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MARKET ACCESS PROSPECTS FOR UKRAINIAN EXPORTERS OF ORGANIC PRODUCTS TO THE EU MARKET UNDER THE ECOLOGIZATION OF THE EU COMMON AGRICULTURAL POLICY

ПЕРСПЕКТИВИ ДОСТУПУ УКРАЇНСЬКИХ ЕКСПОРТЕРІВ ОРГАНІЧНОЇ ПРОДУКЦІЇ НА РИНОК ЄС В УМОВАХ ЕКОЛОГІЗАЦІЇ СПІЛЬНОЇ АГРАРНОЇ ПОЛІТИКИ ЄС

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Горін Н.В., Українець Л.А. Перспективи доступу українських експортерів органічної продукції до ринку ЄС в умовах екологізації Спільної аграрної політики ЄС. Науково-методична стаття.

У статті визначено основні напрямки Спільної аграрної політики ЄС на сучасному етапі, які орієнтовані на екологізацію аграрного сектору. Виходячи з цілей САП ЄС на період 2021-2027 років, проаналізовано динаміку та підтверджено важливість розвитку органічного виробництва в країнах-членах ЄС. Доведено, що органічне виробництво та торгівля органічною продукцією є перспективним нішевим напрямом українського експорту до ЄС. Виділено основні чинники розвитку експорту української органічної продукції до ЄС, серед яких спрощений доступ до ринку ЄС в рамках Угоди про зону вільної торгівлі з ЄС, значна місткість ринку ЄС, зростаючий попит на органічну продукцію у країнах-членах ЄС та недостатня пропозиція органічної продукції на внутрішньому ринку ЄС.

Ключові слова: Спільна аграрна політика ЄС, екологізація, органічне виробництво, органічна продукція, експорт, Україна

Horin N.V., Ukraynets L.A. Market access prospects for Ukrainian exporters of organic products to the EU market under the ecologization of the EU Common Agricultural Policy. Scientific and methodological article.

The article identifies the main directions of the EU Common Agricultural Policy at the present stage, which are focused on the ecologization of the agricultural sector. Based on the goals of the CAP for the period 2021-2027, the dynamics and importance of the development of organic production in EU member states were analyzed. It is proved that organic farming and trade in organic products are the perspective niche area for Ukrainian exports to the EU. The main factors of the development of Ukrainian organic exports to the EU are highlighted, including simplified access to the EU market under the Free Trade Agreement with the EU, the significant capacity of the EU market, growing demand for organic food in EU member states, and insufficient domestic supply of organic products on the European market.

Keywords: EU Common Agricultural Policy, ecologization, organic farming, organic products, exports, Ukraine

Common Agricultural Policy (CAP) is defined as a partnership between the rural economy and society, as well as between the EU and its farmers, and involves a complex mechanism of regulation of agricultural production, processing, and distribution of products [1].

It is worth mentioning that in addition to measures supporting European farmers, the CAP also defines the conditions of access to the EU market for third countries, including Ukraine. Since 2016 Ukraine has shaped its relations with the EU in reliance on the Association Agreement between EU and Ukraine, and more specifically on the Free Trade Agreement concluded as part of the Association Agreement. Hence when entering the EU market Ukrainian exporters of organic agricultural products have to take into account the basic principles of CAP:

- Free trade at equal prices between the EU members.
- Preferences for products produced in the EU members over imported products.
- Common financial responsibility for market and pricing policies in the EU CAP.

It should be noted that the weight of tools regulating agricultural markets in the EU is declining in favor of tools supporting the rural areas with special emphasis on environmental protection and income support for environmentally friendly farming, especially for an organic one. Products are considered organic if chemical fertilizers, pesticides, genetically modified organisms (GMOs), preservatives, etc. weren't used while manufacturing or processing, and the methods, principles, and rules of producing natural (environmentally

friendly) products, as well as conservation and restoration of natural resources, were applied. Thus organic agricultural production is not only a manufacturing practice but also a certain way of management, as well as the way of rural life. This is a manufacturing philosophy, which primarily involves a careful attitude to the natural environment.

