ЕКОНОМІКА ТА УПРАВЛІННЯ НАЦІОНАЛЬНИМ ГОСПОДАРСТВОМ

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PROSPECTS FOR INCREASING EXPORTS OF AGRICULTURAL PRODUCTS IN THE CONTEXT OF DEEPENING THE STRATEGIC PARTNERSHIP BETWEEN UKRAINE AND THE EU

Urgency of the research. *Today the largest capacity to increase export potential are demonstrated by the exporters of agricultural products. EU countries are raising the interest of domestic agrarians in view of further deepening of strategic partnership cooperation through the mechanisms of Association Agreement.*

Target setting. *Taking into consideration the dynamism of Ukraine's foreign trade, the problem of intensifying domestic competition among European and Ukrainian farmers and the ability of the state to provide competitive advantages to Ukrainian suppliers is very important*

Actual scientific researches and issues analysis. *Realization of competitive advantages in export of agricultural products to EU markets was investigated by L. Carraresi, A. Banterle, R. Hiault paid attention to the strengthening of non-protectionist emphasis in the regulation of trade. The issue of regulatory influence in the field of agroindustrial complex is disclosed in the publications of T. Melnyk, O. Golovachova, V. Geiets, O. Borodina, I. Prokopa, V. Zalizko and others.*

Uninvestigated parts of general matters defining. *The issue of reserves and the potential consequences of increasing the export of agricultural products will require in-depth consideration.*

The research objective. *The purpose of the article is to reveal the prospects of expanding the export of agricultural products to EU markets, identifying problems of deepening trade and economic partnership for both sides*

***The statement of basic materials**. The key trends in the development of domestic agricultural products exports to the EU countries have been identified. It has been determined that the condition of access of Ukrainian exporters to European markets of agricultural products is influenced by systematic measures of the EU regulatory policy. The competitive advantages of agricultural products are assessed on the basis of the methods of B. Balass, L. Vollrath and J. Lafay.*

***Conclusions**. The evaluation of the competitive advantages of agricultural products allowed identifying competitive commodity positions. The risks of increasing the export of agricultural products from Ukraine to the EU include the reduction of price comparative advantages for Ukrainian exporters and increased resistance to agrarian lobby in the EU.*

Keywords: *export; food crisis; agrarian lobby; agricultural assets; competitive advantages.*

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ПЕРСПЕКТИВИ НАРОЩУВАННЯ ЕКСПОРТУ ПРОДУКЦІЇ АПК В КОНТЕКСТІ ПОГЛИБЛЕННЯ СТРАТЕГІЧНОГО ПАРТНЕРСТВА МІЖ УКРАЇНОЮ ТА ЄС

Актуальність теми дослідження. *Наразі найбільшу спроможність нарощувати експортний потенціал демонструють експортери продукції АПК. Країни ЄС викликають у вітчизняних аграріїв підвищену зацікавленість з огляду подальшого поглиблення стратегічного партнерства через механізми Угоди про асоціацію.*

Постановка проблеми. *Враховуючи динамізм зовнішньої торгівлі України особливого значення набуває проблема загострення внутрішньогалузевої конкуренції між європейськими та українськими аграріями та здатність держави забезпечувати конкурентні переваги українських постачальників.*

Аналіз останніх досліджень і публікацій. *Реалізація конкурентних переваг при експорті продукції АПК на ринки ЄС досліджувалась Л. Карaресі, А. Бантерле. Посиленню неопротекціоністських акцентів в регулюванні торгівлі приділяв увагу Р. Хайолт. Питання регуляторного впливу у сфері АПК розкрито у публікаціях Т. Мельник, О. Головачової, В. Геєця, О. Борордіної, І. Прокопи, В. Залізко та ін.*

Виділення недосліджених частин загальної проблеми. *Потребують поглибленого розгляду питання резервів та потенційних наслідків нарощування експорту продукції АПК.*

Постановка завдання. *Метою статті є розкриття перспектив розширення експорту продукції АПК на ринки країн ЄС, виявлення проблем поглиблення торговельно-економічного партнерства для обох сторін.*

Виклад основного матеріалу. *Ідентифіковано ключові тренди розвитку вітчизняного експорту продукції АПК в країни ЄС. Визначено, що умови доступу українських експортерів на європейські ринки продукції АПК перебувають під впливом системних заходів регуляторної політики ЄС. Оцінено конкурентні переваги продукції АПК на основі методів Б. Баласса, Л. Вальраса та Ж. Лафея.*

