



Food and Agriculture Organization
of the United Nations

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

3rd Quarter 2023 | Bulletin



TRADE AGREEMENTS

THE REPUBLIC OF MOLDOVA WITHDRAWS FROM THE INTERNATIONAL SUGAR AGREEMENT

The Republic of Moldova withdraws from the International Sugar Agreement adopted on 20 March 1992 by the United Nations Sugar Conference in Geneva. Upon completion of the procedure, Moldova's membership in the International Sugar Organization (ISO) will end. The reasons which spurred the initiation of withdrawal from the International Sugar Agreement include the contraction of areas planted with sugar beets in recent years; the drop of sugar processing in the Republic of Moldova; obligation to periodically prepare and deliver ample statistical reports on the production and processing of sugar beets, which implies administrative and staff expenses.

moldovalive.md

COUNCIL OF THE EU ADOPTED THE RENEWAL OF TEMPORARY TRADE LIBERALIZATION MEASURES FOR THE REPUBLIC OF MOLDOVA

On 20 July 2023 the Council of the EU adopted a regulation, which renews and extends the temporary suspension of all import tariffs and the entry-price system for another year, until 24 July 2024. The measures continue to cover all seven agricultural products for which exports from the Republic of Moldova into the EU are not yet fully liberalized under the Deep and Comprehensive Free Trade Area (DCFTA), as they are subject to duty-free quotas: plums, table grapes, apples, tomatoes, garlic, cherries and grape juice. The renewal and extension of these measures aim to ensure the continuation of existing trade flows from the Republic of Moldova to the EU, which will support Moldova's economy.

consilium.europa.eu

UKRAINE AND ROMANIA SIGNED A NEW GRAIN DEAL

On 18 August 2023 Ukraine and Romania signed an agreement stating their decision to work together on the boosting of Ukraine's export of grain through Romania. During the meeting, the Prime Ministers of the two countries discussed ways to improve infrastructure for grain transportation by river, rail, road and sea.

kragroconsult.com

TRADE AGREEMENTS

MOLDOVAN AGRICULTURAL PRODUCTS TO BE EXPORTED DUTY-FREE TO THE UNITED KINGDOM OF GREAT BRITAIN AND NORTHERN IRELAND

In May 2023, revisions were made to the Strategic Partnership, Trade, and Cooperation Agreement between the Republic of Moldova and the United Kingdom of Great Britain and Northern Ireland. These amendments include a temporary suspension of tariff quotas for imports of Moldovan agricultural products to the market of the United Kingdom of Great Britain and Northern Ireland. In addition, entry prices for specified agricultural products have been temporarily lifted as outlined in the agreement. These measures will be valid for 12 months and will apply to Moldovan exports of the following products: tomatoes, garlic, table grapes, apples, plums, grape juice and cherries. The agreement entered into force on 1 August 2023.

moldpres.md

KAZAKHSTAN HAS RATIFIED KAZAKH-TURKISH AGREEMENT ON INFORMATION EXCHANGE AND SIMPLIFICATION OF CUSTOMS CONTROL PROCEDURES

Kazakhstan has ratified an agreement with Türkiye, focusing on information exchange and customs control simplification. The agreement aims to enhance efficiency and reduce time required for customs clearance through electronic data exchange on goods, including agricultural goods, and vehicles in transit between the two nations.

azertag.az

REGIONAL WTO NEWS

UKRAINE FORMALLY ACCEPTS THE WTO AGREEMENT ON FISHERIES SUBSIDIES

On 17 August 2023 Ukraine formally deposited its instrument of acceptance for the Agreement on Fisheries Subsidies. WTO Director-General received Ukraine's instrument during her visit to Kyiv from the Deputy Prime Minister, Minister of Economy of Ukraine. This significant milestone underscores Ukraine's steadfast commitment to multilateral cooperation and reinforces its resolute endorsement of the WTO's mission for sustainability.

WTO

UZBEKISTAN ADVANCES TOWARDS WTO ACCESSION BY CHANGING NATIONAL LEGISLATION

The President of the Republic of Uzbekistan signed [the Decree "On introducing amendments to some acts of the President of the Republic of Uzbekistan in connection with the harmonization of the national legislation of the Republic of Uzbekistan with the agreements of the World Trade Organization"](#).

Additionally, the Ministry of Economy and Finance and the Customs Committee were instructed to submit proposals to the Cabinet of Ministers on the unification of customs clearance fees for goods under export and import customs regimes by 1 November 2023.