Analysis of recent researches and publications

From the beginning, the CAP was focused mainly on stimulating production and supporting farmers' incomes, but since the mid-1990s it has been gradually integrating environmental support tools. Despite that fact, experts point out that there are many environmental issues to still be addressed at the next stage of development of CAP in 2021-27. Thus, according to a group of researchers [2], 92% of non-EU residents and 64% of EU farmers believe that the CAP does address persistent environmental degradation and climate change insufficiently. Therefore, the future strengthening of environmental development of the EU agricultural sector will not only contribute to the formation of a positive perception of EU CAP tools by society but also, according to A. Navarro and H. López-Bao [3], will increase payments for environmental achievements for farmers and rural populations. It will promote the development of High Nature Value Farmlands, improve CAP flexibility and integrate its mechanism into real practices. Besides, changes in agricultural policy will serve to achieve the UN Sustainable Development Goals by 2030 and consolidate key elements of sustainability. If the new CAP strategy would be able to meet societal demands for higher environmental performance, its core component is, amongst other things, organic agriculture, which is fully compatible with the EU Green Agreement and its "farm-to-fork" and biodiversity strategies.

Theoretical and empirical researches of the formation and development of the agribusiness organic sector are gaining more and more importance. Leading domestic and foreign economists – i.e. A. Antonets, L. Sokol, A. Dudar, M. Orlykovskiy, R. Buriak, M. Brzezinsky, M. Grzybowska, S. Pilarsky, G. Pe'er, Y. Zinngrebe, F. Moreira et al. – study the issues of organic agricultural productions, the problems of their certification, the development of ecological methods of agricultural production. Their researches are creating a scientific and methodological basis of modern economic views and approaches to the environmental innovation policy in the agricultural sector of the country.

Unsolved aspects of the problem

The development of the agriculture organic sector, both in the EU and in Ukraine, remains understudied. The need to stimulate and support organic production not only from an economic and social point of view but also from the point of view of environmental protection and biodiversity conservation is evidenced by special attention to organic production by major European institutions, including the European Commission, the European Parliament, and EU member governments. Given Ukrainian-European integration, it is extremely important to analyze the current state and opportunities for the development of the domestic agricultural organic sector, which determines the purpose of our paper.

The main part

The EU organic production under the CAP ecologization

It should be notice that the organic movement began in the 1940s in Great Britain, and for the first time, the term "organic" was used by E. Balfour in her scientific study "The Living Soil" [4]. In 1972, the International Federation of the Organic Agricultural Movement (IFOAM) was founded as one of the largest and most important agricultural organizations in the world, which is currently represented in 120 countries, including Ukraine. According to this organization, organic production is now implemented in 178 countries and occupies 57.8 million ha (for comparison in 1999 - 11 million ha) [5], and these data are growing every year.

The EU is the world's fastest-growing market of organic food. According to IFOAM Organics Europe, in 2019, the number of organic producers in the EU increased by 5.1% to 343,858 compared to 2018. Significant growth of the EU's organic retail market accompanies this development, rising by 12% to 41.5 billion EUR. Between 2010 and 2019 the value of the EU's organic market more than doubled [6]. This dynamic growth is mostly due to the strong focus on ecologization of European economic activity and fixing it as one of the general goals of the CAP, which, in particular, focuses on [7]:

- securing a fair deal and a stable economic future for farmers;
- setting higher ambitions for environmental and climate action;
- safeguarding agriculture's position at the heart of Europe's society.

To achieve these general goals, the two main strategies – Farm to Fork and Biodiversity – define organic production as a key sector to implement the European Green Deal's food ambitions and accelerate the EU's transition to a sustainable food system [8]. Also, the European Commission published the Organic Action Plan for 2021-2027, which aims at boosting both organic demand and supply. Measures of the CAP should also be paramount in reaching "the objective of at least 25% of the EU's agricultural land under organic farming by 2030 and a significant increase in organic aquaculture", as laid out in the Farm to Fork Strategy [6].

Thus, having comprehensive political, social and economic support, the organic production in the EU grows up dynamically. The utilized agricultural area under organic farming in the EU increases every year: it grew by 34% since 2012 [9], and in 2019 covered almost 13.8 million ha or 8.5% of total utilized agricultural land (see

Table 1). In 2019, Sweden had the highest shares of organic cereals (7%) and fresh vegetables (19%) in its total production, while Greece had the highest share of organic bovine animals (27%) [10].

Table 1. Main indicators of agriculture and organic farming in the EU and Ukraine

