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STATE AND PROSPECTS OF DEVELOPMENT OF TRADE IN
AGRICULTURAL GOODS UNDER CONDITIONS
OF THE UKRAINE-EU ASSOCIATION AGREEMENT

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Анотація. *The purpose of the article is to study the state and dynamics of the main product groups in trade in agricultural products of Ukraine with the EU under the terms of the Free Trade and Association Agreement. Statistical analysis methods were used, which allowed to analyze the dynamics of exports and imports of agricultural products in terms of the EU's share in Ukraine's foreign trade in agricultural products, major commodity groups of exports and imports, commodity structure of foreign trade between Ukraine and the EU. The method of generalization was applied, which allowed to analyze the current state of use of Ukrainian producers of commodity quotas and factors that will determine the opportunities for Ukrainian exporters in the near future. Such factors include, for example, Brexit, as a result of which Ukraine must reach new trade agreements with the United Kingdom, and the crisis through COVID-19. The results demonstrate the strengthening of the position of domestically produced agricultural products in the European market and the attractiveness of trade with EU countries. The share of the EU in Ukrainian exports of agricultural products from 2011 to 2015 ranges from 26 to 28%, in 2017-2020 there was a significant increase to 33.65%. At the same time, EU countries provide the lion's share of food supplies to Ukraine - in 2006-2013, the EU's share in Ukrainian imports of agricultural products averaged 38-39%, and in 2020 reached a record 50.62%. Meanwhile, while imports of agricultural goods from the EU are characterized by a fairly diversified structure, domestic exports are characterized by dependence on several major commodity positions, which creates a risk of export supplies, especially in an environment of increasing international competition and increasing standards for standardization and certification. agricultural products. The practical significance lies in the generalization of the results of the impact of the Association Agreement, which allowed to form directions for further research aimed at making fuller use of the benefits of the Free Trade Area.*

Ключові слова: *Ukraine-EU Association Agreement, exports, imports, product groups, agricultural products, agro-industrial complex, tariff quotas.*

СТАН ТА ПЕРСПЕКТИВИ РОЗВИТКУ ТОРГІВЛІ ТОВАРАМИ ГАЛУЗІ
СІЛЬСЬКОГО ГОСПОДАРСТВА В УМОВАХ ДІЇ
УГОДИ ПРО АСОЦІАЦІЮ УКРАЇНА-ЄС

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Abstract. *Мета статті полягає в дослідженні стану та динаміки основних товарних груп в торгівлі сільськогосподарською продукцією України з ЄС за умов дії Угоди про асоціацію. Застосовано статистичні методи аналізу, які дозволили виявити динаміку експорту та імпорту продукції галузі сільського господарства. Результати демонструють зміцнення позицій продукції АПК вітчизняного виробництва на європейському ринку, однак імпорт товарів з ЄС характеризується досить диверсифікованою структурою, а вітчизняний експорт характеризується залежністю від декількох основних товарних позицій. Практична значимість полягає у наданні узагальнених результатів впливу Угоди про асоціацію, що дозволило сформуванню напрямків подальших досліджень, спрямованих на більш повне використання переваг Зони вільної торгівлі.*

Keywords: *Угода про асоціацію Україна-ЄС, експорт, імпорт, товарні групи, продукція галузі сільського господарства, АПК, тарифні квоти.*

JEL Classification: F100, F130, F680

Formulation of the problem. In the conditions of intensification of processes of globalization of the world economy the role of foreign trade relations of the country amplifies. It is international trade as a form of international economic relations that is a component of balanced economic development, strengthens the competitiveness of the national economy, raises the living standards of the population and provides the fullest satisfaction of its needs. One of the main ways to solve the

problems of sales of agricultural products, which will create opportunities to translate agriculture and food production into the category of highly efficient industries, is the export of agricultural products. Ukraine's agriculture is not only a supplier of food for the population and raw materials for processing enterprises, but also an important source of foreign exchange earnings in the country, and forms the basis of foreign trade. For Ukraine, with its strong agro-industrial potential, favorable climatic conditions, huge area of agricultural land, developed transport network and other favorable factors, foreign trade in the world market of agricultural products can be the basis for overcoming the economic crisis and the beginning of economic growth.

