



**AGRICULTURE AND TRADE
BACKGROUND POLICY NOTE**

UKRAINE



FAO Agriculture and Trade Policy Background Note

Ukraine

1. Main characteristics of Ukraine's agricultural sector

Agriculture has traditionally been one of the most important sectors of the Ukrainian economy, given the high quality and availability of fertile land. More than two thirds (71.2%) of the total land area is agricultural land, compared to only 13.2% in Russia and 44.3% in the EU (2009 data). Arable land at 32.5 million hectares has the largest area in Europe after Russia, accounting for 56.1% of the total land area – the highest percentage in Europe after Denmark. Agriculture is therefore one of the strategically important sectors, accounting for 8.2% of the GDP and 14.5% of total goods exports in 2010. It absorbs approximately 15.8% of the total employment. As in most other ex-Soviet republics, the agricultural sector is characterized by the co-existence of large-scale commercial agro-enterprises that generate approximately 45% of the total agricultural output (OECD, 2011) and a large number of family farms that emerged after collective farming was abandoned following the collapse of the Soviet Union.

Table 1: Agricultural sector indicators for Ukraine, 2010

GDP, current US\$ billion	136
Population, million	45.9
GDP per capita, current US\$	2,974
Rural population, % in total	31.3
Agricultural land, % in total*	71.2
Agriculture, value added (% of GDP)	8.2
Average annual growth in agriculture value added 2000-2010, at constant prices (%)	2.9
Employment in agriculture (% of total employment)**	15.8
Share of agricultural products in total exports	14.5

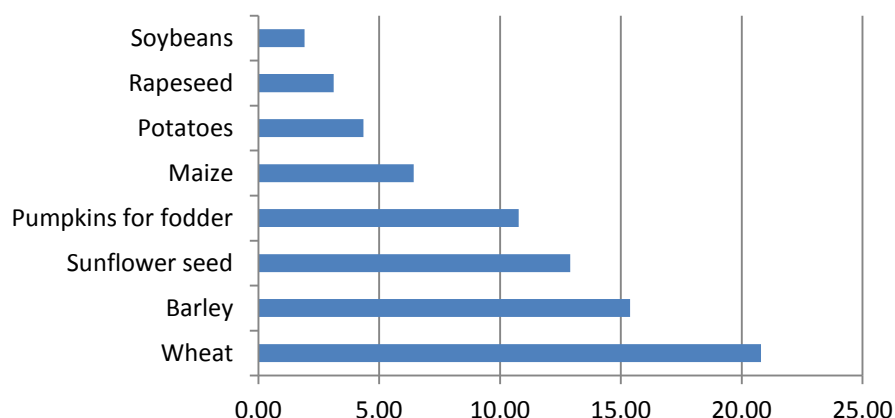
* 2009 data

** 2008 data

Source: FAOSTAT and WDI

Half of all arable land in Ukraine is dedicated to wheat, barley and sunflower seed (2009 data). Together with maize, which accounts for 6.4% of the total arable land, these are the four main crops grown in Ukraine. Wheat is the single most important crop in terms of arable land, occupying 20.8% of the total are and accounting for 46.0% of the total output of cereals by volume in 2009. Other important crops in terms of cultivated area are potatoes, rapeseed and soybeans (Graph 1).

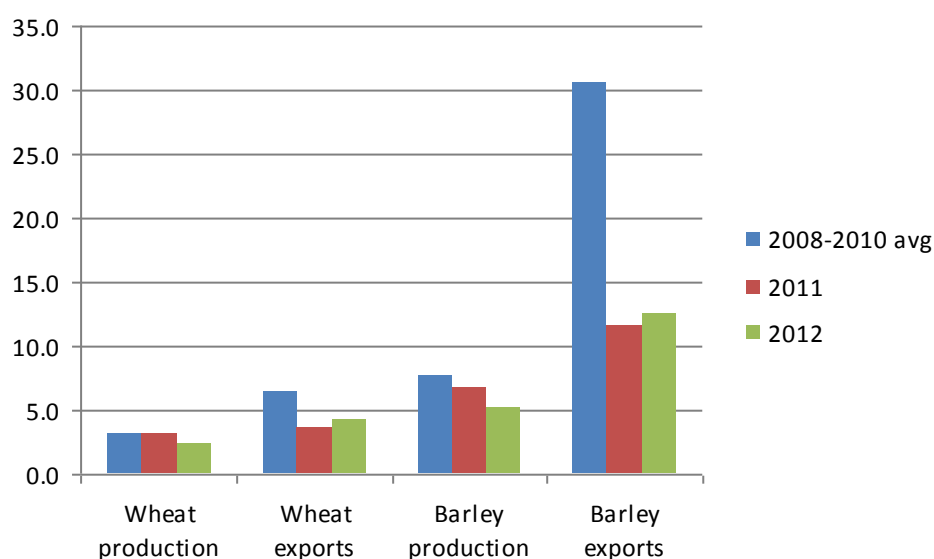
Graph 1: Share of area harvested in total arable land, main crops (2009)



