



Food and Agriculture Organization
of the United Nations

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

2nd Quarter 2023 | Bulletin



REGIONAL AND BILATERAL TRADE AGREEMENTS

CANADA-UKRAINE FREE TRADE AGREEMENT MODERNIZATION

On 11 April 2023, the Prime Ministers of Canada and Ukraine signed a Joint Declaration confirming the conclusion of substantive negotiations to modernize the Canada-Ukraine Free Trade Agreement (CUFTA). The new agreement will build on the strong Canada-Ukraine bilateral relationship, and advance fair, inclusive and transparent trade between the two countries, while contributing to long-term security, stability, and broad-based economic development in Ukraine.

The modernized CUFTA will maintain the terms of market access for goods from the 2017 Agreement, and has been updated to include new and upgraded chapters, including on investment, cross-border trade in services, temporary entry for business persons, financial services, digital trade, rules of origin cumulation with common free trade agreement partners, trade and gender and, for the first time, a chapter on trade and Indigenous Peoples.

[International.gc.ca](https://international.gc.ca)

AZERBAIJAN AND TÜRKIYE AMEND THEIR PREFERENTIAL TRADE AGREEMENT

In June 2022 the WTO Fisheries Funding Mechanism was introduced. It is a fund envisioned to support developing and least-developed countries in implementing the Agreement on fisheries subsidies.

[Sputniknews](https://sputniknews.com)

REGIONAL AND BILATERAL TRADE AGREEMENTS

THE EUROPEAN UNION EXTENDS ITS DUTY-FREE REGIME FOR UKRAINE UNTIL JUNE 2024

The Council of the European Union adopted a regulation on 25 May 2023 that extends suspension of custom duties, tariff rate quotas and trade remedy actions for Ukrainian exports to EU countries until 1 June 2024. The regulation will apply for a period of one year and suspend:

- all customs duties on Ukrainian-made products as per the requirements of the Association Agreement between the European Union and Ukraine, establishing a deep and comprehensive free trade area. This concerns categories of goods such as fruits and vegetables subject to the entry-price system, and agricultural goods and processed agricultural goods subject to tariff rate quotas;
- the collection of the anti-dumping duty on imports originating in Ukraine; and
- the application of the common rules for imports (safeguards) with respect to imports originating in Ukraine.

The above-mentioned regulation entered into force on 6 June 2023.

INTERNATIONAL COOPERATION

UKRAINE AND POLAND AGREE TO UNBLOCK TRANSIT OF UKRAINIAN AGRICULTURAL PRODUCTS

As a result of negotiations held in Warsaw on 8 April 2023, Ukraine and Poland reached an agreement to unblock the transit of Ukrainian agricultural goods across Poland's territory from 21 April 2023.

[Apk-inform](#)

THE RUSSIAN FEDERATION AND CHINA SIGN PROTOCOLS ON PHYTOSANITARY REQUIREMENTS FOR EXPORTS OF SOME AGRICULTURAL GOODS

On 24 May 2023, protocols on the expansion of cooperation between the two countries were signed in Beijing. The heads of the Russian Federation's Federal Service for Veterinary and Phytosanitary Supervision (Rosselkhozadzor) and the People's Republic of China General Administration of Customs (GAC) ratified protocols on phytosanitary requirements for exports of millet and raw plant materials used for Chinese medicine.

[Fsvps.gov.ru](#)

INTERNATIONAL COOPERATION

UZBEKISTAN SIGNED THE COOPERATION AGREEMENT IN AGRARIAN SECTOR

The Ministry of Agriculture of the Republic of Uzbekistan and Deutsche Sparkassenstiftung für Internationale Kooperation e.V., a German company, signed a memorandum of understanding on 3 May 2023. The document defines the following key cooperation areas:

- support for agricultural insurance;
- expanded use of the working loan funds available in certain Uzbekistani banks; and
- use of business simulators to train young farmers in entrepreneurship.

The cooperation agreement covers agricultural education, internships, and the organization of seminars.

Agro.uz

IRAN AND KAZAKHSTAN SIGNED BILATERAL TRADE AGREEMENTS IN THE AGRICULTURAL SECTOR WORTH USD 1 BILLION

On 28 June 2023, during a meeting between Iran and Kazakhstan, Iran showed interest in investing in Kazakh medicine, dairy plants, and agricultural products. As a result, trade agreements in the agricultural sector worth USD 1 billion were signed. Both sides also discussed increasing the bilateral trade to USD 3 billion.

