



Food and Agriculture Organization
of the United Nations

TRADE POLICY REVIEW IN THE COUNTRIES OF EASTERN EUROPE, CAUCASUS AND CENTRAL ASIA

1st Quarter 2023 | Bulletin



REGIONAL AND BILATERAL TRADE AGREEMENTS

THE REPUBLIC OF MOLDOVA, TÜRKİYE AGREE TO EXTEND THEIR FREE TRADE AGREEMENT

The Republic of Moldova and Türkiye agreed to extend their free trade agreement, signed in 2014, during a high-level meeting held in Ankara, Türkiye, on 27 January 2023. The two parties also agreed to open a Moldavian-Türkish Chamber of Commerce as soon as 2023 and to hold a forum for the two countries' entrepreneurs.

The free trade agreement between the Republic of Moldova and Türkiye entered into force on 1 November 2016. It aims to promote mutual growth of exports and investments and contribute to stronger trade and economic ties between the two countries. The agreement generally provides for the liberalization of trade between Moldova and Türkiye by eliminating tariffs and non-tariff barriers, as it includes provisions, among others on sanitary and phytosanitary measures, intellectual property, rules of origin, and other areas. With regard to agricultural products in particular, mutual tariff quotas for agricultural products have been set by the parties.

Infotag.md

TAJIKISTAN TO JOIN THE TRANSPORT CORRIDOR EUROPE-CAUCASUS-ASIA (TRACECA) AGREEMENT ON SINGLE TRANSIT PERMIT

As per a resolution published on 24 January 2023, on the legal information portal of the Ministry of Justice of the Republic of Tajikistan, the Minister of Transport of the Republic of Tajikistan undertakes to sign the Agreement on the Single Transit Permit TRACECA (Transport Corridor Europe-Caucasus-Asia) on behalf of the government of the Republic. The Foreign Ministry of the country is instructed to coordinate with the Secretariat of the Intergovernmental Commission TRACECA the date and place of signing the document.

Asiaplustj.info

INTERNATIONAL COOPERATION

UKRAINE, SENEGAL INTENSIFY COOPERATION IN AGRICULTURE

As part of the Ukrainian delegation's visit to Africa on 9 January 2023, the parties discussed prospects for Ukraine-Senegal relations and development of cooperation in the agricultural sector. A Memorandum of Understanding in agriculture between the two countries' ministries was signed during the meeting.

The purpose of the Memorandum is the expansion of agrifood trade. In this context it includes provisions on the cooperation in research and investments, and relations between public institutions and private organizations.

[Minagro.gov.ua](https://minagro.gov.ua)

THE REPUBLIC OF MOLDOVA, ROMANIA SIGN A COOPERATION AGREEMENT

9 February 2023 the Republic of Moldova and Romania have signed an Agreement on Bilateral Cooperation in Veterinary Health and Food Safety.

[Point.md](https://point.md)

THE BLACK SEA GRAIN INITIATIVE EXTENDED

The Black Sea Grain Initiative Agreement, signed on 22 July 2022 in Istanbul, has been extended on 18 March 2023. The initiative enables the facilitation of the safe navigation of grain exports and related food products and fertilizers, including ammonia, from three Ukrainian sea ports. About 29 million metric tonnes of grain and food products were moved to 45 countries during the first two validity periods since it was signed in July 2022, helping to reduce global food prices and stabilize markets. The Black Sea Grain Initiative, alongside the Memorandum of Understanding on promoting Russian food products and fertilizers to world markets, is critical for global food security, as it supported the stabilization of spiralling food prices worldwide therefore contributing to the prevention of global hunger, especially for developing countries.

[News.un.org](https://news.un.org)

INTERNATIONAL COOPERATION

TURKMENISTAN, AZERBAIJAN ACCEDE TO THE ELECTRONIC WAYBILL PROTOCOL

Turkmenistan and Azerbaijan have acceded to the e-CMR protocol (electronic waybill version). Accession of the two countries at the centre of regional trade to e-CMR will contribute to further digitalization of freight traffic.

Using e-CMR will help Azerbaijan and Turkmenistan manage the growing flow of goods in transit along varying routes more effectively. E-CMR will reduce cargo handling costs, and remove administrative delays and difficulties in invoicing. The protocol will also enhance transparency and security of the entire logistics chain, providing more accurate data for supply tracking with real-time access to information on receipts and delivery.

