



Food and Agriculture
Organization of the
United Nations

REVIEW OF AGRICULTURAL TRADE POLICIES IN THE POST-SOVIET COUNTRIES 2016-17 Summary report



REVIEW OF
AGRICULTURAL TRADE POLICIES
IN THE POST-SOVIET COUNTRIES
2016-2017

Summary report



Required citation:

FAO. 2018. *Review of agricultural trade policies in the post-Soviet countries, 2016-2017*. Rome. 68 pp. Licence: CC BY-NC-SA 3.0 IGO

The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations (FAO) concerning the legal or development status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. The mention of specific companies or products of manufacturers, whether or not these have been patented, does not imply that these have been endorsed or recommended by FAO in preference to others of a similar nature that are not mentioned.

The views expressed in this information product are those of the author(s) and do not necessarily reflect the views or policies of FAO.

ISBN 978-92-5-131022-9

© FAO, 2018



Some rights reserved. This work is made available under the Creative Commons Attribution-NonCommercial-ShareAlike 3.0 IGO licence (CC BY-NC-SA 3.0 IGO; <https://creativecommons.org/licenses/by-nc-sa/3.0/igo>).

Under the terms of this licence, this work may be copied, redistributed and adapted for non-commercial purposes, provided that the work is appropriately cited. In any use of this work, there should be no suggestion that FAO endorses any specific organization, products or services. The use of the FAO logo is not permitted. If the work is adapted, then it must be licensed under the same or equivalent Creative Commons license. If a translation of this work is created, it must include the following disclaimer along with the required citation: "This translation was not created by the Food and Agriculture Organization of the United Nations (FAO). FAO is not responsible for the content or accuracy of this translation. The original [Language] edition shall be the authoritative edition.

Any mediation relating to disputes arising under the licence shall be conducted in accordance with the Arbitration Rules of the United Nations Commission on International Trade Law (UNCITRAL) as at present in force.

Third-party materials. Users wishing to reuse material from this work that is attributed to a third party, such as tables, figures or images, are responsible for determining whether permission is needed for that reuse and for obtaining permission from the copyright holder. The risk of claims resulting from infringement of any third-party-owned component in the work rests solely with the user.

Sales, rights and licensing. FAO information products are available on the FAO website (www.fao.org/publications) and can be purchased through publications-sales@fao.org. Requests for commercial use should be submitted via: www.fao.org/contact-us/licence-request. Queries regarding rights and licensing should be submitted to: copyright@fao.org.

Photo credits:



Front cover: ©Fotolia/Clarke

Back cover: ©Syngenta

Contents

FOREWORD	v
ABBREVIATIONS AND ACRONYMS	vii
KEY DEVELOPMENTS IN AGRICULTURAL TRADE IN THE POST-SOVIET COUNTRIES IN 2016-2017	8
STRATEGIES AND PROGRAMMES FOR AGRICULTURAL EXPORT DEVELOPMENT IN THE POST-SOVIET COUNTRIES	16
CHANGES IN THE AGRICULTURAL TRADE POLICIES BY COUNTRY	23
ARMENIA	24
AZERBAIJAN	26
BELARUS	30
GEORGIA	34
KAZAKHSTAN	36
KYRGYZSTAN	40
THE REPUBLIC OF MOLDOVA	44
THE RUSSIAN FEDERATION	48
TAJIKISTAN	52
TURKMENISTAN	54
UKRAINE	56
UZBEKISTAN	60
REFERENCES	63

Editors of the English summary:

-  **Iryna Kobuta, Ekaterina Krivonos**
Trade and Markets Division, FAO
-  **Olga Melyukhina, Luisa LaFleur**
FAO consultants

The document is based on the publication:
Review of Agricultural Trade Policies in post-Soviet countries 2016-2017
<http://www.fao.org/3/I9313RU/i9313ru.pdf> (available in Russian only)



Foreword

This document presents an English summary of the “Review of Agricultural Trade Policies in the post-Soviet countries 2016-2017” (FAO, 2018). This is the third review in the series on agricultural trade and trade policies in the post-Soviet region prepared within the framework of the Food and Agriculture Organization of the United Nations’ (FAO) Regional Initiative on Improving Agrifood Trade and Market Integration in Europe and Central Asia.

This Initiative supports Members as they develop agrifood trade policies and create favourable environments for the integration of small and medium-sized agribusinesses into international trade. The Initiative helps Members build capacities to implement trade agreements, as well as harmonize national food safety and quality standards with international standards.

The annual trade and trade policy reviews are prepared by the Agricultural Trade Expert Network in Europe and Central Asia, which was established in 2014 with FAO support. The Network is neutral and independent and is a platform designed to facilitate the exchange of knowledge and expertise. It brings together experts from the leading research institutions and analytical centres in the post-Soviet countries and also several European Union countries. It seeks to improve the awareness of private businesses and civil society about the possible consequences of trade policy changes, as well as to improve the trade policy dialogue between interested parties and governments.

The annual reviews analyze developments in agricultural trade in the post-Soviet area and monitor policy changes that influence the dynamics and composition of trade. The annual reviews contribute to the analytical base on agricultural trade and trade policy in the Europe and

Central Asia region. Transparent information on trade policy changes, in turn, helps to foster partnerships and normalize trade of relations between countries.

This summary begins with an overview chapter presenting key developments in agricultural trade in twelve post-Soviet countries in 2016-2017. Regional strategies and programmes for agricultural export development are the special focus of the following chapter, which draws on the findings of FAO’s regional workshop titled “The Agrifood Export Promotion Strategies in the Post-Soviet Countries” that was held on 5 September 2017 in Moscow, the Russian Federation. In 2016-2017, many post-Soviet countries intensified the development of programmes and strategies to diversify agricultural markets, given the view that export growth can be a potential driver of the sector’s overall growth.

This summary includes short country chapters on Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, the Republic of Moldova, the Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan. Each chapter discusses changes in the countries’ agricultural trade during 2016-2017; new government policy measures influencing agricultural exports and imports; progress in multilateral, regional and bilateral trade agreements; and changes in domestic support to agriculture. The full versions of the country chapters are included in the “Review of Agricultural Trade Policies in the post-Soviet countries 2016-2017” (<http://www.fao.org/3/I9313RU/I9313ru.pdf>).



Abbreviations and Acronyms

AIC	Agroindustrial complex
ASSAGROS	Association of Industrial Unions of the Agroindustrial complex (the Russian Federation)
AZIC	Azerbaijan Investment Company
AZPROMO	Fund for Promotion of Exports and Investments (Azerbaijan)
BRUIEIE	Belorussian Republican Unitary Enterprise of Import and Export Insurance
CIS	Commonwealth of Independent States
CJSC	Closed joint stock company
CUFTA	Canada-Ukraine Free Trade Agreement
DCFTA	Deep and Comprehensive Free Trade Area
EAEU CCT	Common Customs Tariff of the Eurasian Economic Union
EAEU	Eurasian Economic Union
EC	European Commission
EEC	Eurasian Economic Commission
EU	European Union
EXIAR	Russian Agency for Export Credit and Investment Insurance
FAO	Food and Agriculture Organization of the United Nations
FTA	Free Trade Agreement
GDP	Gross Domestic Product
IOFS	Islamic Organization for Food Security
JSC	Joint stock company
MFN	Most Favoured Nation
NGO	Non-governmental organization
OECD	Organisation for Economic Cooperation and Development
OIE	World Organisation for Animal Health
OJSC	Open Joint Stock Company
REC	Russian Export Centre
RKDF	Russian-Kyrgyz Development Fund
SDR	Special Drawing Rights
SPS	Sanitary and phytosanitary (measures)
TRQ	Tariff Rate Quota
USAID	United States Agency for International Development
USD	United States Dollar
VAT	Value added tax
WTO	World Trade Organization

Key developments in agricultural trade in the post-Soviet countries in 2016-2017

Main factors influencing agricultural trade in the region

The macroeconomic situation stabilized in most post-Soviet countries in 2016-2017.¹ Economic growth resumed, with aggregate regional gross domestic product (GDP) increasing by 2.5 percent in 2017 (WB, 2017). Inflation decelerated and national currencies in some countries strengthened against the US dollar or weakened at a lower rate in others.² However, the effects of sharp currency depreciations in 2014 remain: expressed in US dollars, the agricultural

value-added generated in the region decreased from USD 128 billion in 2014 to USD 98 billion in 2016.

Continued geopolitical tensions and increased recourse to trade barriers by the leading regional players reduced overall trade, including trade in agricultural products.³ These factors also led to export geographic diversification. Import substitution and export development strategies in agriculture that were put in place in most countries in the region were additional factors driving export diversification.

¹ This review covers 12 post-Soviet countries: Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, the Republic of Moldova, the Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan.

² Uzbekistan is the only exception with the national currency depreciating by 83 percent against the US dollar in 2017, following considerable liberalization of the currency exchange policy and devaluation of the Uzbek som.

³ Here and elsewhere in this publication the term “agricultural products” and “agrifood products” are used interchangeably, as are the terms “agricultural trade” and “agrifood trade”.

©Unsplash/Jean Wimmerlin



In 2016-2017, the Russian Federation maintained its ban on imports of certain agricultural products and foodstuffs from a number of countries. The ban was subsequently extended until 31 December 2018.⁴

Georgia, the Republic of Moldova, and Ukraine continued institutional reforms in 2016-2017 to bring their national legislation closer to that of the European Union in areas such as sanitary and phytosanitary (SPS) measures and technical regulation, state procurement, intellectual property, customs procedures and trade facilitation. Uzbekistan has considerably liberalized its trade regime since the new President took office in late 2016. Member countries of the Eurasian Economic Union (EAEU) harmonized national policies, in particular in the field of tariff protection, SPS regulation and domestic support to agriculture.

⁴ Resolution of the Government of the Russian Federation of 2 July 2017 N 790.

Dynamics and composition of agricultural trade

In 2016, the region registered a positive balance in agricultural trade of USD 1.4 billion, for the first time since 2013. Agricultural exports grew in most of the countries, with the aggregate increase in regional exports reaching USD 1.0 billion, while total regional imports fell by USD 2.4 billion (Figure 1). Ukraine remained the largest net agricultural exporter, followed by Uzbekistan and the Republic of Moldova, while Belarus and Turkmenistan regained net exporter status in 2016 (Figure 2). Seven countries continued to be net agricultural importers, however agricultural trade deficits were reduced in most of them as imports fell at high rates, while exports grew. The Russian Federation runs the largest agricultural trade deficit which, nevertheless, decreased by nearly 25 percent in 2016. Armenia registered a 30 percent growth in agricultural exports against a 5 percent drop in imports, resulting in a narrowing of its negative agricultural trade balance.

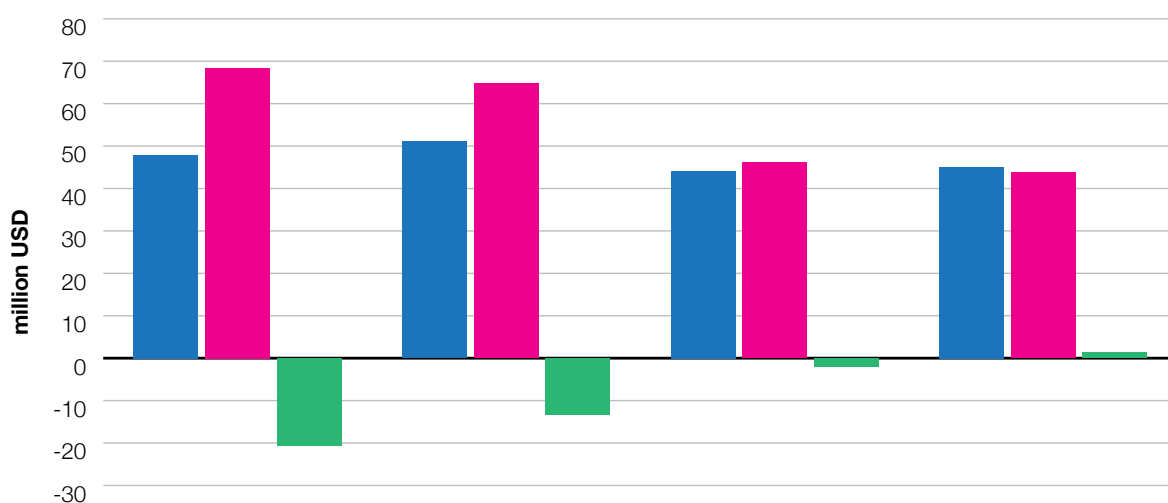
Agricultural goods constituted 11 percent of total regional exports in 2016, ranging from 47 percent in the Republic

©Pixabay/Dimitris Vetsikas



FIGURE 1

Agricultural trade in the post-Soviet region in 2013-2016, USD billion.



	2013	2014	2015	2016
■ Export	47.9	51.2	44.1	45.1
■ Import	68.4	64.7	46.2	43.8
■ Trade balance	-20.6	-13.4	-2.1	1.4

Source: Data by country-chapter authors

of Moldova and 42 percent in Ukraine to 6 percent in Azerbaijan, Kazakhstan and the Russian Federation. Nearly 60 percent of agricultural exports from the region consisted of grains, fats and oils, oilseeds and fish, of which grains alone accounted for 29 percent. These export categories also registered the strongest increases in value in 2016, largely explained by record grain crops in 2016-2017 and high oilseed prices. Grain exports from the Russian Federation reached 37 million tonnes in the 2016/17 marketing year, of which 27.6 million tonnes were wheat and wheat flour (in grain equivalent). Ukrainian grain exports were higher mostly due to shipments of maize, which increased by 20 percent to 20.7 million tonnes in 2016/17 (FAO, 2017b). FAO projects grain exports from the region to hit another record in the 2017/18 marketing year, mostly due to continued production growth in the Russian Federation. In contrast, exports from Kazakhstan and Ukraine are expected to be lower in 2017/18 due to reduced plantings and stronger competition from the Russian Federation for export markets (FAO, 2017c).

Agricultural imports to the region are concentrated in fruits and nuts (14 percent of the total), meat and milk products (7 percent), eggs and honey (7 percent), alcoholic and non-alcoholic beverages (6 percent), and miscellaneous food products (5 percent).

