

EU-UKRAINE AGRICULTURAL TRADE RELATIONS DURING THE 2022 WAR CRISIS

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Abstract. This article aims to examine the impact of the Russian military aggression against Ukraine in February 2022 on the EU trade policy towards Ukraine and its consequences, with a focus on the agricultural sector and mutual trade in farm products. The research employed theoretical explanations, descriptive and empirical analysis. It draws upon the review of academic literature on international trade and political economy, as well as legislation and other documents for its analytical part. For the empirical part, the study employs Eurostat statistical data to show the changes in trade in selected agricultural products between Ukraine and the EU. The comparison of trade turnover is based on a time series that includes data both before and after the Russian invasion. The research indicates that, as a response to the war, the EU has temporarily lifted restrictions on imports from Ukraine as a gesture of solidarity. The implementation of this policy has initially led to a sudden influx of cheaper Ukrainian agricultural products, including cereals, into the EU territory, particularly Ukraine's neighbouring countries. For wheat and meslin, the EU imports were 11 and 22 times higher in 2022 and 2023 than in 2021. This influx of grain has created an unbalanced market and raised concerns about the competitiveness and welfare of local agricultural producers. As a result, farmers in many EU countries organised protests and demonstrations calling for more protectionist, pro-agricultural policies at the EU level, inflaming relations with Ukraine and contributing to a loss of confidence in the EU institutions among part of the public.

Key words: Russian-Ukrainian war, European Union, trade policy, trade turnover, agricultural products.

JEL code: F13, F14, F15, Q17

Introduction

A defining feature of the contemporary global economy is the unprecedented degree of internationalization of production, financial flows, and trade. Nevertheless, a growing contradiction exists between the process of economic integration and the desire for political control and national autonomy. This phenomenon is evident in both Europe and on a global scale. The global economy is frequently disrupted by external shocks that intensify protectionist sentiment, such as the Covid-19 pandemic and the invasion of Ukraine by the Russian Federation. The increasing economic regional integration (e.g., within Europe) raises two main questions that require consideration. Firstly, how does regional trade liberalization impact the region's overall welfare? Secondly, how does liberalisation on a regional basis affect the welfare of individual nations and domestic entities, and how do their self-interested actions shape the rules of trade between nations? The article addresses the second problem in the context of the EU trade relations with Ukraine, focusing on the period preceding the war and its duration.

Russia's full-scale war against Ukraine, which began on 24 February 2022, has caused significant disruptions in global agri-food markets. This has happened both directly by limiting the supplies of agricultural goods, and indirectly through the impact of sanctions imposed on Russia and related spill-overs from other markets such as energy and fertilizers (Alexander et al., 2023; Mbah & Wasum, 2022; Odening & Hüttel, 2022). Before the outbreak of hostilities, both countries were prominent producers and exporters of agricultural and related commodities – Russia the world's largest exporter of wheat and fertilizers, while Ukraine – the largest exporter of sunflower oil and the fourth exporter of corn and wheat. The conflict has resulted in significant disruptions to the supply chain, destabilizing the export of Ukrainian products, including grain and oilseeds, to numerous countries. This situation has led to increased food prices and potential global food security threats (Chepeliev et al., 2023; Glauben et al., 2022).

The European Union (EU) and its international partners have unanimously condemned Russia's aggression and provided unprecedented humanitarian, political, military, financial, and trade support to

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Ukraine. Concerning the latter, the EU has implemented an extraordinary easing of trade policy concerning Ukrainian agricultural products: the suspension of import duties on industrial goods and tariff quotas on agri-food products, conditional trade defence measures, and the creation of the EU-Ukraine solidarity lanes.

This article aims to examine the impact of the ongoing conflict between Russia and Ukraine on the EU's economic cooperation with Ukraine in the sphere of trade policy and agricultural commodity trade. The research focuses on the import of Ukrainian grain by the EU countries following trade liberalisation, revealing conflicts of interest and disputes within the EU and between trading partners. In doing so, the study sheds light on the complex process of EU trade policy towards third countries, especially during crises such as international armed conflicts. It identifies the critical factors that influence two-way trade, including geopolitics, the solidarity paradigm, trade protectionism, trade liberalization, conflicts of interest, and the role of pressure groups. The study's originality lies in incorporating all these elements and their direct or indirect influence on wartime agricultural trade.