Caspianpolicy.org

REGIONAL WTO NEWS

NEW GLOBAL TRADE DATA PORTAL OFFERS REAL-TIME ACCESS TO TRADE DATA

A new Global Trade Data Portal is now available on the World Trade Organization (WTO) website, which provides access to real-time data on trade. The portal allows users to monitor supply chain activities and provides warnings of potential disruptions. The portal was launched by the WTO on 31 May 2023, which included the release of new dashboards on seaborne trade in wheat and other grains and oil seeds that aim to improve market transparency during a time of food insecurity.

[WTO.org](https://www.wto.org)

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, APRIL-JUNE 2023

COUNTRY	MEASURE CATEGORY	PUBLICATION DATE	DESCRIPTION
Belarus	Import ban	28 June 2023	The Belarusian government has prolonged its import ban on certain agricultural and food products originating from sanction-imposing countries, with the restriction effective until 31 December 2023.
Georgia	Lifting of export ban	6 April 2023	The Georgian government has lifted the wheat export ban, which was initially set to last until 1 July 2023. This ban, implemented on 4 July 2022, to guarantee national food security, was lifted on 6 April 2023, providing an earlier opportunity for wheat producers to export their crops.
	Import duty	12 June 2023	In an effort to aid Georgian farmers struggling with crop sales, a temporary duty has been implemented on wheat flour imports exceeding 200 kilograms. As per this new regulation, a levy of 0.2 lari (approximately USD 0.08) will be applied to each kilogram of wheat. However, goods accompanied by a EUR-1 certificate will exempt from this duty. This support measure will stay in effect until 1 November 2023.
Kazakhstan	Lifting of export ban and imposition of export quota	8 April 2023	The Ministry of Agriculture in Kazakhstan has eased the onion export ban initially set in January 2023 for three months. From 8 to 28 April 2023, the ban was replaced with a quantitative quota of 20,000 tonnes for onion exports from Kazakhstan to third countries and Eurasian Economic Union (EAEU) states. This measure was designed to prevent mass exportation of the vegetable and to stabilize its domestic prices.
	Import ban	10 April 2023	Kazakhstan's Minister of Agriculture enacted the Order of 10 April 2023, "On implementing a six-month prohibition on wheat imports via road transport to the Republic of Kazakhstan." This ban is applicable to wheat originating from third countries and countries within the EAEU (codes 100119 and 100199 according to the EAEU foreign economic activity commodity nomenclature).
Russian Federation	Import ban	7 April 2023	As of 5 April, 2023, Rosselkhoznadzor has suspended all imports of dairy products from Armenia due to concerns over inadequate state oversight of these deliveries. Withdrawal of the measure is contingent on the resolution of identified violations by the Armenian authorities, the progress of which will be evaluated in due course.
	Subsidies	16 May 2023	To maintain the resilience of its agro-industrial complex, the Ministry of Agriculture of the Russian Federation has decided to increase the subsidy limits for preferential short-term lending by 2.4 billion rubles, up to a total of 18.9 billion rubles. The limit on investment lending for borrowers in the smaller businesses sector has been increased by 500 million rubles, inclusive of providing them with necessary machinery and equipment.
	Subsidies	29 May 2023	A law has been signed to provide financial support to small- and medium-sized business entities engaged in extraction or sale of mineral drinking waters. According to the new law, small- and medium-sized business entities will be able to receive subsidies, investments from the budget, and state and municipal guarantees. Previously, this category of entrepreneurs had no access to such financial support. The law came into force ten days after its official publication.