Developments in agricultural trade flows include increases in intra-EAEU trade in 2016. Some EAEU members are strongly oriented at the EAEU market in their trade. Nearly 90 percent of Belarus's agricultural exports go to the Russian Federation. Armenia directs 51 percent of its agricultural exports to the EAEU and Kyrgyzstan sends 45 percent of its agricultural exports to the EAEU. The Russian Federation remained the largest EAEU importer, with imports from EAEU countries reaching USD 3.9 billion in 2016. A recommendation "On coordinated policy in development of trade at commodity exchanges for agricultural goods within the Eurasian Economic Union" was adopted in 2016⁵, setting out a mechanism of interaction and principles of cooperation among the member states of the EAEU.

Trade policies

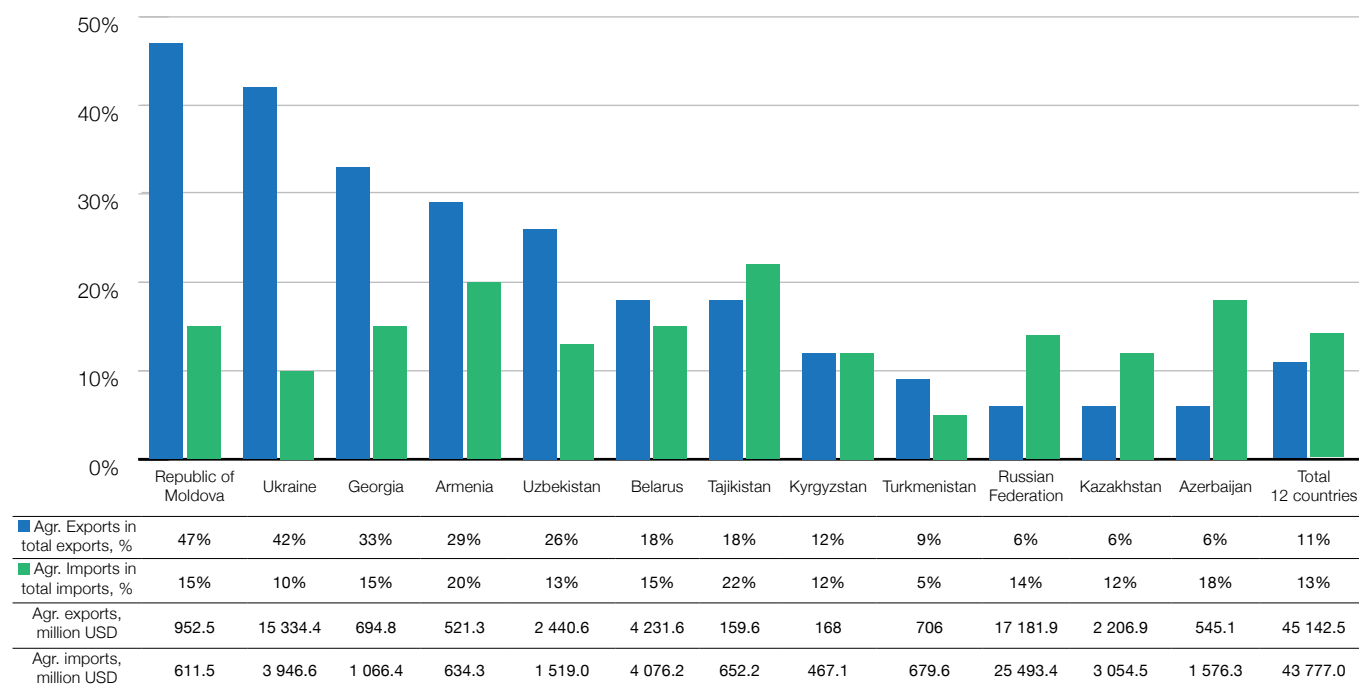
Import policies

Uzbekistan implemented significant tariff changes in 2017 in the context of broad trade liberalization. Import duties and excise taxes on key agricultural and food products were reduced or eliminated.

⁵ Approved by EEC Board resolution No. 19 of 8 November 2016.

FIGURE 2

Agricultural export and import shares of total trade in the post-Soviet countries in 2016, percent.



Source: Data by country-chapter authors

Azerbaijan, in contrast, increased tariff protection for some agricultural products which are now subject to a specific duty instead of the previous 15 percent ad valorem tariff. This is part of the strategy to accelerate development of the non-oil sectors.

EAEU members implemented tariff changes in 2016-2017 to gradually align national schedules with the Russian Federation's WTO tariff reduction commitments, as foreseen by the "Agreement on the functioning of the Customs Union within the framework of the multilateral trade system". Still, differences in the levels of tariff protection among EAEU members remain. The average applied tariff rate in 2016 varied from 8.2 percent in Armenia to 11 percent in the Russian Federation and 11.2 percent in Belarus. In 2016-2017 Kazakhstan implemented an agreement according to which goods entering the EAEU area from third countries at reduced import duties had to be marketed locally, but if directed to other EAEU countries, had to pay an import tariff according to the EAEU Common Customs Tariff.

Some post-Soviet countries use tariff rate quotas (TRQs) as instruments of trade regulation. The EAEU applies TRQs for beef, pig meat, poultry meat and whey, with national quota shares allocated annually to its members. The free trade agreement (FTA) between the EAEU and

Viet Nam, provides for a zero-duty TRQ for imports of Vietnamese long-grain rice. Ukraine applies a TRQ on raw sugar, however, it remained unfilled in 2016-2017. Other reviewed countries – Armenia, Georgia, Tajikistan, Turkmenistan and Uzbekistan – do not apply TRQs.

In addition to tariff regulation, all countries in the region imposed import bans on various agricultural products. In 2016-2017, the Russian Federation kept a ban on imports of certain agricultural products from a number of countries, including Ukraine⁶. This ban was introduced in 2014 as a countermeasure after the imposition of sectoral sanctions on the Russian Federation. In 2017, the Russian government extended the ban until 31 December 2018. Ukraine then prolonged its ban on imports of Russian agricultural products until the same date.

The countries under review prohibited agricultural imports also on the basis of technical regulation and SPS requirements. Some countries took steps to improve policies in these areas. The Republic of Moldova and Ukraine continued to harmonize national regulations

⁶ Albania, Australia, Canada, the European Union, Iceland, Liechtenstein, Montenegro, Norway, the United States, and Ukraine.

with EU legislation. In the EAEU countries, the unified phytosanitary quarantine requirements, the list of quarantine objects and plant quarantine rules and norms took effect as of 1 July 2017.

The post-Soviet countries also implemented initiatives on trade facilitation such as Green Corridors, Single Windows, and free customs zones. Among other things, these initiatives contribute to the fulfillment of the World Trade Organization (WTO) Trade Facilitation Agreement that was concluded in 2017.

Export policies

In 2017, Uzbekistan made important changes to agrifood export policies. The ban on exporting fruits and vegetables, potatoes, melons, and grapes using automobile transport was lifted. A 1997 export ban on a wide range of agricultural and food products was also lifted.

Azerbaijan, Belarus, Kazakhstan, the Russian Federation, Tajikistan and Ukraine maintained export duties on a limited number of agricultural products. A Recommendation “On concerted (coordinated) actions of EAEU Member States in the development of agricultural production and food export potential” was also adopted to improve interaction among EAEU members in accessing third party markets.⁷

In 2016-2017, many post-Soviet countries prepared and implemented programmes and strategies for export development. (See Chapter Strategies and programmes for agricultural export development in the post-Soviet countries for more details.)

Bilateral trade agreements and preferences

In 2016-2017, the post-Soviet countries advanced bilateral trade relations within and outside the region. Georgia and China signed an FTA providing for duty-free imports of Georgian wine, mineral waters and other agricultural products to China. An FTA between the Republic of Moldova and Turkey came into force in 2016, and the Canada-Ukraine Free Trade Agreement (CUFTA) came into effect in 2017. In September 2017, the Association Agreement between the European Union and Ukraine came into full effect, including its trade component, the Deep and Comprehensive Free Trade Area (DCFTA). Belarus and Kazakhstan, as members of the EAEU, signed a Road Map for development of bilateral cooperation.

⁷ Approved by EEC Board resolution No. 30 of 30 December 2016.

Domestic support to agriculture

Investment support, tax concessions, agricultural insurance, market interventions and price regulations are common types of domestic support in the post-Soviet countries. The majority of countries under review are WTO members.⁸ Their WTO notifications indicate compliance with domestic support commitments, however, this information is often substantially outdated. Non-members of the WTO – Azerbaijan, Belarus, Turkmenistan and Uzbekistan – rely predominantly on policy instruments, such as subsidies for variable and fixed inputs and concessional credit.

Some countries introduced new support programmes or policy instruments in 2016-2017. Belarus initiated a programme for 2016-2020 on restructuring and rehabilitation of loss-making and chronically insolvent agricultural enterprises. Georgia launched its “Establish the future” project to increase perennial plantations and establish highly productive orchards with modern technologies. The Republic of Moldova introduced new measures in 2016 to promote and develop organic agriculture, improve rural infrastructure and develop consulting and training services. Azerbaijan introduced per tonne subsidies for sugar beets in place of the previous per hectare payments. WTO member countries revised their existing green box measures and developed new ones, evidenced in particular by increased budgetary spending on research and scientific training, and increased financing of state institutions performing SPS activities and technical regulation.

Import substitution and export development strategies have led to a refocusing of support priorities in some countries, and the introduction of new policy instruments. To increase domestically produced food supplies, Kazakhstan is encouraging small and medium-sized rural businesses through agricultural cooperation and will expand concessional credit for this purpose. Furthermore, a crop diversification programme in Kazakhstan foresees a gradual shift away from wheat to pulses and oilseeds, as the country's high-quality wheat has recently lost some competitiveness on external and domestic markets. Kyrgyzstan launched a guarantee fund and the “Financing of export-oriented and import-competing enterprises” project. Ukraine increased its financing of the State Service for Food Safety and Consumer Protection in 2017. This service is important for diversification of aims to diversify markets for Ukrainian meat and milk products. Support in the Russian Federation focuses on the sectors

⁸ Armenia, Georgia, Kazakhstan, Kyrgyzstan, the Republic of Moldova, the Russian Federation, Tajikistan, and Ukraine.

that ensure the self-sufficiency thresholds determined in the Doctrine on Food Security, in particular the meat and milk sectors.

The EAEU prepared several documents on domestic support in its Member States in 2016-2017: “Methodology for the estimation of levels of trade distorting support in EAEU Member States”; notifications on state support to agriculture; “Compensation procedure in relation to the infringement of commitments on state support by EAEU Member States”; and “Procedure for the organization and conduct of negotiations and consultations on disputes related to the implementation of Agreed (Coordinated) Agroindustrial Policy, including the issues of state support to agriculture”.

Key conclusions

Macroeconomic and political developments, which emerged in 2014, continued to influence agricultural trade in the post-Soviet region in 2016-2017. Overall regional agrifood trade registered a positive balance. Abundant supplies of grains as major exportables and high oilseed prices boosted exports, while weakened national currencies limited imports.

The extended mutual bans on agricultural imports in 2017 by the Russian Federation and Ukraine continued to impede bilateral trade. However, this had a limited effect on both economies. At the time of the bans extended in 2017, the importance of the two countries in each other's exports had already been low and both countries successfully redirected trade toward Asian, African and Middle Eastern markets.

The Russian Federation continued its food embargo for a third year in 2017. The embargo was placed in response to sanctions issued by several countries. Local producers had captured some freed space on the domestic market, responded well to production stimuli and realized higher returns. However, a reorientation to other suppliers has been a more important consequence of the food embargo, often associated with higher costs of imports and contributing to increases in domestic food prices and a reduction of the food basket for certain consumers.

The EAEU adopted several norms with the aim of harmonizing policies across its Member countries. However, differences in trade regulation across the countries remain, particularly in terms of tariff protection. Difficulties in crossing national customs borders also occur, contrary to the principle of free movement of goods within the EAEU area. Nevertheless, EAEU Members continue to put in place programmes to develop mutual

trade and enhance export potential. These programmes, if successfully implemented and provided the mid-term production growth, could encourage mutual trade and the improved operation of the EAEU as a common market.

Georgia, the Republic of Moldova and Ukraine each signed Association Agreements and created free trade zones with the European Union. They have since pursued institutional reforms to move their national legal frameworks more in line with those of the European Union in areas such as technical regulation, state purchases, and SPS measures.

Agricultural exports to European Union countries from Georgia and Ukraine tended to increase. For the Republic of Moldova, the European Union remains the largest trade partner absorbing over half of the country's agricultural exports in 2017. Ukraine and the Republic of Moldova have recently held negotiations with the European Union on increasing export quotas to the EU markets under their Association Agreements. Products such as wheat, honey, table grapes and some other were concerned. The two countries argued that these products had high export potential and that their overall exports to the European Union exceed the agreed quotas.

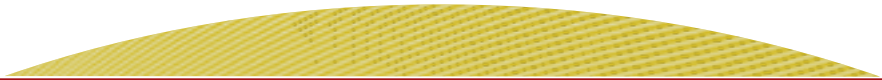
Participation in various trade agreements has helped improve national institutions and alignment with international standards in the post-Soviet countries. This is occurring in the countries that are moving toward integration with the European Union, and in the countries that are integrating within the EAEU. All countries, however, are limited by a lack of budgetary resources, weak infrastructure, and the insufficient expertise of state agencies, which combine to hinder agricultural and trade policy reforms in the post-Soviet region.

Such global phenomena as population increases, shifting diets, rising consumption of animal proteins, and limited agricultural growth potential in African and Asian countries, are driving export growth in the post-Soviet countries.

The FAO-OECD Agricultural Outlook for 2017-2026 projects a slow-down in global agricultural trade growth during this period compared to the previous decade. Nevertheless, the traded share of agricultural output is to remain broadly constant. Net exports from the Americas, Eastern Europe and Central Asia are expected to increase, as are net imports across other Asian and African countries. Food imports are to become more critical for food security in Sub-Saharan Africa, Northern Africa, and the Middle East (FAO/OECD, 2017). In 2016, imports accounted for over half of the grain consumption in Algeria, Egypt and Saudi Arabia. China's growing grain consumption is due to feed needs to meet the rising demand for animal proteins.