Висновки. *Оцінка конкурентних переваг продукції АПК дозволили ідентифікувати конкурентоспроможні товарні позиції. До ризиків, що зумовлює експансія експорту продукції АПК з України до ЄС варто віднести: зниження цінових порівняльних переваг для українських експортерів та посилення протидії аграрного лобі в ЄС.*

Ключові слова: *експорт; продовольча криза; аграрне лобі; аграрні активи; конкурентні переваги.*

Kudyrko L. P., Iksarova N. O., Golovachova O. S. Prospects for increasing exports of agricultural products in the context of deepening the strategic partnership between Ukraine and the EU

ЕКОНОМІКА ТА УПРАВЛІННЯ НАЦІОНАЛЬНИМ ГОСПОДАРСТВОМ

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Urgency of the research. In the light of Ukrainian export opportunities reduction, caused by the loss of control over the eastern region of the country and by decrease in the supply of traditional metallurgical products to the external markets, including CIS countries, there is a need for regional and sectoral diversification of its exports. Exporters of agricultural products show the greatest ability to increase export potential. At the same time, EU is considered to be one of the most promising market for sales.

European Union countries are now attracting a growing interest among domestic farmers due to the further deepening of the strategic partnership between our countries through the mechanisms of the Association Agreement.

Target setting. Considering the dynamism of Ukraine's foreign trade in agricultural products for the last three years in a row, it is worthwhile to make a hypothesis regarding the potential acceleration of capital consolidation processes in the country's agro industrial complex and the actualization of the discourse on the domestic land market. The problem of aggravation of intra-industry competition between European and Ukrainian farmers is now also extremely important. The ability of the state to ensure the existing competitive advantages of Ukrainian food suppliers under conditions of neo-protectionism in the countries of the world's avant-garde, caused by increasing calls for the return of production to national territory and restrictions for import of products competing with the national one, is also very questionable.

Actual scientific researches and issues analysis. The problems of competitive advantages implementation in the export of agricultural products to the EU markets were reflected in the works of L. Cararesi, A. Bunterle (Carraresi L., Banterle A, 2015) [3], S. Bojnec, I. Fertő (Bojnec S., Fertő I., 2015) [7]. Strengthening of neoprotectionist accents in national systems of trade regulation is attentively studied in scientific publications of R. Hiault (Hiault R., 2016) [1]. The issue of regulatory influence in the area of agroindustrial complex is disclosed in the publications of T. Melnyk, O. Golovachova [13]. The works of V. Geets, A. Borodina, I. Prokopov [11], V. Zalizko [10], etc. are devoted to the organizational and economic aspects of the development of the agroindustrial complex of Ukraine.

Uninvestigated parts of general matters defining. Despite the availability of published research results, the question of reserves and potential consequences of increasing exports in agroindustrial products under conditions of the simplified access to the EU markets requires requiring in-depth analysis.

The research objective is to reveal the prospects of Ukraine's agrarian export expansion to the EU markets, to identify the problems of deepening the trade and economic partnership for both the Ukrainian and European sides.

The statement of basic materials. Under conditions of implementing the Association Agreement with the EU, there are additional opportunities for mutual access for domestic and European exporters to the markets of both partners. At the same time, considering the medium-term prospect of outlined liberalization, an understanding of the potential risks that have both European and domestic origin and that can aggravate the course of deepening the strategic trade and economic partnership between Ukraine and the EU is very important.

And if threats from Ukraine are related to the traditionally low competitiveness of domestic products, the EU risks are caused by a new political trend of increased protectionist appeals in France, Germany and Britain. This is especially true against the background of the intensification of the disintegration processes in the EU, the curtailment of the idea of its expansion by including new member states, the possible revenge of the right-wing political forces in the upcoming elections in Germany and France. These potential external constraints can negate the expected benefits from deepening the trade and economic partnership between Ukraine and the EU in the near future, even against the backdrop of the functioning of a comprehensive and in-depth free trade zone.

Estimating the agroindustrial export opportunities of Ukraine for the last ten years, it is worth noting a positive trend: its export consistently exceeded import. At the same time, there was a high dynamism of annual growth both in trade surplus and in the share of agricultural products in the structure of commodity export and import (Tab. 1).

The most astonishing changes in the share of agricultural products in commodity exports could be observed in 2009. It can be explained by the cumulative impact of several favorable factors: the access liberalization for Ukrainian agrarians to the markets of other countries after Ukraine's accession to the WTO and the acquisition of an additional price advantage of domestic export caused by high devaluation of the hryvnia under conditions of a collapse in prices on international commodity markets caused by global financial-economic crisis.