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, APRIL-JUNE 2023

Russian Federation	Subsidies	1 June 2023	<p>A draft law has been passed that augments support for wine grape growers and winemakers, while also defining the regulatory role of the Ministry of Agriculture of the Russian Federation in regulating output of winemaking products. Financial support to wine grape growing and winemaking entities will include subsidies to offset costs associated with vineyard planting.</p> <p>The draft law facilitates the potential application of the GLONASS global navigation satellite system to determine the location of a vine plantation, presented as a graphical chart specifying its boundary coordinates. It mandates winemakers to create a physical vine plantation passport and submit its digital counterpart to the federal self-regulating organization of wine grape growers and winemakers. The document will take effect on 1 September 2023.</p>
Uzbekistan	Zero import duty	23 March 2023	<p>On 23 March 2023, a Decree was signed to introduce zero customs duty rates on the import of certain products. The Presidential Decree provides an exemption from customs duties for 24 types of food products and commodities until 1 January 2024. These include cheese, curd, chocolate, confectionery, apples, pears, quinces, yogurt, kefir, dairy products, pasta, pork, onions, and lettuce.</p>
Ukraine	Support of dairy production	3 April 2023	<p>The Parliament of Ukraine has passed three draft laws aimed at reducing the cost of dairy products and introducing new strategies for the development of the dairy production sector. These include:</p> <ol style="list-style-type: none"> 1. "On Amending the Customs Code of Ukraine and Certain Laws of Ukraine to Introduce a Contribution for Sectoral Financing of Dairy Product Promotion Programmes" (No. 9163) 2. "On Amending the Tax Code of Ukraine to Introduce a Contribution for Sectoral Financing of Dairy Product Promotion Programmes" (No. 9162) 3. "On Amending the Tax Code of Ukraine to Reduce the Value-Added Tax Rate for Milk and Dairy Products" (No. 9161) <p>Draft law No. 9161 aims to reduce the VAT rate for milk and dairy products to 10 percent while, draft laws Nos. 9163 and 9162 suggest the introduction of a fee for processing enterprises of the dairy industry in the amount of 0.5% of the total value of sales of goods in the calendar (reporting) quarter (excluding value added tax); for importers of milk and milk raw materials, dairy products - in the amount of 0.5 percent of the customs value of imported milk and milk raw materials, dairy products (excluding value added tax). These funds are intended for the promotion of dairy products, developing innovations, and setting and designing new standards.</p>

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, APRIL-JUNE 2023

Ukraine	State regulation of fishing industry	28 April 2023	<p>The Law No. 7616, "On Amending Certain Legislative Acts of Ukraine Regarding the Enhancement of State Regulation in Fisheries, Protection and Sustainable Use of Water Bioresources, and Aquaculture," came into effect on 28 April 2023. This legislation establishes the eFish Unified State Electronic System of Sector Management, aimed at the digitalization of the sector. It implements a mechanism for the issuance of authorization documents in an electronic format and ensures all fishing vessels are equipped with remote control capability. Additionally, it introduces legislative requirements for fish receiving centers, providing a significant tool for recording water bioresources caught and their resultant products.</p>
Ukraine	Abolition of export licensing	16 May 2023	<p>The Cabinet of Ministers of Ukraine has amended the 2023 list of goods for which exports and imports are subject to licensing and quotas. The need for a license for exports of some food products has been abolished, as per Resolution No. 472 of 12 May 2023. The commodity items no longer subject to export licensing include live bovine; frozen bovine meat; domestic hen meat; salted, brined, dried, or smoked meat and edible meat offal; edible flours of meat and meat offal; domestic hen eggs; rye; oats; and millet.</p>
EAEU	Lifting of import duty	7 April 2023	<p>The Eurasian Economic Commission's Council decided to grant tariff exemptions in the form of duty-free import of cane raw sugar during the period through to 31 December 2023. Sugar imported to the Republic of Belarus in the amount of no more than 100,000 tonnes, to the Republic of Kazakhstan – in the amount of no more than 350,000 tonnes, to the Kyrgyz Republic – in the amount of no more than 50,000 tonnes and to the Russian Federation – in the amount of no more than 100,000 tonnes is exempt from import customs duty. The decision was adopted with due regard to the EAEU Member States' indicative balances on sugar for 2023. The approved tariff exemption is aimed at developing the capacity of the sugar processing industry and providing the Union countries' enterprises with raw materials. The Decision shall come into effect after 10 calendar days have elapsed from the date of its official publication.</p>