In addition, in today's conditions, integration into the European community is an extremely important issue for Ukraine. In terms of foreign trade, in order to enter the European market effectively, Ukraine needs to increase the efficiency of agricultural exports and imports and bring production standards in line with European trade legislation.

Analysis of recent research and publications. The study of the problems of trade cooperation between Ukraine and the EU is extremely relevant and is studied by many scientists. In particular, it is worth noting T. Tokhtamisha, O. Yabolnytsky and M. Ovchinnikov, who establish the patterns of dynamics of Ukraine's foreign trade with the EU, reveal the main aspects of the organization of foreign trade with EU countries. Problems of research of foreign trade of Ukraine, in particular agricultural products became a priority in the works of P. Gaidutsky, S. Kvasha, O. Maslak, N. Nepryadkina, V. Nelepa etc

Unresolved parts of the overall problem. Numerous scientific papers are devoted to the study of the state and prospects of development of trade in agricultural goods under the Ukraine-EU Free Trade Agreement. However, the current state of Ukraine in the foreign market of agricultural and agricultural products, which is characterized by dynamism, especially in highly competitive conditions of free trade with the EU, needs further study.

The aim of the study. The purpose of the article is to study the state and dynamics of the main commodity groups in trade in agricultural products of Ukraine with the EU under the terms of the Free Trade Agreement and to identify further prospects for increasing Ukraine's exports to the European market.

Presentation of the main research material. The development of integration is an impetus for progressive changes in agriculture and the development of exports of agricultural products [1]. In September 2014, the Verkhovna Rada ratified the Association Agreement between Ukraine and the EU, part of which is an agreement on the establishment of a free trade area. Since April 2014, the EU has granted preferences to Ukraine in terms of access to its market, and on January 1, 2016, the Association Agreement and the Comprehensive Free Trade Area between Ukraine and the EU came into force [2]. An in-depth and comprehensive FTA between Ukraine and the EU provides for the complete abolition of import duties on industrial goods and significant liberalization of trade in agricultural goods [3]. If for agriculture the basic rate of import duty of Ukraine was 6.1, and the final is reduced to 0.7, the EU import duty for this group of goods is reduced under the Agreement from 7.0 to 0.8, respectively [4, p. 283-295]. European perspectives have increased the domestic grain, oil, fruit potential and created the basis for the development of the meat sector, and in the future - and the dairy complex of Ukraine [5, p.24; 6, p. 66].

Today, the EU is Ukraine's main trading partner. In contrast to previous years, exports played an important role in the growth of trade with the EU. The share of the EU in Ukrainian exports of agricultural products from 2011 to 2015 ranges from 26 to 28%, in 2017-2019 there is a significant increase (Fig. 1).

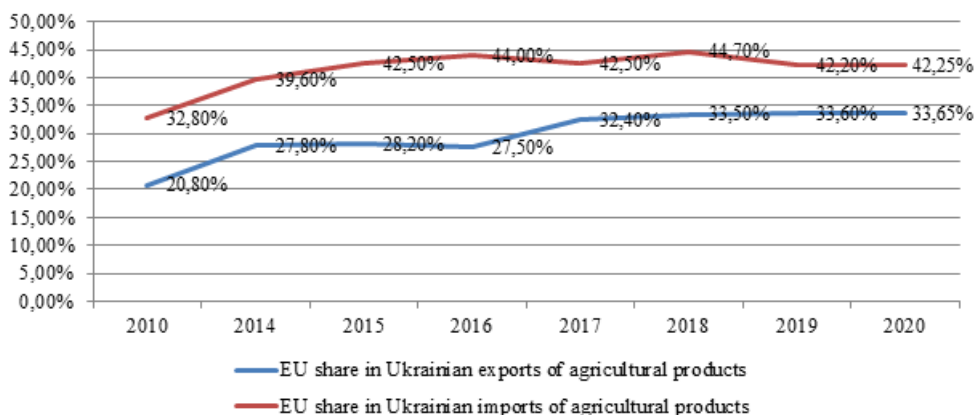


Fig. 1. Dynamics of the EU share in Ukrainian exports and imports of goods, 2010-2020,%