Agricultural trade has generally proven to be more resilient to macroeconomic volatility than trade in other goods. Given relatively high protection in the farm sector, agricultural trade growth could be boosted by further market liberalization across the world (FAO/OECD, 2017).

The export development programmes initiated in many post-Soviet countries in 2016-2017, if successfully implemented, may facilitate the development of high quality export products and promote relations with new trade partners. This will make agricultural trading systems more resilient to macroeconomic volatility, the impacts of climate change and other global trends. The region's improved integration in the world trade system, increased bilateral agreements, and more active participation in multilateral and regional agreements, emphasize the timeliness and importance of export development programmes in the region.



Strategies and programmes for agricultural export development in the post-Soviet countries⁹

National programmes and strategies for support of agricultural exports

Integration into foreign trade offers significant business opportunities for agricultural producers and exporters. Access to external markets can contribute to agricultural growth and welfare improvements for people working in the sector. Increased supplies to foreign markets can also drive overall economic growth, leading governments to pursue export development. Export promotion

mechanisms can and should play an important role in development strategies of the post-Soviet countries, in particular where there is considerable potential for increasing agricultural production and improving product quality. Agricultural export development, therefore, is an agricultural policy priority in the region.

Export development policies in the region are currently in the early stages. Export promotion institutions have limited operational experience, as do programmes for export diversification and access to new markets. However, many post-Soviet countries draw on international experience in developing export support policies, in particular with regard to the diversification of policy instruments.

⁹ This chapter synthesizes the FAO report “Review of the national programmes and strategies for support of agricultural exports in 12 post-Soviet countries”. The National Union of Food Exporters (the Russian Federation) contributed to this review, which builds on the discussions at FAO’s regional workshop “The Agrifood Export Promotion Strategies in the Post-Soviet Countries” on 5 September 2017 in Moscow, the Russian Federation.

©RazionaleFantasia



A lack of competitive export products, weak SPS control systems, and limited export knowledge and skills are the key factors impeding agricultural export growth in the region. Hence, emerging export development strategies need to be multi-dimensional, while governments and businesses need to realize the complexities involved in trade liberalization as well as understanding the export potential of their countries.

Some post-Soviet countries are adopting or preparing special export development laws. A federal law “On export support” is before parliament in the Russian Federation; Tajikistan is preparing a draft law, “On export support and enhancement of competitiveness”; and national law No. 1792, “On ensuring large-scale export expansion of Ukrainian producers by means of insurance and export credit and guarantees,” became effective in Ukraine on 20 December 2016.

Beyond special laws, the countries have introduced or are preparing export development strategies and programmes in which agricultural exports are one of the priorities. The Russian Federation adopted the “Export of agricultural products” priority project, which had been included in

the “State programme for 2013-2020 on development of agriculture and regulation of markets for agricultural products, raw materials and foodstuffs”. In many post-Soviet countries, such strategic documents are the principal regulatory frameworks for agricultural exports. Azerbaijan, Belarus, Kazakhstan and Ukraine adopted strategic road maps, which set out agricultural export policies. Many strategies are being implemented with the support of international organizations. For example, in 2016-2017, FAO assisted the Republic of Moldova in the development of an agricultural export promotion strategy, which is currently in the final stage of preparation.

In most countries, national strategic documents on export development detail the principal objectives and goals of export policies; and define priority export products and export markets, and policy support instruments. The priority markets typically include China, the Commonwealth of Independent States (CIS) area, the European Union and Ukraine. Belarus and Kazakhstan also see the United States, Great Britain, Japan and some Southeast Asian countries as potential markets for their agricultural products. Prioritized exports from the post-Soviet region usually include fresh and processed fruits

©Pixabay/jplenio



and vegetables, poultry meat and milk products (Belarus) and meat products (Kyrgyzstan). Some countries seek to diversify agricultural exports or shift to products with higher demand. Ukraine, for example, aims to refocus exports from raw to processed products.

It should be noted, however, that in some countries under review strategic documents on export development are rather declarative and include little practical guidance. For example, they do not define the roles of various players, such as non-governmental organizations (NGOs), which could play an important role in export support, as international experience shows.

Institutions supporting agricultural exports

Institutions supporting agricultural exports, including NGOs, have emerged in the majority of post-Soviet countries.

Government institutions for export promotion provide various financial and non-financial services to exporters. CJSC Armenian Export Insurance Agency offers insurance to local traders against non-payments by counterparts. In addition, the Armenian Development Fund provides information support to Armenian companies and assists in the search for export markets. Specialized state institutions operate in the Russian Federation, such as the Russian Export Centre (REC) and the Russian Agency for Export Credit and Investment Insurance (EXIAR). All institutions mentioned above receive budgetary funding, as do the majority of export promotion institutions in other post-Soviet countries.

The principal state structures engaged in export support in Azerbaijan include the National Fund for Support of Entrepreneurship, the Fund for Promotion of Exports and Investments (AZPROMO), and the Azerbaijan Investment Company (AzIC). These three institutions are subordinate to the Ministry of Economics of Azerbaijan. There is also the Centre for Analysis of Economic Reforms and Communication and the www.azexport.az portal. Beyond these institutions focused specifically on export support, the State Service on Management of Agricultural Projects and Credits plays an important role in increasing Azerbaijan's export potential through international credit, technical assistance, grants, and investments and pilot projects. These organizations were initiated by the government and receive budgetary funding. They also use own funds where this is permitted by law and organizations' charters.

Tajikistan is in the process of setting up state entities for

export support, such as the Agency for Export Promotion and the Export Bank for Support of Entrepreneurship. Armenia, Belarus, Turkmenistan and Ukraine have formed national councils for export promotion, which include the participation of business representatives. For example, in Ukraine 60 industry unions and associations representing almost all export-oriented sectors participate in the Council of Exporters and Investors under the auspices of the Ministry of Foreign Affairs. The governments of Tajikistan and Uzbekistan have formed special commissions to enhance agricultural export potential.

Single Windows operate or are being organized in the majority of post-Soviet countries. These windows simplify export procedures and contribute to export development. A Single Window is "a facility that allows parties involved in trade and transport to lodge standardized information and documents with a single entry point to fulfil all import, export, and transit-related regulatory requirements" (UN-CEFACT, 2005). The Single Window Centre for international trade functions in Kyrgyzstan; the Russian Export Centre works as a Single Window; as does the Office for Export Support in Ukraine, which opened in December 2016. Azerbaijan, Kazakhstan and Tajikistan are currently setting up similar facilities.

Some state institutions provide paid services to businesses engaged in foreign trade. For example, Uztrade, a joint stock commercial entity in Uzbekistan is 51 percent owned by the state. Other examples include OJSC Promagroleasing and the Republican Unitary Enterprise "National Centre for Marketing and Price Studies" in Belarus, and JSC Uzagroexport in Uzbekistan.

NGOs are also involved in export promotion. Producer unions and associations and specialized exporter associations function in some countries of the region. In the Russian Federation, such groups have become more active in the promotion of agricultural exports. Exporter associations connect state institutions and supplier companies. Producer unions with successful export promotion experience are members of the Agroindustrial Complex Committee of the Chamber of Commerce and Industry of the Russian Federation, and the Association of Industrial Unions of the Agroindustrial Complex (ASSAGROS). These unions, among other key activities, participate in the preparation of government decisions on export policy. Industrial associations in Ukraine, such as the Associations of producers of honey, nuts and organic products, are also actively engaged in export development. In the Republic of Moldova, the Association of Fruit Producers and Exporters "Moldova Fruit" and the Association of Grape Producers and Exporters represent successful exporters with good perspectives for business development.

Chambers of commerce are other non-commercial and non-governmental organizations which promote agricultural exports in the region. They do not receive public funding, but interact closely with governments. For example, the Chamber of Commerce and Trade in Georgia works together with the Ministry of Agriculture to support the participation of Georgian producers in various trade missions and international and domestic fairs. In Uzbekistan, the Ministry of Foreign Affairs provides assistance to the national Chamber of Commerce and Industry in establishing cooperation with similar Chambers in other countries, foreign investors and partners; assistance is also provided for market studies and market development. The Chamber of Commerce and Industry of Ukraine works actively on export promotion and includes a centre for the coordination of export support in its structure. This Chamber also organizes business forums, carries out research, and initiates international cooperation programmes to stimulate Ukrainian exports. It also organizes the participation of national entrepreneurs in foreign exhibitions and fairs. In Kazakhstan, the National Chamber of Entrepreneurs “Atameken” and its subsidiary, JSC Chamber of Foreign Trade, are the institutions most active in the field of export promotion.

In some post-Soviet countries, however, the potential of NGOs is not always exploited. The possibilities which Chambers of Commerce and Trade can offer are underestimated, while exporter associations or industry associations dealing with export issues have not been created in all countries.

Main instruments and measures of export support

The post-Soviet countries are progressively introducing export support instruments based on international practices and WTO rules and regulations.

Several countries in the region provide credit support and credit guarantees to agricultural exporters, and offer insurance for export risks. Exporters can also benefit from funded participation in international exhibitions and fairs. Such instruments exist in Belarus (Beleximgarant company), Kazakhstan, and the Russian Federation. In Kyrgyzstan, the state project “Financing of export-oriented and import-competing enterprises – 1” approved in 2017, will provide interest subsidies on commercial loans to producers of exportable agricultural products. Credit and insurance support is also available to agricultural and food exporters in Armenia, Russian Federation and Uzbekistan. Ukraine is currently setting up an Export Credit Agency which will facilitate access to credit for national exporters and insure them against the risks of non-payments and

financial losses, while Azerbaijan is considering the formation of a credit guarantee fund. Among the post-Soviet countries, Tajikistan implements no credit support or credit guarantees, and Kyrgyzstan and Turkmenistan provide no insurance support.

Some countries in the region grant tax concessions to exporters. For example, in the Russian Federation, a value added tax (VAT) concession is probably a more important support instrument than special programmes for export development. Russian exporters can receive VAT refunds (at a rate of 18 percent) on inputs used in the production of exported products. In Uzbekistan, export revenue received in US dollars are exempt from VAT (except receipts from cotton fiber and lint); and excisable goods are also free of VAT (except officially listed items).

Regional agrifood exporters benefit from various types of non-financial assistance, such as support for market research, facilitation of participation in exhibitions and fairs, and promotion of national and regional brands.

Market research is a common instrument of export support across the post-Soviet countries. In Azerbaijan, a comprehensive analysis of the markets in the Russian Federation and the Islamic Republic of Iran was undertaken in the framework of a road map adopted by the government. These two countries are Azerbaijan’s closest neighbours and their potential could be realized in the short term. The Armenian Development Fund also carries out market research and makes results available to interested organizations. Market research in the Republic of Moldova is carried out primarily as part of various projects, most often financed by foreign donors, such as the United States Agency for International Development (USAID), the European Commission and others. FAO provides technical assistance to Georgia, Kyrgyzstan, Tajikistan and Ukraine on potential export markets, rules for access to these markets and importer countries’ requirements on safety and quality of foodstuffs. Many export-oriented enterprises in the post-Soviet countries conduct export market research using their own resources.

Internet portals are another type of non-financial export support in the reviewed countries. Kazakhstan presents an illustrative example – its portal export.gov.kz consolidates information from all state institutions involved in export support and aims to provide advertising, information, marketing and training services.

Virtually all post-Soviet countries support the participation of national agrifood producers and exporters in exhibitions and fairs. In Armenia such support is typically provided by ministerial funds, such as the Fund for Grape Growing and Wine Production of the Armenian Ministry of Agriculture.

In Georgia, the Enterprise Georgia Agency maintains a calendar of exhibitions across the world and offers budgetary support to national producers who take part in such events. In Kazakhstan, exporters who attend foreign fairs and exhibitions can receive partial compensation of participation costs. Financial support for such activities is also foreseen under the State Programme for Export Development and Import Substitution for 2016-2020 in Tajikistan. Uzbekistan holds the International Food and Vegetable Fair in the city of Tashkent each year, while the Republic of Moldova's Chamber of Commerce and Industry organizes various specialized events in the country.

Work to promote national and regional brands is also underway. For example, Kazakhstan introduced three umbrella brands for its largest target markets: China, the Russian Federation and the Islamic Republic of Iran ("Qazaq Organic Food", "Halal Kazakhstan" and "KazMeat"). Azerbaijan uses the label "Made in Azerbaijan" to promote competitive products, while the Armenian Development Fund intends to organize tastings abroad to popularize Armenian products. The Russian Federation registered the "Made in Russia" national brand to promote agricultural products, among other national products. Uzbekozikovkatholding, an Uzbek company, is developing a unified "UzAgro" label for the country's fresh and processed agrifood exports. Other countries in the region have similar practices, or plan to introduce them.

Export development programmes in some post-Soviet countries include the production of advertising and marketing materials (booklets, catalogues and magazines) to increase sales of national products on foreign markets. Azerbaijan's Fund for Export Promotion and Investment under the auspices of the Ministry of Economy regularly produces printed material for present and potential exporters, such as the "Exporter's manual" and "Azerbaijan agriculture and food processing". The Armenian Development Fund publishes booklets and catalogues of Armenian products. Georgia published the results of genetic research on Georgian grapes, which increased interest in national wine making. Kazakhstan has released the "Export products of Kazakhstan: 2016" directory and publishes advertisements and marketing materials in airway and railway magazines. With the assistance of international organizations, Uzbekistan produces exporters' manuals, such as "How to export to EU markets: the case of horticultural products".

It is worth noting, however, that programmes in some countries do not define specific export support measures. For example, the on-going strategic programme in the Republic of Moldova¹⁰ does not outline specific measures to promote agricultural products, nor does it

indicate priority export products and markets. Overall, agricultural production growth has precedence over export development in this document. The section on export development in the Strategy for Social and Economic Development Georgia 2020 is also rather general and does not include specific measures to promote Georgian products on foreign markets.

