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UKRAINE'S TRADE UNDER THE DCFTA: A DISAGGREGATED STATISTICAL INVESTIGATION

In the article a disaggregated approach to analysing Ukraine's export performance is proposed whereby export performance is analysed for total, agricultural and non-agricultural products and; preferred total, preferred agricultural and preferred non-agriculture. The results show that there are significant and opposing trends in Ukraine's exports to the EU under the DCFTA at a disaggregated level.

Keywords: foreign trade, the Deep and Comprehensive Free Trade Area, economic growth, agricultural sector, tariffs, exports, value, disaggregated approach.

Хеллаер М. Торговля Украины в рамках УВЗСТ: дезагрегированное статистическое исследование. В статье рассмотрен дезагрегированный подход к анализу экспортных результатов Украины, при котором исследуются экспортные показатели по сельскохозяйственной и несельскохозяйственной продукции, а также по предпочтительному сельскохозяйственному и несельскохозяйственному экспорту из Украины в ЕС. Выявлены существенные и противоположные тенденции в экспорте Украины в ЕС в рамках УВЗСТ на дезагрегированном уровне.

Ключевые слова: внешняя торговля, углубленная и всеобъемлющая зона свободной торговли, экономический рост, аграрный сектор, тарифы, экспорт, стоимость, дезагрегированный подход.

Background. Ukraine exported 16,2 billion EUR to EU in 2017 which is a significant increase (27 %) over 2016 and reverses a steady decline in exports since 2010. However, it is unclear whether this last annual growth is an underlying trend or one off spike (*table 1*).

Analysis of the trade between EU and Ukraine [1] shows that of the 19949 customs codes of the EU TARIC (Tarif Intégré Communautaire; Integrated Tariff of the European Communities) system of product classification, Ukraine exports (based on analysis of EU imports from Ukraine) 6,940 products (average 2015–2017).

To examine the underlying trend in growth of exports, a 3-year average can be used to «smooth» the data. This shows that in 2017, the smoothed growth in exports was 7,9 % (average growth 2015–2017) and average smoothed growth since the de-facto application of the DCFTA is 2014 in – 0,4 % per annum and this compares with the average smoothed growth for the 4 years prior to the DCFTA (2010–2013) of +10.0 % per annum.

Table 1

Export from Ukraine to EU

Year	Agri exports		Non-Agri exports		Total Trade	
	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %
2010	1,6	–	9,5	–	11,1	–
2011	2,6	63,8	12,1	26,7	14,7	32,0
2012	4,1	57,8	10,1	–16,1	14,2	–3,1
2013	3,8	–7,0	9,6	–5,6	13,3	–6,0
2014	3,9	3,5	9,3	–2,7	13,2	–1,0
2015	4,0	2,7	8,3	–10,6	12,3	–6,7
2016	4,1	1,3	8,7	4,4	12,8	3,4
2017	5,4	31,7	10,8	24,7	16,2	27,0

Source: composed by the author according to [1].

Similar trends are observed in non-agricultural exports, which has increased since 2010 2017, largely due to the increase in non-agricultural exports in 2017 alone. The average smoothed increase in exports of non-agricultural production decreased after the FTA by 2,8 % per annum between 2014 and 2017 compared to an increase of 10,1 % per annum between 2010 and 2013.