Source: compiled by the author on the basis [7]

In 2019, exports of agricultural products to EU countries increased by 18.3% compared to 2018, in 2020 the growth is small - up to 33.65%. The growing attractiveness of the EU market is confirmed by the positive trade balance in recent years. In 2019, the positive balance reached more than 4.3 billion dollars. USA, which is 19.9% more than in 2018. In geographical terms, import and export flows between the EU and Ukraine have a significant level of concentration. The five largest trading partners in 2019 accounted for more than 67.0% of export deliveries (Netherlands, Spain, Germany, Poland and Italy). Despite the growth of Ukraine's trade with the EU, the share of trade in agricultural products with Ukraine in the total foreign trade turnover of the EU remains insignificant. However, among the largest agricultural importers to the EU, Ukraine took third place, behind the United States and Brazil [8].

At the same time, EU countries provide the lion's share of food supplies to Ukraine - in 2006-2013, the EU's share in Ukrainian imports of agricultural products averaged 38-39%, and in 2020 reached a record 50.62%. In 2019, the five largest trading partners (Poland, Germany, Italy, France and the Netherlands) accounted for more than 66.4% of imported goods.

2020 formed new trade opportunities in Ukraine-EU relations - the terms of the FTA were revised during the year. The EU is increasingly becoming our largest trading partner. Its share is 40.7% of total trade in Ukraine in 2020 [9]. The largest income in trade in agricultural products to Ukrainian producers and suppliers comes from grain and oilseeds, oils and residues of the processing industry, which occupy about 83% of the structure of Ukraine's agricultural exports to the European Union (Fig. 2, Fig. 3).

2020 років побудовано діаграму показника (Рис. 1).

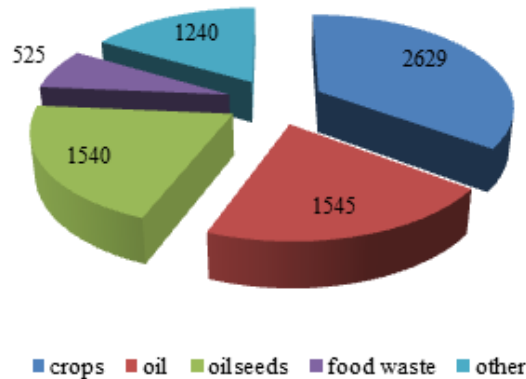


Fig. 2. Commodity exports of agricultural products from Ukraine to the EU, 2019, billion dollars USA

Source: compiled by the author on the basis [7]

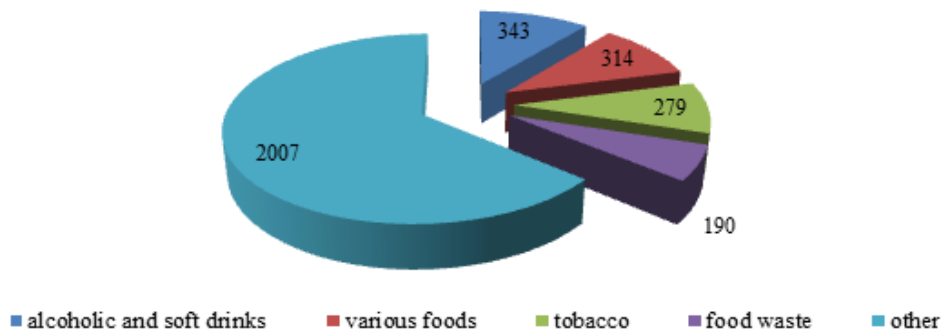


Fig. 2. Commodity exports of agricultural products from Ukraine to the EU, 2019, billion dollars USA

Source: compiled by the author on the basis [7]

Agricultural imports from the European Union to Ukraine are largely represented by products of the processing industry (beverages, food, animal feed and tobacco products), which account for about 36% of total imports of agricultural products from the EU in 2019.