Source: FAOSTAT

Since 2000 exports of grain, oilseeds and vegetable oil from Ukraine grew at a fast pace, converting Ukraine to one of the world's leading agro-food exporters. In 2012 Ukraine produced 5.2% of world's barley and 2.3% of the global output of wheat. It is also the world's leading exporter of barley, with an average market share between 2000 and 2010 of 14.1%. Owing to exceptional yields in 2008 and 2009 barley exports from Ukraine reached 30.6% of the world's total in the period 2008-2010. In the following years the share of Ukraine's barley in global production and exports declined substantially since the area planted dropped from nearly 5 million hectares in 2009/10 to 3.3 million hectares in 2012/13, while the area with more profitable maize increased from 2 to 4.4 million hectares. Ukraine is also the most important producer of sunflower oil in the world, surpassing Russia in total volume of production in 2010 and accounting for 23.5% of the global output.

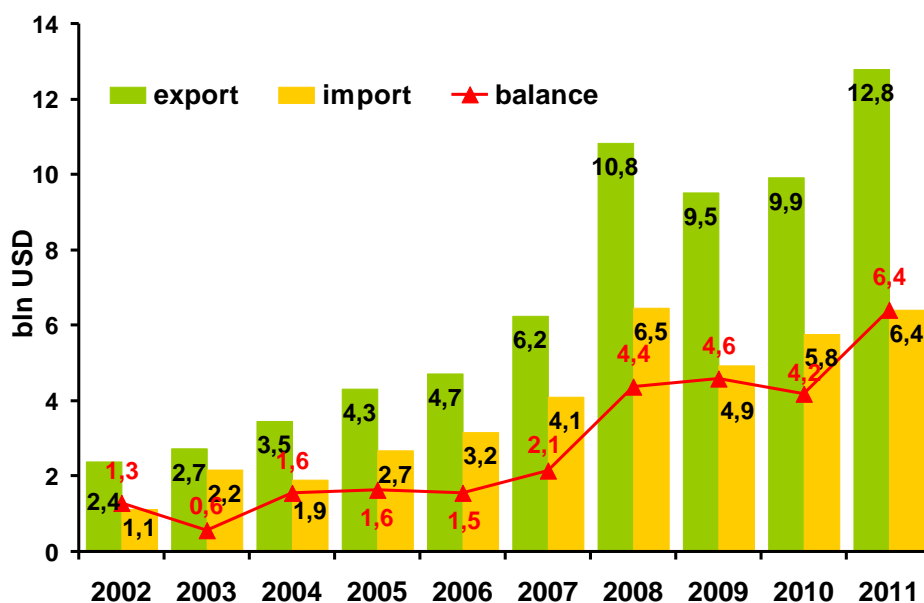
Graph 2: Ukraine's share in world production and exports of wheat and barley by volume



Source: FAO Food Outlook November 2012

Ukraine is a net food exporter, and its agro-food surplus increased especially after 2006, benefiting from high world prices on Ukraine's major exports. Exports received an additional boost from high output of grains and oilseeds in 2008, WTO accession the same year and a subsequent devaluation of the hryvnia as a consequence of the financial and economic crisis. In 2011 trade surplus for these products reached US\$6.4 billion.

Graph 3: Ukraine's agro-food trade, 2008-2010 (US\$ billion)



Source: Ukraine's State Statistics Service data

The main agricultural exports and imports of Ukraine as measured by value of trade are shown in tables 2 and 3. Sunflower oil accounted for over one third of the total value of agricultural and food exports of Ukraine in the period 2008-2010 making it the single most important agricultural product in terms of export revenues. Other exports are more evenly distributed, with wheat, barley, rapeseed and maize playing an important role. Imports are concentrated in pig meat, tobacco, palm oil and poultry with shares of over 5% each in the total agricultural imports of Ukraine. Oranges and bananas together accounted for 5.8% of all imports in this group during 2008-2010.

