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AGRARIAN POTENTIAL OF UKRAINE IN CONTEXT OF ECONOMIC COOPERATION WITH CANADA: THE MODERN STATE AND PROSPECTS FOR BUILDING UP

The purpose of the article. The purpose of this article is to analyze the modern commodity and geographic structure of the export of products of the agrarian sector of Ukraine and to substantiate the prospects of entering the Canadian agricultural market.

Research methodology. Universal and specific methods of scientific research have been used: economic-statistical - for estimation of volumes of international trade in agricultural products in Ukraine, abstract-logical - for the study of modern trends in the development of the national agricultural export potential, formulation of conclusions and proposals, the method of induction and deduction - in the implementation of the SWOT analysis of the strategic prospects for the output of agricultural products Ukraine on the Canadian market, monographic – for the study of Canadian consumer goods.

Research results. The geographical and commodity structure of agrarian export of Ukraine, analyzed dynamics and volumes of foreign trade of Ukraine with Canada have been investigated. SWOT-analysis of strategic prospects for the Ukrainian agricultural output to the Canadian market is implemented. The strategic directions of increasing the export potential of Ukraine in the current world trade integration are grounded.

Elements of scientific novelty. The essence of the definition of "export potential" has been improved through the systematization of its key content characteristics, in particular, from the point of view of the availability of strategic factual and latent opportunities for the expansion of competitive export agrarian capacities necessary for consolidation on the world market.

Keywords: export potential, agrarian sector, competitiveness, export, import, agricultural products, trade.

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The problem. Agriculture has been the driving force behind the development of Ukraine's economy in recent years. Agricultural products account for about 42-46 % of export earnings [9]. The trade turnover of Ukraine with the EU countries, which is due to the gradual convergence of the economies of these countries, is increasing. However, the scarcity of European agrarian markets today requires finding new potential directions for implementing agricultural export potential, one of which is the Canadian food market, which has strong economic, demographic and social ties with Ukraine.

In a changing economic priorities and the formation of new contents of Economy of Ukraine, agrarian enterprises are the key budget-forming segment of the economy and contribute to the inflow of financial resources inside the country. In January-December 2017, the foreign trade turnover of agrarian and food products of Ukraine amounted to \$ 22.6 billion, of which exports amounted to over \$ 17.9 billion and increased by 16.3% compared to 2016. [9,1]. Along with this, the study of the mechanism for implementing the export potential of the agricultural sector of Ukraine is mainly limited to the geographical area of European countries and does not take into account significant opportunities of other areas and groups of countries. In this regard, it is promising to assess the current state and potential parameters of economic cooperation of Ukraine with other leading countries of the world, in particular, Canada.

Recent research and publications analysis. The theoretical and practical aspects of export agrarian potential are considered in the works of many domestic and foreign scientists, among them are: A. Mazaraki [4], M. Malik [5], S. Polkovnichenko [6], V. Rossokha [8], O.Yatsenko [16], Sh. Adjuner [17], A. Burk, V. Gontar [18], R. Hausmann, R. J. Hwang, D. Rodrik [20] and others.

The objective of the study. The agrarian export potential of Ukraine, its current state, scale, development trends, prospects of entering the Canadian market.

Main results of the study. For more than a hundred years Ukraine has played a significant role in the global agrarian market. Ukrainian agricultural producers export lion's share of food produced in Ukraine to the EU [18]. Population growth in countries such as China, India, African countries is creating the world's food security problem, which stimulates the growth of agricultural production and ensures stable markets.

The systematized results of the conducted scientific researches allowed to single out the basic essential characteristics of the export agrarian potential: 1) the potential ability to implement and increase the volumes of export of agrarian products [6]; 2) the presence of a set of elements that allow you to successfully enter and operate on new markets [11] ; 3) the real ability to produce competitive agricultural products and their industrial processing, the level of which allows you to enter external markets [16]; 4) the key resource of the Ukrainian economy to increase the effectiveness of foreign economic activity and to establish economic cooperation with the leading countries of the world [4] . In view of this, export agricultural potential should be understood as a combination of strategic actual and latent opportunities necessary and sufficient for the production and export of agro-food products to world markets, provided with a sufficient level of competitiveness of products for its successful consolidation in the market and an increase in export earnings.

Today, the practical basis for the formation and implementation of Ukraine's export agricultural potential are: significant land resources - 42.7 million hectares (70.7%) of agricultural land, 13.2 million people (31.1%), rural labor resources, total assets worth about 451.3 billion UAH (\$ 16.9 billion), favorable natural and climatic resources. In the agrarian sector of the economy of Ukraine there are 66,837 entities operating various organizational and legal forms [9]. Profitability of economic activity of business entities of the agrarian sector of Ukraine by the results of 2016 amounted to 24.7% (compared to an average of 0.6% by economic activity). [1].

Agricultural production and industrial processing today occupy a leading place in the export potential of the Ukrainian economy and is on average about 30-40 % (see Fig .1). Transport services account for the largest share in the structure of export services – 53,7%.

Ukrainian commodity producers have competitive advantages (according to the price factor and qualitative parameters) to foreign producers for such products as honey, vegetable oil, oilseeds. The primary agricultural products are exported to more than 90 countries of the world, and the level of food security in the middle of the country is 82.5% [5].