Country	Total utilized agricultural area, 1000 ha, 2019	Holdings, 1000, 2016	Average utilized agricultural area per holding, ha, 2016	Agriculture in % of total employment 2019	Agricultural goods output, 2019		Organic farming area (% in the total utilized agricultural area)	
					million EUR	% of EU-27	2018	2019
Austria	2652.22	132.5	20.1	3.3	7142.1	1.8	24.1	25.3
Belgium	1358.7	36.9	36.7	0.8	8654	2.2	6.6	6.9
Bulgaria	5037.47	202.7	22	6.5	4 151	1.0	2.6	2.3
Croatia	1485.65	134.5	11.6	5.6	2 240.1	0.6	6.9	7.2
Cyprus	125.35	34.9	3.2	2.1	716.9	0.2	4.6	5.0
Czech Republic	3523.66	26.5	130.2	2.6	5 200.9	1.3	15.2	15.2
Denmark	2626.0	25.0	74.6	2.0	11 474.8	2.9	9.8	10.9
Estonia	988.41	16.7	59.6	3.1	983.6	0.2	20.6	22.3
Finland	2273.8	49.7	44.9	3.4	4 016.3	1.0	13.1	13.5
France	29024.18	456.5	60.9	2.4	73 286.4	18.5	7.0	7.7
Germany	16666.0	276.1	60.5	1.1	55 843.8	14.1	7.3	7.7
Greece	5153.38	684.9	6.6	11.0	10 704.5	2.7	9.3	10.3
Hungary	5309.52	430.0	10.9	4.7	8 434.9	2.1	3.9	5.7
Ireland	4524.15	137.6	35.5	3.6	8 680.8	2.2	2.6	1.6
Italy	12908.75	1145.7	11.0	3.7	51 809.0	13.1	15.2	15.2
Latvia	1959.40	69.9	27.6	7.3	1 444.7	0.4	14.5	14.8
Lithuania	2974.99	150.3	19.5	6.2	2 940.5	0.7	8.1	8.1
Luxemburg	131.59	1.9	66.3	0.6	393.7	0.1	4.4	4.4
Malta	11.58	9.2	1.2	0.9	120.6	0.0	0.4	0.5
Netherlands	1816.32	55.7	32.3	1.8	27 961.4	7.1	3.2	3.7
Poland	14550.35	1410.7	10.2	9.0	26 301.7	6.6	3.3	3.5
Portugal	3591.42	259.0	14.1	3.4	7 746.6	2.0	5.9	8.2
Romania	13825.61	3422.0	3.7	19.1	17 641.2	4.4	2.4	2.9
Slovakia	1915.73	25.7	73.6	2.8	2 081.3	0.5	9.9	10.3
Slovenia	479.82	69.9	7.0	3.7	1 336.4	0.3	10.0	10.3
Spain	24371.66	945.0	24.6	4.0	49 451.3	12.5	9.3	9.7
Sweden	3004.78	62.9	47.9	1.3	5 791.9	1.5	20.3	20.4
EU-27	161787.58	10467.7	16.6		341 098	100.0	7.5	8.5
Ukraine	41329.21	46794 (2019)	4.4	10.4	20 327.8	-	0.89	1.1

Source: compiled by autor on materials [9; 11-14].

As shown in Table 1, the volume of agricultural areas and the share of employment in the rural sector show no direct correlation with the value of gross agricultural output. This is demonstrated by the case of Bulgaria and Austria: with almost half the area and workers employed in Austrian agriculture, the value of gross agricultural output is almost twice as high as in Bulgaria, and the amount of land devoted to organic production products are 11 times higher than in Bulgaria. In general, in the "old" EU members (i.e. those that were members of the EU before 2004) the employment rate in the agricultural sector is much lower alongside with a higher level of the gross agricultural output compared to the "new" members (i.e. those countries, which entered the EU after 2004). Moreover, the difference between these groups of EU members can be explained by a number of factors that rely on the development of the agricultural sector in "old" EU members:

- more intensive agriculture;
- wide implementation of new advanced technologies;
- transition to smart agriculture;
- conducting agriculture based on sustainable development;
- transition to organic production of agricultural products.

Of course, those countries that were members of the EU before 2004 had the opportunity to benefit from the EU CAP mechanism for a longer period, especially its financial resources. However, enough time has passed for "new" EU member states to assess their positions in the agricultural sector and agricultural markets in the long run.

It should be noted, that the CAP was built as a "two-pillar structure":

- Pillar I – Common organization of the markets in agricultural products – consider the mechanism of direct payments and market measures;

— Pillar II – Rural development policy – aimed to support rural areas by the implementation of socio-economic measures.

In the line of agricultural ecologization, the European Commission defines three "greening" measures aimed at climate change mitigation and biodiversity conservation [15], which consists of the maintenance of permanent pastures, crop diversification, and the creation of ecological focus areas. These measures were implemented within the framework of both two pillars during the 2014-20 period and had a significant impact on organic farming, but the new reform for the 2021-27 period leads to some changes in the CAP mechanism:

— Pillar I – the direct payments to those organic farmers, who apply environmentally beneficial practices [16].