Table 2: Ukraine's main agricultural export products, average value in 2008-10

	Export value million US\$	Share in agro exports %
Sunflower oil	1,658.5	36.1
Wheat	1,382.4	7.7
Barley	943.8	6.0
Rapeseed	803.4	5.1
Maize	729.8	4.5
Milk (equivalent)	533.1	3.1
Chocolate	451.5	2.0
Beverages	412.4	1.8
Total agricultural exports	9,218.7	100.0

Table 3: Ukraine's main agricultural import products, average value in 2008-10

	Import value million US\$	Share in agro imports %
Pig meat	298.1	6.4
Tobacco	269.0	5.8
Palm oil	266.3	5.7
Poultry meat	240.7	5.2
Coffee extracts	185.2	4.0
Oranges*	141.9	3.0
Bananas	130.2	2.8
Sugar and honey	115.6	2.5
Total agricultural imports	4,662.1	100.0

* Includes tangerines and clementines

Source: FAOSTAT

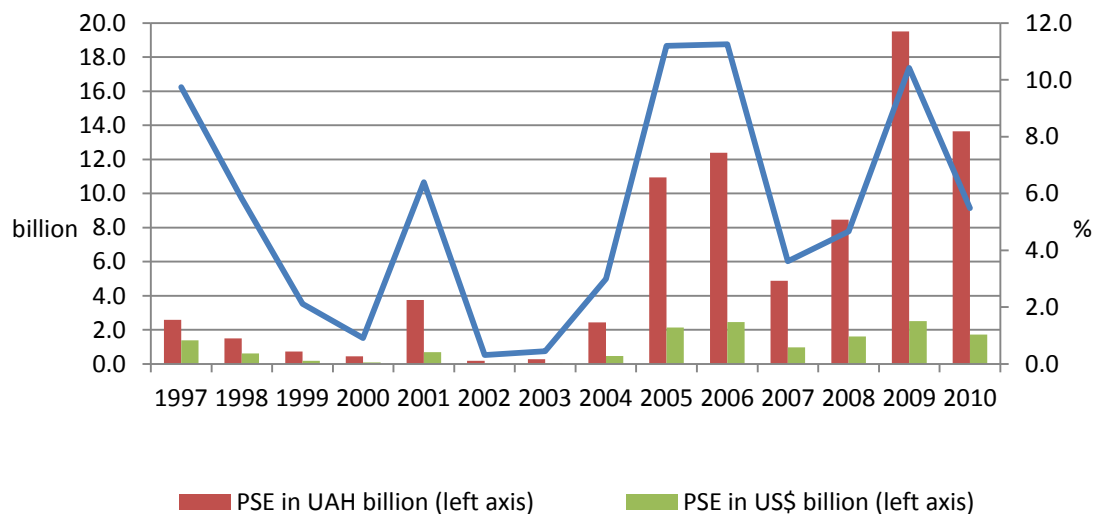
2. Agricultural and trade policy

2.1 The policy framework for support to agriculture

Agricultural policy in Ukraine has been deeply affected by the post-Soviet transformation of the economy and the turbulent economic environment with rapid market liberalization in the 1990's and political and macroeconomic instability for much of the past decade. The Ukrainian hryvnia has depreciated substantially since 2000, with a relative period of stability between 2005 and 2008, when hryvnia was pegged to US dollar, and devaluation in October 2008 as the consequence of the economic crisis. As a result, the government support to agriculture depended more on the overall situation, in particular the state of public finances, rather than long-term priority setting for agricultural development. The uncertain political and budgetary environment is in part responsible for the highly volatile level of support to agriculture as reflected in Producer Support Estimate (PSE)¹. In the period 1997 to 2010 PSE fluctuated between 0.3% and 11.3% as a share in total gross farm receipts, with large variability in support from year to year. In 2002 and 2003 the total support level was close to zero, increasing to 5.5% as percentage PSE in 2010, which is still quite low compared to both Russia and the EU.