The research employed theoretical explanations as well as descriptive and empirical analysis. It is based on various sources such as political economy and international trade literature, Eurostat data, legal provisions, national government and EU documents, blogs and media news. In order to compare the trade turnover both in terms of value and volume, a time series was adopted which covers the period before and after Russia's invasion of Ukraine. This was presented graphically. The monthly data set on the volume of multilateral trade in the "food and beverages" category spans 11 years, from January 2013 to September 2023. The data set also includes information on the volume of selected cereals (wheat and meslin) imported from Ukraine into the EU-27, with the analysis period extending from January 2021 to January 2024.

Research results and discussion

1. The development of economic relations between the EU and Ukraine

The European Union's relationship with Ukraine has been influenced by a complex array of historical, geopolitical, economic, and security considerations (Incaltarau et al., 2022; Vidnyanskyj, 2022; Yıldız, 2023). Given Ukraine's considerable size and geopolitical importance, it was imperative that the EU adopt a clear and coherent policy in the aftermath of the Cold War and the collapse of the Soviet Union. However, up to the current war crisis, the EU focused primarily on the countries that joined the EU in 2004 and on Russia (Raik et al., 2024).

Currently, the European Neighbourhood Policy (ENP), launched in 2004 (European Commission, 2004) and complemented by the Eastern Partnership (EaP) is a foreign policy tool used by the EU towards Ukraine. The EaP was established to foster closer relations between the EU and states that emerged as a consequence of the dissolution of the Soviet Union in 1991 but were not included in the EU enlargement process. ENP's aim is to enhance and intensify political and economic connections of these states with the EU and its member countries (Council of the European Union, 2009). The objective was to implement a Western governance model, European norms, and legislation (known as "*acquis communautaire*") in those countries, and to establish a cooperation framework in various domains such as economy, society, political institutions, civil rights, and liberties (Incaltarau et al., 2022). Although the EU framework proposed to Ukraine offered enhanced political association and deeper trade relations, it did not address Ukraine's request for a membership perspective. The EU adopted a cautious approach to avoid any action that might jeopardize its relationship with Russia. Russia's full-scale invasion of Ukraine on February 24th increased

Ukrainian support for European integration, which has become crucial for Ukraine's resilience in its fight against Russian occupiers, as well as accelerated Ukraine's process of joining the EU (Raik et al., 2024).

Table 1 summarises the key developments related to trade cooperation between Ukraine and the EU member states.

Table 1

The trade relations between Ukraine and the European Union – timeline

Major events	Effective Date/Period
The European Neighbourhood Policy (ENP)	12.05.2004
The Eastern Partnership (EaP), which governs the relationship of the EU with post-Soviet countries, including Ukraine	07.05.2009
Annexation of Crimea by the Russian Federation	March 2014
The Association Agreement between the EU and Ukraine (AA)	01.09.2017
Deep and Comprehensive Free Trade Area (DCFTA)	01.01.2016
Russian invasion of Ukraine	24.02.2022
Autonomous Trade Measures (ATM)	04.06.2022-05.06.2024
Renewed EU's ATM	06.06.2024-05.06.2025
Establishment of the EU-UA Solidarity Lanes	May 2022
Granting EU candidate status to Ukraine	23.06.2022
The Black Sea Grain Initiative	22.07.2022
Termination of the Black Sea Grain Initiative by Russia	17.07.2023
Poland's unilateral ban on import of Ukrainian agricultural products	15.04.2023
Bulgaria's import restrictions on key agricultural products from Ukraine	24.04.2023
The exceptional and temporary preventive measures of the EU applied to Poland, Hungary, Slovakia, Romania and Bulgaria	02.05.2023
	05.06.2023
Lifting EU's temporary ban on imports of Ukrainian grain	16.09.2023
Poland's unilateral national ban on imports of certain agri-food products from Ukraine	16.09.2023
Hungary's ban on imports of sensitive agricultural products from Ukraine	September 2023
Ukraine's complaint to the WTO against Poland, Hungary, and Slovakia on their unilateral grain ban	18.09.2023
European Council's decision to open accession negotiations with Ukraine	14.12.2023