Budgetary financing of export support measures

Support for agrifood exports in the post-Soviet countries is financed by state budgets through government structures and state institutions for export support. NGOs, such as Chambers of Commerce and Trade, exporters' associations and other market participants, can also provide funding for this purpose. In some countries, such as Tajikistan, donor organizations are involved in financing of export support activities.

Several countries have developed plans, priority projects and programmes or sub-programmes which include state financing of various export support activities. Kazakhstan plans to direct budgetary resources for several national programmes aimed at export support, including the Government's 2018-2020 programme, "National export strategy of the Republic of Kazakhstan", which also foresees private co-financing. In the Russian Federation, the "Export of agricultural products" priority project is to attract RUB 622.38 million from the federal budget in 2018, RUB 565.66 million in 2019, and RUB 491.99 million in 2020.¹¹ The "Agricultural reform programme of the Republic of Tajikistan for 2012-2020" is state-financed and makes use of technical assistance programmes from donor organizations.

State financing can be provided through state export support institutions and private banks which receive compensation from the government. As mentioned above, Kyrgyzstan allocated a total of USD 5 million to banks as interest subsidies on loans for exporters and import-competing businesses. The Belorussian Republican Unitary Enterprise of Import and Export Insurance (BRUIEIE) Beleximgarant also receives state funding as a state enterprise with exceptional rights to insure exporters' risks.

Government institutions offer various free services,

¹⁰ The "National strategy for the attraction of investment and export support for 2016-2010" and the "Action Plan" are the principal programme documents in the Republic of Moldova.

¹¹ Respectively, USD 10.55 million, USD 9.59 million, and USD 8.34 million at the official exchange rate of the Central Bank of the Russian Federation on 27 June 2017.

such as consulting, market research and assistance for participation in exhibitions. Such services can also be provided on a commercial basis. An example is the National Centre for Marketing in Belarus which offers paid services of this kind to businesses.

Governments in some countries fund NGOs involved in export development. In Turkmenistan, for example, the government allocated USD 100 million to the Union of Industrialists and Entrepreneurs as a zero-interest loan to support the Union's activities, while the Chamber of Commerce and Trade receives government funding for the organization of exhibitions.

In WTO member countries, the use of financial export support instruments is subject to WTO disciplines. In 2015, the Nairobi Ministerial Decision on export competition was adopted, representing a regulatory framework for export subsidies, export credit and other related measures (Box 1).

Key conclusions

Export policy development is a highly relevant issue in the post-Soviet countries. At present, most countries have prepared or are preparing national strategies and programmes on export development that emphasize agricultural exports.

These documents in some cases include elaborate export development plans which specify products and markets with high export potential and detail other important features. In other cases, export development documents do not adequately draw on international experience in this area, including the use of specific policy instruments. This results in a lack of developed export support institutions, particularly NGOs (Chambers of Commerce and Trade, exporter associations and others). This also leads to an underestimation of these institutions as export promoters. Thus, governments in some post-Soviet countries are far from fully exploiting their institutional possibilities for export support.

In some countries, state institutions for export support provide services on a commercial basis, while in the countries that are major regional exporters such institutions offer services for free or at a reduced cost. Thus, agro-food exporters from post-Soviet countries are in an unequal position vis à vis their competitors across the world.

The post-Soviet countries are progressively introducing export support instruments that are practiced worldwide. However, the range of such instruments remains rather limited. Some instruments, such as support for participation

BOX 1. THE WTO NAIROBI MINISTERIAL DECISION ON EXPORT COMPETITION

At the 10th World Trade Organization (WTO) Ministerial Conference held in Nairobi (Kenya) in December 2015, Members agreed on a Ministerial Decision on Export Competition which covers all elements of agricultural export competition, namely: export subsidies, export credit and guarantees, state trading enterprises and international food aid. The agreement on export subsidies is the most important part of the Decision. This instrument has always been addressed in WTO negotiations as one of the most trade-distorting types of support.

The Decision foresees the elimination of export subsidies that were in effect at the time of the 10th WTO Ministerial Conference. This is to be implemented in different timeframes for developed and developing countries. The Decision contains a special provision (footnote 4) which grants a transition period for developing countries until the end of 2020 if they eliminate, as of 1 January 2016, all export subsidies on products destined for least developed countries. This derogation is limited to processed products, dairy products and swine meat and on the condition that the country has notified export subsidies for such products in one of its three latest export subsidy notifications examined by the WTO Committee on Agriculture before the date of adoption of this Decision.

Another principal provision on export subsidies is that developing countries shall continue to benefit from the provisions of Article 9.4 of the Agreement on Agriculture until the end of 2023. It permits the recourse to subsidies covering or reducing the costs of marketing exports of agricultural products and transport costs. Least developed countries and net food-importing developing countries shall continue to benefit from the provisions of Article 9.4 for seven additional years, i.e. until the end of 2030.

With regard to export credit, the Decision stipulates that the Maximum Repayment Period (MRP) of such credit by exporters cannot exceed 18 months. This discipline shall apply to developed country Members from the end of 2017, and in four years from that date to developing country Members. Export credit guarantee programmes, as well as insurance and reinsurance programmes should be self-financing and cover their long-term operating costs and losses.

Source: WTO, 2015.

in international exhibitions, are not diversified and are simply reimbursement for participation costs and renting of exhibition areas.

Given limited budgetary resources, the amounts allocated for export development activities are not enough to fully leverage the potential of the national agricultural sectors. Rational spending of funds is very important, however, no specific criteria have been developed so far to evaluate the efficiency of such spending.

It is important to stress that export promotion is a primary task of exporters themselves. Some countries of the region have advanced in export markets thanks to the work of commerce and industry associations, including market research, establishment of contacts with importers and improved quality of exports. These associations become part of the dialogue with governments, voicing the needs and ideas that reflect the reality of their sector as a whole and not just of individual companies.

Suggestions and recommendations

This overview concludes with the following recommendations on agrifood export support. Implementation of these recommendations could have significant positive effects in the post-Soviet countries:

- Development of state and non-governmental export support institutions, and establishment of effective cooperation between them;
- Diversification of policy instruments for export development consistent with WTO rules and based on best international practices;
- Comparative analysis of economic efficiency of various policy instruments;
- Concentration of budgetary financing on most efficient policy instruments for export development;
- Setting up an internet portal to identify export products with high potential and facilitate information exchange between export and import structures in the region;
- Preparation of projections on agro-food exports and imports for the countries of the post-Soviet region;
- Organization of education projects and training for export specialists; and
- Integration of the above issues into national strategies

and programmes for development of agro-food exports.

Broadly speaking, governments, in close cooperation with the private sector, should support exports primarily by creating favourable conditions to improve the competitiveness of national products. The development and the choice of policy instruments for export support should be based on the actual needs of agribusiness. Improvement of quality standards based on international experience, and negotiations at the official level on market access with regard to SPS requirements and similar activities may be more effective than export support measures in a narrow sense. Promoting each country's positive image and developing trade relations with importer countries are also part of each government's responsibilities. Simplification of trade procedures, such as customs clearance of goods, receipt of SPS certificates, quality certificates, and other exporting and importing documentation are other key activities to support trade.



CHANGES IN THE AGRICULTURAL TRADE POLICIES BY COUNTRY

ARMENIA

Armenia's negative balance in agricultural trade narrowed to USD -113 million in 2016, or almost by 59 percent compared to 2015. Agricultural exports reached USD 521.29 million, 33 percent more than in 2015, while imports, mainly from non-EAEU countries, declined. For example, imports from China decreased by 28 percent, from the CIS countries, which are not EAEU members, by 31 percent, and from European Union countries by 10 percent. Armenia's key agrifood exports are tobacco products (40 percent of total agricultural exports) and alcoholic beverages (34 percent). The export share of fresh fruits and vegetables almost doubled in 2016. The largest agrifood imports are raw tobacco (16 percent of total agricultural imports) and cereals (11 percent). The Russian Federation and Middle East countries were the key export destinations in 2016. On the import side, Armenia's principal partners in 2016, as in the previous year, were the Russian Federation (34 percent of total agricultural imports), the European Union (14 percent), and Ukraine (10 percent).

Armenia applied no quantitative restrictions on imports of agricultural products in 2016-2017. Zero volumes were allocated to Armenia within the EAEU tariff rate quotas.¹² Import duties on agricultural goods remain the lowest among the EAEU members. An agreement was reached to gradually increase Armenia's import duties on certain goods by 2020. This agreement is intended to avoid price surges on the domestic market after the country's accession to the EAEU. According to the schedule, no substantial tariff changes were implemented between 2015 and 2016.

The State Service for Food Safety under the Ministry of Agriculture of the Republic of Armenia opened a new service centre in 2017, operating as a Single Window. The aim is to simplify import and export procedures for agricultural goods. This facility substantially reduces the time required for the provision of services by eliminating the need to deal with several units to obtain information and file documents; it also ensures the transparency of procedures (SSFS, 2017).

¹² According to the new regulations of the Eurasian Economic Commission.

©Pixabay/Alexas_Fotos



Armenia applied no quantitative restrictions on exports in 2016-2017. Exported products are not subject to export duties. To promote exports, the country provides preferences to large producers and exporters. Exporters' profit tax is reduced to one-tenth of the standard rate if exports exceed USD 105 million, and to one-fourth if exports are between USD 105 million and USD 84 million (Armenian Lawyer, 2015). The Armenian Export Insurance Agency provides insurance to resident exporters against financial losses due to non-payment for delivered goods by foreign buyers or by banks which are eligible payers under contract terms. A special entity for export coordination, Armenia Prod LLC, was established in November 2017. The company exports and presents Armenian agricultural products under a common brand in foreign markets (MOAAr, 2017).

Armenia, as an EAEU member, ratified an FTA between the EAEU and Viet Nam in 2016. In early 2017, the country completed negotiations on a framework Comprehensive and Enhanced Partnership Agreement with the European Union in which one of the three sections covers trade. This Agreement foresees the approximation of national customs regulations to those of the European Union,

taking into account previous commitments. Hence, the government decided to maintain trade preferences granted by the European Union before Armenia's accession to the EAEU.

Armenia complied with its WTO commitments on domestic support to agriculture in 2016-2017. The overall support equaled 1.1 percent of the value of agricultural production in 2016, below the de minimis threshold of the WTO's amber box of 5 percent. In value terms, support to agriculture totaled USD 61.9 million in 2016, or 13.6 percent less than in 2015. Domestic support policy to some extent focused more on large farms in 2016. The government introduced subsidies for the heating of large greenhouse facilities and for agricultural machinery leasing. In 2017, a programme was launched to grant loans to agricultural processors at 3 percent per year (Arminfo, 2017). Following an independent assessment, the previous agricultural consulting programme was found inefficient and was terminated in 2017.

©Pixabay/Pexels



AZERBAIJAN

The negative balance in Azerbaijan's agricultural trade widened to USD -1 031.2 million in 2016, or by 77.9 percent compared to 2015. Imports rose to USD 1 576.3 million (by 15.3 percent), whereas exports declined to USD 545.0 million (by 30.8 percent). Azerbaijan's trade with CIS countries decreased in 2016, except for some growth in exports to the Russian Federation, from USD 271.8 million in 2015 to USD 324 million in 2016. Some increase in trade with European Union countries was recorded: agricultural exports tended to grow during the first nine months of 2017 compared to the same period in 2016 (for example, exports of fresh vegetables were up by 94.5 percent, tobacco by 82.2 percent, and potatoes by 50.7 percent).

Azerbaijan applied no quantitative restrictions on imports of agricultural products in 2016-2017. Import duties vary from zero to 15 percent of the commodity customs

value. Increased tariff rates for some agricultural goods¹³ have been in force since 2016 to stimulate domestic production and are to remain in effect until 1 November 2018. Cereals and cereal products imported for the Grain Fund of Azerbaijan and goods arriving to in the special economic zone of Baku's international sea trade port (Alyat township) are free from VAT or pay zero rates compared to the standard 18-percent VAT on imported goods. In addition, all imported wheat is exempted from VAT for the period between January 2016 and 31 December 2019. A tariff quota for imports of hard wheat was applied in 2015-2016, with a zero in-quota tariff and a 30 percent over quota tariff. The "Rules for the use of green corridors and other crossing points" were approved in 2016 to simplify customs formalities in the movement of goods and vehicles across borders.¹⁴ These rules allow certain customs procedures to be executed through an electronic system with no direct

¹³ Apples, chicken eggs, chicken meat, cucumbers, grapes, onions, pears, quince and tomatoes.

¹⁴ Decree of the President of the Republic of Azerbaijan No. 920 of 21 May 2016 "On the approval of the rules for use of Green Corridors and other passage systems for movement of goods and vehicles across the customs border".

©FAO/Biayna Mahari



contact between officer and trader. Import declarations can now be submitted to customs authorities in electronic format in advance. In 2016, the country also adopted a “Uniform list of goods subject to veterinary, phytosanitary and sanitary control”.

Azerbaijan applied no bans or quantitative restrictions on agricultural exports in 2016-2017. Exports of goods are exempt from customs duties.¹⁵ Fees between 10 and 275 Azerbaijani manats are collected for customs clearance depending on the customs value of goods, plus 30 Azerbaijani manats per page of a customs declaration of any type.

Azerbaijan continued to develop its export promotion policy in 2016-2017. The Centre for Analysis of Economic Reforms and Communication under the President of the Republic of Azerbaijan and the web portal, www.azexport.az, were set up in 2016. A Single Window began operation under the Export Support Centre in 2017. A number of non-governmental associations

¹⁵ Except for raw hides, some base metals and products made therefrom.

were created in 2016-2017.¹⁶ In October 2016, the government approved the rules and list of products and coefficients to provide financial incentives to exporters of non-oil goods. Budgetary support is also available to cover part of the costs incurred in the promotion of the “Made in Azerbaijan” brand to foreign markets and for other export development activities.

In 2016-2017, the country concluded a number of international cooperation agreements in the field of agriculture which also cover agricultural trade. In 2016, Azerbaijan and the Islamic Republic of Iran signed agreements on cooperation in veterinary medicine and animal health and on cooperation in plant protection and quarantine (MOAAz, 2017a). In the same year, Azerbaijan signed an agreement with Israel on cooperation in agriculture. In August 2017, the country signed an agreement with Turkmenistan on cooperation in plant quarantine (MOAAz, 2017b).