¹ Producer Support Estimate (PSE) is the annual monetary value of gross transfers from consumers and taxpayers to agricultural producers, measured at the farm-gate level, arising from policy measures that support agriculture, regardless of their nature, objectives or impacts on farm production or income. Percentage PSE (%PSE) is the PSE as a share of gross farm receipts (including support) (<http://www.oecd.org/tad/agriculturalpoliciesandsupport/41120402.pdf>).

Graph 4: Producer Support Estimate (PSE): Percentage PSE* and the values in US\$ and UAH



* The share of PSE in the total value of total gross farm receipts

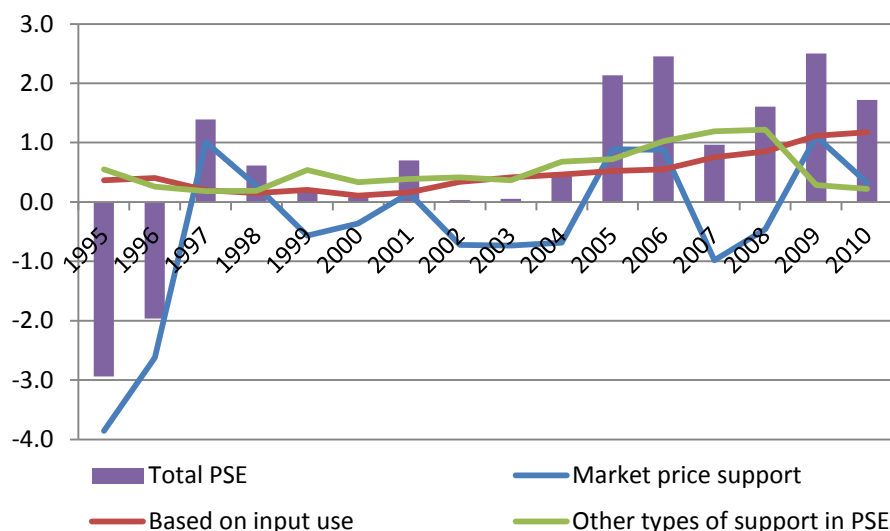
Source: OECD Producer and Consumer Support Estimates database

Although the overall level of support is not high, most of it is provided in a way that is categorized as production and trade distorting. Market price support (MPS²) and payments based on input use are the two types of support that constitute the bulk of PSE (80% of the total PSE in 2010), with high variability in the level of MPS which during several periods registered negative values (Graph 5). MPS was reduced from the high level of UAH8.6 billion in 2009 to only UAH2.6 billion in 2010, driving the overall level of support down. On aggregate from 1996 to 2010 the total value of MPS was a US\$-6.4 billion, while the total PSE amounted to US\$10.0 billion. Input-based subsidies, on the other hand, increased steadily from 2000 to 2010. They reached US\$1.2 billion in 2010, increasing their share in total PSE from 40.9% in 2009 to 61.2% in 2010. Most of the expenditure (89.5%) was subsidies based on variable input use.

² Market Price Support (MPS) is an indicator of the annual monetary value of gross transfers from consumers and taxpayers to agricultural producers arising from policy measures creating a gap between domestic producer prices and reference prices of a specific agricultural commodity measured at the farm-gate level.

(<http://stats.oecd.org/glossary/detail.asp?ID=1600>)