AGRIFOOD TRADE IN EASTERN EUROPE, CAUCASUS AND CENTRAL ASIA – JANUARY-MARCH 2023

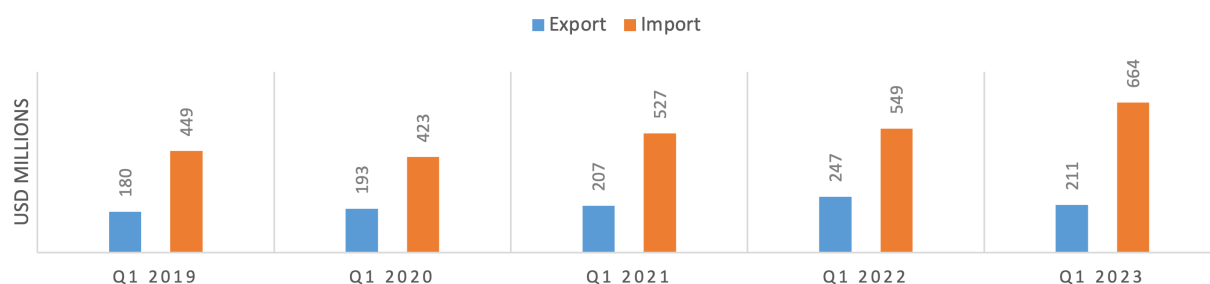
In the first quarter of 2023, the agrifood trade in the region displayed mixed trends, with Kazakhstan, Ukraine and Uzbekistan experiencing higher exports due to strong global demand and sustained high food prices. However, Azerbaijan, Georgia and Kyrgyzstan saw moderate decreases in exported agrifood volumes compared to the previous year. Countries in the region demonstrated resilience and adaptability to external shocks and increasingly uncertain global food markets. Ukraine remains a big net exporter of agrifood products in the Eastern Europe, Caucasus and Central Asia (EECCA) region. However, the ongoing war in Ukraine poses challenges and risks to food security, highlighting the need to diversify food supply sources and enhance cooperation in regional cross-border trade.

The following analysis provides a comparison of agrifood trade flows in EECCA countries in the first quarter (January-March) of 2023 with the same period in previous years.¹

AZERBAIJAN

In Q1 2023, Azerbaijan's agrifood **exports** totaled USD 211 million, marking a 15 percent drop compared to Q1 2022. However, when compared to the 4-year average, there was a moderate growth of 2 percent. A significant surge was seen in the export of non-alcoholic beverages to the Russian Federation, which increased 13-fold from the previous year's low levels. In contrast, exports of vegetables, one of Azerbaijan's primary export commodities, fell by 20 percent, while cotton exports to Türkiye halved due to the closure of plants in the country's earthquake-affected regions.

Azerbaijan's agrifood **imports** significantly increased in Q1 2023, with imports valued at USD 664 million. This represents a rise of 21 percent compared to Q1 2022 and exceeds the 4-year average by 36 percent. The country more than doubled its import volumes of cereals from Kazakhstan and the Russian Federation, and sugar from Brazil compared to Q1 2022. Due to potato stock shortages during a record-cold winter and a reduced supply from Türkiye, Azerbaijan imported potatoes from Belarus for the first time.



Quarter I	Q I-2023	2023/2022 (Q I)	2023/4-years avg. (Q I)
USD millions		Change, %	
Export	211	↓-15	↑2
Import	664	↑47	↑36

Source: based on the TDM data

Note: Inconsistent data for volumes prior to 2019, hence only 2019-2023 data are included.

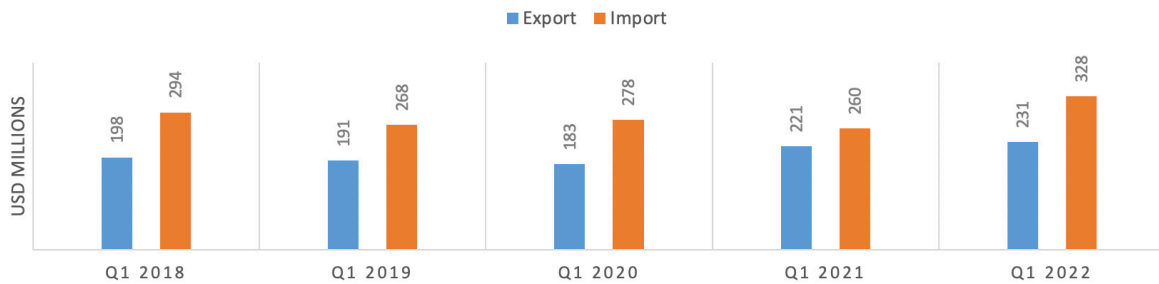
¹ Only countries with data available for January-March of 2023 are included in this review. TDM does not publish trade data for Tajikistan or Turkmenistan, and 'mirror' data for 2022 do not reflect these countries' total trade flows since trade with the Russian Federation is missing for this period in TDM.