UZA.UZ

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, JULY–SEPTEMBER 2023

| COUNTRY | MEASURE CATEGORY | PUBLICATION DATE | DESCRIPTION |
|------------|------------------|-------------------|---|
| Azerbaijan | Import ban | 4 September 2023 | In order to ensure protection against infectious diseases of animals, Azerbaijan has introduced a temporary restriction on imports of poultry products, feed and equipment used for the slaughtering and processing of poultry meat from enterprises located in the Republic of Tatarstan of the Russian Federation, as well as in the province of Guayas of the Republic of Ecuador. |
| Belarus | Export licensing | 21 September 2023 | Belarus has extended licensing of flax fiber exports for six months in compliance with Resolution No. 607 of the Council of Ministers dated 19 September 2023. |
| Georgia | Import ban | 13 July 2023 | The Georgian government has imposed a ban on wheat imports until 1 November 2023 due to the poor harvest in Kakheti province caused by heavy rainfall. |
| Kazakhstan | Import ban | 26 September 2023 | Kazakhstan has extended the ban on road imports of wheat for six months, starting from 11 October 2023. This measure was first introduced from 10 April 2023 until 10 October 2023. Furthermore, on 26 September 2023, a six-month ban on rail imports of wheat was introduced, except for grain destined for licensed elevators, grain processing, and poultry enterprises. These rail import restrictions do not apply to transit transport through Kazakhstan. |
| Kyrgyzstan | Export ban | 5 September 2023 | The Kyrgyz authorities have introduced a temporary ban on the exports of certain types of grain crops and animal feed for a period of six months. The restriction applies to hay, straw, compound feed, bran, and grain feed, as well as barley, rice and oats. |
| | Export ban | 26 September 2023 | The Government of Kyrgyzstan has adopted Resolution "On the introduction of a temporary ban on the export of certain types of agricultural goods imposing a ban on the export of wheat flour and food wheat for a period of six months. The decision aims to ensure food security in Kyrgyzstan. The document was adopted on 22 September 2023 and comes into force on 25 September 2023. |

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, JULY–SEPTEMBER 2023

| | | | |
|--------------------|----------------------------|-------------------------------|--|
| Russian Federation | Organic products | 17 July 2023 | The Government of the Russian Federation has approved a strategy for the development of organic production until 2030. The strategy is aimed at advancing the development of production and consumption of organic products, the development of its domestic market and exports, the introduction and use of advanced scientific and technical developments in the field of organic agriculture and the promotion of entrepreneurship in the production of organic products. |
| | State support | 20 July 2023 | The State Duma of the Russian Federation has passed a law promoting domestic seed production. The law was considered in the first reading in early July 2023. It prioritizes state support for Russian legal entities and individuals who cultivate agricultural plant varieties and hybrids within the Russian Federation without need to import seeds from abroad. This legislation aims to boost domestic seed production, foster the development of lucrative and promising crop varieties, enhance food security, encourage investment in domestic breeding, and streamline administrative processes. |
| | Import quota | 20 July 2023 | The Russian Federation has increased the quota for tomatoes to be imported from Türkiye. According to the Decree issued by the Russian Federation Ministry of Agriculture, the annual import quota has been raised from 350 000 tons to 500 000 tons. |
| | Import duty and import ban | 26 July 2023 3 August 2023 | The Russian Federation has raised the import duty on wine from 12.5 percent to 20 percent and banned imports of prepared fish and seafood products from Albania, Canada, the EU, the United Kingdom of Great Britain and Northern Ireland, Iceland, Liechtenstein, Montenegro, Norway, the Republic of Moldova, the USA and Ukraine. The ban will be in effect from 1 August 2023 until the end of 2023. The measure is described in Decree No. 1173 issued by the Cabinet of Ministers on 7 July 2023. |
| | Logistics subsidies | 8 August 2023 | From 1 January 2024, the Russian Federation will compensate 100 percent of the logistics costs associated with exports of several categories of dairy products, including cheese, butter and dry whey. The Russian government decided to subsidise the full cost of logistics for dairy exports to remove the surplus of dairy products from the domestic market and to prevent a price slump. The Russian Agricultural Ministry explained that the hike in logistics subsidies was needed due to large stocks of dairy products with long-shelf life accumulated at warehouses of Russian milk processors over the past several months. |
| | Import ban | 21 August 2023 | The Russian Federal Service for Veterinary and Phytosanitary Surveillance (Rosselkhoz nadzor) has banned the import of some fruits from New Zealand into the Russian Federation beginning from 22 August 2023. This ban applies to products under the HS codes 0808 and 0809, which include fresh apples, pears, quince, apricots, cherries, sweet cherries, peaches, nectarines, plums, and sloe berries. The reason for the decision is the identification of the quarantine object, <i>Monilinia fructicola</i> (Winter) Honey. |
| | Export ban | 28 August 2023 | The Government of the Russian Federation has renewed the ban on rapeseed exports until 29 February 2024. According to the respective Decree , the renewed ban on rapeseed exports from the Russian Federation is established from 1 September 2023 to 29 February 2024, inclusive. The export restriction will not apply to exports to member-states of the Eurasian Economic Union. |