Turkmenportal.com

TRADE POLICY AND DOMESTIC SUPPORT MEASURES IN JANUARY – MARCH 2023

COUNTRY	MEASURE CATEGORY	PUBLICATION DATE	DESCRIPTION
Azerbaijan	Tax exemptions	9 January 2023	With the most recent amendments to the Tax Code, the State Tax Service under the Ministry of Economy of Azerbaijan decided tax exemptions for agricultural product processing enterprises. These exemptions aim to optimize costs and reduce prices for domestically produced products. According to the amendments, food producers will exempt from tax on half of their profits for seven years. Property and land taxes exemptions will enter into force after adoption of respective exemptions by the Cabinet of Ministers.
	Elimination of import duties	14 March 2023	On 13 March 2023, Azerbaijan eliminated duties on imports of soybeans with the objective to reduce feed prices and stimulate poultry farming. Azerbaijan extended exemptions from import duties for feed, feed additives, fertilizers and some other commodities until the end of 2023.
Belarus	Fish catching quota	9 January 2023	Belarus has set fish catching quotas for 2023 via the Order of the Ministry of Agriculture and Food No. 337 of 29 December 2022, published on the Ministry's official website. The quotas are set for every fishing ground leased. A list of 75 grounds is provided in an annex to the Order. Lessees are allowed to catch 861.7 tonnes of fish through commercial fishing, and 773.2 tonnes through paid recreational fishing in 2023.
	Export licensing	16 March 2023	On 14 March 2023, a resolution of the Council of Ministers of the Republic of Belarus introduced licensing for flax fibre exports. In this regard, one-time licences will be issued by the Ministry of Antimonopoly Regulation and Trade. Flax licensing is introduced on a temporary basis, for six months.
	Export ban	28 March 2023	The Government of Belarus extended an export ban of grains for six months as of 24 March 2023. The decision is stipulated in the government's Decree No. 207 of 24 March 2023. The export restriction has been in place since 11 March 2022 and was extended on 24 September 2022 . The list of goods banned for export includes wheat, rye, barley, oats, corn, millet, buckwheat, and other cereals – 19 items in total. Exports are banned, <i>inter alia</i> , to EAEU member states regardless of the country of origin. The ban does not apply to goods for humanitarian aid.

TRADE POLICY AND DOMESTIC SUPPORT MEASURES IN JANUARY – MARCH 2023

Kazakhstan	Export duty	25 January 2023	Kazakhstan has introduced an export duty on sunflower seeds. The customs duty rate will be 20 percent but no less than EUR 100 per tonne. A relevant order of the Minister of Trade and Integration took effect in February 2023. The document amends the Order of the Minister of National Economy No. 81 of 17.02.2016. [▫] This export duty has been introduced on a permanent basis.
	Export ban	2 February 2023	A 3-month ban on exports of onions from the country's territory was introduced in Kazakhstan on 28 January 2023. It is associated with high demand from third countries.
Kyrgyzstan	Export ban	1 February 2023	A resolution of the Cabinet of Ministers of Kyrgyzstan on imposing a temporary export ban has been adopted. The ban is valid from 31 January 2023 for a period of three months. The measure was taken to ensure food security and to contain prices for socially important food products – in particular, onions, shallots, leeks and other bulbous vegetables, fresh or refrigerated.
	Lifting of Import ban	20 February 2023	On 20 February 2023, Kyrgyzstan lifted restrictions on meat and bovine animal imports. In particular, it cancelled the ban on imports of agricultural animals and animal products from Uzbekistan, as well as poultry and poultry farming products from the United States of America. The ban had been valid since September 2022.
Russian Federation	Subsidies to producers	1 January 2023	The Russian Federation's livestock breeders have been receiving a new type of support since 1 January 2023 – subsidies to reimburse some expenses related to bovine cattle breeding and meat production. The additional measures of support for bovine meat producers, and the increase in financing for this sector in general, aims to boost production.
	Export ban	9 January 2023	The Russian Federation has extended a ban on exports of rice and rice grits for the first half of 2023. Supplies of these products to EAEU countries are not restricted. Initially, the Russian Federation had banned exports of rice from 1 July through 31 December 2022. The measure aims to provide the domestic market with rice grits.
	Export ban	18 March 2023	A temporary ban has been set on exportation of rapeseeds from the Russian Federation from 20 March 2023 to 31 August 2023 inclusive.
Tajikistan	Export ban	30 January 2023	Tajikistan has banned exports of onions, potatoes and carrots since 30 January 2023 until the market stabilizes. This measure is connected to growing domestic prices for these product types.

▫ According to the Decree of the President of the Republic of Kazakhstan No. 17 of 17 June 2019, the Ministry of Trade and Integration of the Republic of Kazakhstan was established, with transfer thereto of the functions and powers of the Ministry of National Economy of the Republic of Kazakhstan in terms of formulating and implementing domestic and foreign trade policy, international economic integration, and protection of consumer rights.
<https://adilet.zan.kz/rus/docs/U190000017U>.