Despite the fact that agricultural exports from Ukraine turned out to be much better than exports of non-agricultural production, increasing from 1,7 billion EUR in 2010 to 5,4 billion EUR in 2017, the bulk of growth was observed in the FTA. The average gradual increase in agricultural exports after FTA was 8,0 % per annum between 2014 and 2017, but was significantly lower than the average growth rate of 16,6 % per annum between 2010 and 2013. As a result of this difference in indicators, there has been a shift in the importance of Ukraine's agriculture exports to the EU during the period where the share of Ukraine's agriculture exports to the EU in 2017 (on average 2015–2017) by a third (32,7 %) compared to only a quarter (24,8 %) in 2013 (2011–2013 average). However, this was part of a long-term trend, as agriculture exports to the EU accounted for only 17,2 % in 2010 (2008–2010 average). From 2010 to 2017, the number of products exported by Ukraine increased from 63838 HS8 lines in 2010 (on average 2008–2010) to 6940 in 2017 (2015–2017), up 15 % over the period. Agricultural exports increased by 74,4 % over the period and non-agricultural exports by 7,6 %. This indicates a significant diversification trend. Importantly, most of this diversification occurred after the DCFTA with overall declines in total and non-agricultural products exported between 2010 and 2013 (from 6388 to 5712 and; 5774 to 5022, respectively) and only a slight increase in agricultural exports to the EU (from 664690). This means that the number of goods exported to the EU from Ukraine increased by 21,5 % between 2014 and 2017 from 5712 in 2013 to 6940 in 2017. Agricultural exports increased from 690 in 2013 to 1158 in 2017 (+67,8 %) and non-agricultural exports from 5022 to 5782 (15,1 %) over the same period.

Notwithstanding the increase diversification of Ukraine's export base to the EU since implementation of the DCFTA, Ukraine's exports to the EU have been disappointing given the expected impact. However, the above analysis does not link causality and therefore, it is unknown whether this failure of the DCFTA to stimulate Ukraine's exports are due to fundamental flaws in the policy approach or from exogenous factors affecting performance or simply that insufficient time has passed for the mechanisms to have an impact. Similarly, it is unknown if the diversification of Ukraine's export base to EU post DCFTA is attributable to DCFTA or other factors (eg collapse of certain industries in Ukraine during crises).

The review of scientific sources. In terms of impact of preferential/free trade agreements, the main body of literature uses Computable General Equilibrium estimation to predict the impact on trade and for Ukraine this was mostly undertaken ex ante with a range of predictions from increases in exports of Ukraine to EU due to the DCFTA of between 6,3 % and 15 % in the first year, that is the increase over and above expected normal increases [2–4].

The most comprehensive modelling of the predicted sector impact on Ukraine's exports to EU is given in Berden et al 2007 [2] but no recognition is given to the differences in Ukraine's pre and post tariff levels at a product level (tariffs within sector can vary greatly).

Kravchuk (2016) [5] modelled the expected increase in exports to the EU post DCFTA at a sector level stating «*only the most competitive industries would thrive*» suggesting that the tariff preference effect of the AA/DCFTA would not be significant except in the most competitive sectors which may have increased exports anyway. Kravchuk modelled Ukrainian exports retrospectively and identified crop production (cereals and oilseeds) as having the greatest potential with expected growth of 22 % followed by textiles and clothing at 18 %. No further sectors were presented. However, he concludes, «*This scenario has already been borne out by the actual impacts of the EU's unilateral market opening to Ukraine in 2014*».

The **aim.** Exemption from «customs duties and charges having equivalent effect» can only have a potential effect of increasing the exports from Ukraine to EU if the AA/DCFTA provided Ukraine with a significant margin of preference over the previous market entry regime given by the EU to Ukraine under the general system of preferences (GSP) so that it provided Ukraine with a price advantage. Few studies on trade performance generally actually examine margins of preferences at a detailed product level and the literature and modelling predicting the impact of AA/DCFTA on Ukraine's trade compared «sector averages» and which hides impact of preferences within groups of products that can differ significantly (EU TARIC assigns market entry conditions at an HS 8 or 10 level which can vary from significantly). This Article will examine Ukraine's trade at this disaggregated level to see if there was expected performance in products that enjoyed better market access under the DCFTA than those products where there was no change.

Materials and methods. McQueen and Stevens [6] undertook the first real analysis of the margins of preferences on EU imports in a study on imports from African, Caribbean and Pacific States (ACP). This analysis covered all products accounting for 1 per cent or more of ACP exports to the European Union in 1987, and showed that of these products (accounting for 75 % of ACP exports), 60 % were not subject to MFN tariffs or quantitative restrictions against third countries. Therefore, there was no margin of preference on at least 45 % of ACP exports to the European Union. The percentage share is strongly influenced by the world price of crude oil (by far the most important ACP export) and would have been even greater in previous years when oil prices were higher than in 1987. McQueen and Stevens concluded that analysing the effects of preferences based on an analysis of *total* ACP exports is therefore invalid.