GEORGIA

Georgia recorded a surge in the value of agrifood **exports** in Q1 2023, with a significant increase of 30 percent compared to Q1 2022, demonstrating a growth of 46 percent over the five-year average. Notably, the country almost doubled the exports of beverages and spirits to the Russian Federation both in value and volume, while the shipments of these commodities from EU countries to the Russian Federation declined.

Agrifood **imports** in Georgia saw a substantial rise of 35 percent, surpassing the 5-year average by 55 percent in Q1 2023. The country increased its imports of wheat grain from the Russian Federation by 45 percent, while wheat flour imports were up 34 percent compared to Q1 2022. This marks the first increase in wheat grain imports in Georgia since the Russian Federation implemented an export duty on wheat grain exports in June 2021, which had led Georgian importers to prefer purchasing wheat flour. However, as of June 2023, the Government of Georgia imposed a temporary customs duty on imported wheat flour for five months to enhance the competitiveness of domestic processors and promote their local market sales.

Moreover, Georgia imported ten times more sugar from Brazil than the previous year, driven by higher domestic demand for this commodity due to lower imports in 2022. There was also a 20 percent increase in meat exports from Brazil. Notably, the country saw a rise in imports of animal feed, corn, and soybean oilcake from Ukraine, responding to the increased demand from poultry producers for animal feed.



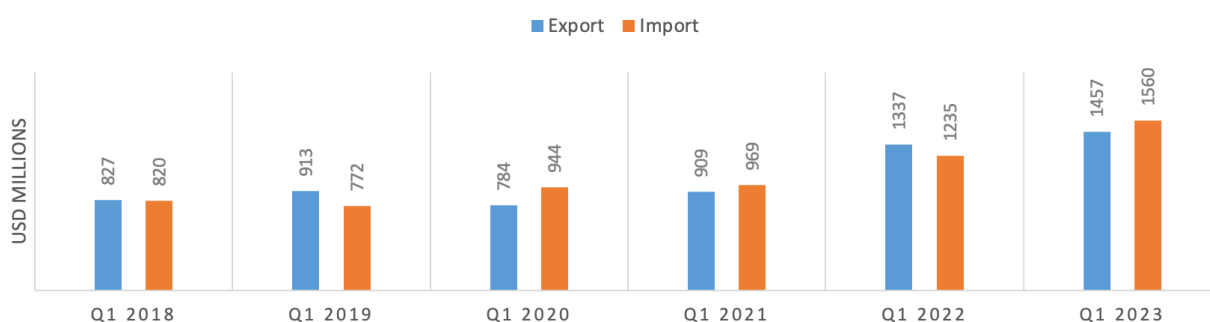
Quarter I	Q I-2023	2023/2022 (Q I)	2023/5-years avg. (Q I)
USD millions		Change, %	
Export	300	↑30	↑46
Import	444	↑35	↑55

Source: based on the TDM data

KAZAKHSTAN

Kazakhstan's agrifood **export** sector demonstrated moderate growth in Q1 2023, registering a 9 percent increase in value compared to Q1 2022. However, this growth jumps to a significant 53 percent when compared to the 5-year average. The increase is predominantly driven by higher exports of cereals and oilseeds to Azerbaijan, China, Tajikistan, and Uzbekistan, due to stronger demand, higher wheat output in the 2022/23 season, and elevated food prices. Exports to China are expected to improve further due to grain carriers' resumption of shipments to China from April 2023. Additionally, as of April 2023, Kazakhstan and Azerbaijan signed contracts worth USD 55 million during a Baku trade mission, suggesting further enhancement of trade flows between the two countries.

On the **import** side, agrifood imports in Kazakhstan increased by 26 percent year-on-year in value terms in Q1 2023, exceeding the 5-year average by 65 percent. The country experienced a 24 percent growth in imported volumes of cereals, and a 43 percent surge in sugar supply from the Russian Federation. However, wheat imports from the Russian Federation are expected to fall due to the 6-month ban on road-import wheat, imposed in mid-April 2023.