Source: author's compilation based on reviewed documents

In 2014, Ukraine and the EU signed the Association Agreement (Association Agreement, 2014), marking a significant achievement in their mutual economic relations. It was crucial for integrating Ukraine into the EU internal market and establishing a free trade area between the two parties. Its economic part, dealing with trade and related matters (Title IV), is known as the Deep and Comprehensive Free Trade Area. Due to pressure from Russia (which annexed Crimea in 2014), the DCFTA has been temporarily applied with a one-year delay, from 1 January 2016. The AA/DCFTA aims to boost trade in goods and services between the EU and Ukraine by gradually reducing tariffs and aligning Ukrainian regulations with those of the EU in certain industrial sectors and agricultural products. Following the military aggression of the Russian Federation against Ukraine in February 2022, the EU has implemented temporary measures to support Ukrainian exports to the EU, known as Autonomous Trade Measures (ATM), that have been in place since June 2022. They include suspension of import duties, quotas and trade defence measures on Ukrainian exports.

Prior to the Russian invasion, 89% of Ukrainian grain that was intended for export to world markets was transported through Black Sea ports (Blinov & Djankov, 2023). But for the first four months of the invasion, Russian warships blocked the ports, preventing any exports. From July 2022 to July 2023, an agreement called the 'Black Sea Grain Initiative' was in effect between Russia and Ukraine. The agreement, mediated by the UN and Turkey, allowed for the lifting of the blockade on some ports, which enabled the safe export of grain through the Black Sea via a humanitarian route. On 17 July 2023 Russia unilaterally withdrew from the treaty (European Council, 2024). Ukraine had to divert almost 50% of its exports from the blockaded Black Sea ports to Poland, Hungary, Romania and other neighbouring countries. The European Commission (EC) and EU countries backed this move by establishing alternative export routes or "Solidarity lanes" for Ukrainian agricultural goods to ensure that its exports could reach global markets. Grains, oilseeds, and other commodities were transported from Ukraine's western border through land and river to neighbouring countries for export to the rest of the world. Rather than leaving the EU's eastern member states, a significant proportion of the produce has flooded local markets. In response, on 15 April 2023, the Polish government enacted a unilateral ban on the import of Ukrainian agricultural products, citing the need to protect the Polish agricultural sector. Afterward, Bulgaria, Hungary, Slovakia, and Romania also implemented this measure.

The EC initially opposed the unilateral decisions of Eastern European countries. Finally, the EU has temporarily introduced preventative measures on imports of four agricultural products – wheat, maize, rapeseed, and sunflower seeds – originating in Ukraine due to the logistical bottlenecks and limited grain storage capacity experienced in these five states (European Commission, 2023). It is worth noting that listed sensitive products were allowed to be circulated freely in all of the EU's member states, except for mentioned frontline ones. If the products had to be transported across the territory of the five countries, this could be done under the common customs transit procedure or they could be exported outside the EU to another country or territory. The preventative measures came into effect on 2 May 2023 and were to last until 5 June 2023 but were phased out by 15 September 2023. On 16 September 2023, the EC lifted temporary ban on Ukrainian grain after Ukraine agreed to tighten controls over its agricultural exports.

As for Poland, Hungary, and Slovakia, they were not satisfied with the EU's decision to end this restrictive measure. Despite the EC's disagreement, they unilaterally announced national bans to protect their local farmers (Gijs, 2023; Liboreiro, 2023). Poland has indefinitely banned the import of certain cereals and oilseeds from Ukraine, according to a decree issued by the Minister of Development and Technology, which came into force on 16 September 2023. The prohibition did not apply to external transit and the common transit procedure provided that the transit conclude at seaports in Gdansk, Gdynia, Swinoujscie, Szczecin, Kolobrzeg, or outside Poland (Regulation of the Minister of Development and Technology., 2023). In mid-September 2023, the Hungarian government banned imports of sensitive products, including various cereals, from Ukraine.

The Ukrainian authorities, on the other hand, welcomed the EC decision. However, they expressed dismay at the actions of Poland, Slovakia and Hungary, which had ignored it, and warned they would take retaliatory measures against these countries. These included taking the case to the World Trade Organization (WTO) and imposing restrictions on imports of Polish fruit and vegetables, among others. On 18 September 2023, Ukraine filed a lawsuit against Poland, Hungary, and Slovakia before the WTO for unilaterally banning Ukrainian grain exports, which it says "violates their international obligations" (Foote, 2023; WTO, 2023a, 2023b).