TRADE POLICY AND DOMESTIC SUPPORT MEASURES IN JANUARY – MARCH 2023

Uzbekistan	Import duty	6 January 2023	The President of Uzbekistan has extended zero customs duty rates for imports of several commodities including meat, oil, wheat until 1 January 2024. The President has signed the respective resolution "On measures to ensure compliance with the Law on the State Budget of Uzbekistan for 2023".
	Subsidies to producers	7 January 2023	Subsidies to meat and milk producers in Uzbekistan have been reduced by half compared to 2022. The President signed on 30 December 2022 the resolution "On measures to ensure compliance with the Law on the State Budget of Uzbekistan for 2023".
	Export ban	20 January 2023	A ban on exports of onions has been introduced in Uzbekistan for four months from 1 January 2023 until the end of April 2023. The main cause of the measure is that onion reserves in the country had been frozen due to abnormally cold weather, resulting in lower availability in the country. The Government of Uzbekistan lifted the restriction on 15 March 2023 due to the stabilization of prices.
Ukraine	Export licensing	2 January 2023	The Cabinet of Ministers of Ukraine has approved the list of agricultural goods for some export commodities that are subject to licensing in 2023. The list includes live cattle; beef and chicken meat; edible meat offal; eggs; rye; oats; buckwheat; millet; sugar; and nitrogen, phosphate and potassium fertilizers. This list is published in Government Resolution No. 1466 of 27 December 2022.

The report on the ***Eighth Annual Meeting of the Agricultural Trade Expert Network in Europe and Central Asia*** is available on the [FAO website](#) in [Russian](#) and [English](#).

AGRIFOOD TRADE IN EASTERN EUROPE, CAUCASUS AND CENTRAL ASIA, JANUARY – DECEMBER 2022

In 2022, most countries in Eastern Europe, Caucasus and Central Asia (EECCA) increased exports and imports of agrifood commodities, in particular grains, oilseeds and sugar. This was mostly underpinned by rapidly growing food prices rather than by increasing export volumes, which in many countries in the region remained unchanged compared to previous years. To ensure food availability and accessibility in domestic markets, most countries of the region introduced various restrictive measures on exports of main food staples – this could have a negative spillover effect for countries which rely on imports as a major source of food to fulfil domestic food demand. Ukraine remained an agrifood net exporter and a key food supplier from the EECCA region to global markets, despite the active war in its territory, with agrifood exports declining by 2 percent, and imports by 10 percent, in 2022 compared to the previous 3-year average.

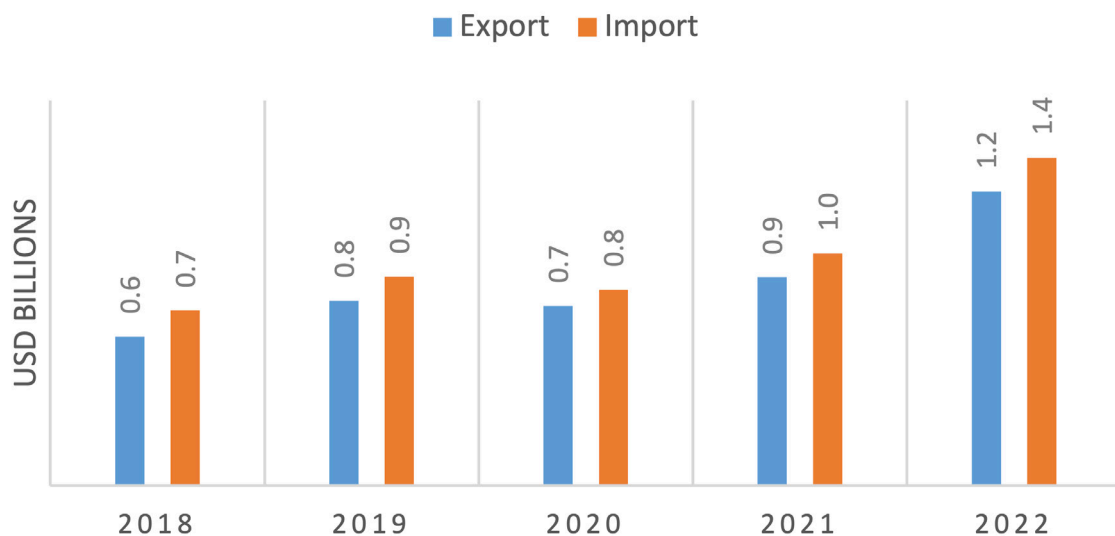
The following analysis provides a comparison of agrifood trade flows in EECCA countries in 2022 with previous years.¹

¹ Only countries with data available for at least nine months (January-September) of 2022 are included in this review. TDM does not publish trade data for Tajikistan or Turkmenistan, and 'mirror' data for 2022 do not reflect these countries' total trade flows since trade with the Russian Federation is missing for this period in TDM.