Graph 5: The composition of PSE by main category, 1995-2010, US\$ billion

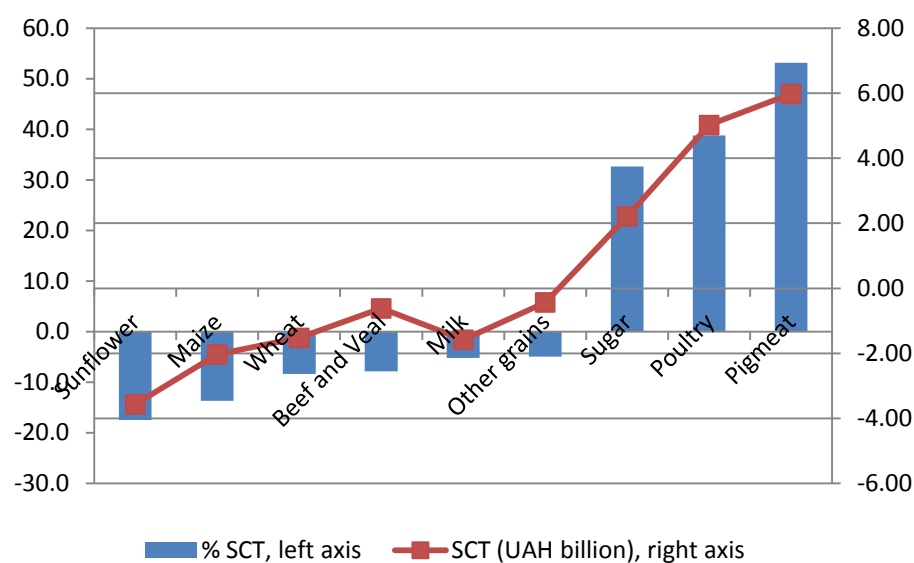


Source: OECD Producer and Consumer Support Estimates database

Agricultural support is determined on the basis of the Law on *State Support to Agriculture* adopted in 2005. It provides a set of long-term goals for sector development (including food security and competitiveness of the agricultural sector) and the *State Targeted Programme for Development of the Ukrainian Countryside* that is valid until 2015. The program establishes the priority areas for state support and the financing requirements, but does not contain firm budget commitments.

There are significant disparities in producer support across commodities, and some products have high levels of protection. As in the case of Russia, Ukraine implicitly taxes agricultural producers of export crops such as sunflower, maize and wheat while subsidizing producers of import-competing pig meat, poultry and sugar (Graph 6). The total subsidies on pig meat reached the highest level in 2008 at 68.7% of all pig farm receipts, declining to 53.2% in 2010. The value of this support was equivalent to 141.4% of the aggregate Single Commodity Transfers (SCT) and to 43.8% of the total PSE value in 2010. At the same time support to poultry and sugar accounted for 36.8% and 16.2% of all PSE, respectively. Milk and beef producers traditionally receive high levels of subsidy as well, but in 2010 the overall support to these products was negative. Rapeseeds and soybeans, important export crops, are neither subsidized nor taxed.

Graph 6: Producer Single Commodity Transfers (SCT), 2010



* % SCT is the share of SCT in the total value of total gross farm receipts for each commodity

Source: OECD Producer and Consumer Support Estimates database

Price support is implemented through a variety of market intervention measures carried out by the state agency called *Agrarian Fund*. These include state purchases and sales of a range of agricultural and food products at intervention minimum and maximum prices, forward-contracting, flour processing and wholesaling, and sales of diesel fuel and mineral fertilizers to agricultural producers (OECD, 2011). Stocks are maintained for grains for price stabilization purposes.

The range of products and the periods during which the price bands are in effect are defined by specific government resolutions on an annual basis. For example, in 2009-10 this list included wheat, rye, barley, maize, flour and sugar. Purchases by private traders are not subject to administered prices, however the minimum government established prices a play of indicative floor-price reference for private market operators. To keep bread prices low for consumers, the Agrarian Fund was involved in processing and sales of flour to bakeries at administered prices (OECD, 2011).

Administrative price fixing is another attempt to guarantee minimum prices to dairy and sugar beet farmers. In 2006, Ukraine adopted minimum prices for milk purchases by dairy industry. It is an administrative measure not supported by any subsidy or border measure. The minimum milk prices were later abandoned.

Price support to sugar is provided through an annual national production quota that is set annually, which establishes minimum within-quota prices for the raw material (sugar beet) as well as the processed product (sugar). In 2010 this measure was supplemented by payments per sown hectare. In 2010 the minimum administered price for sugar produced from sugar

beets was set at 4,250 UAH/tonne (US\$535/tonne) in 2010. At the average world market price³ US\$470/tonne in 2010, this means that the domestic price was 14% higher.

The total of per tonne payments constituted 17% of the total PSE between 2008-2010 and approximately 95% of these payments were provided for livestock products including beef and veal, milk, pigmeat, poultry, eggs and sheep meat (OECD, 2011). These subsidies are partly funded through actual budgetary allocations within the State Programme for Livestock Breeding, and partly through redirected fiscal revenue: Milk and meat processors “re-direct” VAT due on processed products to livestock producers to instead of paying the tax to the state budget.

Moreover, farmers can also accumulate VAT due on their primary and processed products on a special account to fund the purchase of agricultural inputs, ultimately benefitting input suppliers. Inputs subsidies constitute the biggest category in PSE and the largest share (81% during 2008-10) is provided through this VAT accumulation mechanism. The transfers provided through this VAT payment mechanism increased from UAH 2.6 billion in 2008 to UAH 7.7 billion in 2009 and around UAH8 billion in 2010 (OECD, 2011).

