

Evolving market and policy scenarios for Ukrainian grain and oilseed trade

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List of abbreviations

CAP	Common Agricultural Policy
CEECs	Central and Eastern European Countries
CCU	Custom Code of Ukraine
CIF	Cost Insurance and Freight
CIS	Commonwealth of Independent States
CMU	Cabinet of Ministers of Ukraine
CN	Custom Nomenclature
FAO	Food and Agriculture Organization
FAPRI	Food and Agricultural Policy Research Institute
FAS USDA	Foreign Agriculture Service of United States Department of Agriculture
FDI	Foreign Direct Investments
FOB	Free on Board
FSU	Former Soviet Union
FTA	Free Trade Agreement
EU	European Union
EUROSTAT	Statistical office of the European Union
GDP	Gross Domestic Product
GHG	Green House Gas
GOU	Government of Ukraine
IER	Institute for Economic Research and Policy Recommendations in Ukraine
JSC	Joint Stock Company
Ltd	Limited Company
MFN	Most Favoured Nation
Minagro	Ministry of Agricultural Policy of Ukraine
NBU	National Bank of Ukraine
NTB	Non-Tariff Barrier
NTM	Non-Tariff Measure
OECD	Organisation for Economic Cooperation and Development
PCA	Partnership and Cooperation Agreement
PSE	Producer Subsidy Estimate
RED	Renewable Energy Directive of the European Parliament

ROW	Rest of the World
SFS	Sunflower seeds
SPS	Sanitary and Phytosanitary Measures
TBT	Technical Barrier to Trade
UCAB	Ukrainian Club of Agricultural Business
UGA	Ukrainian Grain Association
Ukrstat	State Statistical Committee of Ukraine
VAT	Value Added Tax

Summary

The agricultural sector plays an important role in the Ukrainian economy: 71% of the country's area is agricultural land, agriculture is important in the labour market, more than 16% of workers are employed in this sector, and the agricultural sector also has the potential to become a major export earner. The Ukrainian agricultural output has experienced a considerable decrease in the 1990s, but managed to recover since 2000. Especially the crop sector demonstrated a strong growth, whereas the livestock sector shows a downward output tendency even today. Moreover, Ukraine became one of the world's top ten grain exporters during the last decade. Crops such as wheat, barley and maize have leading positions in the country's agricultural exports. Two other mostly exported crops are sunflower seeds and rapeseed. Ukrainian grain and oilseed exports are well diversified, nevertheless, some regions like the European Union play a major role as an import trade partners.

Despite the positive developments in Ukrainian agricultural production and foreign trade, there are many problems in policy framework and market infrastructure, which hamper this process. On the one hand, Ukrainian trade policies demonstrate a significant progress, so Ukraine became a member of World Trade Organisation and initiated the Free Trade Agreement negotiations with the European Union. On the other hand, the Ukrainian government tries to control the agricultural sector, using ineffective policy instruments and holding back the liberalisation of agriculture and its full opening to international trade. Undeveloped market infrastructure causes higher transaction costs and reduces the farm-gate prices. Hence, even having a comparative advantage in crop production, Ukraine has a problem to realise its agricultural potential.

Against this background different development scenarios for Ukrainian grain and oilseed sectors are investigated in this study. In order to do this, the main market and policy factors, which influence grain and oilseed trade, are identified, using a survey among Ukrainian agricultural exporters. The results of the survey show that companies involved in agricultural trade assess state interventions in exports and domestic market inefficiency as main factors, which create uncertainty on markets and rather negatively influence the trade performance. Other factors like the world market situation or import regulations play an important, but less critical role for Ukrainian agricultural exporters.

To analyse the impact of different market and policy factors on Ukrainian grain and oilseed trade, a multi-market, multi-region partial equilibrium model is used in this study. The modelling framework includes six grain and oilseed markets,

three regions and allows the implementation of Ukrainian domestic and trade policies for the analysis. In the first scenario the Ukrainian export policies on grain and oilseed markets, including export quotas and export taxes, are simulated. The second scenario estimates implications of Ukraine's World Trade Organisation membership and the third one considers current world food prices growth on grain and oilseed markets. The focus of the fourth scenario is on the rapeseed market and implications of the European Union Renewable Energy Directive on Ukrainian exports. The fifth scenario models the assumed positive effects of the European Union Free Trade Agreement. The results of the scenarios clearly show that restrictive export policies of the Ukrainian government can cause considerable welfare losses for the sector, whereas trade liberalisation through multilateral or bilateral agreements has potentially positive impacts on the Ukrainian agriculture.

In general, the results of the study emphasize the importance of a balanced state policy on agricultural markets in Ukraine and of state support measures that aim at the improvement of the efficiency of agricultural production and international competitiveness of the sector. The government has to ensure as soon as possible a stable market infrastructure background that is vital for agricultural trade. The same stability is needed in the country's political framework to ensure a reliable environment for Ukrainian producers and exporters.