ARMENIA

Armenia's agrifood **exports** were 41 percent higher in 2022 than in the previous year, reaching **USD 1.2 billion**. The higher year-on-year exports reflect increased shipments of beverages and spirits, fruits and vegetables to the Russian Federation, and nuts and seeds to Georgia. In March 2022 Armenia supplied 4000 tonnes of wheat to Georgia. Following this unusual uptick in wheat exports, supported by higher global prices, amidst an uncertainty at the global food markets, Armenia introduced an export ban on wheat and other cereals in May 2022 for six months and extended it for another six months in December 2022.

Imports of agrifood products were 41 percent higher year-on-year, amounting to **USD 1.4 billion**. The higher agrifood imports reflect increased grain and fats and oils imports from the Russian Federation; dairy produce from Belarus and the Islamic Republic of Iran; and different types of meat from Brazil, the Russian Federation, and the United States of America.



January - December	2022	2022/2021	2022/3-years avg. ^a
USD billions		Change, %	
Export	1.2	↑41	↑54
Import	1.4	↑41	↑54

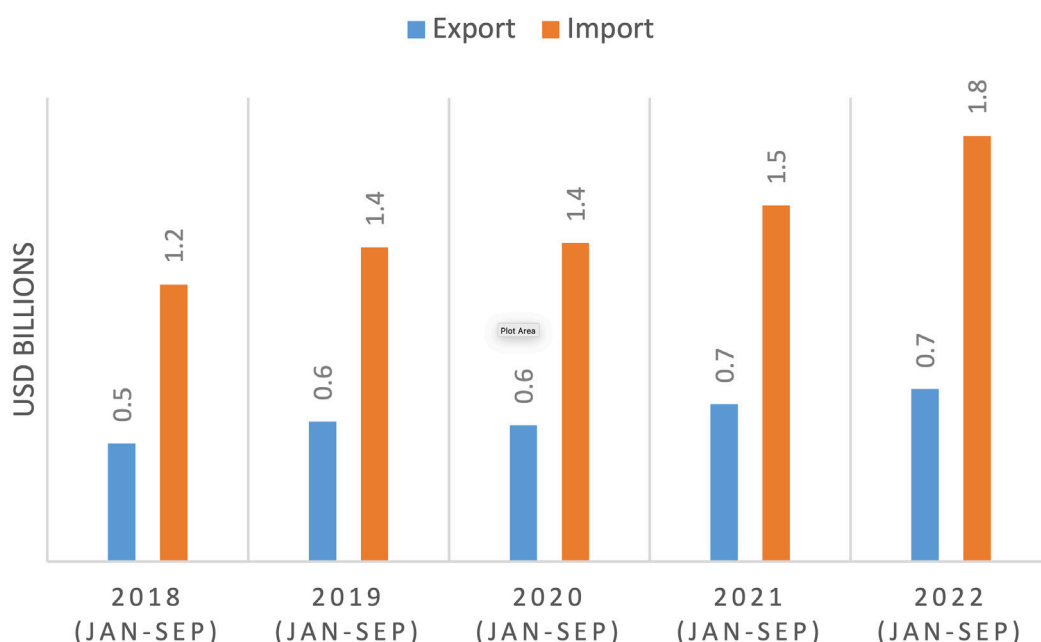
Source: based on the TDM data.

^a The years are 2019, 2020, 2021.

AZERBAIJAN

In **Azerbaijan**, agrifood **exports** in January- September 2022 were 10 percent higher year-on-year and 19 percent above the previous 3-year average for the same period. The total value of agrifood exports was **USD 745 million** in nine months of the 2022. The country increased exports of fruits and vegetables to the Russian Federation and Italy.

Agrifood **imports** were 20 percent higher year-on-year, amounting to **USD 1.8 billion** in January-September 2022. The country increased imports of cereals from Kazakhstan and the Russian Federation, as well as fats and oils from Indonesia, Malaysia, and the Russian Federation.