TRADE POLICY AND DOMESTIC SUPPORT MEASURES, JULY–SEPTEMBER 2023

| | | | |
|---------|------------------|-------------------|--|
| Ukraine | Import ban | 17 July 2023 | Ukraine has banned imports of incubation eggs, poultry meat and products from Poland on 13 July 2023 due to registered cases of the Newcastle disease. |
| | Export licensing | 28 September 2023 | In order to regulate the export of certain agricultural goods to Bulgaria, Romania, Slovakia, Hungary and Poland, the Cabinet of Ministers of Ukraine has adopted Resolution No. 1020 dated 19 September 2023 that introduces licensing of export of certain goods to the specified countries. Resolution No. 1020 entered into force on 28 September 2023. |
| EAEU | Import duty | 11 July 2023 | The Eurasian Economic Commission's Board has set the rate of import customs duty for krill meat (code 1605 40 000 1 in CN FEA of the EAEU) at 0 percent for a period of one year. The measure is aimed to improve the competitiveness of finished products manufactured using shellfish in the territory of the Eurasian Economic Union and to increase the capacity utilization for deep processing of raw materials. |

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

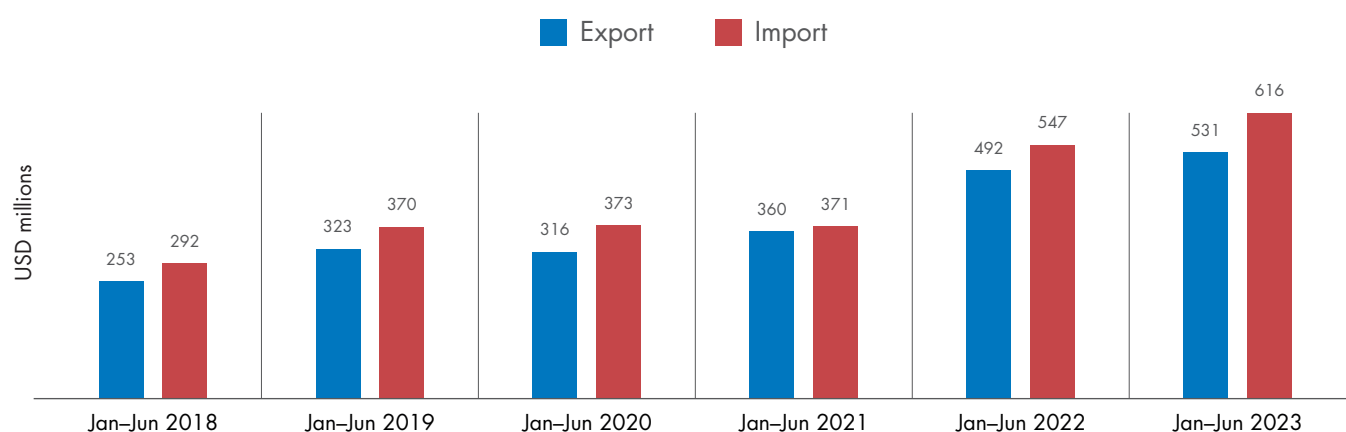
In the first half of 2023, the agrifood trade in the region displayed mixed trends, with most countries experiencing higher exports due to strong global demand and sustained high food prices. Azerbaijan and Kyrgyzstan saw moderate decreases in exported agrifood products compared to the previous year, while the Republic of Moldova experienced a 35 percent year-on-year drop from the record export levels a year earlier. Countries in the region demonstrated the ability to diversify their exports and imports amidst the continuous supply chain disruptions and global food market uncertainties. Despite the war, Ukraine remains a big net exporter of agrifood products.

