to the EU countries. Therewith, the total trade balance for all goods with the EU member states was adverse and amounted to USD 4.2 billion in 2019 [3].

Unfortunately, a significant number of goods of Ukrainian origin do not correspond to the current EU standards and have low quality or low added value. As for agricultural goods, Ukrainian agricultural enterprises have received additional opportunities to expand their exports to the EU countries through gradual trade liberalisation, unification of sanitary and phytosanitary measures, and establishment of tariff quotas for individual groups of goods. During 2015-2019, Ukraine was a net exporter of agricultural goods in trade with the EU countries [2, 3].

The analysis demonstrates a gradual increase in Ukrainian agricultural exports to the EU (from USD 2.8 billion in 2015 to USD 9.2 billion in 2019). According to statistics, imports of agricultural goods are

growing. Over the past five years (from 2015 to 2019), imports have increased by 82%, and exports – by 78.6%, while the trade surplus in agricultural goods is constantly increasing. A significant increase in agricultural exports (by 24% in 2017 compared to 2016) occurred after the unification of sanitary and phytosanitary measures and the reduction of tariff barriers.

It is established that import and export flows between the EU countries and Ukraine are characterised as having a significant level of concentration. The five largest trading partners in 2019 accounted for more than 67.0% of exports (the Netherlands, Spain, Germany, Poland, and Italy) and 66.4% of imports (Poland, Germany, Italy, France, and the Netherlands) [3].

The increase in exports of agricultural goods from Ukraine is facilitated by the EU tariff quotas. According to the European Commission, quotas for honey, sugar, barley groats, flour, and starch, including processed, processed tomatoes, apple and grape juices were fully used in 2019. However, tariff quotas for lamb, mushrooms and processed animal oil products were not used at all. The quotas for the following goods were almost unused: cigars and cigarettes, processed dairy cream products, sweet corn and syrups [17].

After the signing of the Association Agreement, the share of agricultural goods in the structure of imports from the EU countries in 2019 increased to 50.6%, compared to 40.8% in 2012. Therewith, if considering the overall structure of imports of goods, the share of European goods in the total import flow to Ukraine in 2012-2018 reached 40.1% and in 2019 amounted to 41.1%. In this case, it can be argued that Ukraine is more

dependent on imports of agricultural goods from the EU compared to the total imports of Ukraine [4, 3].

The structure of Ukraine's foreign trade exports of agricultural products is not diversified, oriented to products of plant origin. Thus, 67% of total exports of agricultural goods to the EU countries in 2019 were provided by corn (32.2%), sunflower oil (18.5%) and rapeseed (16.3%). Sunflower oil cake and other wastes accounted for 4.8% of total food exports, poultry meat and edible by-products – 2.6, soybeans – 3.3, wheat – 1.6, honey – 1.2%, other commodity items provided less than 1% of total agricultural exports to the EU. The structure of agricultural imports is quite diversified, the share of most goods does not exceed 5% of total agricultural imports from the European Union. In 2019, only tobacco and tobacco products, protein concentrates and animal feed products exceeded 5% in the structure of imports [9, 6].

Instead, the structure of imports is dominated by finished products with a large share of added value. If considering the European value chains in the agricultural sector, Ukrainian products are at the very beginning of such a chain and accumulate the least added value [12]. Other factors that hinder the export of Ukrainian agricultural products are the inconsistency of EU import quotas with the structure of Ukrainian exports and the non-compliance of Ukrainian products with European sanitary and phytosanitary standards [8]. To assess the role of mutual exports and imports of agricultural goods to and from the EU countries were calculated indicators of the level and intensity of intra-industry trade in 2012-2019 (Table 1).