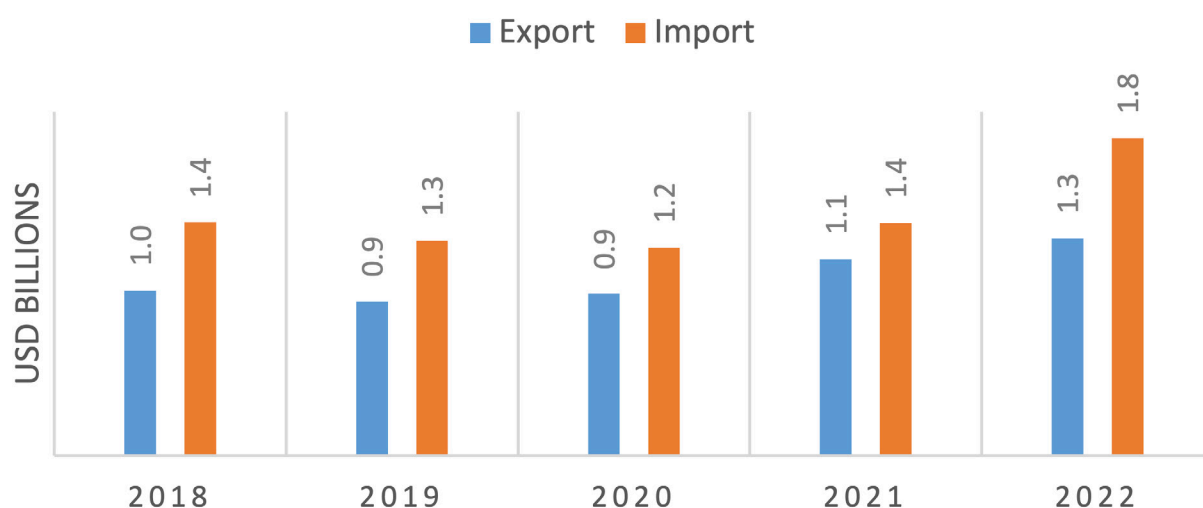
January - September	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	0.7	↑10	↑19
Import	1.8	↑20	↑29

Source: based on the TDM data.

GEORGIA

In **Georgia**, in 2022, agrifood **exports** were 11 percent higher than a year earlier and 27 percent above the average of the previous three years, amounting to **USD 1.3 billion**. The country increased animal feed, live animals, and meat exports to Azerbaijan, Armenia and Iraq. Exports of alcoholic and non-alcoholic beverages – a significant category of exports – were 4 percent below the 2021 level. Reduced exports to Ukraine and Lithuania mainly account for this drop. The Russian Federation remained the primary destination for Georgian alcoholic and non-alcoholic beverages, and exports to this destination in 2022 increased compared to the previous year.

Agrifood **imports** were 37 percent higher in 2022 than in the previous year, reaching **USD 1.8 billion**. The country increased imports by 250 thousand tonnes of milling industry products from the Russian Federation, reaching 305 000 tonnes of this commodity group in 2022. This increase was underpinned by the export duty imposed by the Russian Federation on exports of wheat grain in June 2021, which pushed Georgian importers to purchase wheat flour instead.



January - December	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	1.3	↑11	↑27
Import	1.8	↑37	↑45

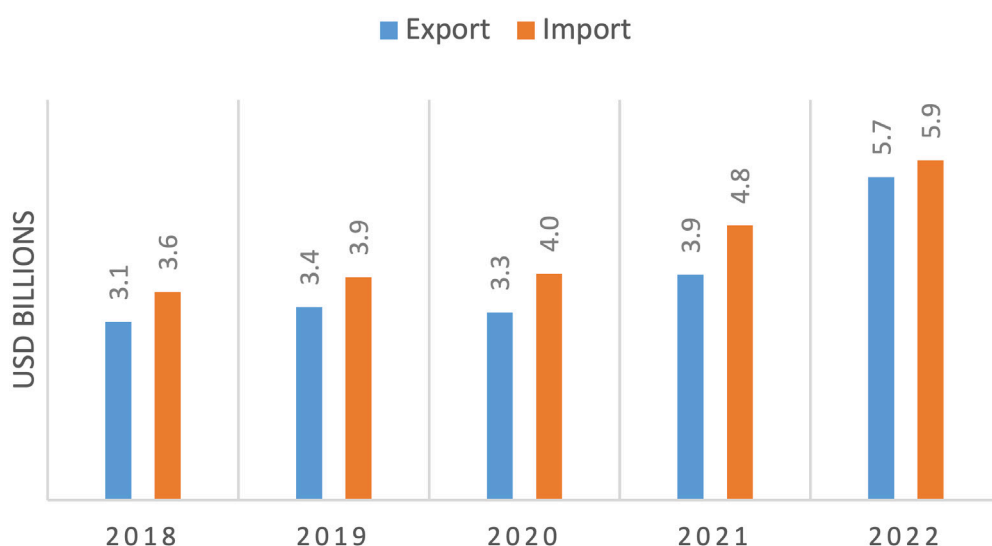
Source: based on the TDM data.

KAZAKHSTAN

Kazakhstan increased agrifood **exports** by 43 percent in 2022 compared to 2021. Driven by high agricultural commodity prices, exports of agrifood products reached **USD 5.7 billion in 2022** – substantially higher than in previous years. The value of exports of cereals increased by 43 percent year-on-year, while the volumes were up by 8 percent only. Kazakhstan increased supplies of cereals to its traditional partners for this commodity group: Azerbaijan, Afghanistan, Tajikistan, Turkmenistan, and Uzbekistan. At the same time, exports of cereals to the Islamic Republic of Iran, China and Kyrgyzstan declined in 2022 compared to the previous year. To ensure domestic availability of food amidst global food market uncertainty, Kazakhstan introduced quantitative quotas for wheat and wheat flour exports from 14 April until 30 September 2022. The total size of the quotas were 1 million tonnes for wheat and 670 000 tonnes for wheat flour, of which 83 percent of the wheat export quota and 66 percent of the wheat flour quota had been utilized.