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

ARMENIA

Armenia's agrifood **exports** increased by 8 percent year-on-year in the first six months of 2023 and were 52 percent up compared to the previous five-year average, amounting to USD 531 million. The country increased exports of spirits and beverages by 33 percent year-on-year, 78 percent of which were shipped to the Russian Federation.

Agrifood **imports** also showed substantial growth, with imports totaling USD 616 million. This marked a 13 percent increase compared to the same period of the previous year and a significant 58 percent rise compared to the five-year average. The country imported higher volumes of cereals (19 percent up compared to the same period in 2022) and meat (29 percent up) from the Russian Federation, and sugar from Brazil (35 percent up).



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/5-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 531 | ↑8 | ↑52 |
| Import | 616 | ↑13 | ↑58 |

Source: based on the TDM data.

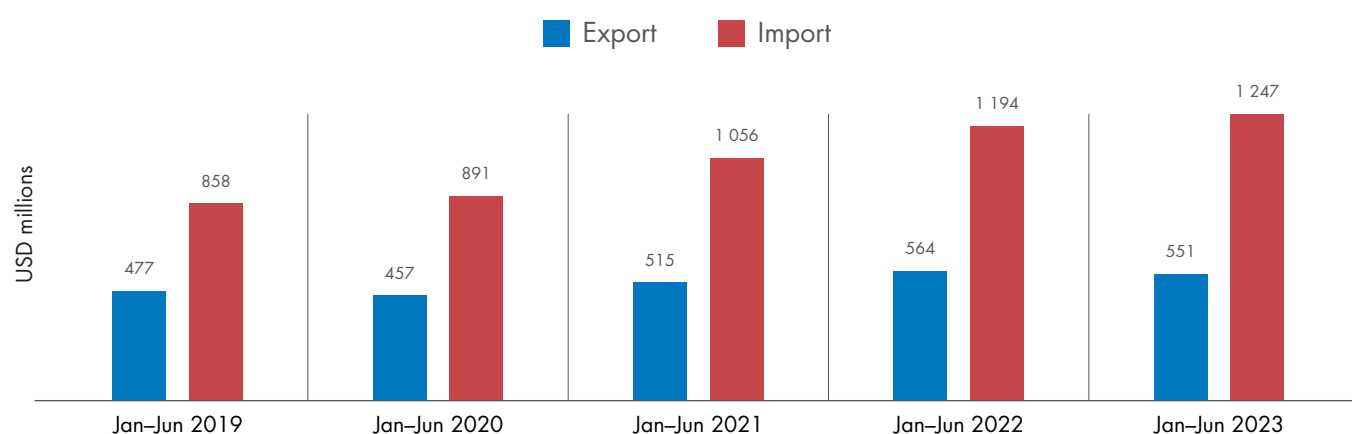
¹ Only countries with data available for January–June of 2023 are included in this review. TDM does not publish trade data for Tajikistan or Turkmenistan, and 'mirror' data for 2022 (and 6 months 2023) do not reflect these countries' total trade flows since trade with the Russian Federation is missing for this period in TDM.

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

AZERBAIJAN

In the first half of 2023, Azerbaijan's agrifood **exports** totaled USD 551 million, showing a marginal decrease of 2 percent compared to the same period in 2022. However, exports were up by 9 percent compared to the previous four-year average. The drop in exports reflects an almost two-fold decrease in cotton exports to Türkiye due to a shorter demand after the closure of manufacturing plants in the earthquake-affected areas of Türkiye in February 2023.

Agrifood **imports** amounted to USD 1 247 million in January–June 2023, reflecting a moderate increase of 4 percent compared to the first half of 2022. The country increased imports of cereals from the Russian Federation: supplies of wheat and meslin were up by 39 percent and corn – by 51 percent in the first half of 2023 compared to the previous year.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/4-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 551 | ↓-2 | ↑9 |
| Import | 1 247 | ↑4 | ↑25 |

Source: based on the TDM data.

Note: data prior to 2019 are inconsistent, hence only 2019–2023 data are included.