As the different studies showed, the effectiveness of this payment has been limited and it is heavily criticized for the additional administrative efforts required to monitor compliance, so the European Commission eliminated this instrument from its proposals for the period 2021-2027 [17, p.14], but despite that fact, the European Commission introduced transitional regulation for the years 2021 and 2022 to allow for continued payments to farmers [18];

— Pillar II – the agri-environment-climate measures affected organic farming [2]. This instrument was regarded as ecologically effective [19] and will be developed in the period 2021-2027.

Opportunities for Ukraine to enter the European market of organic products

In Ukraine, the domestic market of organic products began to take shape in the 2000s, and since 2005 the Federation of Organic Movement of Ukraine, which is the part of IFOAM, aims to promote the development and efficiency of organic production in our country while developing modern global and domestic technologies that are safe for nature and human.

Despite lagging behind EU members, as early as January 1, 2018, the organic market of Ukraine was characterized by fairly high indicators increasing annually (Table 2). According to the Ministry of Economic Development, Ukraine exports more than 80% of organic products worth \$ 60 million. USA [20].

Table 2. The main indicators of organic production and trade in organic products in Ukraine

Indices	2018	2019
The total area of agricultural land certified as organic, ha	381 173	384 529
Share of organic lands from the total area of agricultural lands,%	0.89	1.1
The total number of market operators including producers of organic agricultural products	504 304	617 470
Exports of organic products, number of countries	40	46
Exports of organic products to the EU, thousand tons	265.8	337.9

Source: compiled by autor on materials [20-21].

As Tables 1 and 2 demonstrate, in Ukraine the share of areas of agricultural land certified as organic increased from 0.89% in 2018 to 1.1% in 2019 out of the total area of all agricultural land. In 2019 organic agricultural land amounted to 384 529 ha. For comparison, in the EU-27 lands certified as organic comprise in average 5.3 million hectares, but their share in the total area of agricultural land is many times higher and is 8.5%. However, if in Ukraine we take into account the total number of lands that are already certified as organic and lands in the transition period, engaged in organic production, the Ukrainian index amount to 467,980 hectares.

Another indicator of the long-term development of the organic products sector is the growth of the total number of market operators from 504 in 2018 to 617 in 2019, with a significant increase in the number of organic agricultural producers (from 304 in 2018 to 470 in 2019). Over the same period quantity of traders and processors decreased from 200 to 147. This trend indicates, firstly, the interest of producers in the development of organic production, and secondly, the improvement of their understanding of the mechanism of entry into foreign markets.

It is noteworthy, that there is an annual increase in the number of certified organic producers for a variety of sectors, including processed food products, of which 4 – producers of organic dairy products, 1 - meat products, 15 – cereals, 11 – oil, 3 – producers of organic spices, etc. [22].

In general, the commodity structure of Ukrainian organic products exports coincides with the commodity structure of traditional agricultural exports - grain, oilseeds and legumes, fruits, as well as wild berries, mushrooms, nuts, and herbs. The problem is that, both in traditional agricultural and in organic exports, the main items are raw materials. Also, there is a tendency to increase the share of processed and finished products, including sunflower meal, flour, sunflower oil, sunflower meal, apple concentrate, and birch sap.

It bears noting that exports of domestic organic products are mainly directed to the markets of EU members. The main factors of the development of this promising area for Ukrainian organic goods exporters are the following:

- the effect of the Free Trade Agreement with the EU, concluded within the framework of the Association Agreement between Ukraine and the EU, which simplifies access to the European market for domestic exporters;
- significant capacity of EU markets, confirmed by effective demand;

- growing demand for organic products in EU members;
- underdeveloped sector of organic agricultural production in EU members, which is not yet able to meet existing domestic demand.

As we can see in Table 2, the growth rate of Ukrainian exports of organic products to the EU amounts to 27% – from 265.8 thousand tons in 2018 to 337.9 thousand tons in 2019.

According to the official data of the Ministry of Economic Development, Trade and Agriculture of Ukraine [13], in 2019 Ukraine ranked second out of 123 countries exporting organic products to the EU market, which improved domestic positions compared to fourth place in 2018. The largest consumers of domestic organic goods in the EU are the Netherlands, Germany, Italy, Austria, Poland, the Czech Republic, France, Hungary, Romania, Belgium, Bulgaria, Lithuania, and Denmark. Furthermore, Ukraine exports organic products to the markets of the United States, Switzerland, Great Britain, Canada, Australia, and some Asian countries.

Thus, the organic production and organic products trade may become a promising niche area for Ukrainian exports to EU members shortly.