Export volumes of fats and oils doubled, supported by strong demand and higher prices in 2022 compared to the previous year, with a substantial increase in exports to China, Uzbekistan and Tajikistan.

Imports of agrifood products in 2022 increased by 24 percent compared to a year earlier, reaching **USD 5.9 billion**. The growth of agrifood imports reflects higher imported volumes of wheat and meslin (500 million tonnes more compared to the previous year) and sunflower and rape seeds from the Russian Federation, which was five times above the 2021 level. Kazakhstan also increased sugar imports from Brazil (a 60 percent increase in 2022 year-on-year). To minimise country's dependency on imports of sugar and support domestic production, the government endorsed the initiative to triple sugar beet planting and increase subsidies for sugar beet producers from 15 000 Tenge (33 USD) to 25 000 tenge (55 USD) per tonne.



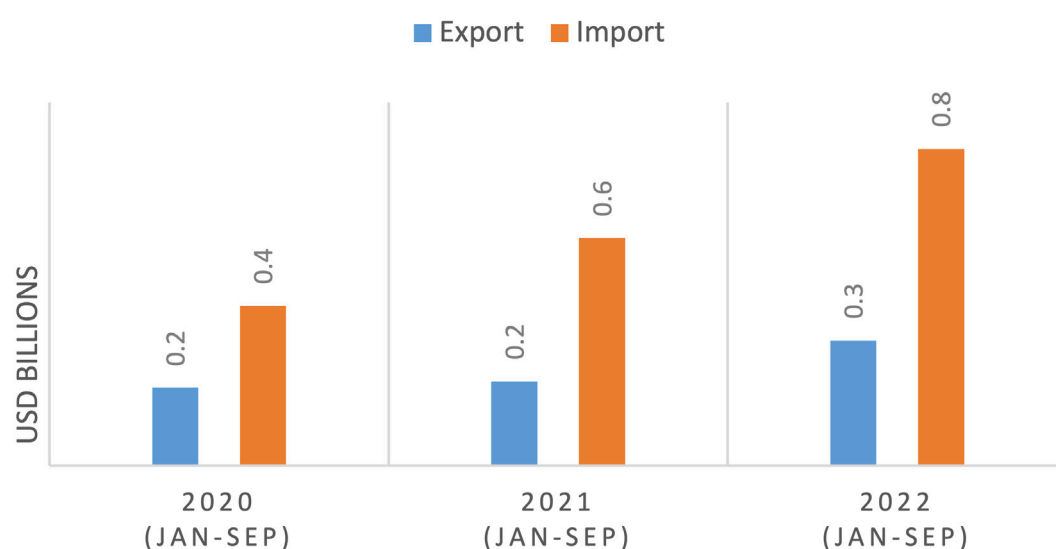
January - December	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	5.7	↑43	↑60
Import	5.9	↑24	↑41

Source: based on the TDM data.

KYRGYZSTAN

In **Kyrgyzstan**, agrifood **exports** reached **USD 310 million** in January-September 2022 – up 48 percent from the same period in 2021. Higher exports reflect increased supplies of fruits, onions, and root vegetables to the Russian Federation and Kazakhstan, and live animals to Uzbekistan.

Agrifood **imports** in January-September 2022 were 39 percent higher year-on-year, amounting to **USD 785 million**. Cereal import volumes were down by 3 percent in 2022 compared to the previous year, with an 83 000 tonne drop in supply from Kazakhstan, which it substituted with 80 000 tonnes from the Russian Federation. Kyrgyzstan increased imports of preparations of vegetables and fruits from the Russian Federation by 15 times in 2022 compared to the previous year. Amidst a drop in supply of sugar from the Russian Federation, Kyrgyzstan increased sugar imports from Brazil and India.



January - September	2022	2022/2021	2022/2-years avg. ^a
USD billions		Change, %	
Export	0.3	↑48	↑54
Import	0.8	↑39	↑64

Source: based on the TDM data.