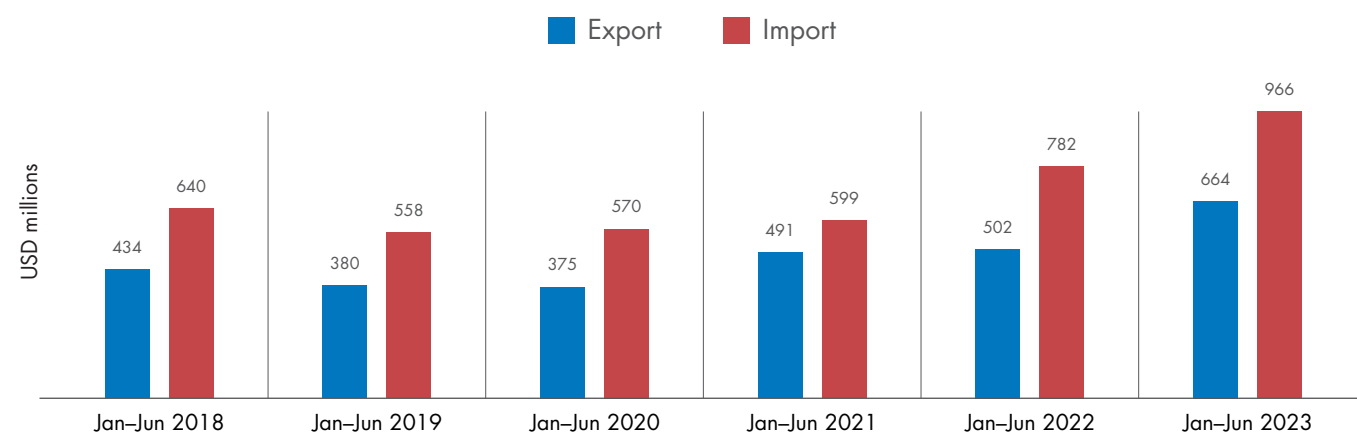
AGRIFOOD TRADE IN EASTERN EUROPE, CAUCASUS AND CENTRAL ASIA – JANUARY–JUNE 2023

GEORGIA

In the first half of 2023, Georgia's agrifood **exports** exhibited notable growth and amounted to USD 664 million, showing a significant increase of 32 percent compared to the same period in 2022. Georgia increased exported volumes of beverages and spirits to the Russian Federation by 75 percent in the first half of 2023. Additionally, the country more than doubled exports of bovine animals (HS0102) to Iraq.

Georgia's agrifood **imports** reached USD 966 million, marking an increase of 24 percent compared to the first half of 2022. Agrifood imports were also notably higher compared to the previous five-year average with increase totaling 53 percent. Georgia increased imported volumes of wheat and meslin from the Russian Federation by 54 percent. At the same time, imports of wheat flour (92 percent of which originated from the Russian Federation) slightly declined by 5 percent.

Additionally, in the first half of 2023 Georgia increased volumes of corn imported from the Russian Federation and Ukraine almost six times compared to the same period of the previous year.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/5-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 664 | ↑32 | ↑52 |
| Import | 966 | ↑24 | ↑53 |

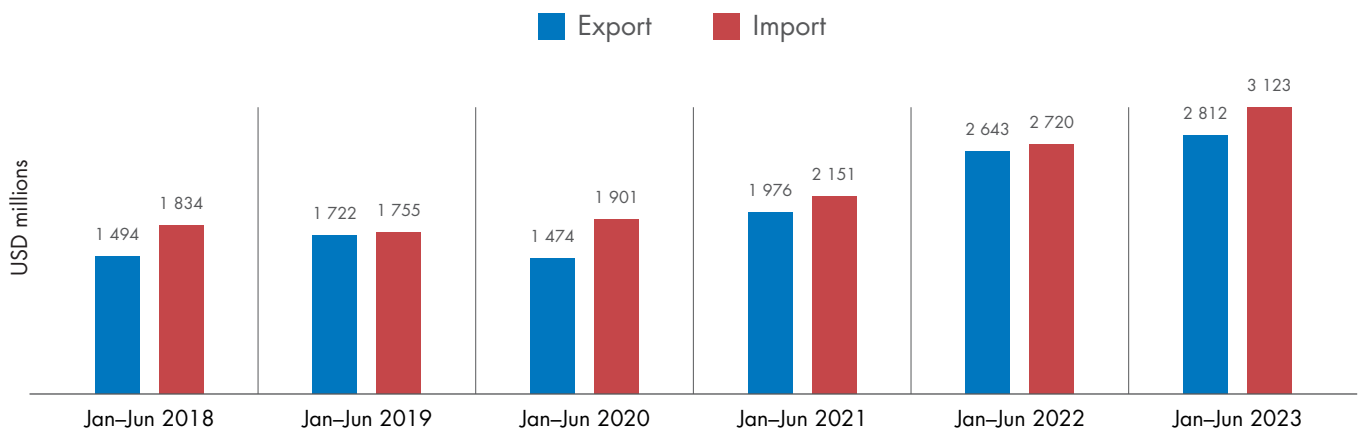
Source: based on the TDM data.