¹⁶ For example, the Association of Producers and Exporters of Fruit and Vegetable Products of Azerbaijan, the Association of Wine Producers and Exporters of Azerbaijan, the Association of Pomegranate Producers and Exporters of Azerbaijan, and others.

©Pixabay/3dman_eu



Regarding domestic support to agriculture, a gradual shift from per hectare subsidies to support based on output had been taking place since 2016. For example, output subsidies are currently provided for sugar beets¹⁷, silkworm cocoons (DFNX, 2017), and cotton and tobacco.¹⁸ Budgetary support to agriculture amounted to 148.2 million Azerbaijani manats in 2016, or 9 percent of total budget expenditures.

¹⁷ Decree of the President of the Republic of Azerbaijan of 4 April 2017 “On the stimulation of sugar beet production in the Republic of Azerbaijan”.

¹⁸ Order of the President of the Republic of Azerbaijan No. 2350 of 22 September 2016 “On state support for the development of cotton farming in the Republic of Azerbaijan”; Order of the President of the Republic of Azerbaijan No. 2366 of 5 October 2016 “On state support to tobacco farming in the Republic of Azerbaijan”.



BELARUS

The agricultural trade balance in Belarus increased to USD 155.4 million in 2016 compared to USD 4.8 million in 2015.¹⁹ Agricultural exports totaled USD 4.23 billion in 2016, or 5.0 percent less than in 2015.²⁰ The main agricultural exports are products of animal origin, such as milk and dairy products (43.8 percent of total agricultural exports), meat and meat by-products (16.8 percent), and processed meat and fish products (6.3 percent). Agricultural imports amounted to USD 4.1 billion in 2016, or 8.4 percent below 2015 levels. Fruits and vegetables dominated agricultural imports with shares of 26.7 percent and 11.7 percent, respectively. The Russian Federation remained Belarus's largest partner in agricultural trade in 2016: it absorbed

¹⁹ Data from the National Statistics Committee of the Republic of Belarus.

²⁰ Data from the National Statistics Committee of the Republic of Belarus.

89.2 percent of Belorussian exports and was the source of 22.4 percent of the country's imports. Between January and June 2017, agricultural exports reached USD 2.38 billion and imports USD 2.39 billion, an increase of 24.8 percent and 19.0 percent, respectively, compared to January-June 2016.

In 2016-2017, Belarus applied import tariff quotas for products of animal origin (beef, pig meat and poultry meat) according to the resolutions of the Board of the Eurasian Economic Commission (EEC).²¹ In 2017, a part of the EAEU tariff quota for imports of long-grain rice from Viet Nam was allocated to Belarus.²² The country grants tariff preferences to non-EAEU parties in accordance with the EAEU Treaty.²³ Following the changes in import duties in view of Russia's WTO tariff

²¹ EEC Board resolutions No. 131 of 19 August 2014 and No. 99 of 18 August 2015.

²² Resolution of the Council of Ministers of the Republic of Belarus No. 329 of 3 May 2017.

²³ The International Treaty on the Eurasian Economic Union of the Republic of Belarus, the Republic of Kazakhstan, and the Russian Federation of 29 May 2014.

©Shutterstock/Cristain Draghici



reduction commitments, duty rates in Belarus decreased considerably for products from the milling industry (from 19 percent to 10 percent) and cereals (from 36 percent to 30 percent). In 2017, the Department of Veterinary and Food Supervision of the Republic of Belarus issued 39 directives on temporary imports restrictions for certain agricultural products based on SPS measures and technical regulation requirements.

In 2016-2017, Belarus maintained the same export duty rates for several goods²⁴ exported beyond the customs territory of the EAEU.^{25,26} Starting from 2017, exports of flax fiber outside the EAEU customs territory require one-time licenses from the Ministry of Antimonopoly Regulation and Trade of the Republic of Belarus. The country applies no export subsidies.

²⁴ Rapeseeds, raw cowhides and other raw hides, tanned cattle leather and tanned leather from other animal skins.

²⁵ Decree of the President of the Republic of Belarus No. 272 of 21 May 2010, with amendments of the Decree No. 380 of 28 July 2014.

²⁶ Decree of the President of the Republic of Belarus No. 40 of 1 February 2011.

In 2016-2017, Belarus organized national exhibitions in several countries to promote agricultural exports. The government co-finances such events as requested by the Ministry of Foreign Affairs.

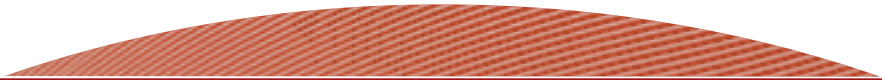
Belarus advanced bilateral and multilateral trade relations in 2016-2017. The country applied for accession to the WTO in 1993. As of 1 September 2017, over 30 rounds of bilateral negotiations were conducted with the Member states of the Working Group, the last of which took place in January and March 2017. The main result was the signing of final protocols on the completion of bilateral negotiations on market access with 12 WTO Members, the last of which were signed with the Republic of Korea (10 April 2017) and Japan (27 April 2017) (MFARB, 2017). In 2017, the draft Report of the Republic of Belarus Working Group was updated taking into account the questions and suggestions of the WTO Working Party on the Accession of Belarus. The 9th regular meeting of this Working Party took place in September 2017. Belarus also signed a Roadmap for 2017-2018 on the enhancement of bilateral trade with Kazakhstan. The Roadmap for Bilateral Cooperation between the Republic of Belarus and the Islamic Republic of Iran for 2016-2017 was also signed.

©Alamy/Elena Odareeva



In 2016, amber box measures constituted around 88 percent of total agricultural support in Belarus, and green box measures were around 12 percent.²⁷ Non-product-specific support made up 98 percent of the amber box. The principal green box measures included training (42 percent); infrastructure services (25 percent); environmental programmes (16 percent); and research (8 percent). Direct budgetary support totaled USD 987.5 million in 2016, or USD 116 per hectare of agricultural land. The State Programme for Development of the Agricultural Business in the Republic of Belarus for 2016-2020 emphasizes the restructuring and financial rehabilitation of loss-making and chronically insolvent agricultural enterprises as a key structural transformation challenge.

²⁷ Estimates by the Belarus chapter author.



GEORGIA

Georgia's negative agricultural trade balance narrowed by 25.2 percent to USD -371.6 million in 2016, from USD -496.9 million in 2015. Agricultural exports amounted to USD 694.8 million, which is 13.4 percent more than in 2015, while agricultural imports decreased by 3.9 percent to USD 1.1 billion.²⁸ During the first six months of 2017, agricultural goods exports rose by 12.0 percent compared to the same period in 2016 to reach USD 324.9 million, while imports grew by 6.3 percent to USD 527.9 million. Exports of agricultural products to the Russian Federation, Georgia's largest trade partner, increased by 15.0 percent in 2016, whereas imports from this country declined by 4.6 percent. Ukraine remained Georgia's second largest partner in agricultural trade. Agricultural exports to Ukraine increased by 34.3 percent as compared to

2015, while imports from this country fell by 4.0 percent. Exports to the European Union grew by 5.8 percent in 2016, whereas imports from the European Union fell by 9.4 percent when compared to 2015. Georgia's largest agricultural exports in 2016 were hazelnuts (8.5 percent of total agricultural exports), wines (5.5 percent), and alcoholic beverages (4.4 percent). Main agricultural product imports were tobacco products (1.5 percent of total agricultural imports), wheat (1.2 percent), and sugar (0.9 percent).

Georgia did not apply tariff quotas or quantitative restrictions on agricultural imports in 2016-2017. There are three import duties rates on agricultural products: 0 percent, 5 percent, and 12 percent. Beyond customs duties, imported goods are subject to 18 percent VAT and excise duties. In 2016, Georgia applied a simple average most favoured nation (MFN) tariff for agricultural products of 6.7 percent.

In accordance with the European Union – Georgia Association Agreement, the country continued to approximate its legislation in areas of SPS and technical regulation to that of the European Union. Georgia

²⁸ All statistical data in this chapter are from the National Statistics Office of Georgia (GEOSTAT, 2017).



also worked on bringing its foreign trade policy in line with international practices and WTO requirements, for example, in areas of customs regulation and trade facilitation. In 2016, Georgia joined the WTO Trade Facilitation Agreement.

Georgia applied no export tariffs, quantitative restrictions or bans on agricultural exports in 2016-2017. Agricultural exports are exempt from VAT. No export subsidies are provided and no export finance instruments are applied. Export support consists mainly of facilitating exporters' participation in international exhibitions and trade delegation missions, and of the activity of Enterprise Georgia.

In 2016-2017, major developments occurred in Georgia's bilateral and multilateral trade agreements. Georgia's agricultural exports to the European Union have grown considerably since the Association Agreement and the Deep and Comprehensive Free Trade Area (DCFTA) Agreement with the European Union came into force in mid-2016. Agricultural exports increased by 5.8 percent in 2016 and export growth is expected to have accelerated in 2017, especially given that the European

Union permitted imports of honey and other bee-keeping products from Georgia, that were previously prohibited due to veterinary control issues. In 2017, Georgia signed an FTA with China. Georgian wines, mineral waters, and a range of other agrifood products will be imported to China at zero tariffs and with no additional customs fees. Negotiations on an FTA with India began in April 2017, and a memorandum on the launch of a related feasibility study was signed some time later.

Georgia used no amber box measures in domestic support to agriculture in 2016. Government allocations for the green box programmes totaled USD 77.3 million (USD 71 million in 2015). Two new projects began in 2016: "Establish the future" with the aim of increasing perennial plantations, creating highly productive orchards with modern technologies, and supporting local producers of planting material; and "Georgian tea" for the efficient use of new tea plantations, restoration of old ones, and support for the establishment of primary processing enterprises.

©Pixabay/Neonbrand



KAZAKHSTAN

Kazakhstan's negative balance in agricultural trade decreased to USD -0.8 billion in 2016, or by 32.3 percent compared to 2015. Agricultural imports totaled USD 3.1 billion, 9.8 percent less than in 2015. Agricultural exports amounted to USD 2.2 billion, 3.4 percent more than in 2015. The largest imports were fruits and nuts (13.7 percent of total agricultural imports), sugar and sugar confectionery (8.7 percent), and dairy products (7.6 percent). Key suppliers of agrifood products to Kazakhstan in 2016 were the Russian Federation, Uzbekistan, Ukraine, Brazil, China, and the United States. Cereals dominated the country's exports: 5.4 million tonnes of grain were exported in 2016 (up from 4.4 million in 2015), of which 4.5 million tonnes were wheat (up from 3.6 million in 2015). The main export destinations were Central Asian countries (Uzbekistan and Tajikistan). Middle Eastern countries, in particular Afghanistan, are the key non-EAEU partners.

According to Kazakhstan's WTO commitments, the average import MFN duty on agricultural products was reduced to 9.5 percent in 2016 (from 10.7 percent in 2015) (WTO, 2017a). In 2016-2017, goods imported to Kazakhstan from non-EAEU countries at reduced duty rates had to be sold on Kazakhstan's internal market. If supplied to other EAEU countries, these products had to pay duties at rates set in the EAEU Common Customs Tariff (CCT).²⁹ Raw cane sugar imported to Kazakhstan for industrial processing remained exempt from customs duties within the EAEU framework.³⁰ Kazakhstan complies with its WTO commitments on the established tariff quota for imports of beef and poultry meat. In 2016-2017, temporary restrictions on imports

²⁹ The EAEU Treaty of 24 May 2014, Art. 42, and the Resolution of the Supreme Eurasian Economic Council No. 22 of 16 October 2015 "On some issues related to the accession of the Republic of Kazakhstan to the World Trade Organization" (came into force on 11 January 2016).

³⁰ At the national level, it was affirmed by the Order of the Minister of the National Economy of the Republic of Kazakhstan No. 45 of 26 January 2015 "On some issues related to the importation of raw cane sugar to the territory of the Republic of Kazakhstan", registered with the Ministry of Justice of the Republic of Kazakhstan No. 10262 of 16 February 2015.

©Unsplash/Meric Tuna



of some agricultural goods were introduced based on SPS requirements and technical regulations. Control of the compliance with weight limits for freight vehicles was strengthened in 2017 at the Kazakhstan-Kyrgyzstan border. This control applies to both Kazakhstani and foreign carriers.

In 2016-2017, Kazakhstan applied export duties on raw cowhide and equine skins. Customs duties on exports of some types of animal wool and hair are also effective on a permanent basis.³¹ During the period under review, Kazakhstan imposed no quantitative restrictions or bans on agricultural exports.

As part of the export development and promotion programmes, three umbrella brands were created in 2016-2017, targeted to the large markets of China, the Russian Federation, and the Islamic Republic of Iran: “Qazaq Organic Food” for agricultural producers and

³¹ The Order of the Minister of the National Economy of the Republic of Kazakhstan No. 81 of 17 February 2016 “On the approval of the list of goods subject to export customs duties, duty rates and validity periods, and of the rules for calculation of export customs duty rates for crude oil and oil products” No. 13217 of 24 February 2016.

processors; “Halal Kazakhstan” for manufacturers who follow Muslim traditions in production technologies; and “KazMeat” for cattle and poultry meat producers. Programmes are also underway to support export potential through the increased competitiveness of agrifood enterprises, creation of efficient transport infrastructure and logistics, and improvements in product quality through the development of laboratory facilities.

In 2016-2017, Kazakhstan actively advanced partner relations with China, the Islamic Republic of Iran, the United Arab Emirates, and other countries. Key developments included the simplification of export procedures, in particular the coordination of veterinary requirements and certification of products of animal and plant origin. In 2017, the Islamic Organization for Food Security (IOFS) and KazAgro National Holding signed a Memorandum of Understanding on joint activity and financing of export-oriented agricultural projects. In addition, that same year the Government of Kazakhstan and the World Organization for Animal Health (OIE) agreed on a cooperation programme in veterinary medicine.