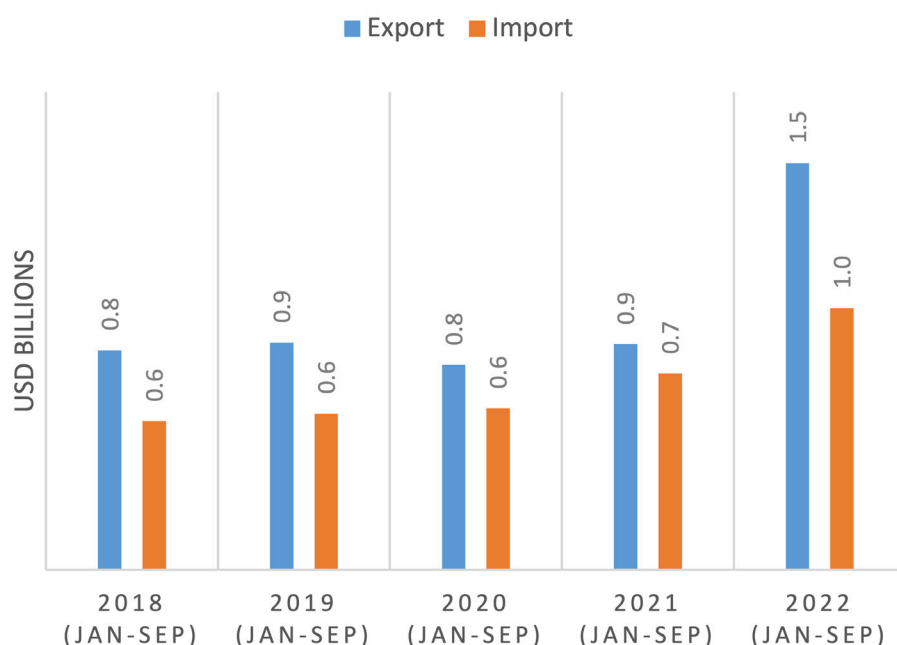
^a The years are 2020, 2021. The trade data reported in TDM for Kyrgyzstan starts from 2020.

REPUBLIC OF MOLDOVA

The **Republic of Moldova** experienced a sharp increase in agrifood **exports** in January-September 2022, which were 80 percent higher than in the same period for 2021, and 85 percent higher than the previous 3-year average. The total value of agrifood exports driven by high food prices was **USD 1.5 billion** in January-September of 2022.

Higher exports reflect record levels of oils and fats – up by USD 255 million compared to the previous year, most of which were destined for European Union countries, the Islamic Republic of Iran, and Türkiye. Additionally, export of oilseeds almost doubled, mainly to Romania and Bulgaria. Supported by record high domestic cereal production in 2021 and higher prices, export volumes for this commodity group increased by 55 percent in 2022 compared to year earlier. The government banned wheat, maize and sugar exports from 1 March to 30 April 2022. However, the maize export ban was cancelled on 10 March 2022, and the wheat ban was lifted in late June 2022. The wheat and sugar export bans contributed to a 77 and 9 percent drop in these products' exports, respectively, in 2022 relative to a year earlier. While the exports of maize almost doubled year-on-year in 2022, given a short term of the export ban.

Agrifood imports were up 33 percent in January-September 2022 compared to the previous year, and 53 percent above the previous 3-year average, reaching **USD 1.0 billion**. The higher imports reflect a two-fold increase in imports from Ukraine, with the sharpest growth for cereals, oil seeds, fats and oils, and dairy products.



January - September	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	1.5	↑80	↑85
Import	1.0	↑33	↑53

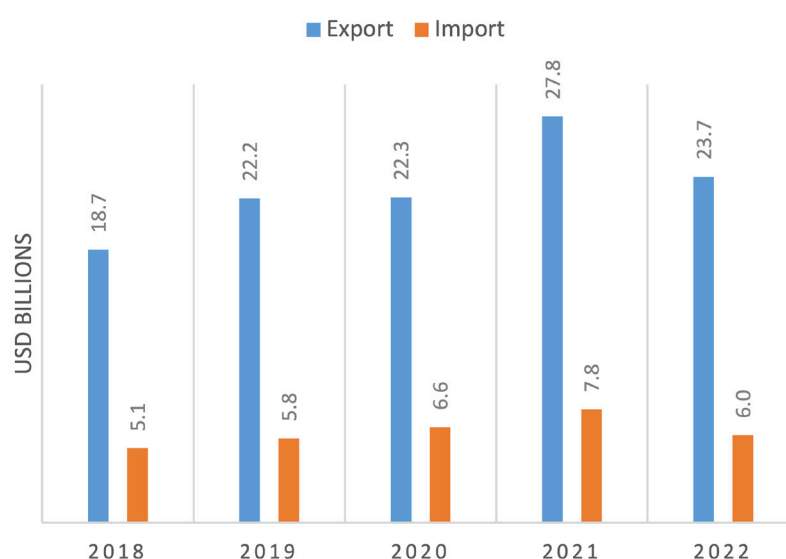
Source: based on the TDM data.

UKRAINE

In **Ukraine**, amid the unfolding war since February 2022, agrifood **exports** were 15 percent lower in 2022 than in 2021, amounting to **USD 23.7 billion**. Despite the ongoing war, the country increased exports of some staples such as oil seeds, meat and dairy products to countries of the European Union and the Middle East.