AGRI FOOD TRADE IN EASTERN EUROPE, CAUCASUS AND CENTRAL ASIA – JANUARY–JUNE 2023

KAZAKHSTAN

In the first half of 2023, Kazakhstan's agrifood **exports** reached USD 2.8 billion, representing a modest increase of 6 percent compared to the same period in 2022. This growth was more pronounced, with a notable 51 percent rise, when viewed against the previous five-year average. Between January and June 2023, Kazakhstan increased exports of cereals, (wheat, meslin and barley) to China six times up as compared to the last year.

Agrifood **imports** totaled USD 3.1 billion, reflecting a 15 percent increase compared to the first half of 2022. Notably, Kazakhstan's imports of wheat and meslin from the Russian Federation almost doubled year-on-year in January–June 2023 despite the [six-month ban](#) on wheat import by road imposed in mid-April 2023.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/5-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 2 812 | ↑6 | ↑51 |
| Import | 3 123 | ↑15 | ↑51 |

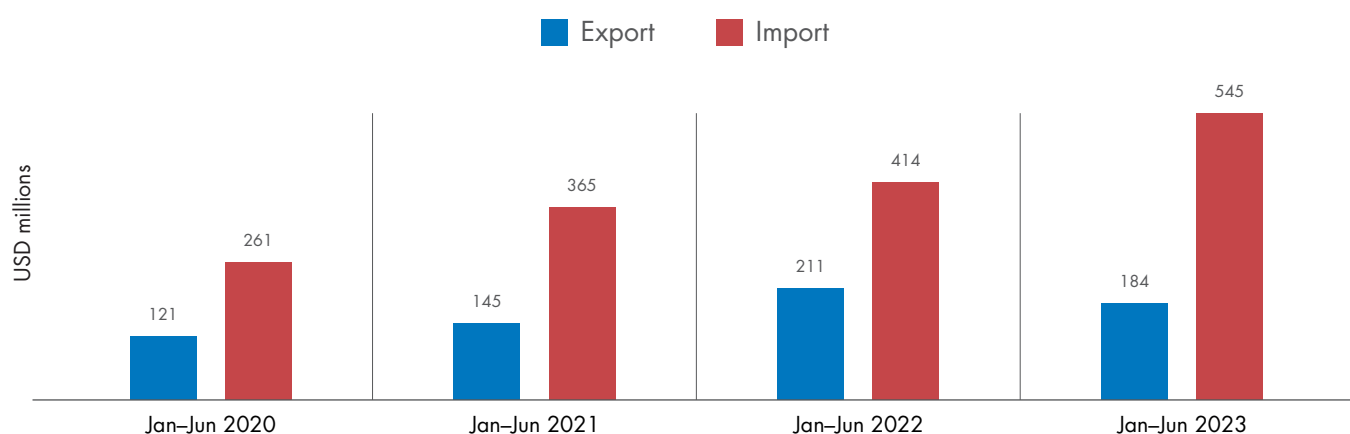
Source: based on the TDM data.

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

KYRGYZSTAN

In the first half of 2023, Kyrgyzstan's agrifood **exports** amounted to USD 184 million, reflecting a decrease of 13 percent compared to the same period in 2022. However, there was a positive growth of 16 percent when contrasted with the previous three-year average. The lower year-on-year exports reflect reduced supplies of fruits and vegetables to the Russian Federation and Kazakhstan.

On the import side, agrifood **imports** reached USD 545 million, marking a substantial increase of 32 percent compared to the first half of 2022. Agrifood Imports were also significantly higher, with a 57 percent increase compared to the three-year average. The volumes of Kyrgyzstan's imports of wheat and meslin from the Russian Federation were almost three times up compared to the last year. Additionally, the country substantially increased imports of cereal straw and husks: from 5 000 tonnes in the first half of 2022 to 116 000 tonnes in 2023, most of which originated from Kazakhstan and the Russian Federation.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/3-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 184 | ↓-13 | ↑16 |
| Import | 545 | ↑32 | ↑57 |

Source: based on the TDM data.