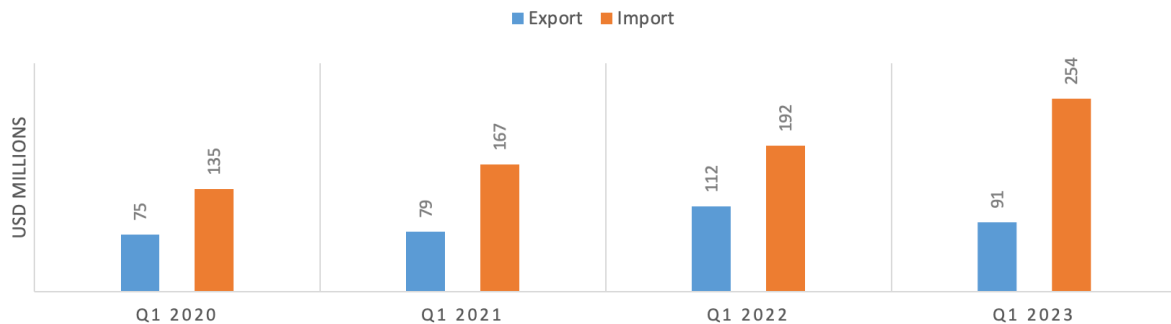
Quarter I	Q I-2023	2023/2022 (Q I)	2023/5-years avg. (Q I)
USD millions		Change, %	
Export	1457	↑9	↑53
Import	1560	↑26	↑65

Source: based on the TDM data

KYRGYZSTAN

Kazakhstan’s agrifood **export** sector demonstrated moderate growth in Q1 2023, registering a 9 In Q1 2023, Kyrgyzstan’s agrifood **exports** amounted to USD 91 million, reflecting a decrease of 19 percent compared to Q1 2022. However, compared to the 3-year average, there was a slight increase of 3 percent. Notably, amidst supply shortages in onion and potatoes throughout Central Asia and the South Caucasus countries in January-March due to stock losses as a result of extreme cold weather in the region, Kyrgyzstan supplied onions to Uzbekistan for the first time in the last four years, which led to a temporary export ban on onions due to higher domestic demand and increased prices for this product. Additionally, Kyrgyzstan exported 13,000 tons of maize to Uzbekistan during Q1 2023, compared to insignificant or no shipments in previous years. The signing of a contract between Kyrgyzstan and Uzbekistan businesses in January 2023, valued at USD 100 million for the supply of maize grain from Kyrgyzstan to Uzbekistan, contributed to the increased maize exports.

On the **import** side, Kyrgyzstan’s agrifood imports reached USD 254 million in Q1 2023, indicating an increase of 32 percent compared to Q1 2022. There was a three-fold increase in imported volumes of wheat and other cereals from the Russian Federation in the first three months of 2023, supported by lower imports in 2022 and relatively stabilized global prices on this food staple.



Quarter I	Q I-2023	2023/2022 (Q I)	2023/3-years avg. (Q I)
USD millions		Change, %	
Export	91	↓-19	↑3
Import	254	↑32	↑54

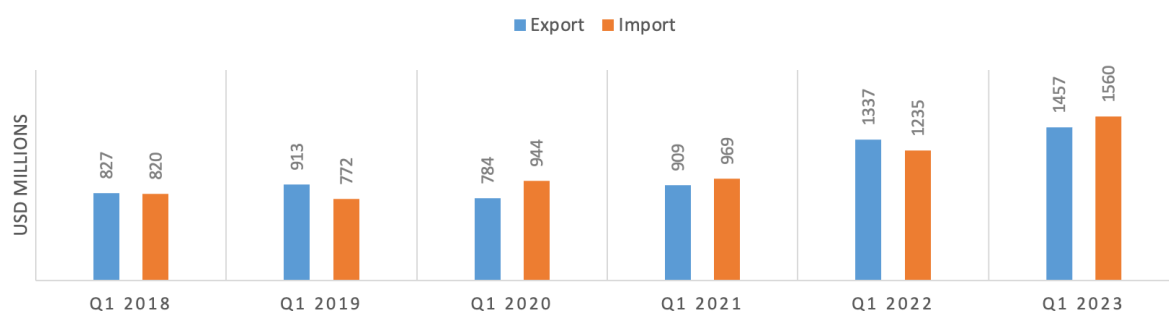
Source: based on the TDM data

Note: Data for Kyrgyzstan is only available from 2020.