It is noted that exports of grains have improved following the entry into force of the Black Sea Grain Initiative Agreement, which was signed in July 2022 and allowed grain and other foodstuff exports from three Black Sea ports in Ukraine. In 2022, the country exported 39 million tonnes of cereals – 24 percent below the year's earlier levels.

Agrifood **imports** declined by 23 percent year-on-year in 2022, falling 10 percent below the 3-year average, amounting to **USD 6 billion**. The lower imports are due to the ongoing war, which resulted in population displacement, economic recession and destruction of transport infrastructure, and seaport closures. The major commodities imported in 2022 were vegetables and prepared animal feed.



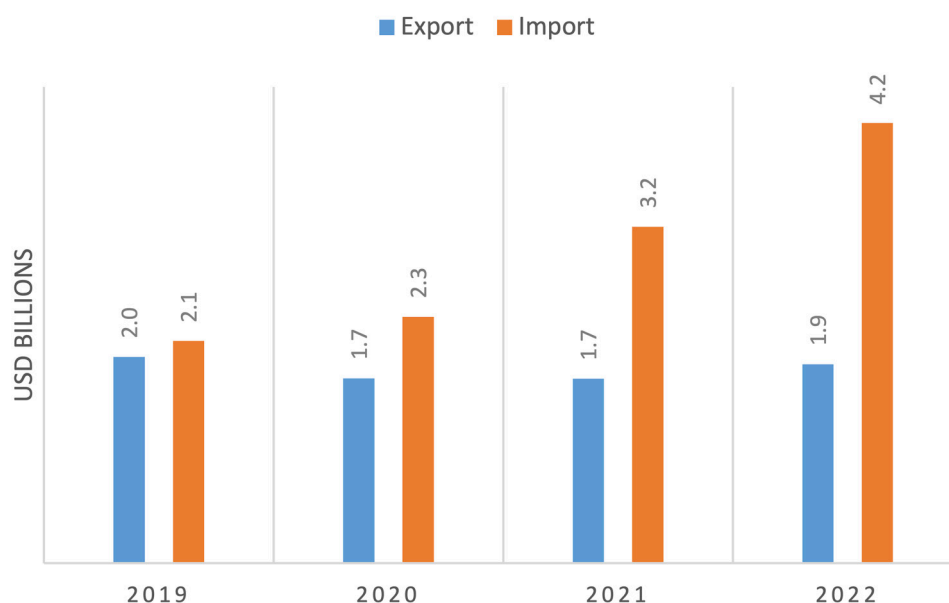
January - December	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	23.7	↓-15	↓-2
Import	6.0	↓-23	↓-10

Source: based on the TDM data.

UZBEKISTAN

Uzbekistan exported agrifood products valued at **USD 1.9 billion** in 2022. Similar to most other countries in the region, agrifood exports increased compared to 2021 – by 8 percent for Uzbekistan. The country increased exports of fruits and vegetables, mainly to the Russian Federation. Moreover, between January-June 2022 Uzbekistan exported 13 million tonnes of sunflower seed, safflower or cottonseed oil (HS1512), which is 12 million tonnes up from the previous year levels, most of which were shipped to Afghanistan. Following this spike, in June 2022 and until further notice, to prevent growing domestic prices amidst global food market uncertainty, Uzbekistan introduced a ban on exports of oils, sunflower seeds (HS1206) and other oil seeds (HS1207). This ban prevented from further export of sunflower-seed oil, and contributed to almost 100 percent drop of sunflower seeds exports in 2022 compared to previous year, from 15 million tonnes to 15 thousand, while exports of other oils seeds remained unchanged. Notably, the country's cotton exports dropped from 47 million tonnes in 2021 to 2 million tonnes in 2022, followed by gradual cotton market liberalization announced in 2020.

Agrifood **imports** were 31 percent higher year-on-year in 2022. The total value of agrifood imports was **USD 4.2 billion**. Higher prices drove higher import values of major staples. The volumes of cereals are almost unchanged year-on-year, while the value of imports increased by 25 percent in 2022 compared to a year earlier. To support imports of essential staples, the government lifted import duties on wheat flour, vegetable oils and other products in January 2022 and introduced Value Added Tax exemptions for meat and vegetable oil imports between January and 30 April 2022, and extended it until the end of 2022. These measures contributed to a 20 percent increase in imports of wheat flour and a 21 percent increase in meat imports, while imports of vegetable oil dropped by 19 percent in 2022 compared to a year earlier.



January - December	2022	2022/2021	2022/3-years avg.
USD billions		Change, %	
Export	1.9	↑8	↑4
Import	4.2	↑31	↑64

Source: based on the TDM data.

Required citation:

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