Zusammenfassung

Der Agrarsektor spielt eine wichtige Rolle in der Wirtschaft der Ukraine: 71% der Landfläche sind landwirtschaftliche Nutzfläche. Weiterhin ist die Landwirtschaft auch von Bedeutung für den Arbeitsmarkt: Mehr als 16% der Arbeitnehmer sind in diesem Sektor beschäftigt. Die Agrarwirtschaft hat das Potenzial, sich zum größten Exportsektor der Ukraine zu entwickeln. Die ukrainische Agrarproduktion hat einen erheblichen Rückgang in den neunziger Jahren erlebt, jedoch einen Aufschwung seit 2000 erfahren. Besonderes der Ackerbau hat ein starkes Wachstum erfahren, während in der Tierhaltung selbst heute noch eine Abschwächungstendenz zu beobachten ist. Außerdem ist die Ukraine zu einem der zehn weltgrößten Getreideexporteure in den letzten Jahrzehnten aufgestiegen. Weizen, Gerste und Mais zählen zu den wichtigsten Exportgütern des Landes. Unter den Ölsaaten werden Sonnenblumenkerne und Raps am meisten exportiert. Ukrainische Getreide- und Ölsaatexporte sind geographisch gut diversifiziert, manche Regionen, wie die Europäische Union, spielen allerdings eine dominierende Rolle als Handelspartner.

Trotz aller positiven Entwicklungen in der ukrainischen Landwirtschaft und im Agrarhandel gibt es viele Probleme mit den agrarpolitischen Rahmenbedingungen und der Marktinfrastruktur, die die Wachstumsprozesse erschweren. Einerseits demonstriert die ukrainische Handelspolitik deutliche Fortschritte – die Ukraine ist der Welthandelsorganisation beigetreten und hat Verhandlungen über ein Freihandelsabkommen mit der Europäischen Union initiiert – andererseits versucht die ukrainische Regierung, den Agrarsektor zu kontrollieren, indem sie ineffektive Politikinstrumente anwendet und so die Liberalisierung der Agrarwirtschaft und deren vollständige Integration in den Welthandel verlangsamt. Die unentwickelte Marktinfrastruktur verursacht höhere Transaktionskosten und beeinflusst so die Erzeugerpreise negativ. Demzufolge hat die Ukraine trotz ihrer komparativen Vorteile Probleme mit der Realisierung ihres Agrarpotenzials.

Vor diesem Hintergrund werden in dieser Studie verschiedene Szenarien für den ukrainischen Getreide- und Ölsaatenhandel untersucht. Um dies umsetzen zu können, werden die wichtigsten Markt- und Politikfaktoren, die auf den Getreide- und Ölsaatenhandel den größten Einfluss haben, mittels einer Befragung der ukrainischen Agrarexporteure identifiziert. Die Ergebnisse der Befragung zeigen, dass die Agrarexportunternehmen staatliche Eingriffe in die Export- und Binnenmarktineffizienz als die Hauptfaktoren bewerten, die Unsicherheiten auf den Märkten schaffen und dadurch den Handel negativ

beeinflussen. Andere Faktoren, wie die Einfuhrregelungen in Importregionen, spielen eine weniger kritische Rolle für die ukrainischen Agrarexporteure.

Um die Auswirkung von verschiedenen Markt- und Politikfaktoren auf den ukrainischen Getreide- und Ölsaathandel zu analysieren, wird in dieser Studie ein partielles Gleichgewichtsmodell für mehrere Regionen und mehrere Märkte angewendet. Das Modell erfasst sechs Getreide- und Ölmärkte sowie drei Regionen und ermöglicht somit, sowohl die ukrainischen agrar- und handelspolitischen Instrumente als auch die Marktveränderungen für die Analyse zu implementieren. Im ersten Szenario wird die ukrainische Exportpolitik einschließlich der Exportquoten und Exportsteuern auf den Getreide- und Ölmärkten modelliert. Das zweite Szenario kalkuliert die Auswirkungen einer Mitgliedschaft der Ukraine in der Welthandelsorganisation, und das dritte befasst sich mit den aktuellen Preis- und Nachfragesteigerungen auf den Weltagrarmärkten. Das vierte Szenario hat den ukrainischen Rapsmarkt und die Auswirkungen der Nachhaltigkeitsrichtlinie der EU (RED) auf die Rapsexporte aus der Ukraine im Fokus. Im fünften Szenario werden die als positiv angenommenen Auswirkungen von Verhandlungen über ein Freihandelsabkommen mit der EU auf die analysierten Märkte untersucht. Die Ergebnisse der Modellierung zeigen klar, dass beschränkende Eingriffe der ukrainischen Regierung in die Agrarexporte erhebliche finanzielle Verluste für den Sektor bedeuten können, die Liberalisierung des Handels auf bi- und multilateraler Ebene hingegen potenziell positive Auswirkungen auf die ukrainische Landwirtschaft und den Agrarhandel hat.

Die Ergebnisse der Studie betonen die große Bedeutung der ausgeglichenen Agrarpolitik in der Ukraine und der staatlichen Maßnahmen, die die Steigerung der Produktionseffizienz in der Agrarwirtschaft und die Verbesserung ihrer internationalen Wettbewerbsfähigkeit zum Ziel haben. Die ukrainische Regierung soll sich auf Marktinfrastrukturverbesserung und -stabilisierung konzentrieren, weil diese von zentraler Bedeutung für den Agrarhandel sind. Nicht weniger bedeutend sind stabile agrarpolitische Rahmenbedingungen, die ein zuverlässiges und sicheres Umfeld für die ukrainischen Produzenten und Exporteure schaffen.