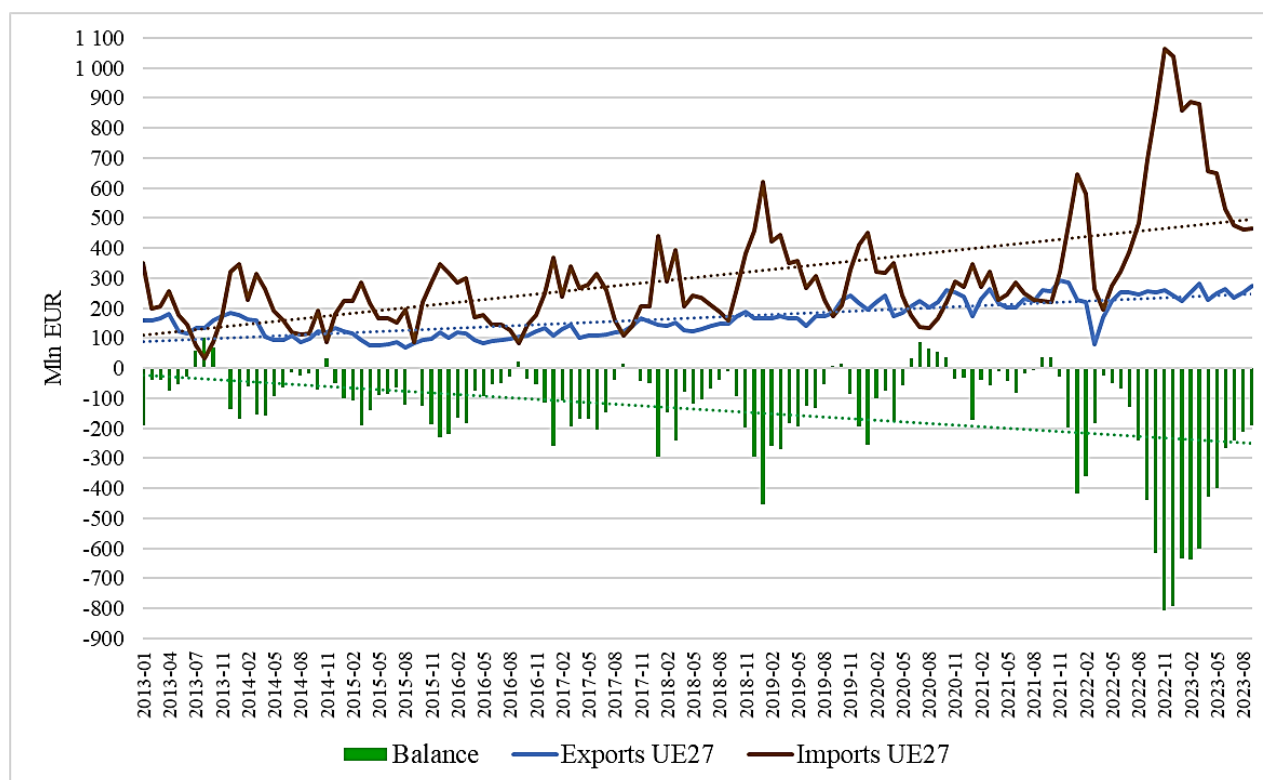
In March 2024, the European Parliament adopted changes to the regulation for extending trade liberalisation measures with Ukraine, supporting EU farmers' demands (Mambro, 2024). On 20 March 2024, the European Council and the European Parliament provisionally agreed to renew the suspension of import duties and quotas on Ukrainian exports to the EU for another year (until 5 June 2025), reaffirming "the EU's unwavering political and economic support for Ukraine, after two years of Russia's military aggression". The EU also decided to strengthen the protection of vulnerable agricultural products by enhancing the existing safeguards on temporary trade liberalisation measures. These measures should consider any negative impact on the markets of one or more member states, not just the EU market. A new automatic safeguard mechanism will require the Commission to reintroduce tariff-rate quotas if imports of poultry, eggs, sugar, oats, maize, groats, and honey exceed the average quantities imported in 2022 and 2023 (Council of the European Union, 2024). Unfortunately, the temporary agreement did not limit Ukrainian exports of wheat and barley. The proposed restrictions were less severe than those advocated by some countries, such as Poland. In addition, the years before the invasion, when Ukrainian exports to the EU were much lower, were not taken into account as the reference period for the import ceilings.