Although researchers highlight the low and sometimes almost absent demand of the domestic food market as the main barrier to the development of organic production in Ukraine [23], we believe that it can lead to the export orientation of organic producers and stimulate their entry into markets of EU members. They are the nearest highly solvent markets, especially since the Association Agreement with the EU provides for convergence of relevant policies and legislation, with special attention paid to the gradual harmonization of domestic regulations with EU law and standards. Convergence of Ukrainian agricultural regulations to EU legislation, – in particular norms of food safety, sanitary and phytosanitary control – will help to provide a predictable and sound basis for organic agricultural production, processing, and trade. It should smooth the acute adaptation of Ukrainian organic producers to new markets and opportunities. This will help reform and reorganize agricultural research and education, integrate them, and introduce a system of advisory services, ensuring that all market participants have access to analytical information and monitoring services, advising and assisting exporters, especially on exploring opportunities in new markets.

When entering the European market it should be borne in mind that EU regulatory rules clearly define the general principles of organic production, the requirements for agricultural production, processing, and manufacturing of food, the rules for organic products labeling, the issues of inspection (control) of organic products. The producers of organic products must be certified in the accredited laboratories and receive a certificate confirming that their products are produced according to the rules of organic production. This is perhaps the most difficult stage in the promotion of Ukrainian products on the EU market. It needs to be addressed as a result of Ukraine's commitments to adopt and unify EU technical regulations to properly implement the Association Agreement between Ukraine and the EU.

Conclusions

The dynamic growth in organic farming in the EU reflects the implementation of the support measures within the CAP concerning balanced agricultural development, rural areas, and environmental protection, and, on the other hand, the increasing domestic demand for high-quality, sustainable food production. It should be stressed, that the effectiveness of the “green” direct payment for organic farming has been evaluated as limited, though this instrument is eliminated from the CAP measures for the period 2021-2027. In general, the new Strategic Plan, which determines the framework of the CAP reform for the period 2021-2027, also contains proposals aimed to provide stronger support to European organic farmers in the current and future social, economic, and environmental challenges. In the nearest future, the CAP will mostly develop the agri-environment-climate measures that affected organic farming. Moreover, the implementation of the European Green Deal and the EU's ambitious agri-food chain and environmental strategies (Farm to Fork and Biodiversity Strategies) will play a key role in the development of European organic farming. Thus, both European and third countries' organic producers have to take into account new EU strategies.

The study found that there is no direct correlation between the amount of agricultural land, the share of employment in agriculture, and the gross value of agricultural production. On the contrary, the more developed the economy, the lower the employment rate in agriculture, but the higher the value of the gross agricultural output as a whole and the greater the share of organic production in it. This situation is explained by several factors, including more intensive agriculture, the widespread introduction of new advanced technologies, the transition to smart agriculture, smart agriculture based on sustainable development, the transition to organic production.

The statistical and empirical analysis shows that Ukraine has a strongly positive development of organic farming and a significant possibility to become one of the European leaders in organic production in the nearest future. Under the Free Trade Agreement with the EU Ukrainian exporters have better access to the EU market than other non-EU countries. Furthermore, among the main factors influencing the growth of Ukrainian exports of organic products to the EU are the significant capacity of EU markets, growing demand for organic products in EU members, and lack of domestic production of organic products. However, with the help of regulatory instruments, it is necessary to stimulate the improvement of the commodity structure of exports of organic products, as it is dominated by raw materials, rather than processed and finished products. EU technical requirements, in particular the certification system, have a restrictive effect on Ukrainian exports of organic

products, but the harmonization of domestic regulations with EU law and standards under the terms of the Free Trade Agreement should smooth out the sharp adaptation of Ukrainian organic producers to new markets and opportunities.

Abstract

Common Agricultural Policy (CAP) is defined as a partnership between the rural economy and society, as well as between the EU and its farmers, and involves a complex mechanism of regulation of agricultural production, processing, and distribution of products. From the beginning, the CAP was focused mainly on stimulating production and supporting farmers' incomes, but since the mid-1990s it has been gradually integrating environmental support tools. The development of the agriculture organic sector, both in the EU and in Ukraine, remains understudied. It's necessary to stimulate and support organic production not only from an economic and social point of view but also from the point of view of environmental protection and biodiversity conservation. Given Ukrainian-European integration, it is extremely important to analyze the current state and opportunities for the development of the domestic agricultural organic sector, which determines the purpose of our analysis.

The EU is the world's fastest-growing market of organic food. According to IFOAM Organics Europe, in 2019, the number of organic producers in the EU increased by 5.1% to 343,858 compared to 2018. Significant growth of the EU's organic retail market accompanies this development, rising by 12% to 41.5 billion EUR.

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