Table 1

Dynamics of Ukrainian foreign trade in agricultural products for 2007- 2015, million USD

Section and title by Ukrainian Foreign Economic Activity Commodity Classification	2007	2008	2009	2010	2011	2012	2013	2014	2015
	Export								
I. Live animals and animal products	747,2	783,4	596,0	771,4	936,6	961,3	1084,1	1014,5	823,3
II. Vegetable products	1726,4	5577,4	5034,9	3976,3	5532,0	9213,9	8875,9	8736,2	7971,5
III. Fats and oils of animal or vegetable origin	1820,0	2048,3	1887,2	2741,4	3562,8	4211,5	3507,1	3823,7	3299,8
IV. Food products	2056,2	2518,2	2088,1	2571,1	2939,1	3493,9	3557,2	3096,7	2468,4
Total export	49248,1	66954,4	39702,9	51430,5	68394,2	68809,8	63312,0	53913,3	38127,0
Agrarian export	6349,8	10927,2	9606,1	10060,2	12970,5	17880,6	17024,3	16671,1	14563,0
Share of agrarian products in total export, %	12,9	16,3	24,2	19,6	19,0	26,0	26,9	30,9	38,2
Share of finished goods in total export, %	4,2	3,8	5,3	5,0	4,3	5,1	5,6	5,7	6,5
Section and title by Ukrainian Foreign Economic Activity Commodity Classification	Import								
I. Live animals and animal products	782,3	1702,0	1267,6	1241,7	1035,4	1718,4	1892,1	1122,7	548,1
II. Vegetable products	860,5	1462,5	1259,9	1563,7	1815,9	2429,7	2669,8	2027,1	1146,2
III. Fats and oils of animal or vegetable origin	388,2	612,9	374,3	451,6	468,7	406,3	403,3	301,5	182,3
IV. Food products	2090,9	2679,2	2034,3	2504,9	3026,7	2965,4	3218,8	2600,6	1607,5
Total import	60669,9	85535,4	45435,6	60740,0	82608,2	84658,1	76964,0	54381,4	37516,2
Agrarian import	4121,9	6456,6	4936,1	5761,9	6346,7	7519,7	8184,0	6051,9	3484,2
Share of agrarian products in total import, %	6,8	7,5	10,9	9,5	7,7	8,9	10,6	11,1	9,3
Share of finished goods in total import, %	3,4	3,1	4,5	4,1	3,7	3,5	4,2	4,8	4,3

Source**:** calculated by authors using [2]

According to the trends for the indicated period in the export of Ukraine's agricultural products to the EU countries, it is worth highlighting several stages: the period of Ukraine's membership in the WTO (2008-2014) and from 2015 till now - the period when the EU introduced the mechanism of the ATP (Autonomous Trade Preferences). Ukraine has received an extension for the removal of import duties on EU products for up to seven years and permission for the application of protection instruments in the form of export quotas for 10 years. As for export of domestic products to the EU tariff quotas are set for 36 items [3].

In 2008-2014 despite some liberalization of access, the market of agricultural products of the EU countries remained closed to Ukraine. It can be explained by significant non-tariff barriers, primarily sanitary and phytosanitary norms. In addition, the EU has super-powerful system for farmer's support based on considerable number of subsidies, that constitute about 50% of the EU budget annually [4]. The support of farmers also influences the growth of the EU's competitive advantages in international markets (Carraresi L., Banterle A., 2015) [5]. These institutional constraints did not allow Ukraine to take full advantage of open markets, obtained through membership in the WTO.

As for the second period of 2015-2016, it was different from the previous stage because of the introduction of ATP tools. According to the State Statistics Service, the share of agricultural products in the total exports of goods and services to the EU countries in 2015 increased to 31.5% of all exports to these countries, that was equal to $ 40.6 billion. In 2016, it was also the largest among all product groups and accounted for 30.5% ($ 4.12 billion) [2].

For the evaluation of the internal reserve for the export of agricultural products to the EU countries we used the methods of B. Balassa - to calculate the index of relative trade advantage Index (RTA) (Balassa, 1965) [4]; L. Vollrath - the index of the revealed comparative advantages (RCA) (Vollrath, 1991) [5] and G. Lafay- the Lafay index (LFI) (Lafay, 1992) [6]

The Trade Map database allowed to calculate the arithmetic average of indexes for all goods in groups from 1 to 24 of Ukrainian Foreign Economic Activity Commodity Classification (by two digits) for the period from 2007 to 2015. (Tab. 2).