**Table 1.** Ukraine's foreign trade with EU countries in agricultural products (groups 1-24), USD million

Year	Export of agricultural goods to the EU	Import of agricultural goods from the EU	Intensity of intra-industry trade
2012	4931	2974	0.60
2013	4468	3067	0.68
2014	4765	2479	0.52
2015	4049	1503	0.37
2016	4121	1711	0.41
2017	5649	2014	0.36
2018	6126	2420	0.39
2019	7314	2840	0.39

**Source:** Calculated based on the data of the State Statistics Service of Ukraine [10, p. 63-65; 11, p. 29-31]

High values of indicators of the level and intensity of intra-industry trade indicate that Ukraine simultaneously exports and imports a

large number of agricultural products. According to calculations, the level of intra-industry trade in agricultural goods has been growing since 2015,

since 2012 – due to an increase in exports to the EU market. The maximum intensity of intra-industry trade was recorded before the signing of the Association Agreement between Ukraine and the European Union (2011 – 0.92 and 2013 – 0.68).

During 2015-2019, the values of the intensity indicator ranged from 0.36 to 0.41, which indicates a relatively low level of competition for agricultural producers in the EU market, their emphasis on low-value-added products. The conclusions are confirmed by the structure of export-import: export of agricultural goods is dominated by raw materials, and import – is by finished food products.

To implement the Association Agreement between Ukraine and the EU, the Cabinet of Ministers of Ukraine approved the “Action Plan for the Implementation of the Association Agreement” by Resolution No. 1106 of 25 October 2017. It provided for measures to adapt European legislation on quality, organic farming, fisheries, genetically modified organisms, and standards of trade in plants and animals. This Plan has 1943 tasks, of which 434 are designed to implement the provisions of the Agreement in terms of agriculture and rural development [18].

Work on the main part of the activities was planned for 2020 and 2021 with the implementation of 183 and 135 activities in this area, respectively. According to the Ministry of Economy of Ukraine, according to the results of 2018, 8% of all planned measures were not implemented, and in 2019, 36% of the planned measures were not implemented. In the area of sanitary and phytosanitary measures, as of February 2020, the overall success in the implementation of tasks is estimated at 55%. The Action Plan provides for the active implementation of European sanitary and phytosanitary measures from 2016 to 2021. In 2016, 93% of all measures were implemented, in 2017 – all measures were implemented, in 2018 – 76%, in 2019 – 43% [3, 18].

Along with this, it is recommended to implement measures to improve the economic situation in the agricultural sector, to increase the volume of possible exports of finished goods. In addition, it is proposed to reduce the dependence on imports of resources, which will reduce the cost of manufactured commodities, plan larger volumes of their production for export and other measures to improve Ukraine's foreign trade (Fig. 2).

Strengthen state support for foreign trade
Deepen awareness of foreign trade
Increase the competitiveness of agricultural enterprises oriented to foreign trade
Introduce innovations in agricultural enterprises to improve the quality of their activities
Increase the efficiency of national policy on foreign trade in agricultural goods

**Figure 2.** Measures to improve foreign trade in the agricultural sector of Ukraine

**Source:** Developed by the authors based on [12]

Currently, Ukraine is a commodity export country and the largest exporter of sunflower oil, corn and wheat. Considering the high level of openness of Ukraine's economy and the dependence of its exports on commodity prices on world markets, it is advisable to diversify the commodity structure, namely: to increase exports of agricultural products with medium and high added value, i.e. finished products.