Therefore, any meaningful investigation of the impact of a tariff preference agreement such as the AA/DCFTA must focus on those exports for which a margin of preferences was created by the AA/DCFTA itself, comparing with the previous applicable tariffs/regime (that is compare with GSP, not the Most Favoured Nation (MFN) rate that is given as the base rate of the DCFTA agreement).

The range of applicable tariffs on the TOP-10 exports of Ukraine at entry into force of the AA/DCFTA was provided by [7] and summarised in *table 2* below.

Table 2

Range of applicable tariffs on top exports per HS chapter

HS Chapter	Description	Tariff Range and EIF, %	Years to eliminate (staging)
01	Live animals	0-6,7	0-3
02	Meat	10-20 + TRQ	5-7
03	Fish	0	n/a
04	Dairy	8-17 + TRQ	5-7
05-06	Other Animal origin products and Live plants	0	n/a
07	Vegetables	0-16 + TRQs	0-5 (but some tariffs 50 % reduction)
08-09	Fruits; spices	0	n/a
10	Cereals	0-16 + TRQ	0-5
11	Products of the milling industry	0 + TRQ	n/a
12-15	Oil seeds, Vegetable plaiting materials and Vegetable saps and Animal or vegetable oils	0	n/a
16	Preparations of meat, of fish or of crustaceans, molluscs	0-14,4 + TRQ	0-7 (but some tariffs 50 % reduction)
17-18	Sugar and Cocoa	0+TRQ	n/a
19	Preparations of cereals, four, starch or milk	0-16 + TRQ	0-5
20	Preparations of vegetables, fruit, nuts	0-30 +TRQ	n/a
21	Miscellaneous edible preparations	0-9 + TRQ	n/a

End of the Table 2

HS Chapter	Description	Tariff Range and EIF, %	Years to eliminate (staging)
22	Beverages, spirits and vinegar	0+ TRQ	n/a
23	Residues and waste	0-16 + TRQ	0-7
24	Tobacco	0 + TRQ	n/a
25	Salt	0-16	0-5
26-27	Ores, slag and ash and Mineral fuels	0	n/a
28	Inorganic chemicals	0-3,3	0-3
29	Organic chemicals	0-4,3 + TRQ	0-3
30	Pharmaceutical products	0	n/a
31	Fertilisers	0-4,34	0-3
32	Tanning or dyeing extracts	0-4,8	0-5
33	Essential oils and resinoids	0-9 + TRQ	n/a
34	Soap	0	n/a
35	Albuminoidal substances	0 (8,3 + 8,9 EUR /100 kg/net)	n/a
36-37	Explosives; pyrotechnic products; matches and Photographic	0	n/a
38	Miscellaneous chemical products	0 + TRQ	n/a
39	Plastics	0-4,3	0-3
40	Rubber	0-8	0-5
41	Raw hides and skins (other than furskins) and leather	0-4,5	0-5
42	Articles of leather	0-6,5	0-3
43	Fur, skins and artificial fur	0-6,67	0-3
44	Wood and articles of wood	0-4,7	0-3
45-68	Various non-agricultural products	0	n/a
70	Glass and glassware	0-6,67	0-5
71	Natural or cultured pearls, precious or semi-precious stones	0-6,67	0-3
72-80	Metals and articles thereof	0	n/a
81	Other base metals; cermets; articles thereof	0-7,2	0-5
82	Tools, implements, cutlery, spoons and forks, of base metal	0-6,67	0-3
83	Miscellaneous articles of base metal	0-6,67	0-3
84	Machinery and mechanical appliances	0	n/a
85	Electrical machinery and equipment and parts thereof	0-12	0-7
86	Railway or tramway locomotives, rolling stock and parts thereof	0	n/a
87	Vehicles other than railway or tramway rolling stock	0-8,6	0-7
88-89	Aircraft and boats	0-6,67	0-3
90	Optical and measuring devices	0	n/a
91	Clocks and watches and parts thereof	0-10	0-3
92	Musical instruments	0-6,7	0-3
93	Arms and ammunition; parts and accessories thereof	0-1,8	0-3
94-95	Furniture and Toys	0-6,7	0-3
96-97	Miscellaneous articles and Works of art	0	n/a

Source: calculated by the author from [8].