Table 2

Priority product groups for export of agricultural products from Ukraine to the EU

Code by UCC FEA	Commodity group	Competitive advantages by		
		RTA - Relative Trade Advantage Index	RCA - Index of the revealed comparative advantages	LFI - Lafay index
Groups that have competitive advantages now and potentially				
10	Cereals	8,644	7,559	2,691
15	Fats and oils, ready-made edible fats, waxes	7,312	6,499	1,998
Groups that have competitive advantages				
12	Seeds and oleaginous fruits; straw and fodder	3,571	2,941	0,781
4	Milk and milk products; eggs of birds; natural honey	1,988	1,752	0,451
18	Cocoa and cocoa him	1,869	1,236	0,217
23	The remains of the food industry; animal feed	1,690	1,278	0,295
11	Flour and cereals; malt; starches; inulin	0,968	0,729	0,048
19	Preparations of cereals, flour, starch or milk; pastry	0,882	0,697	0,140
17	Sugar and sugar confectionery	0,820	0,609	0,102
14	Plant materials	0,640	0,426	0,001
22	Beverages, spirits and vinegar	0,562	0,375	0,171
7	Vegetables and tubers	0,130	0,039	0,023
20	Preparations of vegetables, fruit, nuts	0,086	-0,098	0,021
Groups that don't have competitive advantages				
5	Other animal products	-0,135	-0,196	-0,003
16	Food from meat, fish or crustaceans, molluscs	-0,457	-0,520	-0,049
2	Meat and edible offal	-0,819	-0,929	-0,247
1	Live animals	-0,830	-0,915	-0,049
24	Tobacco and manufactured tobacco substitutes	-0,960	-1,553	-0,135
6	Live plants	-1,115	-1,181	-0,063
8	Edible fruits and nuts	-1,119	-1,461	-0,317
3	Fish and crustaceans, molluscs and other aquatic invertebrates	-1,403	-1,588	-0,386
9	Coffee, tea, mate and spices	-1,412	-1,531	-0,163
13	Shellac; gums, resins and other vegetable juices and extracts	-1,509	-1,592	-0,027
21	Different foods	-1,633	-1,981	-0,263

***Source*:** calculated by authors using [2]

Taking into account all the above indexes of comparative advantages just 29 products from over 200 could be considered competitive. For now, these are group 10 "Cereals", and group 15 "Fats and oils, ready-made edible fats, waxes" that have the strongest competitive advantages and significant competitive potential. But price competitive advantages as well as certain favorable institutional pre-requisites created by ATP influence already export statistics of individual commodity subgroups of group 10 in the 2015-2016 marketing year. For this period Ukraine exported 78.9 thousand tons of sunflower against 43.5 thousand tons in 2014-2015. Moreover, in 2016-2017, in the light of increasing sunflower processing in the EU countries, experts expect an increase in the export of seeds of this crop to 100 thousand tons, despite the current export duty in Ukraine.

The EU countries have become the largest importer of Ukrainian sunflower oil over the past few years (about 32%) [2]. So the question about possible competition from the EU countries in the relevant market is quite logical. High-oil varieties of sunflower cover just 2-3% of the total area in the EU, while in Ukraine it is 5%. Demand of the EU for high oleic sunflower oil led to the restructuring of production and export of sunflower oil: 5 years ago, its share was about 7-8% of the total mass of sunflower oil produced, but now it is already 12%. The increase in the export of agricultural products in 2016 to 2015 was mainly caused by significant increase in shipments of: sunflower oil –by 1.9 times; sunflower seeds – by 3.4 times; cake and other solid wastes obtained during the extraction of soybean oil – by 4 times; sugar - by 3.1 times.

Commodity groups that have negative values of the RTA, RCA and LFI indices can form a portfolio of Ukrainian import purchases from the EU. But we also should stress that for some of them, there is an increase in the share in the structure of total export. That raises the question of the necessity to switch to new production and marketing technologies for foreign markets expansion and to apply a set of financial, communication and diplomatic tools for export support, consistent with EU practice.

Outlining other determinants that affect the ability of domestic agrarians to increase exports to the EU, we should stress: the active use of non-tariff barriers by the European Union in restricting the import of food products, primarily in terms of safety parameters; a certain resistance of the agrarian lobby in the EU to quotas for the import of agricultural products to be increased (Bojnec S., Fertő I., 2015) [7]; the dominance in the agrarian sector of Ukraine of agroholdings and investment funds, some of which are formed on the capital of non-residents who take the lion's share of value added in the chains of production and marketing of agricultural products.