©Unsplash/Annie Spratt



Amber box measures constituted the largest share (63.4 percent) of domestic support to agriculture in Kazakhstan in 2016, with the rest (36.6 percent) provided through green box measures. Trade distorting support equaled 3.1 percent of the value of agricultural production compared to Kazakhstan's de minimis level of 8.5 percent. The government set two priorities in the new "State Programme for development of the agro-industrial complex of the Republic of Kazakhstan for 2017-2021" (the State Programme): saturation of domestic food demand with locally produced products, and development of the export potential of domestic products. The aggregate budget of the State Programme for 2017-2021 amounts to USD 6.67 billion. It is intended to increase the number of support beneficiaries and make support more results-oriented using criteria such as increased crop yields, animal productivity, and utilization of processing capacities.



KYRGYZSTAN

Kyrgyzstan's negative agricultural trade balance decreased from USD -413 million in 2015 to USD -299 million in 2016 as exports grew by 1.5 percent and imports fell by 19.3 percent. However, the dollar values of both exports and imports decreased by 5.7 percent and 7.1 percent, respectively. Kyrgyzstan's trade with EAEU member countries somewhat expanded in 2016, with the shares of these partners in the country's exports increasing by 5.4 percentage points and in imports by 3.2 percentage points.

Overall agricultural export growth in 2016 was largely driven by a 25-percent increase in bean exports, Kyrgyzstan's key agricultural export. This export increase was directed mainly to Turkey, the Russian Federation and Kazakhstan. At the same time, (re)exports of tobacco and tobacco products, particularly

to Kazakhstan, almost halved, which can be attributed to the unfavourable exchange rate factor. Inaccuracies in trade statistics due to the elimination of the customs border between Kyrgyzstan and Kazakhstan following Kyrgyzstan's accession to the EAEU may also explain this result.

Agricultural imports decreased largely because of smaller inflows of wheat and wheat flour from Kazakhstan and meat from China. Lower imports from the Russian Federation were recorded for a broad range of goods, which can also be explained by statistical noise. A drastic (by two-thirds) fall in imports from Ukraine was a consequence of the considerable complication in transit for Ukrainian goods through, or bypassing, the territory of the Russian Federation, as well as by increased transport costs.

In 2017, Kyrgyzstan lowered import duties on some types of alcoholic drinks, cereals, cheeses, fish and fish products, fruits, processed foods, soft drinks, spices, starch, vegetables and vegetable oil. This was part of the adjustment of the EAEU CCT in line with the Russian Federation's WTO tariff commitments. According to the

©FAO/Sergey Kozmin



EEC's decisions, Kyrgyzstan will open a tariff rate quota for imports of fresh, chilled or frozen beef amounting to 3 500 tonnes in 2018 (in 2017, Kyrgyzstan's quota for these products equaled zero). The country's tariff rate quotas for pork imports (3 500 tonnes) and poultry meat (58 000 tonnes) remained unchanged. To avoid an undervaluation of imports from EAEU countries for the purpose of VAT computation, Kyrgyzstan introduced minimum reference prices in 2017 for products such as eggs, flour from hard and soft wheat, rice and sugar.

No changes were made in export duties, quantitative restrictions on exports, or export subsidies in 2016-2017. The Export Development Plan adopted in 2015 was amended in February 2017. The amendments concern mainly the promotion of Kyrgyzstan's exports to Chinese and European Union markets. To implement the new measures in the Plan, the Government approved the "Financing of export-oriented and import-competing enterprises" project. The project will allocate 350 million Kyrgyz soms from the national budget for interest subsidies on loans by commercial banks. The aim is to subsidize 3.5 billion Kyrgyz soms of total borrowing in 2017. Food and light industry enterprises are on the list

of priority recipients of these concessional loans.

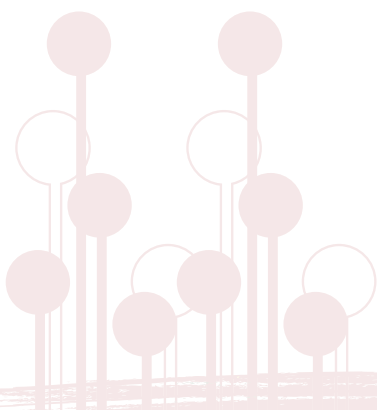
No changes occurred in 2016-2017 related to Kyrgyzstan's WTO membership or other regional trade agreements (except the EAEU). In August 2017, the transition period expired for the application of EAEU technical regulations in Kyrgyzstan. Eighteen EAEU technical regulations came into force, of which nine concern agrifood processing and agricultural trade directly. These regulations now apply not only to products directed to the EAEU, but also to those marketed domestically and exported to non-EAEU countries. The number of Kyrgyz enterprises which received permits for exports of animal products to Kazakhstan and the Russian Federation increased.

Agricultural support rose in Kyrgyzstan in 2016-2017. In 2016, all principal areas of agricultural support received higher budgetary funding. Total funding increased by 17.4 percent in nominal terms and rose by 0.3 percent relative to the gross value of agricultural production. In addition to direct budgetary allocations, Kyrgyzstan provided support through concessional loans from the Russian-Kyrgyz Development Fund (RKDF). As of

©Unsplash/Sean Thoman



August 2017, RKDF approved 322 projects in the agro-industrial complex totaling USD 52.36 million, which is 21.3 percent of all loans approved by the Fund. New support instruments for agriculture and agricultural trade were introduced, such as the Guarantee Fund and the “Financing of export oriented and import competing enterprises” project.





THE REPUBLIC OF MOLDOVA

The agricultural trade balance remained positive at USD 341 million in 2016, similar to the USD 330.3 million recorded in 2015. Exports amounted to USD 952.5 million, or 3 percent above the previous year, while agricultural imports totaled USD 611.5 million, or 2.9 percent above 2015. The country's main exports were oilseeds and fruits, alcoholic and non-alcoholic beverages, cereals, and fruits and nuts. The main buyers were Romania (17.6 percent of total agricultural exports), the Russian Federation (8.4 percent), the United Kingdom (7 percent), Belarus (5.8 percent), and Italy (4.5 percent). Exports to the Russian Federation almost doubled in 2016. The country's main imports are tobacco, alcoholic and non-alcoholic beverages, and fruits and nuts. In 2016, the Republic of Moldova's agricultural imports from the European Union exceeded those from the CIS countries for the first time. The European Union supplied 41.2 percent of total imports, the CIS countries 40.6 percent, and other countries 18.3 percent.

In 2016-2017, import duties remained within the limits of the country's commitments to the WTO. The simple average applied MFN duty was 11.6 percent in 2016 (13.5 percent in 2015). In May 2016, the Government approved trade measures to protect the domestic market.³² A temporary exemption of Ukrainian goods from import duties was suspended and import quotas for some dairy and meat products were introduced.³³ Imports above the quotas were subject to duties between 10 and 20 percent. These measures, however, were abolished in January 2017. In 2016-2017, the Republic of Moldova continued to align its national legislation with European Union legislation on food safety.

³² Resolution of the Government of the Republic of Moldova No. 576 of 6 May 2016 "On the introduction of trade measures for protection of the domestic market" (*Monitorul Oficial*, 2016).

³³ Import quotas for condensed milk and cream containing added sugar were set at 1 000 tonnes; for kefir, yoghurt and cream at 1 000 tonnes; butter, ice-cream, cheese and curd at 750 tonnes; sausages and similar meat products and prepared or canned meat products at 250 tonnes.

©Pixabay/Couleur



The Republic of Moldova applied no export duties or taxes, introduced no quantitative restrictions or bans on exports, and used no export or transportation subsidies in 2016-2017. The Stimulus for the Promotion of Products to Foreign Markets was introduced into the national legislation in 2017 as an agricultural subsidization principle³⁴ According to it, organizations and agricultural producers who participate and organize exhibitions and fairs can receive compensation for their expenses. It also provides for compensation of expenses for the registration of products with protected geographical indications, protected designation of origin, and guaranteed traditional quality. This support must not exceed 50 percent of the expenses of potential beneficiaries. A draft strategy for the promotion of Moldovan agrifood products on domestic and foreign markets was being prepared in 2016-2017 with FAO support.

³⁴ Resolution of the Government No. 455 of 21 June 2017 "On the allocation of resources from the National Fund for Agriculture and Rural Development" (Monitorul Oficial, 2017).

In 2016, an FTA between the Republic of Moldova and the Republic of Turkey came into force. It provides for the liberalization of trade over about 9 000 tariff lines. Mutual tariff rate quotas were set for agricultural tariff lines of high interest, including seasonal products. Under this Agreement, Turkey will be able to supply the Republic of Moldova with some types of vegetables and fruits duty free.³⁵ The amounts of duty free imports are specified, as are the periods during which they are permitted, i.e. when deficits of similar locally produced goods may occur on the Moldovan market. In October 2017, the Republic of Moldova requested an increase in European Union tariff quotas in the context of its agreement with the European Union. This concerns cereal crops, fresh plums, fresh table grapes, sugar and other goods (MEI, 2017).

³⁵ 5 000 tonnes of tomatoes during the period from 1 November to 30 April, 750 tonnes each of pears and quinces from 1 October to 30 June, 600 tonnes of apricots from 31 July to 31 May, 750 tonnes of cherries from 1 August to 20 May, 300 tonnes of peaches and nectarines from 1 September to 10 June, 200 tonnes of plums from 1 September to 10 June, and 300 tonnes of strawberries from 1 August to 30 April.

©Pixabay/Holzjue



In 2016, new agricultural support measures were introduced to accelerate the sector's development. These include support for the establishment and operation of agricultural producer groups; promotion and development of ecological agriculture; improvement and development of agricultural infrastructure; and consulting and training services. According to the notification submitted by the Republic of Moldova to the WTO, domestic support to agriculture meeting green box criteria equaled 14.99 million special drawing rights (SDR) in 2016. The total fund for state support amounted to about USD 45 million in 2016.





THE RUSSIAN FEDERATION

The Russian Federation's negative agricultural trade balance declined by nearly 25 percent in 2016 and amounted to USD -8.3 billion (USD -10.8 billion in 2015). Agricultural imports decreased by 6 percent to USD 25.5 billion in 2016 (USD 27.1 billion in 2015), while exports rose by 5.2 percent to USD 17.2 billion (USD 16.35 billion in 2015). The largest import groups were fruits and nuts (15.1 percent), meat (9.0 percent), and dairy products, eggs and honey (8.6 percent). Main exports were cereals (32.6 percent), fish (17.4 percent), and fats and oils (12.8 percent). Key importers to the Russian Federation in 2016 were the European Union countries (22.9 percent of total agricultural imports), Belarus (13.1 percent), and China (6.6 percent). The share of the country's exports to the European Union increased marginally from 11.7 percent in 2015 to 12.0 percent in 2016. Agricultural

trade with EAEU countries expanded slightly in 2016: imports were at USD 3.9 billion (USD 3.7 billion in 2015) and exports at USD 2.5 billion (USD 2.4 billion in 2015).

The simple average agricultural import tariff was 11 percent in 2016 (10.8 percent in 2015). In September 2017, import duty rates for a number of goods were reduced as part of the Russian Federation's commitments to the WTO. These tariff changes were implemented for products imported in significant quantities, such as sunflower oil, water, and cigars. Import tariff quotas allocated in 2017 to the Russian Federation within the EAEU framework³⁶ remained at the previous year's level (WTO, 2017b), even though the quotas were not filled

³⁶ EEC Board Resolution No. 97 of 30 August 2016 "On the setting of tariff quotas for certain types of agricultural goods imported in 2017 to the customs territory of the Eurasian Economic Union and on tariff quotas for these goods imported to the territories of the Member States of the Eurasian Economic Union".

©Pixabay/Pexels



or were under filled in 2016.³⁷ Under the FTA between the EAEU and Viet Nam, a zero-duty import tariff quota for rice was opened for 10 000 tonnes per year, of which 8 974 tonnes were allocated to the Russian Federation.³⁸

The ban on imports of certain agricultural products to the Russian Federation from a number of countries³⁹ was extended until 31 December 2018. During 2016-2017, the list of countries covered was increased, while

³⁷ In the 2016 calendar year, the tariff import quota for fresh and chilled beef amounted to 40 000 tonnes and was filled at 1 percent; the quota for frozen beef was 530 000 tonnes (39 percent filled); for pork and pork trimmings 430 000 tonnes (57 percent filled); for poultry 364 000 tonnes (14 percent filled); and for whey 15 000 tonnes (not filled).

³⁸ The EEC Board Resolution No. 98 of 30 August 2016 “On establishing the volumes of tariff quotas for certain types of long grain rice originating from the Socialist Republic of Viet Nam and imported in 2016 to the territories of the Member States of the Eurasian Economic Union”.

³⁹ Albania, Australia, Canada, European Union countries, Iceland, Liechtenstein, Montenegro, Norway, the United States of America, and Ukraine.

some products earlier prohibited for importation, were excluded from the list. The ban on tomato imports from Turkey was replaced with import quotas in October 2017. In July 2017, a provision was included in the “Law on the Customs Regulation of the Russian Federation” empowering the Government to prohibit the turnover of goods subjected to the import ban within the country’s territory.⁴⁰ In January 2017, excise rates for some alcoholic and tobacco products were raised.

A number of changes occurred in import policy in 2016-2017 with respect to SPS requirements and technical regulation. It is now possible to submit accompanying veterinary documents in electronic form. Another change is that beans, feed supplements and vegetables have become subject to veterinary control. During the period under review, temporary restrictions were occasionally introduced on agrifood imports from certain countries in connection with the epizootic situation.⁴¹ In 2017,

⁴⁰ Federal Law No. 232-FZ of 29 July 2017.

⁴¹ Some areas of Bulgaria, Chile, Croatia, the Czech Republic, Denmark, Ecuador, France, Germany, Great Britain, Greece, Italy, Kazakhstan, Mongolia, Poland, Romania, Slovakia, Spain and Sweden, and entire countries: Columbia, the Czech Republic, the Islamic Republic of Iran, Namibia, Romania, South Ossetia and Ukraine (as listed in several governmental decisions during the period under this review).