Following the Russian invasion, Ukraine had to divert almost half of its supplies from blockaded Black Sea ports to neighbouring countries such as Poland, Hungary and Romania. The European Commission and EU countries supported Ukraine by setting up alternative export routes, called "Solidarity Lanes", to ensure that Ukrainian agricultural products could reach global markets. In July 2022, Ukraine, Russia, Turkey and the United Nations established the Black Sea Grain Initiative with the objective of ensuring a stable supply of grain, addressing global food security concerns and mitigating the impact of rising food prices. Russia left this initiative in July 2023, despite its success. The EU condemned this move. The transportation of grains, oilseeds, and other commodities from Ukraine's western border through land and river solidarity lanes to neighbouring countries for export to the rest of the world was necessary. However, instead of leaving the EU's eastern member states, a significant portion of the produce has flooded local markets.

2. Trade between Ukraine and the EU

Since the start of the war, Ukraine's economy has become increasingly dependent on agricultural and food exports, which account for more than half of the country's export revenues (53% in 2022, compared to 40% in 2021). Despite the significance of these exports, a decline of USD 4.3 billion was observed in 2022, representing a 15.5% decrease (Taran, 2023).

Looking at the more extended period, following the implementation of the DCFTA, trade between Ukraine and the EU has grown steadily in both directions, recovering from the effects of the Maidan revolution (the turn of 2013 and 2014). There was also a growing trend in mutual trade in the "food and beverages" group, with a rising negative trade balance of the EU with Ukraine (Figure 1).

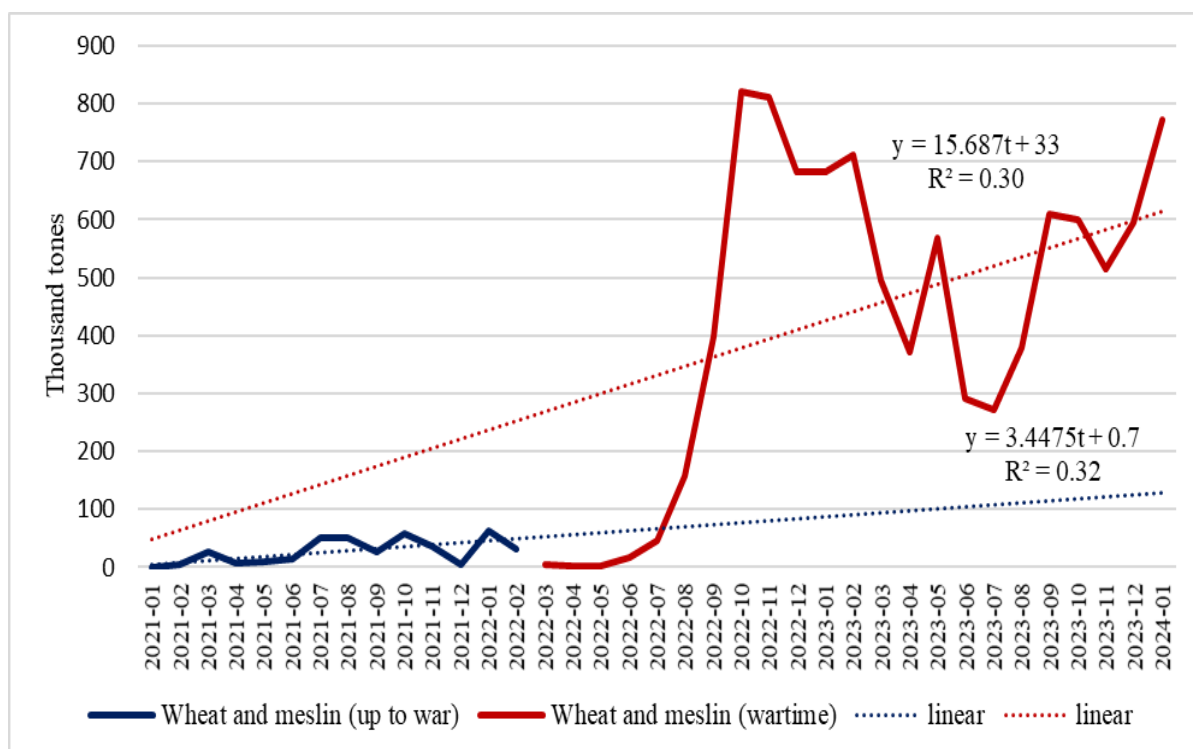


Source: author's compilation based on Eurostat; Data set: EU27 (from 2020) trade by SITC product group

Fig. 1. EU trade with Ukraine by "food and beverages" group, January 2013 - September 2023

The surge in the value of Ukraine's agri-food exports to the EU was due to the increase in their volume, which was caused by the suspension of duties and tariff quotas on their import from June 2022. Although the value of EU imports from Ukraine fell sharply at the start of the Russian invasion, it has risen again, peaking at over EUR 1 billion in November and December 2022. The EU's temporary preventive measures applied to Poland, Hungary, Slovakia, Romania, and Bulgaria between May and September 2023 led to a reduction in Ukrainian exports to the EU.