The issue of quotas increase with the prospect of their complete withdrawal from the EU for domestic exports of agricultural products cannot be narrowed to just resistance of European agrarian lobbies. After all, we are talking about the high sensitivity of raw materials and, in the first place, grain markets, to fluctuations in the supply and to the strengthening over the past few years of a trend in prices decrease for agricultural products in the EU markets (Tab. 3).

Table 3

Dynamics of prices for agricultural products in the EU in 2015-2016

Indicator	2 quarter 2015	3 quarter 2015	4 quarter 2015	1 quarter 2016	2 quarter 2016	2016/ 2015
Prices for agricultural products	-1,5	-0,2	1,9	-3,7	-0,8	-2,8
Producer prices for finished food products	0,1	0,0	-0,6	-0,6	-0,3	-1,4
Consumer prices for finished food products	0,3	-0,9	0,5	0,1	0,4	0,1
Inflation	1,2	-0,4	0,1	-0,8	1,0	-0,1

***Source*:** [8]

So, after the US Department of Agriculture released its forecast for a decrease in corn production in Ukraine from 27 to 25 million tons in 2016, international markets reacted with lightning speed: if the price reduction was the strong trend before, after the announcement of the forecast, the curve of prices for corn grain began to level off rapidly. Under the conditions of the European grain quotas cancellation, Ukraine would be able to increase supplies, that can hit both European and domestic agrarians. According to calculations by analysts of Eavex Capital, Ukrainian agrarians lost about 1.9-2 billion US dollars due to grain prices reduction [9].

As for the special role of agroholdings and investment funds, it is caused by their strategic behavior, since some of them are compound of powerful TNCs networks. Among influential exporters in the sphere of agro-industrial complex of Ukraine, by outlined groups of Ukrainian Foreign Economic Activity Commodity Classification (10 and 15) “Cargill” (crop production), “Kernel Holding SA” (the world's largest producer and exporter of sunflower oil), American investment fund “NCH”, “New Century Holdings” (cereals export), "Louis Dreyfus Company Ukraine" (cereal exports) should be called. They export raw materials for further production of finished goods in other divisions of the transnational supply chain [10], and then Ukraine receives less revenue from processing those crops, cereals and technical crops, for which it obvious has competitive advantages.

According to experts, for every 100 thousand tons of food raw materials export Ukraine loses approximately 25 million UAH of potential income from processing of these products inside the country. In particular, European companies that import Ukrainian corn, purchasing it at $ 120-160 per ton, receive up to $ 600 of added value per ton. Moreover, it is agroholdings that receive up to 70% of all funds aimed to support agriculture, and so the share of budgetary surcharges they get is about 15% of their sales [11]. In 2016, the financing of Ukrainian agroindustrial complex by international institutional investors was also mainly related to powerful agricultural holdings: EBRD - Ukrainian Agrarian Investments (UAI) - 20 million USD, EBRD - IMC (Industrial Milk Company) - 20 million USD, EBRD-ASTARTA Holding NV - 20 million USD, EBRD - Louis Dreyfus Company Ukraine 100 million USD etc.

The interest in investing to the promising industry is growing: according to estimates of the legal company “Aequo” together with the authoritative edition of Merger market, in 2015 the scope of the AIC was included in the M&A top three sectors in terms of the number and volumes of transactions involving non-residents, taking the third place (slightly more than 15%), losing only to financial services (more than 40% of the total cost) and energy (about 30%). In 2016, the growth of foreign direct investment was directed to two priority areas: commercial real estate and agrobusiness [13].

Conclusions. The analysis of volumes, dynamics and structure of the agrarian export from Ukraine to the EU confirmed the availability of a reserve to increase the volumes of supplies. The access of Ukrainian exporters to the European markets of agricultural products is ensured by the introduction of the ATP between Ukraine and the EU. Evaluation of competitive advantages of agricultural products allowed to identify positions that can be competitive in the EU - groups 10 and 15 by Ukrainian Foreign Economic Activity Commodity Classification. To potential risks, related to the expansion of agrarian export from Ukraine to the EU countries are: the reduction of price comparative advantages, taking into account additional costs to overcome non-tariff barriers to the EU, including activation of non-protectionist trends; strengthening of the agrarian lobby in the EU against quotas for the import of agricultural products to be increased; further de-industrialization of the Ukrainian economy through the implementation of corporate strategic actions of agroholdings, which are participants of international supply chains.

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