©Pixabay/Sergiogridelli



the following regulation came into force in the Russian Federation as a member of the EAEU: EAEU uniform quarantine phytosanitary requirements; the list of quarantine organisms; and EAEU plant quarantine rules and regulations. The directory of EAEU quarantine organisms was also released; and EAEU Technical Regulation “On the safety of fish and fish products” took effect.⁴²

In 2016-2017, duties were reduced on exports of sunflower seeds and the raw hides of cows, animals of the horse family, lambs, and sheep, among other animals. In August 2016, export duties on crustaceans, fish and soya beans were abolished. In 2016, an EEC Board resolution approved a new list of goods for which quantitative export restrictions may be introduced in exceptional cases. These include certain items within commodity groups such as beans, cereals, meat, milk and others. The ban on exports of some types of tanned leather and leather crust from the EAEU customs territory had, since January 2017, covered also live sable.

A new priority project titled “Export of Agricultural Products” was included in the State Programme for the Development of Agriculture. It focuses on information and advisory support, facilitation to set up export cooperatives, and veterinary and phytosanitary assistance for access to priority markets.⁴³ In September 2017, the Russian Export Centre was tasked with subsidizing Russian companies for the surface transport of agricultural and food products. A Green Corridor is being organized at the state border section of the Northwestern District to simplify deliveries of fish and other sea products (FSVPS, 2017).

Agricultural cooperation issues were included in the following international documents: Russia-ASEAN: a Future Oriented Multifaceted Strategic Partnership and Comprehensive Action Plan for the Development of Cooperation between the Russian Federation and the Association of South-East Asian Nations (2016-2020).

In 2016-2017, the Russian Federation made recourse to

WTO mechanisms to avert or address trade disputes. This concerned, for example, the dispute on duties applied by the Russian Federation on imports of palm oil and import restrictions on pigs and pork originating from the European Union (WTO, 2017c). In May 2017, the Russian Federation requested consultations with Ukraine concerning its ban on the import of some categories of food products, alcoholic beverages, cigarettes, and plant products.

Budgetary support to agriculture and fisheries decreased from USD 5.97 billion in 2015 to USD 4.96 billion in 2016. Investment co-financing for the construction and modernization of farms began in 2016. This new support instrument complemented interest subsidies, the principal type of support within the State Programme (45.4 percent of all agricultural subsidies). The Ministry of Agriculture of the Russian Federation implemented intervention purchases of grain in 2016 to reduce price volatility on the domestic grain market. No new green box measures were applied in 2016.

⁴² The EAEU Council Resolution No. 162 of 18 October 2016 “On the technical regulation of the Eurasian Economic Union ‘On Safety of Fish and Fish Products’”.

⁴³ Resolution of the Government of the Russian Federation No. 396 of 31 March 2017 “On the amendment of the ‘State Programme for the development of agriculture and regulation of markets for agricultural products, raw materials and food for 2013-2020’”.



Tajikistan

The country's negative agricultural trade balance decreased from USD 602.12 million in 2015 to USD 492.65 million in 2016. Agricultural exports contracted by 16.9 percent (from USD 192.0 million in 2015 to USD 159.55 million in 2016), whereas imports fell by 17.9 percent (from USD 794.12 million in 2015 to USD 652.2 million in 2016). Exports of agrifood products during the first six months of 2017 reached USD 48.5 million and imports USD 313.6 million, leading to a negative balance of USD -265.1 million. Between 2015 and 2016, exports of dairy products, eggs and honey, fruits and nuts, vegetables and raw cotton fiber, among other products, decreased. The largest agrifood imports in 2016 were cereals (37.2 percent), sugar and confectionery (9.7 percent), and milling industry products (5.9 percent). Turkey, the Islamic Republic of Iran, the Russian Federation and Pakistan remained key buyers of Tajikistan's cotton fiber, while Kazakhstan was

the country's main supplier of flour and wheat.

In 2017, a 10-percent VAT was set on imported wheat supplied for milling (except wheat imported to produce excisable goods), as well as on products processed from wheat. No quantitative restrictions or bans on agrifood imports were applied in Tajikistan in 2016-2017.

In November 2016, a 10-percent export duty on cotton fiber was introduced. It replaced the previous 10-percent sales tax on cotton fiber, whether destined for external or domestic markets. Tajikistan applied no quantitative restrictions or bans on agrifood exports in 2016-2017, no export subsidies and no export credits or guarantees.

In 2016, the State Programme for Export Promotion and Import Substitution for 2016-2020, and its implementation plan were approved. A Coordination Committee for Simplification of Trade Procedures was also established under the Ministry of Economic Development and Trade. The World Bank's project on trade logistics in Central Asia is being implemented which foresees the creation of a Green Corridor to simplify trade procedures in Tajikistan.

©Pixabay/Mamyoung



In May 2017, trade and economic agreements between Afghanistan and Tajikistan were signed. In August 2017, a draft Memorandum of Understanding on enhanced cooperation between the Ministries of Agriculture of Tajikistan and China was adopted for a five-year period. This includes the creation of a joint agricultural science and technology park, introduction and use of agricultural equipment, and the advancement of a partnership in agro-industrial processing. A Memorandum between the Agrarian University of the Republic of Tajikistan and the Agricultural Academy of the People's Republic of China was signed. The Agrarian University of the Republic of Tajikistan also concluded an Agreement on Cooperation in Science and Technology with the Research Institute of the Agricultural Academy of China. Tajikistan's cooperation agreements with India and Sri Lanka are under consideration.

Budgetary expenditures on agriculture amounted to about USD 48.8 million in 2016, or 2.1 percent of the total state budget. A number of reform and development programmes in the field of agriculture are underway. Russian company Rostselmash won a state tender and

began deliveries of grain harvesters to Tajikistan with the support of Agroservice, the official representative of the Russian manufacturer in Tajikistan. The Tajikagroleasing company leases equipment to peasant farms for up to six years with a minimum 30 percent advance payment.

Work to improve foreign trade statistics was ongoing in 2016-2017, and focused on the methodology and estimation of export and import volume indices and average prices, as well as on the explanation of divergences between output and export (import) prices.

©Pixabay/Daria-Yakovleva



Turkmenistan

Turkmenistan's positive agricultural trade balance amounted to USD 26.4 million in 2016. During the year, imports decreased for a range of products, including meat and meat by-products (by 40 percent), pasta products (by 38 percent), rice (by 21 percent), dairy products (by 20 percent), and poultry meat (by 2.6 times), while imports of sausages shrank almost seven-fold. The devaluation of the national currency led to a fall in imports. Another factor was the increase of customs duties on some products in 2015 to support domestic producers and encourage import substitution. Agrifood exports exceeded USD 706 million in 2016, which is 13.3 percent higher than in 2015. Exports of cotton yarn increased by 32 percent, wool by 34 percent, licorice extract by 44 percent, and fruits by 68 percent, while wheat exports were three times the previous year's level.

Import duties remained at the 2015 level in 2016 - 2017. The country applied no import quotas, quantitative

restrictions or bans on imports of agricultural products during the period under review. As previously, economic entities were required to undergo border veterinary control when importing live animals, products of animal origin, veterinary medicines, biological materials, feed, and raw materials of animal origin. A quarantine permit was required for imports to or transit across the territory of Turkmenistan of quarantine products of plant origin. Beyond tariff regulation, Turkmenistan used non-tariff measures, such as import licensing for some goods. The following non-tariff import regulation measures were also applied:

1) Customs and administrative border measures. Some types of imported products are subject to special procedures for testing and certification (agricultural machinery, etc.).

2) Credit restrictions for import deliveries to Turkmenistan. Import contracts with foreign suppliers foresee only the following ways of settlement for delivered goods: letter of credit, payment against a bank guarantee, or payment upon receipt of the goods by a Turkmen buyer.

In 2016, the list of goods permitted for export from

©Pixabay/Staleybk



Turkmenistan at zero duty was extended to include fruits, furs and vegetables. As of February 2016, cotton and cotton fiber, raw silk and silkworm cocoons, and wheat and wheat flour, are subject to export certification. No quantitative restrictions or bans on agricultural exports were imposed in 2016-2017.

The resolution “On the improvement of procedures for exportation and marketing of certain goods abroad” was signed in 2016 with the aim of increasing the output of exportable products. According to this resolution, a Supervisory Council for Sales of Agricultural Products was established. Preferential railway tariffs on internal transportation remained in force. The beneficiaries are the state-owned cargo transporters, including those forwarding the cargo to export markets. The preferential tariffs are significantly reduced compared to those charged to non-state enterprises and foreign entities exporting goods to Turkmenistan by rail.

Turkmenistan concluded no new agreements in 2016-2017 within the CIS framework where it has an observer status, and no substantial developments took place related to the country’s accession to the WTO.

In 2016, cotton and wheat producers could buy agricultural equipment, fertilizers and seeds at reduced prices. They also benefited from a guarantee on the timely supply of water. A resolution was signed in March 2017, according to which agricultural producers of all ownership types could receive concessional loans at 1 percent per annum for the purchase of agricultural equipment and materials, and at 5 percent per annum for investments in livestock and poultry farming, processing facilities, and services in rural areas. As part of the import substitution and export development programmes, private farms and enterprises are being set up for agricultural production and processing. These include large poultry complexes, and processing plants for bread, dairy and meat products. The non-state sector generated about 95 percent of the country’s agricultural output in 2016.

©Unsplash/meric tuna



Ukraine

Ukraine's positive agricultural trade balance reached USD 11.4 billion in 2016, which is 2.7 percent higher than in 2015. Agricultural exports amounted to USD 15.3 billion, 4.8 percent higher than in 2015, whereas imports equaled USD 3.9 billion, or 11.5 percent above the previous year's level. During the first six months of 2017, agricultural exports increased by 28.0 percent and imports by 1.4 percent as compared to the same period in 2016. In 2016, agrifood exports to the Russian Federation declined by 65.5 percent compared to their 2015 level, while deliveries to the European Union increased by 1.3 percent. The share of Asian and African countries in Ukraine's agricultural exports continued to rise. The share of the Russian Federation in Ukrainian agricultural imports fell to 1.2 percent (from 7 percent in 2015), while the share of the European Union increased to 44.5 percent (from 40 percent in 2015).

In 2016, the average import duty on agricultural goods remained at 9.2 percent, the same as the previous year's level. In December 2016, the removal of the zero-duty preferences on imports from the Russian Federation was extended until the end of 2017. In July 2016, the ban on imports of agricultural goods from the Russian Federation was also extended until 31 December 2017. In June 2017, antidumping duties at the rate of 31.3 percent were introduced on chocolate and other finished foods containing cacao manufactured in the Russian Federation. The tariff rate quota on imports of raw cane sugar to Ukraine, amounting to 267 800 tonnes, with a 2 percent in-quota duty rate, remained unfilled in 2016 (WTO, 2017d) and during the first six months of 2017.

A broad reform of Ukrainian legislation in the SPS area continued in 2016 and 2017 with the goal of harmonizing domestic legislation with the European Union framework. The Law "On state control on compliance with the legislation on food products, feed, animal by-products, and animal health and well-being" was adopted in May 2017. In January 2016, the European Union lifted the prohibition on imports of cattle and cattle parts from

©Unsplash/Aleksandr Eremin



Ukraine following a systemic control audit of animal health on bovine spongiform encephalopathy (WTO, 2016a). In 2016, Ukraine introduced a temporary prohibition on imports of fresh lettuce and cabbage from Spain due to the diagnosed presence of *Frankliniella occidentalis* Perg (WTO 2016b). Imports of poultry, finished and semi-processed poultry products from some European Union countries were also prohibited⁴⁴ following the identification of Newcastle disease (WTO, 2016c; WTO, 2016d; WTO, 2016e; WTO, 2016f; WTO, 2016g; WTO, 2016h).

In 2017, Ukraine reduced export duties on oil seeds, live cattle and rawhides as part of its commitments to the WTO. Export duties on flax, sunflower and false flax seeds, live cattle and rawhides were also reduced according to the schedule for the elimination of export duties by Ukraine in trade with the European Union.

In August 2017, the Ukrainian Ministry of Agrarian Policy and Food signed another Memorandum of

⁴⁴ Austria, Bulgaria, Denmark, some regions of Germany, Hungary and Poland.

Understanding with grain exporters for the 2017/2018 marketing year seeking to ensure food security without recourse to export restrictions. The parties agreed to cooperate in the estimation of grain balances, in particular, in determining volume limits for grain exports.

The state's Office for Export Support was established in 2016. It offers insurance, reinsurance and contract guarantees to Ukrainian exporters and also acts as the Government's agent in the provision of export credit concessions. In 2016-2017, however, the Ukrainian Government implemented no export credit or export insurance, and applied no export subsidies. VAT refunds to exporters are another export support measure in Ukraine. To optimize this support, a Uniform Register for VAT refund applications was approved in January 2017, merging two previous registers. The new facility enables the automatic entry of applications on the day of the transaction and in chronological order, as well as automatic and daily refund payments.

©Pixabay/Candix



The Canada-Ukraine Free Trade Agreement (CUFTA) came into force in August 2017. The Association Agreement between the European Union and Ukraine was fully implemented in September 2017. In 2016-2017, the Government of Ukraine held negotiations to increase European Union import tariff quotas for certain products. This concerned products for which Ukrainian exporters fully filled existing quotas, such as apple juice, chicken meat, honey, maize, sugar, wheat, wine and others. In June 2017, new import tariff quotas for Ukrainian producers were approved to remain in force during three years. However, additional quotas for apple juice, chicken meat and sugar were not allocated. With regard to other products, in 2016 European Union import tariff quotas were filled at 46 percent for butter, 36 percent for powdered milk, and 15 percent for eggs and albumins. Tariff quotas for beef, lamb and pork were not filled at all. In this regard, Ukraine actively works on the certification of domestic livestock production capacities for export to the European Union.