If we consider the trends and dynamics of exports and imports of certain types of agricultural products in trade with the EU, we can note such trends in the main product categories.

Poultry meat and offal. According to the Association Agreement with the EU, domestic producers received a tariff quota of 16 thousand tons of meat and poultry by-products with a gradual increase to 70 thousand tons in 2020-2021 (import duty rate of 17.9-35.8 euros / 100 kg depending on the types of products, within the tariff quota - 0%) [10]. As a result, in 2019 exports reached more than 114.7 thousand tons, which is 8.8% more than in 2018. The main importers were the Netherlands and Slovakia. In 2019, compared to 2010, imports of poultry meat and offal almost doubled. The main supplier of frozen poultry carcasses and offal to Ukraine was Poland with a share of 61.7% (Fig. 4).

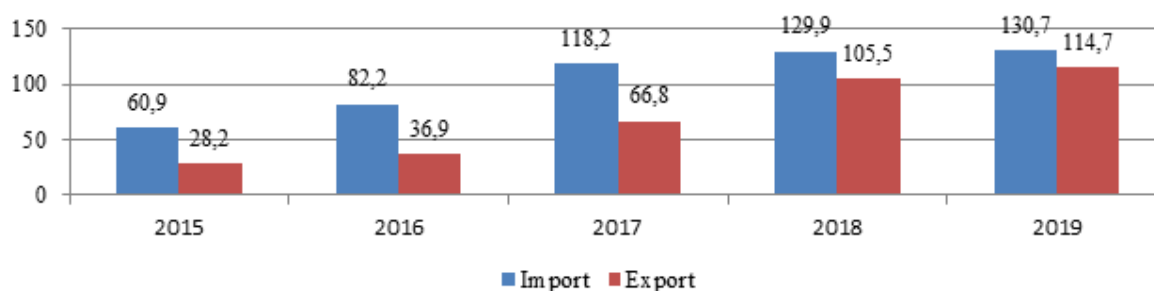


Fig. 4. Dynamics of foreign trade in meat and poultry offal from the EU, 2015-2019, thousand tons

Source: compiled by the author on the basis [9]

Pork is fresh, chilled or frozen. According to the Association Agreement with the EU, domestic producers received a tariff quota of 20 thousand tons of fresh, chilled or frozen pork (the basic rate of import duty ranges from 26.8 euros / 100 kg to 86.9 euros / 100 kg depending on the type of product, within the tariff quota - 0%) [10]. Despite this, in 2018 pork exports amounted to only 16 tons, and in 2019 - 14 thousand tons. During 2015–2017, pork imports from EU countries tended to decrease, but EU countries provide the bulk of Ukrainian imports. In 2019, their share was 96.4% of total pork imports (Fig. 5).

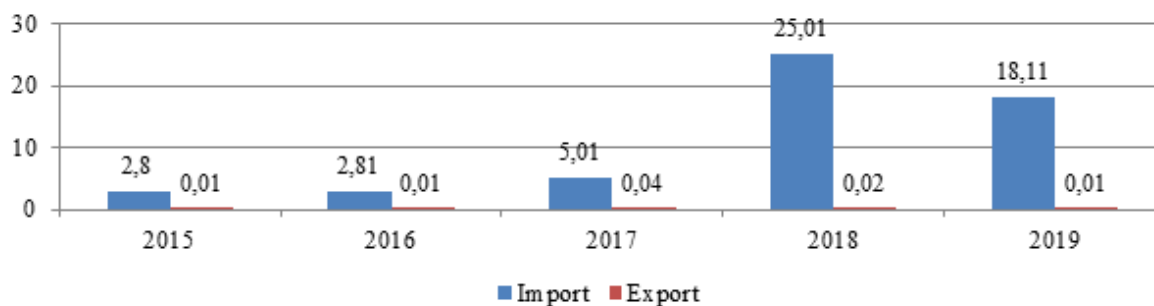


Fig. 5. Dynamics of foreign trade in fresh, chilled or frozen pork from the EU, 2015-2019, thousand tons