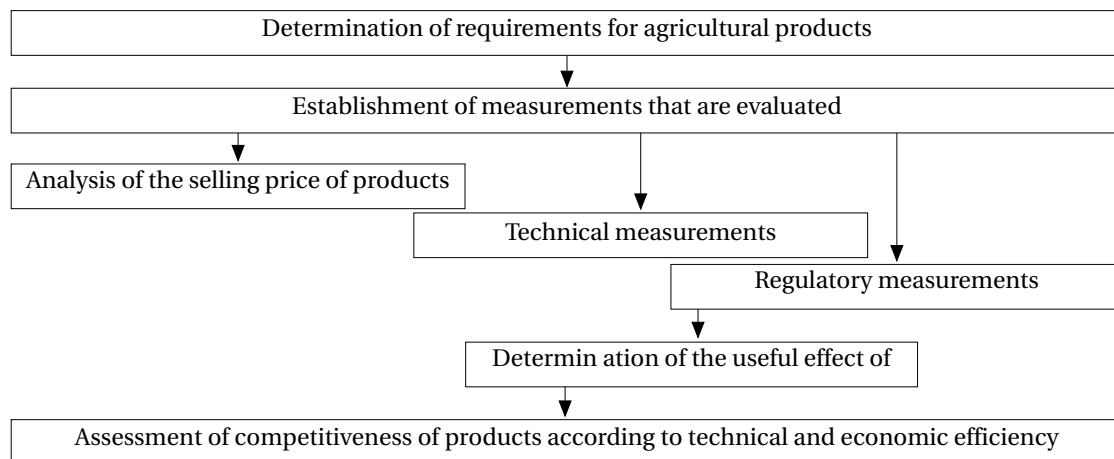
The growth of total Ukrainian agri-food exports has a price foundation, thus, it is necessary to consider the risks of the impact on both domestic and foreign markets to a greater extent. However, the competitiveness of agricultural products on the world market is mainly price-based. The national agricultural

policy on pricing and regulation of prices for agricultural commodities should be extremely well-considered and balanced. In addition, the algorithm for assessing the level of competitiveness of agricultural products in the domestic and foreign markets is essential in determining the competitiveness of agricultural products, which consists of the system of a counting of economic, technical and regulatory parameters (Fig. 3).

The algorithm demonstrates that the competitiveness of commodity products of the agricultural sector should be understood as a level of its economic, technical and operational dimensions or parameters, at which it can compete with analogues

of foreign and Ukrainian origin. Products are more competitive in the market when their features com-

ply with all the requirements, namely technical and quality characteristics, and European standards.



**Figure 3.** Algorithm for assessing the level of competitiveness of agricultural products

**Source:** Developed based on [19]

Competitive commodity products of the agricultural sector, the sale and consumption of which depend on the behaviour of sellers and buyers, easily penetrate food markets. The behaviour of producers depends on the trading strategy, the practice of setting prices, on the extent to which consumers can influence trade processes, which, given the situation, should make appropriate decisions to increase or decrease investments, introduce or change the advertising strategy, introduce innovative activities to achieve the final result [19].

According to the author, the behaviour of sellers and buyers depends on the existing structure of the domestic market, namely: on the number of sellers and buyers, the presence of different levels of barriers to entry and exit of producers to the market, the degree of differentiation of products, and the development of the network of market infrastructure institutions.

When developing a strategy to improve the competitiveness of commodity products, it is necessary to proceed from the innovative model of competitiveness, with the growing role of competition at the enterprise level, where the main advantages are becoming more important than production costs, but the quality and originality of products. Thus, the joint efforts of the state and enterprises should actively use the innovative development area. If Ukraine successfully masters innovative models of development, it will have an opportunity not to remain an outsider of the European community and change the current raw material area of foreign trade development. The emphasis of the national innovation policy should

be on: the development and implementation of state scientific, technical and innovation programs; stimulation of investments in scientific research and their implementation; an increase of funding for scientific research; support of small and medium innovative enterprises; encouragement of import of advanced technologies; improvement of the legal framework; international cooperation on innovation policy; state coordination and information support; state control over the implementation of innovation policy.

Under the current conditions, Ukraine needs to intensify innovation processes that can ensure the proper development of the agricultural sector. With the lower solvency of the population, exports become a reliable source for innovation processes in the agricultural sector, thereby establishing a chain to increase the competitiveness of agricultural products. Thus, the size of exports will increase, and the domestic market will be replenished with much more diverse and high-quality agricultural products. Repeated innovation should ensure the continuity and scale-up of the innovation process. More competitive products in the foreign market will allow for obtaining a stable profit, which will contribute to the accumulation of capital for the expansion of production.