Compliance with the budgeted targets for per tonne payments has been poor: For example, producers of beef and veal, pig meat and poultry received only 10% of the initially budgeted payments in 2009, and the funding was much lower than budgeted initially. In 2010 no new per tonne payment was provided other than part of the arrears from 2010. Thus, predictability of payments is a major issue for farmers and agribusiness investors.

Another part of inputs subsidies is concessional credit that provides subsidies for interest payments on short and long-term loans for production-related expenses as well as investments. Moreover, to ease the tax burden for producers, the government introduced a *fixed agricultural tax* to replace the 12 different types of taxes that were in place prior to 1998, reducing the complexity and the overall level of taxation, since enterprises that are eligible for the fixed agricultural tax also benefit from a reduced rate on other obligatory budget contributions such as the Pension Fund.

2.2 Agricultural trade policy before and after WTO accession

The main driver of trade policy reforms since 2008 was the long awaited accession to the WTO. Substantial modifications to national legislation were introduced to bring Ukrainian trade policy in conformity with the WTO obligations, in particular on market access.

Market Access

Ukraine’s WTO commitments include an important reduction in import barriers on agricultural and food products, with the majority of tariff reductions to be reached by 2011

³ I.S.A. daily price

and some by 2012-13. Market access for import products is to be expanded primarily through the reduction of tariff peaks. The average tariff rates for agricultural products before and after the accession are shown in Table 4. Prior to WTO accession Ukraine applied 18.2% in trade-weighted average MFN tariff on agricultural products. As the result of WTO obligations it declined to 7.9% in 2011, with a bound rate of 10% when weighted by imports.

Table 4: Distribution of applied MFN tariffs on agricultural products in 2011

	Final bound	Applied MFN rate	
		2008	2011
Simple average	11.16	13.8	9.5
Trade weighted average	10.0	18.2	7.9

Source: WTO Tariff Profiles (and <http://stat.wto.org>) and USAID (2008)

As the result of WTO accession, the biggest tariff cuts were introduced on the sensitive products exposing them to stronger import competition: The tariff on pig meat declined from 42% to a 12% bound rate in 2010. The rates on poultry declined from 31% to a range of 5%-15% in 2010. Tariffs on frozen beef and butter also declined, from 29% to 15% and from 28% to 10%, respectively. (OECD, 2011). Substantial reductions were introduced for grains, but this is not expected to have a large impact given the competitiveness and high levels of exports. The bound import duty on sunflower seed oil was set relatively high at 30%.

Table 5: Distribution of applied MFN tariffs on agricultural products in 2011

Frequency distribution		Duty-free	0 <= 5	5 <= 10	10 <= 15	15 <= 25	25 <= 50	50 <= 100	> 100
		Tariff lines and import values (in %)							
Agricultural products									
	Final bound	12.6	19.6	27.5	13.9	25.5	0.9	0.1	0
	MFN applied 2011	21.2	21.8	26.4	12.1	17.5	0.8	0.2	0.1
	Imports 2010	37.4	19.1	30.5	5.9	1.5	5.1	0.5	0

Source: WTO Tariff Profiles (<http://stat.wto.org>)

As a result, in 2011 37.4% of all imports by value entered Ukraine duty-free (Table 5). In addition, half of all imports were facing tariffs lower than 10%, and only 13% of agricultural imports by value have tariffs higher than 10%. As such, Ukraine made substantial progress in fulfilling its market access commitments and the tariffs currently imposed by Ukraine on agricultural imports are quite low. The highest tariffs are imposed on sugar and the beverages and tobacco category (Table 6).

Table 6: Applied MFN tariffs by product group (2011)

Product groups	Average tariff	Share of duty-free	Max tariff
Animal products	11.0	9.0	20.0
Dairy products	10.0	0.0	10.0
Fruit, vegetables, plants	9.9	18.9	20.0
Coffee, tea	5.8	35.4	20.0
Cereals & preparations	12.6	3.8	20.0
Oilseeds, fats & oils	8.2	21.5	30.0
Sugars and confectionery	17.5	0.0	50.0
Beverages & tobacco	12.8	26.2	445.0
Cotton	1.4	40.0	5.0
Other agricultural products	5.5	45.2	20.0

Source: WTO Tariff Profiles (<http://stat.wto.org>)

During the WTO accession Ukraine reserved the right to apply a TRQ for raw cane sugar. In 2010 the quota was 267,800 tonnes, with 2% in-quota and 50% over-quota tariff rates. However the quota was not filled completely: Ukraine imported only 215,381 tonnes of raw sugar in total, or 80% of the quota.