Source: compiled by the author on the basis [9]

Sunflower oil. Ukraine ranks first in the world in terms of sunflower oil exports, and the EU is the second (after Asia) largest market for its sale. In 2018, exports of sunflower oil to EU countries amounted to only 1.35 million tons, which is 24.1% less than in 2017 (base rate of import duty 6.4%, preferential rate - 2.9%, rate for Ukraine - 0%) [10]. In 2019, exports of these products to the EU amounted to 41.7% more than in 2018. This is the highest figure for the last 5 years. Ukraine imports a small amount of sunflower oil from the EU for technical or industrial use (Fig. 6).

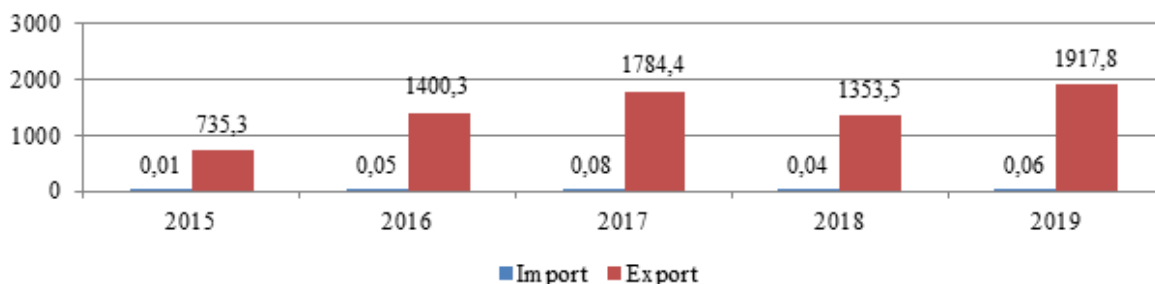


Fig. 6. Dynamics of foreign trade in sunflower oil with the EU, 2015-2019, thousand tons
Source: compiled by the author on the basis [9]

Wheat. According to the Association Agreement, domestic producers received a tariff quota of up to 950 thousand tons of wheat. On October 1, 2017, the EU Regulation on increasing the volume of products that Ukraine can export to the EU came into force. The signed Regulation provides additional zero tariff quotas in the amount of 65.0 thousand tons of wheat. In 2018, wheat exports reached 1.45 million tons, which is 6.8% more than in 2017 [10]. In 2019, this quota amounted to 1,045 thousand tons, but only 614.5 thousand tons of wheat were exported to the EU, which is 57.8% less than the previous year. In 2019, the volume of imports of this product amounted to more than 2.0 thousand tons (mainly from Germany and Poland) against 2.4 thousand tons in 2018 (Fig. 7).

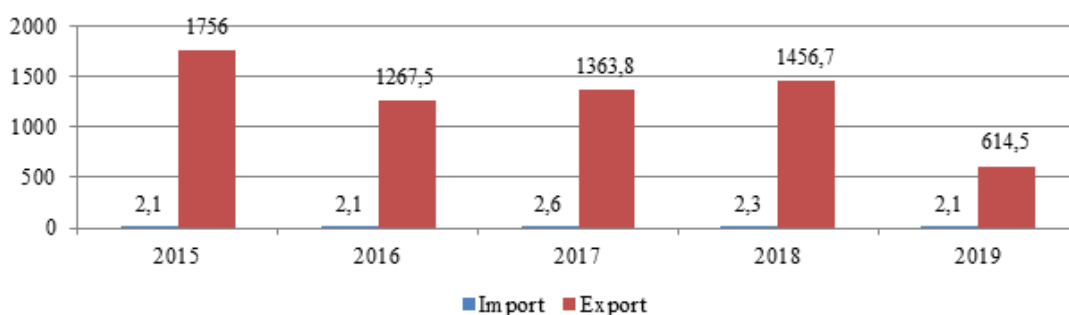


Fig. 7. Dynamics of foreign trade in wheat and a mixture of wheat and rye with the EU, 2015-2019, thousand tons
Source: compiled by the author on the basis [9]