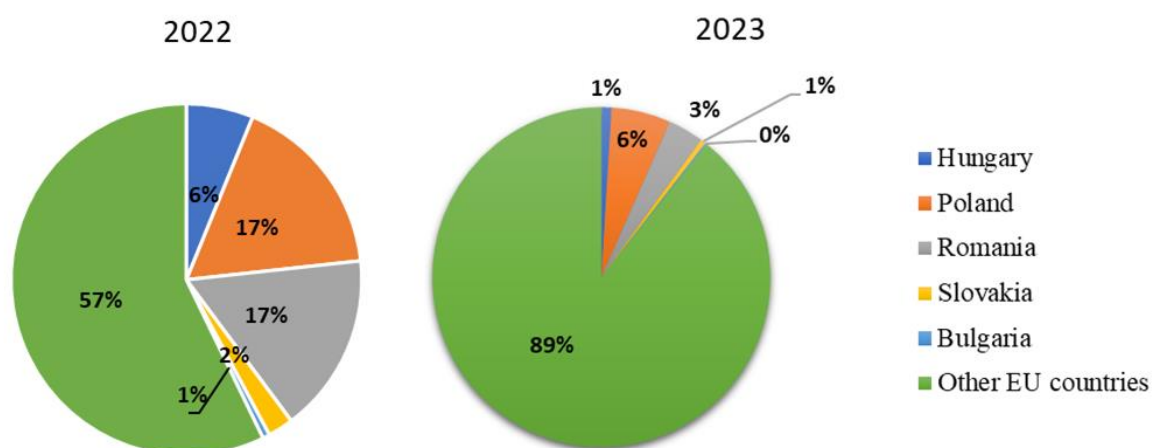
A critical question is how the EU trade policy rules following the outbreak of the war in Ukraine have affected the volume of disputed agricultural products imported into the from that country. Increased importation, mainly of wheat and meslin (Figure 2), was evident after the autonomous trade measures were introduced in June 2022. The exceptional and temporary preventive measures applied by the EU to Poland, Hungary, Slovakia, Romania and Bulgaria in May 2023 hampered grain imports, but the trend reversed after their removal in September 2023.



Source: author's compilation based on Eurostat data (Eurostat, 2024)

Fig. 2. Volumes of wheat and meslin imports from Ukraine to the EU27, 2021-2024

The volume of imports of wheat and meslin from Ukraine increased significantly in 2022 and 2023, being 11 and 22 times higher respectively on an annual basis than in 2021. The burden of importing cereals placed on Poland and the other four countries is reflected in their shares of the EU's wheat and meslin supplies from Ukraine (Fig. 3), which were many times higher in 2022 and 2023 than in previous years. According to available Eurostat data, allowing for comparison, Poland, Hungary, and Romania's combined share skyrocketed from 0.5% in 2018 to 40% in 2022. It remained relatively high (10%) in 2023 despite trade disputes between these countries and Ukraine.



Source: author's calculations based on Eurostat data (Eurostat, 2024)