UKRAINE

Ukraine's agrifood **exports** experienced a moderate 3 percent increase in Q1 2023 compared to Q1 2022. The export increase was primarily driven by higher shipments of cereals to EU countries and oilseeds to the European Union and Türkiye, supported by the European Union's solidarity lanes and the Black Sea Grain Initiative implemented since mid-2022. However, starting from June 2023, the European Union has extended restrictions on Ukrainian grain imports due to an excess of supply in five member states shared borders with Ukraine: Bulgaria, Hungary, Poland, Romania, and Slovakia. The products cannot be sold domestically but can be transited or be exported outside the EU. This is a temporary measure to manage surplus in those countries.

Regarding agrifood **imports**, Ukraine recorded a 22 percent increase in value in Q1 2023 compared to the previous year, surpassing the 5-year average by 15 percent. Notably, there was a 15 percent decrease in imported volumes of fruits from Türkiye, and a 33 percent decline in meat supplies, with a significant share originating from EU countries.



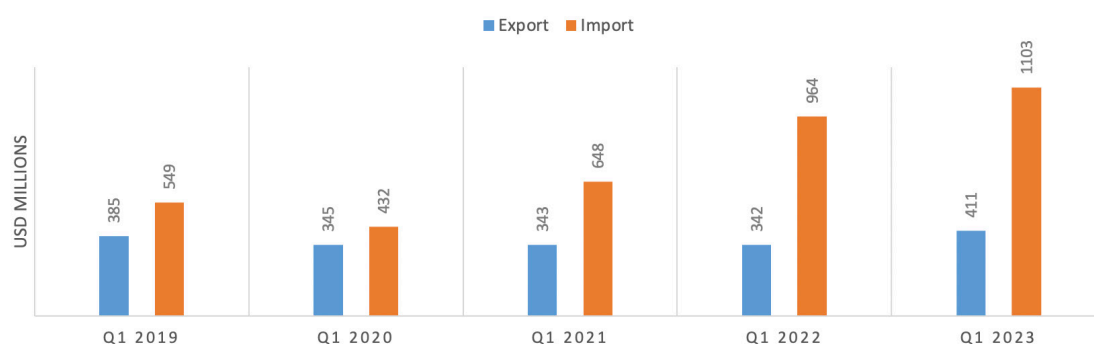
Quarter I	Q I-2023	2023/2022 (Q I)	2023/5-years avg. (Q I)
USD millions		Change, %	
Export	6777	↑3	↑25
Import	1809	↑22	↑15

Source: based on the TDM data

UZBEKISTAN

Uzbekistan's agrifood **exports** showcased a robust growth of 20 percent in Q1 2023 compared to the same period in 2022. Specifically, Uzbekistan increased shipped volumes of wheat flour to Afghanistan by 20 percent year-on-year, as well as fruits to the Russian Federation and fruits and vegetables to China.

Regarding agrifood **imports**, Uzbekistan experienced an increase of 14 percent, exceeding the 4-year average by 70 percent in the Q1 2023. The growth in the value of imports reflects higher demand for imported products, elevated global food prices, and measures that lower tariff barriers. For example, in 2022, the zero customs duty rates for imports of several commodities, including meat, oil, and wheat, were in place and have been extended from January 2023 until 1 January 2024. In Q1 2023, Uzbekistan increased imports of wheat and wheat flour by 27 percent and oilseeds by 69 percent from Kazakhstan compared to the previous year.



Quarter I	Q I-2023	2023/2022 (Q I)	2023/4-years avg. (Q I)
USD millions		Change, %	
Export	411	↑20	↑16
Import	1103	↑14	↑70

Source: based on the TDM data

Note: Data for Uzbekistan is only available from 2019.

Additional information

[FAO Regional Office for Europe and Central Asia](#)

<https://www.fao.org/markets-and-trade/areas-of-work/trade-policy-and-partnerships/europe-and-central-asia/en/>

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