This shows that the analysis at a HS two customs code level is already insufficient to understand the price advantage under the AA/DCFTA and typical CGE models and other analyses exam sectors using EU Nomenclature des Activités Économiques dans la Communauté Européenne (NACE) or Standard Industry Classification (SIC) which is far more aggregated than even 2 digit customs codes (and these do not correlate so that actual tariffs cannot be attributed).

Results. An analysis of all Ukraine’s exports to the EU (averaged 2015–2017) valued over 1 million EUR was undertaken. Of the 6940 products exported from Ukraine to the EU, 768 are valued over 1 million EUR and these account for 96,5 % of total exports.

Within this group of 768 tariff lines, only 211 products have a margin of preference under AA/DCFTA over GSP, amounting to 2,27 billion EUR of exports to the EU or 17,1 % of the sample. Therefore, only 17,1 % of Ukraine’s exports had improved market access under the AA/DCFTA and this could have masked the potential market entry effects of the AA/DCFTA.

Table 3 below compares the performance of Ukrainian exports to the EU at an aggregate (Total Trade) level and then disaggregated into two further groups: those that had a preference under the AA/DCFTA, including tariff rate quota (TRQ), (Preferential Trade) and those products that experience no change in market access (non-preferential trade).

Table 3

EU Imports from Ukraine

Year	Preferential Trade		Non-Preferential Trade		Total Trade	
	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %
2010	1,2	30,9	7,6	57,4	11,1	43,0
2011	1,4	20,6	10,5	38,0	14,7	32,0
2012	1,6	13,4	11,3	8,1	14,2	-3,1
2013	1,4	-11,1	11,0	-2,7	13,3	-6,0
2014	1,7	15,4	10,9	-1,0	13,2	-1,0
2015	1,9	12,1	10,0	-7,9	12,3	-6,7
2016	2,2	18,8	10,1	0,6	12,8	3,4
2017	2,7	22,7	12,9	27,6	16,2	27,0

Source: composed by the author according to [1].

Total and non-preferential exports from Ukraine performed similarly both pre and post application of the AA/DCFTA with average growth in exports to the EU of total exports declining from 16,5 % pre AA/DCFTA (2010–2013) to only 5,7 % post AA/DCFTA (2014–2017) and growth in non-preferential exports averaging 25,2 % pre AA/DCFTA to 4,8 % post DCFTA. By contrast, preferred exports from Ukraine to EU performed worse than total and non-preferred pre AA/DCFTA growing on average by only 13,4 %. This is not surprising given that these products all faced tariff

barriers under the GSP. As expected, these products then performed better than average and non-preferred exports post AA/DCFTA growing on average by 17,3 % per annum; growing more than 3 times faster per annum than total and non-preferred.

Examining smoothed growth rates (based on average of 3 year averages) shows an even bigger difference with average annual smooth growth of total exports of Ukraine to EU of -0,4 %, non-preferred of +0,4 % and preferred products of +11,3 %, more than 28 times faster growth than non-preferred. Moreover, the share of the sample in total trade post AA/DCFTA is significantly larger, indicating a change in structure of exports over the period with large declines in exports of certain products (that had been valued over 1 million EUR pre AA/DCFTA but did not feature post AA/DCFTA).

The largest part of preferred exports is in agricultural exports, totaling 1,4 billion EUR in the sample (2015–2017) or 61 % of the sample. This again is not surprising as under GSP, the greater number of protected products are in the agricultural sector.

Table 4 below shows the evolution of total agricultural, non-preferred agricultural and preferred agricultural exports under AA/DCFTA.