In 2017, direct budget support to agriculture increased to USD 347.19 million, which is almost five-fold the level recorded in 2016.⁴⁵ A new financial support programme was introduced to provide the funding for agricultural development and subsidize domestically produced agricultural machinery. State funding to the Agrarian Fund for storage, transportation, processing and exports of products subject to price regulation through the state intervention fund, halved in 2017 to USD 1.89 million from USD 3.68 million in 2016. From 1 July 2017, the state regulation of food prices was abolished.⁴⁶ The minimum price of sugar beets used for sugar production within quota "A" was USD 23.28 per tonne (net of VAT) for the period from 1 September 2017 to 1 September 2018, and the minimum sugar price was USD 337.35 per tonne. Some increase in the budgetary funding for scientific research and training of academic staff in the agrifood field was envisaged in 2017 (by 37 percent compared to the previous year).

⁴⁵ In accordance with the Law of Ukraine "On Amendments to the Budget Code of Ukraine" of 20 December 2016 No. 1789-VIII in 2017-2021, the annual amount of state budget funds that are directed to support agricultural producers should be at least 1 percent of the gross value of agricultural production.

⁴⁶ Decree of the Cabinet of Ministers of Ukraine No. 394 of 7 June 2017.



Uzbekistan

The agricultural trade balance decreased in 2016 by almost 20 percent compared to 2015, but remained positive at USD 921.6 million. Agricultural exports reached USD 2.4 billion in 2016 (13.7 percent less than in 2015), while agricultural imports were about USD 1.5 billion (9.5 percent below the 2015 level). The country's largest exports are cotton (50.6 percent), fresh fruits (24.3 percent), and vegetables (13.6 percent). Key export destinations are the Islamic Republic of Iran (25.7 percent of total agrifood exports), Kazakhstan (23.2 percent) and the Russian Federation (8.6 percent), the latter two being traditional importers of Uzbekistani products. In 2016, imports were dominated by sugar and sugar confectionery (23.1 percent), fats and oils (16.0 percent), cereals (15.2 percent), and milling industry products (11.0 percent). As in previous years,

Uzbekistan's largest agrifood suppliers in 2016 were Kazakhstan (30.4 percent of total agricultural imports), Brazil (24.7 percent), and the Russian Federation (20.6 percent).

Uzbekistan undertook broad import liberalization in 2017. Zero or reduced tariffs were introduced on items such as buckwheat, cacao, fish, milk, rice, spices, wheat and many others.⁴⁷ Excise taxes were decreased considerably on a number of agricultural products imported from Kazakhstan (for example, the rates for wheat flour were more than halved from 11 percent to 5 percent), while excise taxes were abolished for pasta products, meat, edible meat by-products, and others. Uzbekistan applied no import tariff quotas, quantitative restrictions, or bans on imports of agrifood products in 2016-2017.

In June 2016, a ban on exports of fruits and vegetables, including potatoes, melons and grapes by road

⁴⁷ Resolution of the President of the Republic of Uzbekistan No. ПП-3303 of 29 September 2017 "On the measures for further streamlining of foreign economic activities of the Republic of Uzbekistan" (LexUz, 2017).

©FAO/Rustam Shagaev



transport was lifted.⁴⁸ This ban had been in effect since 1 September 2015.⁴⁹ In May 2017, a ban in force since 1997, on exports of bread products, cattle and poultry, down and fur materials, flour and groats, grain, meat and edible meat by-products, rawhide, raw silk, silk cocoons, silk waste, sugar and vegetable oils was also cancelled.⁵⁰ Uzbekistan applied no export duties or taxes, or export subsidies in 2016-2017.

The policy to develop and further liberalize exports continued in 2016-2017. New trade houses were opened in 2017 in Latvia, India, the Russian Federation, Tajikistan and the United States. In July 2017, the monopoly of the

⁴⁸ Resolution of the Cabinet of Ministers of the Republic of Uzbekistan No. 207 of 15 June 2016 “On the approval of the regulations related to export procedures for fresh and processed fruit and vegetable products”.

⁴⁹ The Resolution of the Cabinet of Ministers of the Republic of Uzbekistan No. 249 of 28 August 2015 “On the measures for further improvement of the export regulation mechanism for fruits and vegetables, potatoes, pumpkins and grapes”.

⁵⁰ Decree of the President of the Republic of Uzbekistan No. UP-5057 of 25 May 2017 “On the measures to encourage exports and ensure competitiveness of domestic goods in foreign markets”.

Uzagroexport company in fruit and vegetable exports was eliminated, and businesses were allowed to export fresh fruits and vegetables, including grapes and melons, based on direct contracts with 100 percent prepayment. Another step in export liberalization was the August 2017 abolition of the mandatory sale of 25 percent of foreign currency receipts from the exports of all goods (works and services). The Government of Uzbekistan adopted and began implementing its Strategy of Actions for the Development of Uzbekistan for 2017–2021, which envisages the creation of an “Export activities development concept for 2018-2021” that would include programmes for the identification and development of prospective industries for export-oriented products, export market diversification and trade infrastructure development.

A protocol on Partnership and Cooperation Agreement between the European Union and Uzbekistan took effect in July 2017. It foresees a reduction of import duties on textile items from Uzbekistan. In January 2017, Kyrgyzstan became another CIS state to ratify the Treaty on Free Trade Area with Uzbekistan. Thus, out of eight CIS countries which signed the Treaty, seven countries

©Pixabay/Engin_Akyurt



(Armenia, Belarus, Kazakhstan, Kyrgyzstan, the Republic of Moldova, the Russian Federation and Ukraine) had ratified it to date. A Russian-Uzbek working group on deliveries of fruits and vegetables from Uzbekistan to the Russian Federation was established in 2016. In 2017, the Republic of Korea lifted the ban on imports of Uzbek black cherries as Uzbekistan fulfilled the conditions on product transportation.

A number of programmes were in force in Uzbekistan in 2016-2017, aimed at the reform, modernization and intensification of agriculture.^{51,52} Starting from the 2016 harvest, the government implements a procurement order for fresh fruits and vegetables, including potatoes, melons, and grapes.⁵³ Measures for radical improvements in the silk farming sector were taken in 2017.⁵⁴ Producers of mulberry silkworm cocoons were granted concessions on a single tax payment and a single social payment; they were also exempted from import duties on imported material and technical equipment until 1 January 2023. In addition, persons working as individuals and producing fresh mulberry silkworm cocoons at their homes were exempted from personal income tax.

⁵¹ Resolution of the President of the Republic of Uzbekistan No. PP -2460 of 29 December 2015 “On the measures for further reform and development of agriculture for 2016-2020”.

⁵² Decree of the President of the Republic of Uzbekistan No. UP-4947 of 7 February 2017 “On the action strategy for further development of the Republic of Uzbekistan”.

⁵³ Resolution of the President of the Republic of Uzbekistan No. PP-2520 of 12 April 2016 “On the measures for improving the system of procurement and use of fruit and vegetables, potatoes, and melons”.

⁵⁴ Resolution of the President of the Republic of Uzbekistan No. PP-2856 of 29 March 2017 “On the measures for organizing the work of the Uzbekipaskanoat Association”.



REFERENCES



- Armenian Lawyer.** 2015. Corporate profit tax in Armenia. In: *Armenian Lawyer* [online]. Yerevan. <http://armenian-lawyer.com/corporate-law/corporate-profit-tax-in-armenia/>
- Arminfo.** 2017. Ministry of Agriculture launches a pilot programme for subsidizing agricultural loans for processing enterprises for raw materials. In: *Arminfo Portal* [online]. Yerevan. http://finport.am/full_news.php?id=31015&lang=3
- DFNX.** 2017. Xəbərlər (News). Barama İstehsalçılarına subsidiyanın ödənilməsinə başlandı. In: *State Service for Phytosanitary Supervision at the Ministry of Agriculture* [online]. Baku. www.dfnx.gov.az/?r=1
- FAO.** 2017b. *Food outlook: biannual report on global food markets*. November 2017. Rome. <http://www.fao.org/3/a-l8080e.pdf>
- FAO.** 2017c. *Crop prospects and food situation*. No. 4. December 2017. Rome. <http://www.fao.org/3/a-i8278e.pdf>
- FAO.** 2018. *Review of Agricultural Trade Policies in the post-Soviet countries 2016-2017* [available only in Russian]. Rome. <http://www.fao.org/3/I9313RU/I9313RU.pdf>
- FSVPS.** 2017. News. In: *The Federal Service for Veterinary and Phytosanitary Surveillance of the Russian Federation* [online]. Moscow. [cited 14 July 2017]. <http://www.fsvps.ru/fsvps/news>
- GEOSTAT.** 2017. *National Statistics Office of Georgia* [online]. Tbilisi. <http://geostat.ge>
- LexUZ.** 2017. *National database of the legislation of the Republic of Uzbekistan* [online]. Tashkent. http://lex.uz/Pages/GetPdfView.aspx?lact_id=3362737
- MEI.** 2017. *Republica Moldova a solicitat partenerilor europeni majorarea cotelor de export la unele produse*. In: *Ministerul Economiei și Infrastructurii* [online]. Chisinau. <http://www.mec.gov.md/ro/content/republica-moldova-solicitat-partenerilor-europeni-majorarea-cotelor-de-export-la-unele>
- MFARB.** 2017. *Ministry of Foreign Affairs of the Republic of Belarus*. [online]. Belarus. <http://mfa.gov.by/>
- MOAAr.** 2017. *Monthly Archives: November 2017*. In: *Ministry of Agriculture of the Republic of Armenia* [online]. Yerevan. <http://minagro.am/ru/2017/11/>
- MOAAz.** 2017a. *Kənd təsərrüfatı sahəsində imzalanmış Sazişlər və Anlaşma Memorandumları (Agreements and Memorandums of Understanding signed in the field of agriculture)*. In: *Ministry of Agriculture of the Republic of Azerbaijan* [online]. Baku. <http://www.agro.gov.az/sazilr-v-memorandumlar>
- MOAAz.** 2017b. Xəbərlər (News). *Ministry of Agriculture of the Republic of Azerbaijan* [online]. Baku. www.agro.gov.az/xbrlr/776-azrbaycan-respublikasi-hkumti-il-trkmnistan
- Monitorul Oficial.** 2016. *Monitorul Oficial al Republicii Moldova*. 13 May 2016, №128-133. Chisinau. <https://www.monitorul.md/monitor/v-158-v/>
- Monitorul Oficial.** 2017. *Monitorul Oficial al Republicii Moldova*. 23 June 2017, №201-2013/537. Chisinau. <https://www.monitorul.md/monitor/v-1976-v/>
- OECD/FAO.** 2017. *OECD-FAO Agricultural Outlook 2017-2026*. OECD Publishing. Paris. <http://www.fao.org/documents/card/en/c/ea8a5cae-6c68-4aa0-b929-713fded65e6e/>
- SSFS.** 2017. *State Service for Food Safety, Ministry of Agriculture of the Republic of Armenia* [online]. Yerevan. <http://snund.am/ru>
- UN/CEFACT.** 2005. *Establishing a Single Window. Recommendation no. 33*. United Nations Centre for Trade Facilitation and Electronic Business. Geneva. https://www.unece.org/fileadmin/DAM/cefact/recommendations/rec33/rec33_trd352e.pdf
- World Bank (WB).** 2017. *Global economic prospects, June 2017: A Fragile Recovery*. Washington, DC. <https://openknowledge.worldbank.org/bitstream/handle/10986/26800/9781464810244.pdf>
- World Trade Organization (WTO).** 2015. Export competition. Ministerial Decision of 19 December 2015. WT/MIN(15)/45 WT/L/980. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/thewto_e/minist_e/mc10_e/nairobipackage_e.htm
- World Trade Organization (WTO).** 2016a. *Committee on Sanitary and Phytosanitary Measures. Notification of Emergency Measures G/SPS/N/UKR/108*. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm
- World Trade Organization (WTO).** 2016b. *Committee on Sanitary and Phytosanitary Measures. Notification of Emergency Measures G/SPS/N/UKR/110*. In: *World*

Trade Organization [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016c. Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures G/SPS/N/UKR/114. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016d. Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures G/SPS/N/UKR/115. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016e. Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures. G/SPS/N/UKR/116. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016f. Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures G/SPS/N/UKR/117. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016g. Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures G/SPS/N/UKR/118. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2016h. *Committee on Sanitary and Phytosanitary Measures. Notifications of Emergency Measures G/SPS/N/UKR/119*. In: *World Trade Organization* [online]. Geneva. https://www.wto.org/english/tratop_e/sps_e/work_and_doc_e.htm

World Trade Organization (WTO). 2017a. *Statistics database. Trade profiles* [online]. Geneva. <http://stat.wto.org>

World Trade Organization (WTO). 2017b. *Committee on Agriculture. Notification. Russian Federation. Tariff quotas. G/AG/N/RUS/16*. In: *World Trade Organization* [online]. Geneva. [https://docs.wto.org/dol2fe/Pages/FE_Search/FE_S_S006.aspx?Query=\(%20@Symbol=%20g/ag/n/rus/*\)&Language=ENGLISH&Context=FomerScriptedSearch&languageUIChanged=true#](https://docs.wto.org/dol2fe/Pages/FE_Search/FE_S_S006.aspx?Query=(%20@Symbol=%20g/ag/n/rus/*)&Language=ENGLISH&Context=FomerScriptedSearch&languageUIChanged=true#)

World Trade Organization (WTO). 2017c. Dispute Settlement. DS475: Russian Federation - Measures on the Importation of Live Pigs, Pork and Other Pig Products from the European Union. In: *World Trade*

Organization [online]. Geneva. https://www.wto.org/english/tratop_e/dispu_e/cases_e/ds475_e.htm

World Trade Organization (WTO). 2017d. *WTO Committee on Agriculture. Notification. Ukraine. Tariff quotas. G/AG/N/UKR/25*. In: *World Trade Organization* [online]. Geneva. [https://docs.wto.org/dol2fe/Pages/FE_Search/FE_S_S006.aspx?Query=\(%20@Symbol=%20g/ag/n/ukr/*\)&Language=ENGLISH&Context=FomerScriptedSearch&languageUIChanged=true#](https://docs.wto.org/dol2fe/Pages/FE_Search/FE_S_S006.aspx?Query=(%20@Symbol=%20g/ag/n/ukr/*)&Language=ENGLISH&Context=FomerScriptedSearch&languageUIChanged=true#)



ISBN 978-92-5-131022-9



9 789251 310229

CA0879EN/1/10.18