Corn. For Ukraine, corn is the main export crop, and EU countries are the main market. According to the Association Agreement, domestic producers received a tariff quota of 400 thousand tons of corn (basic import duty rate of 94 euros / 1000 kg, within the tariff quota - 0%). In 2019, this quota for the import of corn is 550 thousand tons according to the Regulation of 2017 on increasing the volume of products that Ukraine can export to the EU [10]. In 2019, corn exports were 26.4% more than a year earlier. In 2019, the volume of corn imports amounted to 29.5 thousand tons, which is 0.1% more than in 2018 (Fig. 8).

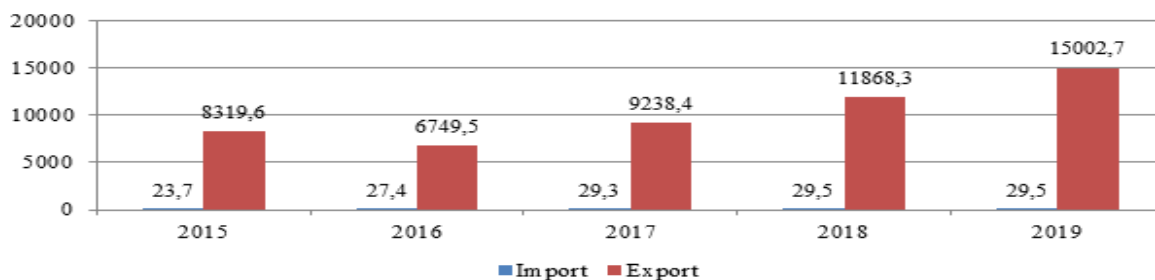


Fig. 8. Dynamics of foreign trade in corn with the EU, 2015-2019, thousand tons
Source: compiled by the author on the basis [9]

Dairy products. Until 2017, Ukraine exported small consignments of dairy products to the EU (in 2006–2016 - mainly condensed milk and cream with added sugar). According to the Association Agreement with the EU, domestic producers received a tariff quota of 8 thousand tons of condensed milk and cream, 1.5 thousand tons of milk powder and 1.5 thousand tons of butter [10]. In 2019, Ukraine imported dairy products from the EU for a total of almost 143.2 million dollars. USA, which is 62.7% more than in 2018. In 2019, the largest share in the structure of imports of dairy products to Ukraine fell on cheese, butter, cream, yogurt and kefir (Fig. 9).

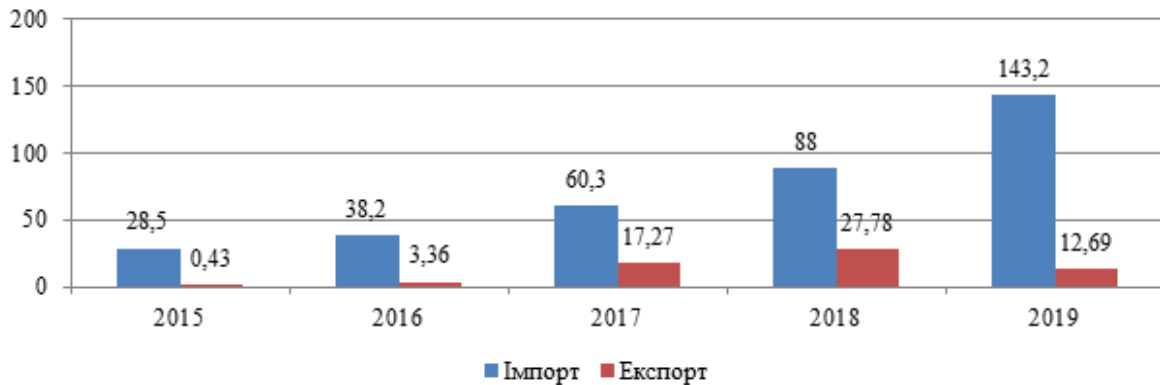


Fig. 9. Dynamics of foreign trade in dairy products with the EU, 2015-2019, million dollars USA