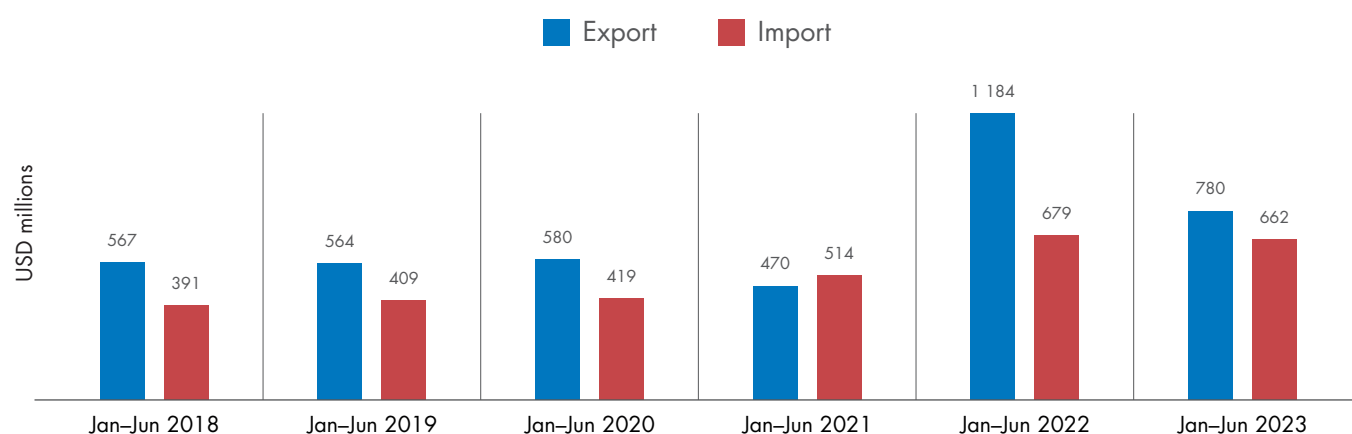
Note: Data for Kyrgyzstan is only available from 2020.

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

THE REPUBLIC OF MOLDOVA

In the first half of 2023, the Republic of Moldova's agrifood **exports** amounted to USD 780 million, showing a decrease of 34 percent compared to ample exports during the same period in 2022. However, there was a growth of 16 percent when compared to the previous five-year average. The lower year-on-year exports reflect an almost two-fold reduction of shipments of wheat, meslin, corn, and oilseeds compared to the last year record. Additionally, due to the Russian Federation's [ban on imports](#) of Moldovan apples introduced in August 2022 and still in place as of August 2023, the exports of this product category dropped by 69 percent year-on-year in the first half of 2023.

On the import side, agrifood **imports** reached USD 662 million, marking a decrease of 3 percent compared to the first half of 2022. There is a sharp increase in imported wheat grain and wheat flour volumes from Ukraine. Additionally, the country imported potatoes from Belarus and Ukraine.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/5-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 780 | ↓-34 | ↑16 |
| Import | 662 | ↓-3 | ↑37 |

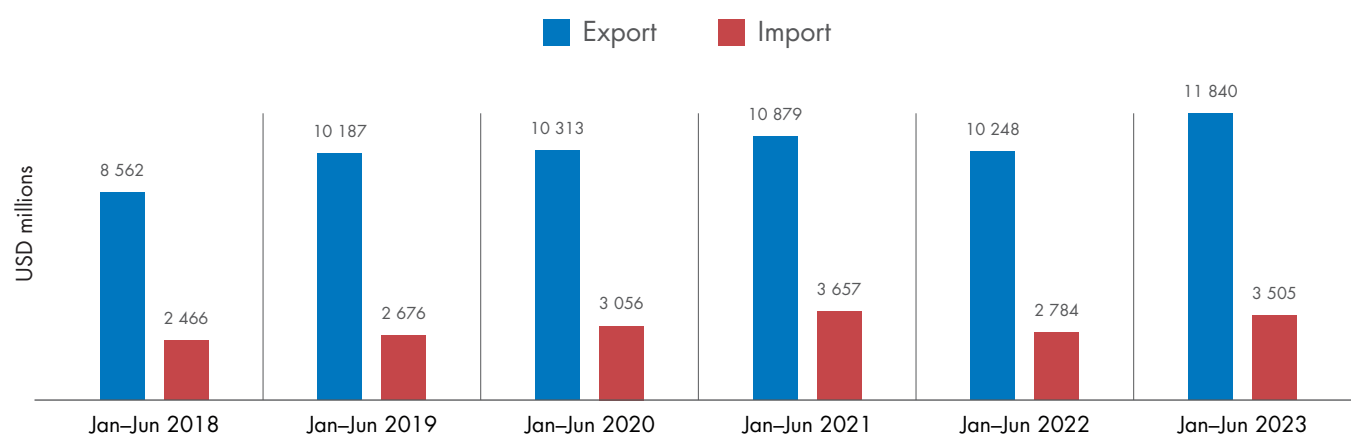
Source: based on the TDM data.