### ► Conclusions

Interaction of dairy market participants is based on commodity-money relations, including price characteristics of raw milk – dynamic fluctuations, quality standards, volumes and regional deviations.

The analysis of the production and financial statements of the Group of Companies "Milk Alliance" demonstrated that the decrease in the efficiency of the economic mechanism of dairy processing enterprises is explained by the following factors: increase of borrowed capital by enterprises (long-term and short-term bank loans) to finance current activities, respectively, and increase of financial expenses for servicing their obligations, which significantly reduces the net financial result; excess of the growth rate of net sales income compared to the growth rate of milk cost; decrease in coverage and quick liquidity indicators with simultaneous growth of absolute liquidity of the enterprise, which is associated with the development of unproductive assets; decrease in the level of financial stability of enterprises, indicators of autonomy and financial stability, coefficients of equity mobility and provision

with own working capital, which increases the dependence of enterprises on borrowed funds; decrease in the level of provision of enterprises with their own working capital and asset turnover, increase in the period of their turnover and increase in the operating cycle of enterprises; decrease in the level of business activity of enterprises by indicators of turnover of receivables and payables, turnover of assets and inventories, equity and borrowed capital.

Considering the above, the solution to the problem of improving the efficiency of the economic mechanism of functioning of dairy processing enterprises should emphasise the following areas that require further scientific study: optimisation of the structure of assets and liabilities of business entities and forecasting of receivables; introduction of a system for assessing the solvency and financial discipline of potential buyers; operational control over the efficiency of production costs to increase profitability.

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## Зовнішня торгівля аграрними товарами України в контексті Угоди про асоціацію з Європейським Союзом

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► **Анотація.** Зовнішня торгівля відіграє важливу роль в економіці України. Провідна роль агропромислового експорту для нашої країни набуває рівня національної, зокрема, продовольчої безпеки держави. Тому зміни в зовнішній торгівлі аграрною продукцією мають спиратися як на фундаментальні засади галузевого виробництва, так і на зсуви сучасної. Мета статті – встановити на основі аналізу тренди зовнішньої торгівлі та напрями поліпшення конкурентоспроможності аграрних товарів України з Європейським Союзом (ЄС) у контексті імплементації Угоди про асоціацію. Використано методи: аналізу і синтезу, аналітичних узагальнень – у процесі аналізу зовнішньої торгівлі аграрними товарами; табличний – для наочного відображення результатів дослідження; економіко-статистичний – для оцінки тенденцій розвитку зовнішньої торгівлі; абстрактно-логічний – при формуванні висновків. Проаналізовано обсяги, динаміку, структуру експорту та імпорту аграрними товарами України з країнами ЄС, надано оцінку змінам зовнішньоторговельного режиму, встановлено тренди і вплив імплементації Угоди про асоціацію між Україною та Європейським Союзом на розвиток зовнішньої торгівлі України. Досліджено місце і значення аграрного сектору на європейських ринках. Визначено зовнішньоторговельний обіг аграрних товарів України. Узагальнено алгоритм оцінки рівня конкурентоспроможності аграрних товарів. Встановлено, що за посилення експортної сировинної орієнтації на ринок ЄС продукції рослинництва, разом із тим зберігається висока імпортна залежність від готових продовольчих товарів, причому структура імпорту диверсифікованіша. Адаптація українського законодавства в частині сільського господарства, санітарні й фітосанітарні заходи незавершені й не відповідають запланованим темпам. Запропоновано шляхи диверсифікації експорту та підвищення прибутковості зовнішньої торгівлі аграрними товарами з України на ринку країн ЄС

► **Ключові слова:** сільське господарство, зовнішня торгівля, аграрні товари, експорт-імпорт, конкурентоспроможність, Угода про асоціацію між Україною та Європейським Союзом