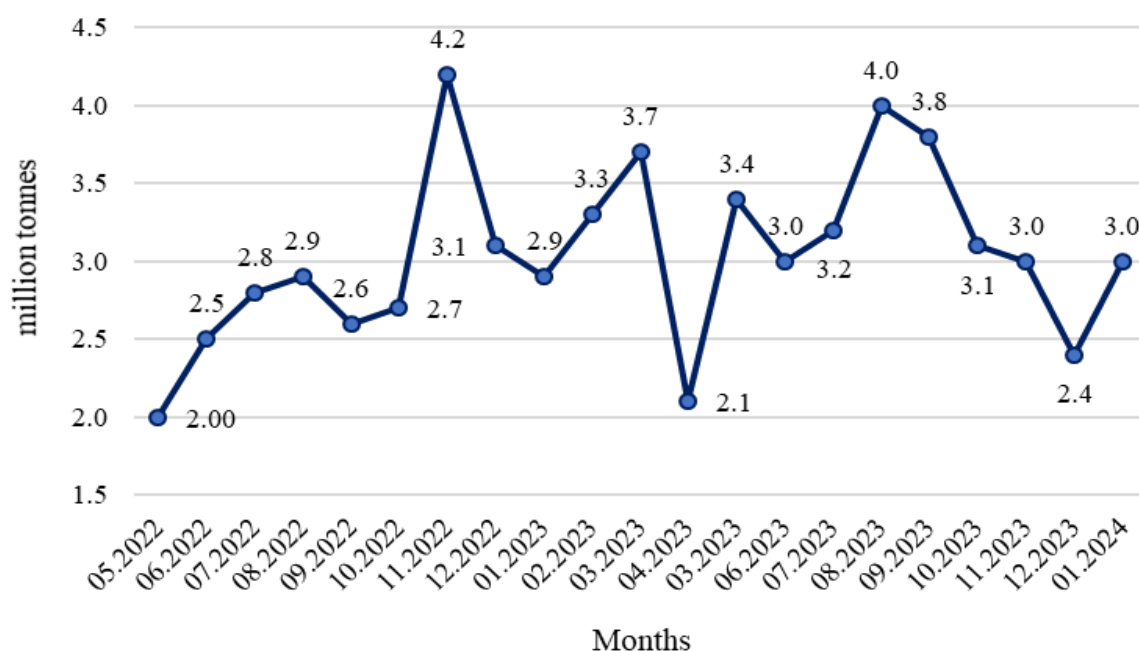
Fig. 3. Distribution of wheat and meslin imports from Ukraine into the EU27 by member state

3. The role of solidarity lanes in trade between Ukraine and the EU

In addition to a series of measures designed to support Ukrainian agricultural exports as a gesture of solidarity, a new export corridor was established in May 2022, following the disruption of transit through

the Black Sea caused by Russia. This initiative was continued. For example, on 11 January 2024, the EC approved, under the EU state aid rules, a EUR 126 million Romanian scheme to support investments in ports facing increased trade flows following war, which EU cohesion funds will partly finance. By facilitating trade flows to and from Ukraine, the project will contribute to the functioning of the EU-Ukraine Solidarity Lanes (EU NEIGHBOURS east, 2024).

What are the effects of the EU-UA Solidarity Lanes? Between May 2022 and January 2024, Ukraine shipped approximately 63.7 million tonnes of grain, oilseeds, and related products via new transport routes, including rail, road, and inland waterways (Fig. 4). Approximately 58% of Ukraine's total grain production has been exported since the onset of the conflict. Black Sea ports have facilitated about 42% of Ukraine's grain exports.



Source: author's compilation based on European Commission, 2024

Fig. 4. **Export of grains, oilseeds and other related products from Ukraine via the Solidarity Lanes**

It is crucial to acknowledge that there are concerns regarding alternative export routes from Ukraine through Europe. Ukrainian food exports are accumulating in Eastern Europe and failing to reach their intended destinations, threatening developing countries' food security. Simultaneously, Ukrainian exports via those routes harm farmers and consumers in certain EU countries.

4. Reactions of EU farmers to the liberalisation of agricultural trade with Ukraine

The literature on international political economy highlights how political and diplomatic relations play a crucial role in determining trade flows between countries. Some trade policy models consider the influence of pressure groups, which are individuals or organizations that come together to achieve desired policy outcomes in government and society. According to researchers, special interest groups are the main drivers of order and disorder in global economic relations, including by influencing trade policy choices (Grossman & Helpman, 1994; Osgood, 2021; Swinnen, 2010). Public choice theory states that policy outcomes are determined by interactions between elected officials, who provide specific public policies, and organized interest groups that express demand for policies that increase the economic rents derived by interest groups (Krueger, 1974; Zawojcka, 2011). Political opposition from individuals or groups at risk of

harm to their well-being due to specific political actions may cause resistance to trade policy. Domestic interest groups seek to protect or liberalize the market because the desired policies enable them to maintain or improve their welfare.