Export duties and quantitative restrictions

In the WTO accession package Ukraine committed to a gradual reduction of export duties. Export duty rates on sunflower seeds are set to decline from 14% in 2008 to 10% in 2012. The 50% duty on live cattle exports is set to decrease by 5 percentage points per year to reach 10%.

By accepting Article XI of the GATT 1994 Ukraine is committed not to impose any quantitative export. Between 2006 and 2008, Ukraine occasionally imposed quantitative export restrictions (bans and export quotas). After country's accession to the WTO in May 2008, the country again applied export quotas on wheat, barley and corn⁴ as a way of regulating domestic supplies in times of poor harvest or high world prices. Although the GATT article permits the use of export prohibitions to be temporarily applied to prevent critical shortages of foodstuffs, it is difficult to judge whether Ukraine's export restrictions were fully in compliance with the clause. The last official restriction was introduced in

⁴ See Ukraine's notification to WTO Committee on Agriculture G/AG/N/UKR/5/Add.1 as amended on 10 January 2011(
http://docsonline.wto.org/GEN_viewerwindow.asp?http://docsonline.wto.org:80/DDFDdocuments/t/G/AG/NUK R5A1.doc)

October 2010 and remained in effect until May 2011. Since then the authorities have negotiated export quantities with the industry.

Domestic support to agriculture according to WTO rules

On domestic support, the WTO commitments regarding trade-distorting subsidies in the “amber box“ as measured by the Aggregate Measurements of Support (AMS)⁵ are set at UAH3,043 billion, with no obligation to lower it. With the current level of AMS which is substantially lower, this means that Ukraine is not obliged to reduce its level of domestic support. According to Ukraine’s official notification to WTO in 2012, its subsidies under the “green box”⁶ amounted to UAH 3,527 million in 2010 and the total AMS was UAH 2,180 million. Ukraine’s subsidies classified as transfers under the green box increased substantially over time: These measures amounted to UAH 677.3 million in 2000-2002 (annual average) and UAH 2424.1 million in 2004-2006.

In 2010 subsidies to sugar beet producers accounted for 94% of the total AMS. 90% of this subsidy was provided through market-price support to maintain the minimum prices that are set well above world market prices. The product-specific support reported by Ukraine to WTO in 2010 also included subsidies to milk production receiving UAH1,448 million through the VAT rebate system in 2010.

Ukraine also notified the WTO with regard to the non-product specific support to producers from the special value-added tax accumulation mechanism that are not included in the total AMS: These amounted to UAH7,099 million. However these transfers fall within the *de minimis* provisions for milk and cattle and are therefore not considered in the total AMS commitments.

⁵ According to WTO, all domestic support measures considered to distort production and trade (with some exceptions) fall into the so-called amber box. These include measures to support prices, or subsidies directly related to production quantities. The reduction commitments for these types of subsidies are expressed in terms of Total Aggregate Measurement of Support (Total AMS) (http://www.wto.org/english/tratop_e/agric_e/agboxes_e.htm). The AMS calculation of market price support is based on a fixed, historical world reference prices rather than current world prices. Unlike the AMS, the purpose of the PSE described earlier in the note is to monitor and evaluate progress in agricultural policy reform, whereas the AMS is the basis for a legal commitment to reduce domestic support in the WTO Agreement on Agriculture. The PSE and AMS are closely related, but there are important differences. The PSE covers all transfers to farmers from agricultural policies, whereas the AMS covers only domestic policies deemed to have the greatest production and trade effects (amber box). (Refer to the OECD Agricultural Support: How is it Measured and What does it Mean? (2004) for more information <http://www.oecd.org/agriculture/agriculturalpoliciesandsupport/32035391.pdf>)

⁶ Green box subsidies must not distort trade, or at most cause minimal distortion. They must not involve price support or be funded by consumers. In general these are reserved for programmes that are not targeted at particular products, and include direct income supports for farmers that are not related to (are “decoupled” from) current production levels or prices. (http://www.wto.org/english/tratop_e/agric_e/agboxes_e.htm)

4. Recent agricultural policy developments

Ukraine's WTO accession required substantial modifications in the legislation governing the trade regime and support to agriculture. Although Ukraine is on track to fulfil its WTO obligations with regard to market access and agricultural subsidies, some specific issues have resurfaced impeding effective compliance and reducing the benefits from the WTO accession.