Source: compiled by the author on the basis [9]

Juices. The basis of domestic exports are apple and grape juices. According to the Association Agreement with the EU, domestic producers received a tariff quota of 10 thousand tons of juice (within the tariff quota, the duty rate is 0%, the basic and reduced duty rates for apple juice - 14.5-20%; grape juice - 0-40 % depending on the type of product). From October 1, 2017, the EU Regulation provided additional zero tariff quotas for 500 tons of juice [10]. In 2019, the EU exported 2.7% less juice than in 2018. In 2019, imports of this product increased by 31.6% compared to the previous year and amounted to 7.6 thousand tons (Fig. 10).

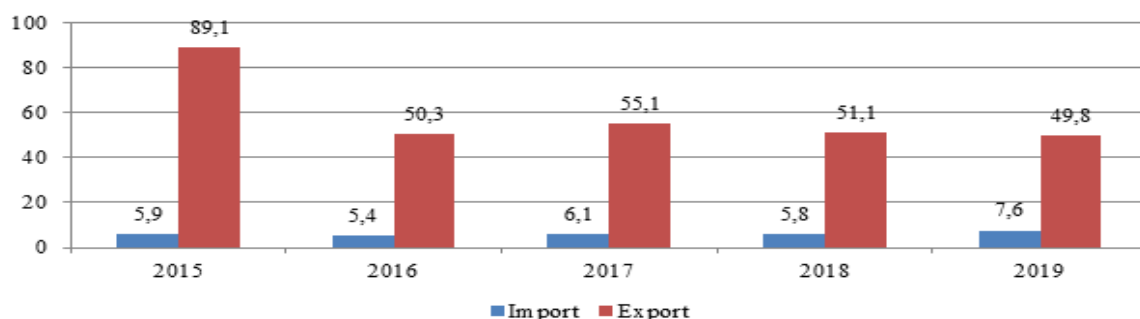


Fig. 10. Dynamics of foreign trade in juice of all kinds from the EU, 2015-2019, thousand tons
Source: compiled by the author on the basis [9]

Today, the right to export products to the EU have 308 Ukrainian enterprises (of which 128 enterprises-producers of products for human consumption: 22 producers of milk and dairy products; 4 producers of poultry meat; 1 producer of poultry products; 24 fish producers; 4 producers of eggs and egg products, 66 producers of honey, 1 producer of food collagen, 1 producer of intestinal raw materials, 5 producers of snails and frog legs). At the same time, all food producers from the 28 EU member states can export to Ukraine without restrictions under import conditions. Ukraine, on the other hand, needs to undergo an assessment of the state control system and obtain export permits to open exports to the EU [11].

Ukraine's liabilities in the agricultural sector are 29%. One of the largest is the sphere of sanitary and phytosanitary measures. Thus, during 2017-2019, a number of important legislative norms were adopted in the field of organic production, state control, on food safety and hygiene, on information for consumers about food products, and several other important norms were developed, in particular: a draft law on requirements for items and materials that come into contact with food; on the tracking and labeling of genetically modified organisms and others.

If we talk about the prospects for the development of foreign trade in agricultural products

between Ukraine and the EU, we should consider the following main factors that may indicate the impact on the development of export-import operations. First of all, it should be remembered that such an event as Brexit took place not so long ago. Eurostat shows that in 2018, Ukraine and the United Kingdom traded in the agro-industrial complex for a total of 299.6 million dollars USA. The main goods exported from Ukraine to Britain were: grain - 124 million dollars USA, sunflower oil - 71.8 million dollars USA, oilseeds - 13.2 million dollars USA. At the same time, Ukraine imported alcoholic beverages (primarily whiskey) from Britain - 34 million dollars USA, Frozen fish - 20.3 million dollars USA, tobacco - 7.7 million dollars USA [8]. The Ukrainian authorities now need to work on a new free trade agreement between Ukraine and Britain. Since 2018, the countries have been holding informal consultations on signing a new agreement. But it should be remembered that in power in the United Kingdom - the Conservatives, so do not expect full trade liberalization, and, most likely, agricultural trade between countries will still be limited by tariff quotas and import tariffs [12].