Table 4

Agricultural Export from Ukraine to EU

Year	Preferential Agri Trade		Non-Preferential Agri Trade		Total Agri exports	
	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %
2010	0,6	55,6	0,8	-12,4	1,6	-8,5
2011	0,6	0,6	1,4	71,8	2,6	63,8
2012	0,8	27,7	3,2	124,4	4,1	57,8
2013	0,6	-22,0	3,1	-3,5	3,8	-7,0
2014	0,8	33,2	3,1	-2,8	3,9	3,5
2015	1,0	20,3	3,0	-1,8	4,0	2,7
2016	1,4	44,3	2,6	-12,9	4,1	1,3
2017	1,8	27,0	3,5	34,0	5,4	31,7

Source: composed by the author according to [1].

Average annual growth in exports to the EU of total agricultural exports declined from 26,5 % pre AA/DCFTA (2010–2013) to only 9,8 % post AA/DCFTA (2014–2017). Growth in non-preferential agricultural exports performed even worse declining from an average of 45,1 % per annum pre AA/DCFTA to only 4,1 % post DCFTA.

Again, preferred exports from Ukraine to EU performed worse than total and non-preferred pre AA/DCFTA growing on average by only 15,5 %; but performed better post AA/DCFTA, growing by an average of 31,2 % per annum post AA/DCFTA, that is growing more than 7 times faster per annum than non-preferred.

Total and non-preferred smoothed agricultural export growth rates performed similarly with average annual growth of 8,0 % and 9,3 % respectively whilst preferred agricultural exports grew by 21,6 %, more than 2 times faster growth than non-preferred. This difference between nominal and smoothed growth can be attributed to the extremely high growth in 2017, especially compared to slow and negative growth 2014–2016.

Non-agricultural exports from Ukraine to the EU enjoying a tariff preference under the DCFTA total 0,9 billion EUR (2015–2017) or 39 % of the sample as shown in *table 5* below.

Table 5

Non-Agricultural Export from Ukraine to EU

Year	Preferential Non-Agri Trade		Non-Preferential Non-Agri Trade		Total Non-Agri exports	
	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %	Value, billion EUR	Growth, %
2010	0,5	12,4	6,7	74,9	9,5	57,6
2011	0,8	41,3	9,0	33,8	12,1	26,7
2012	0,8	2,8	8,1	-10,6	10,1	-16,1
2013	0,8	-1,2	7,9	-2,4	9,6	-5,6
2014	0,9	2,3	7,9	-0,3	9,3	-2,7
2015	0,9	4,0	7,0	-10,3	8,3	-10,6
2016	0,8	-9,2	7,5	6,4	8,7	4,4
2017	0,9	16,0	9,4	25,3	10,8	24,7

Source: composed by the author according to [1].

Average annual growth in exports to the EU of total non-agricultural exports declined from 15,7 % pre AA/DCFTA (2010–2013) to only 4,0 % post AA/DCFTA (2014–2017). Growth in non-preferential non-agricultural exports performed even worse declining from an average of 23,9 % per annum pre AA/DCFTA to 5,3 % post DCFTA.

Preferred non-agricultural exports from Ukraine to EU performed similarly to total exports pre AA/DCFTA growing on average by only 13,8 % and grew by an average of 3,3 % per annum post AA/DCFTA.

Total and non-preferred smoothed non-agricultural export growth rates declined from an average annual growth of 10,1 % per annum and 19,9 % pre AA/DCFTA to declining by an average of -2,8 % and -0,8 % post DCFTA. However, preferred non-agricultural exports performed better and grew by 13,9 % pre AA/DCFTA and continuing to grow post AA/DCFTA, albeit at a lower rate of +1,4 %.

In all cases, preferred exports from Ukraine to EU performed better than non-preferred exports after the implementation of the AA/DCFTA in total, agricultural and non-agricultural trade.

Conclusion. With 4 years of data since the effective application of DCFTA provisions on Ukraine’s exports to the EU, it shows that Ukraine’s exports have not significantly improved under the DCFTA. Average EU imports

from Ukraine in 2017 (smoothed 2015–2017 to take account of annual anomalies) was 13,8 billion EUR, compared with imports from Ukraine in 2013 (averaged 2011–2013) of 14,1 billion EUR. This shows that Ukraine’s exports are less post DCFTA than pre DCFTA.