Farmers in countries on Ukraine's periphery, such as Poland, Hungary, Slovakia, Romania and Bulgaria, have suffered severe losses as a result of the surge in tariff-free, low-cost grain from Ukraine, which, unlike grain produced in the EU, is not subject to strict regulations on production and food standards. These imports saturated local markets, leading to decreased prices and losses to local farmers (Cervera, 2023; Talach, 2024; Vos & Glauber, 2023). The arisen grain conflict can be analysed through different theoretical frameworks, one of which is the Exit, Voice, and Loyalty framework. Drawing on Albert Hirschman's (Hirschman, 1970) metaphors of "exit" and "voice", it can be argued that farmers who lack the option to disengage from agricultural activity, due to their assets specificity, resort to collective action to have a stronger political voice (the public expression of protest), and pursue their economic interests through the political system. Farmers' protest movements are meant to mobilize public opinion and put pressure on decision-makers.

Farmers' large-scale protests and demonstrations against national and European agricultural policies have recently occurred in around half of EU countries, including Germany, France, Poland, Romania, and Belgium (Farm Europe, 2024; Rose, 2024). The reasons for these protests vary. In Germany, for instance, farmers were concerned about planned cuts in diesel subsidies. Farmers in Poland and other Central and Eastern European countries were obstructing roadways and border crossings to impede the importation of cheap grains and other products from Ukraine (Riegert, 2024).

Polish farmers have taken action to protest against what they perceive to be unfair trading practices by blocking the Ukraine-Poland border. This was in response to the unsatisfactory European Commission's proposed safeguard mechanisms to protect agricultural producers from the effects of its liberalised trade policy with Ukraine (Dodd & Welsh, 2024). Representatives of Polish agricultural organizations forced an agreement with Poland's Minister of Agriculture in March 2024 regarding maintaining the embargo on agricultural products from Ukraine and regulating trade relations with this country. The parties declared that access to the Polish market must be controlled for cereals, rapeseed, corn, sugar, poultry, eggs, soft fruits, and apples. After signing this agreement, some protests were suspended but the blockade at the border crossings continued.

Following the protests of farmers across the EU who are dissatisfied with the EU's agricultural and trade policy, there is a noticeable increase in tensions between Ukraine and EU member states, particularly those neighbouring Ukraine. On the other hand, these protests have garnered widespread public support in some EU countries, such as Poland and France. It is challenging to find a satisfactory solution for both sides, as the dilemma between solidarity with Ukraine and the prosperity of EU farmers needs to be solved in politics.

Conclusions and recommendations

- 1) The impact of international agricultural trade goes beyond economic considerations, as it can also have significant socio-political implications. This trade can help build and strengthen diplomatic relationships, providing valuable opportunities for nations to work together. However, trade imbalances, unfair trade, regulatory standards, sanitary requirements, and tariffs can disrupt agricultural trade patterns and strain diplomatic relations. This sector plays a vital role in the political domain, as demonstrated by Ukraine's trade cooperation with the EU and its member states. The development of economic and political relations between the EU and Ukraine, presented in the paper, highlights the complexity of international trade issues and can provide for controversy. Despite this, the authors of

this paper are optimistic about the benefits of agricultural trade, recognizing its potential to foster positive relations between nations and promote economic prosperity.

2) Researchers, farmers, politicians, and other stakeholders will be able to assess all mutual gains and losses from liberalized agri-food trade between the EU countries and Ukraine after the end of the war, which started in 2022. But even before the war is over, the EU institutions should take action under the Common Agricultural Policy and trade policy to balance the interests of all member states and their agri-food sectors with EU solidarity towards Ukraine. As this article shows, the implementation of the Autonomous Trade Measures liberalising trade with Ukraine has harmed farmers in some EU countries, and their continuation may increase this harm. The EU and national government's commitment to protecting the interests of local farmers can include, among others, ensuring that the quality of imported agricultural products meets the highest EU standards.

3) Politicians at the national and EU levels need to consider the interests of local farmers. Ignoring their demands could lead to further unrest, such as street protests and road or border blockades. This type of reaction by farmers, who are worried about the increase in agricultural products, especially cereals, entering the EU from Ukraine, which has been visible so far, could develop into more severe actions threatening the country's stability.

4) The resilience of the EU agri-food market and the prosperity of local farmers, the entire agri-food sector, and consumers depend significantly on the EU's internal policies and its future diplomatic and economic relations with Ukraine, both during and after the ongoing war. These factors are crucial and need to be considered by academics and practitioners.

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