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

UKRAINE

In the first half of 2023, Ukraine's agrifood **exports** amounted to USD 11.8 billion, reflecting a substantial increase of 26 percent compared to the same period in 2022. Ukraine doubled its exported volumes of cereals to the EU countries, as well as increased exports to China by 42 percent. Additionally, the country substantially increased exports of oilseeds and sunflower oil to Türkiye in the first six months of 2023.

Agrifood **imports** reached USD 3.5 billion, marking an equivalent increase of 26 percent compared to the first half of 2022. Imports remained notably higher, with a 20 percent increase compared to the five-year average. There was a 17 percent increase in the imported volumes of fish and crustaceans and preparations of fruits and vegetables from the EU countries.



| | Jan-Jun 2023 | Jan-Jun 2023/Jan-Jun 2022 | Jan-Jun 2023/5-year avg. |
|---------------|---------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 11 840 | ↑26 | ↑18 |
| Import | 3 505 | ↑26 | ↑20 |

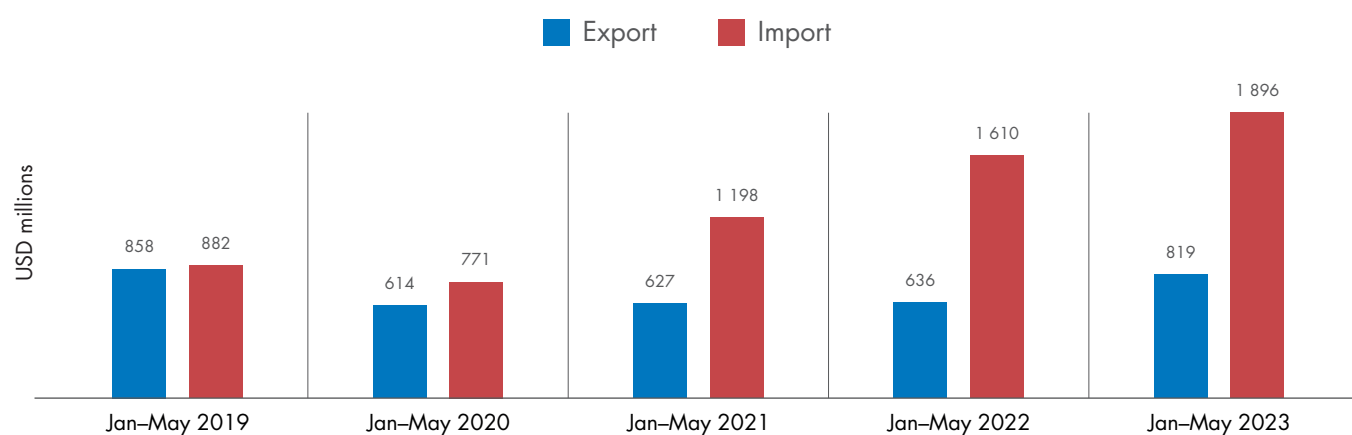
Source: based on the TDM data.

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

UZBEKISTAN

In the first five months of 2023, Uzbekistan's agrifood **exports** amounted to USD 819 million, 29 percent up compared to the same period in 2022. The country increased agrifood exports to the Russian Federation by 78 percent, including vegetables, fruits and preparations from fruits and vegetables. Additionally, there was a 27 percent increase in volumes of wheat flour exported to Afghanistan year-on-year in January–May 2023.

Agrifood **imports** reached USD 1 896 million, marking a considerable increase of 18 percent compared to the first five months of 2022. Imports were substantially higher, with a 70 percent increase compared to the four-year average. In the first five months of 2023 Uzbekistan increased volumes of wheat and meslin imported from Kazakhstan by 38 percent.



| | Jan–Jun 2023 | Jan–Jun 2023/Jan–Jun 2022 | Jan–Jun 2023/4-year avg. |
|---------------|--------------|---------------------------|--------------------------|
| USD millions | | Change, % | |
| Export | 819 | ↑29 | ↑20 |
| Import | 1 896 | ↑18 | ↑70 |

Source: based on the TDM data.

Note: Data for Uzbekistan is only available from 2019, and up to May 2023.

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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