This runs contrary to both the EU and Ukrainian policy objective of the DCFTA as well as traditional economic theory that states that with the removal of tariffs, trade between the two parties should increase due to specialisation in areas of comparative advantage. It therefore would have been expected that Ukraine’s exports to the EU (measured by the EU as imports from Ukraine) should have increased post DCFTA.

A literature review of ex ante models of the AA/DCFTA generally predicted a positive impact on Ukraine’s exports to the EU with a predicted increase in exports in the short run of between 1–15 % and an average predicted impact across studies of 7,7 % directly attributed to the application of the AA/DCFTA. Given this is the predicted impact under the DCFTA and average growth in exports from Ukraine to EU pre implementation of the DCFTA trade regime (2011–2013) had been 10,0 % per annum, then actual observed increase in Ukraine’s exports could have been expected to be up to +17,7 % (7,7 % due to AA/DCFTA and a further 10 % due to underlying growth trend).

Examining Ukraine’s exports to the EU in 2014 revealed that only 17,1 % of Ukraine’s exports to the EU had improved market access under the AA/DCFTA compared with GSP so that in the short run, aggregate increases in Ukraine’s exports to the EU due to the tariff preference part of the AA/DCFTA would most likely be small.

However, analysis of this preferred exports to the EU of products showed that post 2014, this group of exports increased significantly more than non-preferred exports (as expected). Total preferred exports grew by an average of 15,4 % and preferred agricultural exports grew by 33,2 %, which is much closer to the ex-ante predictions. This shows that although there has been widespread criticism of the effectiveness of the DCFTA between Ukraine and EU (and also of FTAs in general), that actually products where there have been improved market access under the DCFTA have performed well and increased exports. However, since these exports represent a relatively small proportion of Ukraine’s total exports (less than one fifth), this performance has been masked by the non-preferred exports whose trade regime to the EU had not changed at all under the DCFTA.

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Хеллаєр М. Торгівля України в рамках ПВЗВТ: дезагреговане статистичне дослідження.

Постановка проблеми. Україна підписала Угоду з Європейським Союзом у 2014 році, що передбачає створення поглибленої та всеохоплюючої зони вільної торгівлі (ПВЗВТ), з очікуванням та прогнозами на основі економічного моделювання, через що відбудеться негайне значне збільшення експорту з України до ЄС. Однак, насправді, після відкриття ринку ЄС фактично обсяги торгівлі України за 3 роки зменшились.

Аналіз останніх досліджень і публікацій. Вивчаючи результати діяльності торгівлі в цілому або на галузевому рівні, визначено, що після підписання угоди торговельна діяльність проводиться на сукупному рівні.

Мета статті – дослідження результативності України на дезагрегаційному рівні з урахуванням відмінностей на національному рівні та беручи до уваги продуктивний рівень існування переваг у торговельному режимі України до та після ПВЗВТ.

Матеріали та методи. Використано методи аналізу та синтезу, статистичної обробки даних, дезагрегаційний підхід до аналізу експорту. Дослідження базується на даних ЄС про експорт продукції; про тарифи; а також на даних Угоди про асоціацію між Україною та ЄС.

Результати дослідження. Запропоновано застосовувати дезагрегаційний підхід до аналізу показників експорту всієї, а також сільськогосподарської та несільськогосподарської продукції. Водночас проведено аналіз за показниками привабливішого експорту продукції (як сільськогосподарської, так і несільськогосподарської) з України до ЄС. За результатами дослідження визначено, що в експорті України до ЄС в рамках ПВЗВТ спостерігають значні та протилежні тенденції на дезагрегованому рівні.

Висновки. Доведено, що попри те, що в цілому після ПВЗВТ український експорт виглядає недостатньо привабливим, експертиза конкурентоспроможних для українського експорту продуктів (тих, що покращили доступ до ринку в межах ПВЗВТ) насправді виявилася, як і очікувалося, ефективною.

Ключові слова: зовнішня торгівля, поглиблена і всеохоплююча зона вільної торгівлі, ПВЗВТ, економічне зростання, аграрний сектор, тарифи, експорт, вартість, дезагрегований підхід.