With regard to export restrictions on grains, these are not established directly by the government, but are negotiated with the industry for each crop year. Thus, in September 2012 Ukraine's Ministry of Agriculture and the main agro-industry organization signed a Memorandum of Understanding (MoU) agreement on maximum export volumes of 19.4 million tonnes of grains for the 2012/2013 marketing year including 4 million tonnes of wheat, 3 million tonnes of barley, and 12.4 million tonnes of maize. This MoU was later amended to increase the possible export levels.

It is clear, on the other hand, that given the continuing problems with the fiscal balance there is not much space for expanding agricultural support. In fact, the State Budget of Ukraine for 2013 fixes the government expenditures on agricultural programs at UAH 4 billion only, down from UAH 8.6 billion in 2012, although as a share of the total state budget it is almost unchanged (2.3% in 2013 and 2.4% in 2012)⁷.

In September 2012 Ukraine submitted a request for revision of WTO commitments on market access of over 371 tariff lines that were approved in its accession protocol. These tariff lines almost certainly include a large number of agricultural products, although the exact extent of the petition is not yet confirmed. This caused widespread concerns among other WTO Members and at a meeting of the Goods Council in December 2012 30 members asked Kiev to withdraw the controversial request, given its unprecedented scope. Although Article 28 of GATT allows for renegotiating accession terms, it is has usually been used for making small, technical adjustments to a member's tariff schedule, and not for a comprehensive revision. Ukraine cited the unfulfilled expectation with regard to additional liberalisation among other WTO members to be agreed in the ongoing Doha Round talks.

5. Concluding remarks

Two main factors have affected Ukraine's agricultural trade as well as government support to agriculture since 2008: the reforms prompted by the WTO accession and the economic and financial crisis that started in 2008. Ukraine's agriculture, like the rest of the economy, was severely affected by the internal political and economic instability, exacerbated by global financial crisis of 2008. Ukraine was hit hard by a recession that started in 2008, and in 2009 the economy shrank by 14.8% in real terms. In 2008 the hryvnia dropped 38% against the US dollar, increasing the cost of imported products, including foods such as pork and poultry. On

⁷ Source: <http://agroconf.org/content/uak-agrarniy-mizer-derzhbyudzhetu-2013>

the other hand the devaluation benefited Ukrainian exporters by providing a boost to their competitiveness. Although the country returned to positive growth in 2010 and 2011, fiscal deficit, current account deficit and external debt continued to accumulate. This means that the current priority of the government is to bring macro-economic stability, for which fiscal austerity is required. One of the repercussions of this was a reduced availability of public funds for expenditures on agriculture and expansion of the support in the short-term is not likely.

At the same time the requirements to comply with the WTO commitments on market access implied lower revenue collection from import duties, placing an additional pressure on the fiscal balance. Moreover, the double effect of the decline in trade protection and economic recession hit hard the dairy and meat producers, as well as other import-competing products. The recent request of Ukraine for revision of its WTO commitments on market access is probably related to these issues.

Ukraine has a tremendous agricultural potential given its natural conditions, but this potential has not been realized fully, partly due to inappropriate and inconsistent policies. The main challenge for Ukrainian agricultural policy is making support to agriculture stable, transparent and predictable, establishing clear goals and mechanisms, ensuring that producers receive the necessary support in a minimally distorting way. The level of producer support has been characterized by great variability over the last decade, and some recent policy developments have contributed to this variability and lack of predictability.

To reap the full benefits of WTO accession to enhance its export of agricultural and food products (and improve domestic supplies), Ukraine will also need to place importance on food safety and quality and implement certification systems to document compliance with internationally accepted standards. Should government support increase in the medium term, the government could increase the transfers within the “green box” to improve food safety and product quality, rather than providing price support. It could expand programs on environmental improvements, rural development, foster investments into infrastructure for livestock breeding and support crop insurance programs. The WTO accession generates a number of challenges which can only be achieved through modernization of the agricultural policy and new approaches to domestic support, targeting long-term improvements in productivity and competitiveness and making the programs more predictable.

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