Modern agricultural production is characterized by trends of annual growth in production costs and rising prices for products, which in turn leads to increased import dependence in the food sector and exacerbation of food danger. In particular, in the overall ranking of food security, taking into account the impact of natural conditions, Ukraine ranked 63rd out of 113 countries. Note that the index draws attention to system gaps and the strengthening of their impact on food systems through COVID-19. With the exception of Ukraine, all European countries have strong government food security programs that have come under severe pressure due to the COVID-19 crisis. Also, in 2020, the pandemic affected the overall food supply due to the lack of seasonal migrant workers. In the EU, food supply has been jeopardized by the behavior of consumers who panicked to buy basic necessities. According to an EIU report, the index shows that the volatility of agricultural production in Europe exceeds the global figure. However, in Ukraine the volatility of agricultural production is not so critical, so we should take advantage of the opportunities that arose during the pandemic.

It should also be borne in mind the planned revision of the terms of the Free Trade Area (FTA), in accordance with the Association Agreement between Ukraine and the EU, which is to take place in 2021. During the FTA the greatest economic effect had those items of goods exhaustion of quotas: cereals, juices, sugar, processed tomatoes, etc. During 2016-2020, there is a positive trend in Ukraine's use of EU tariff quotas, including quotas for goods with a higher degree of processing. In 2019, Ukraine used 32 tariff quotas, in 2018 - 32 tariff quotas, in 2017 - 29 tariff quotas, in 2016 - 26 tariff quotas). In 2020, Ukrainian exporters used 31 of the 40 tariff quotas under the FTA with the EU. As of December 2020, 11 tariff quotas have been fully used, such as honey, barley groats and flour, processed tomatoes, grape and apple juices, corn, sugar, poultry, etc. Also, Ukrainian exporters actively used the opportunities in the framework of additional trade preferences, which at the initiative of the Government of Ukraine introduced the EU for a number of agricultural and industrial goods, which came into force on October 1, 2017 and lasted 3 years [13]. Tariff quotas for honey, corn, processed tomatoes and barley groats and flour have been fully used. Tariff quotas for barley, barley flour and pellets (13.0%), oats (9.6%) and wheat (9.3%) were used. Meanwhile, trade in quotas from processed sugar products (10.2%), food products (2.6%), and sugar syrups (0.2%) was not very active [14].

Conclusions. The dynamics of foreign trade with the EU convincingly proves the strengthening of economic ties between Ukraine and the EU, strengthening the position of domestically produced agricultural products in the European market and the attractiveness of trade with EU countries. Imports of agricultural products from the EU are characterized by a fairly diversified structure - the share of most goods does not exceed 5.0% of total imports. Domestic exports of agricultural products are characterized by dependence on several major product items, which creates the danger of significant fluctuations in the volume and cost of export deliveries. In 2019, 67.0% of foreign exchange earnings from exports of agricultural products provided only three items, including corn (32.2%) and sunflower oil (18.5%).

Establishing an in-depth and comprehensive FTA with the EU is certainly in the country's economic interests. Ukrainian exporters will have wider access to a large and stable market, while Ukrainian companies will be able to import advanced investment goods at lower prices, thus increasing their competitiveness, and consumers will be able to enjoy a wider choice of goods at relatively lower prices. It can be concluded that since the signing of the Association Agreement and the FTA, exports of agricultural products to the EU have increased by 37%, this position remains one of the key in the total exports of Ukrainian producers to the EU market.

Meanwhile, it is necessary to remember to increase competition in the market of agricultural products, to increase the efficiency and volume of exports to the EU, Ukrainian producers should modernize production and improve the production process; There is also a slow improvement in Ukraine's use of duty-free quotas for agri-food exports.

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