The conducted studies showed positive changes in the export of domestic agricultural products (see Table 1). The most demanded commodity

groups are grain crops (16.7% of total exports), fats and oils of animal or vegetable origin (10.9%), seeds and fruits of oilseeds (4.22%). For the period 2005-2016, Ukraine increased exports by more than twice in the following segments: meat and by-products (2.5 times), vegetables (3.9 times), and grain and crop (4.4 times), products of the milling industry (4.8 times), seeds and fruits oil plants (in just 11.4s), and animal or vegetable origin fat (6.8 times), sugar and candy products with sugar (3.2 times). During the analyzed period by 40.3% decreased exports of milk and milk products, eggs, natural honey [3].

1. Dynamics of export of agro-food products in Ukraine

| Product type | 2005 | | 2010 | | 2015 | | 2016 | |
|--|-------------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|
| | million USdollars | % | million dollars | % | million dollars | % | million dollars | % |
| I. Animals; products of animal origin | 732.1 | 2.14 | 771.4 | 1.50 | 823.6 | 2.16 | 775.0 | 2.13 |
| II. Products of vegetable origin | 1694.9 | 4.95 | 3976.1 | 7.73 | 7971.5 | 20.91 | 8093.7 | 22.26 |
| III. Fats and oils of animal or vegetable origin | 587.1 | 1.72 | 2617.4 | 5.09 | 3299.9 | 8.65 | 3963.0 | 10.90 |
| IV. Ready food products | 1290.8 | 3.77 | 2571.1 | 5.00 | 2468.6 | 6.47 | 2450.1 | 6.74 |
| Agriculture products as a whole | 4,304.9 | 12.5 | 9936.0 | 19.3 | 14563.6 | 38.2 | 15281.8 | 42.0 |
| Export together | 34228.4 | 100.0 | 51405.2 | 100.0 | 38127.1 | 100.0 | 36361.7 | 100.0 |

Source: Foreign Trade of Ukraine. Statistical yearbooks of the corresponding years.

The largest share of foreign currency earnings was attributed to Ukrainian exporters of sunflower oil and grain crops (see Table 2).

2. Export of sunflower oil and grain crops in 2016

| Product type | The largest companies are exporters | The largest importing countries | Sales volume, million tons | Volume of revenue, billion dollars | The country's rating is in the volume of the export in the world |
|-------------------------------|--|---|----------------------------|------------------------------------|--|
| Sunflower oil | Kernel, Myronivsky Hliboproduct, Cargill Ukraine, ViOil, Bunge Ukraine, Delta Wilmar CIS, Pologovsky SEZ, Dniproliya, Bessarabia B, Creativity Group | India, China, the Netherlands, Spain, Italy, France, Iran, Egypt and Turkey | 4.8 | 4.2 | 1 |
| Cereals (corn, wheat, barley) | DUPKU, Kernel, NIBULON, Cargill, UkrLandFarming, Louis Dreyfus Ukraine LTD, Granum Invest, Bunge, Noble Resources Ukraine, ADM Ukraine | EU, Egypt, Tunisia, South Korea, Thailand, Indonesia, Israel, Iran, Libya, Bangladesh, Saudi Arabia | 40.2 | 6.1 | 3 |

Source: Calculated by authors for Foreign Trade of Ukraine. Statistical yearbooks of the corresponding years.

Paying attention to the fact that the structure of foreign trade of agricultural products in Ukraine is not optimal, the important task is the diversification of the commodity structure of export and import, as well as the increase of export of certain types of products in accordance with comparative advantages of the country [15].

The state agrarian policy is based on national priorities and takes into account the need for Ukraine's integration into the European Union and the world economic space. For this purpose, Ministry of Agrarian Policy and Food of Ukraine develop a draft Leno single comprehensive strategy to develop agriculture and rural areas in the years 2015-2020 [7] as the first overall aim is to increase the competitiveness of agriculture and promote rural development in a sustainable manner in accordance with international standards. The strategy envisages increasing export agrarian potential, stabilizing the economy of agriculture and developing rural areas.

To assess the export potential, a quantitative approach is used which determines the perspective export sectors and markets (mainly on the basis of analytical data on trade volumes and market access) [19].

The EU market for Ukrainian producers is open in various product segments. However, the barriers to export should be taken into account - the quotation of the volumes of supplies of different types of products, compliance with international quality standards, etc. [20]. With the purpose of the diversification of product promotion must be taken into account the growing needs of the markets in Asia which are more open comparing to the EU markets. 96.2% of total exports were directed to the EU, Asia, Africa and the CIS. What is more in 2016 the export to the CIS dropped by more than 20% comparing to 2015 [3].

According to international experts, Ukraine has a strong export agrarian potential, which can be realized both on the markets of the EU and on the intercontinental agrarian markets. According to experts of NSC, Institute of Agricultural Economics, export agrarian potential is 45 billion US dollars. [8].

Today, Canada is one of the world's leading importers per capita; Canadian imports are three times larger than US imports per 1 citizen. Also Ukrainian diaspora in Canada is 1.3 million of people, hypothetically increase opportunities for establishing partnerships between Canada and Ukraine.

On August 1, 2017 the official "Agreement on Free Trade between Ukraine and Canada: New Horizons for Ukrainian Business" [12] came into force, the basic provisions of which determined the intensification and deepening of trade cooperation between the two countries, in particular, in the field of trade in industrial goods and agricultural products. The effect of this Agreement was an increase in trade flows between Ukraine and Canada (see Table 3). So, according to official data from the embassy of Ukraine in Canada, in 2017 the volume of trade has increased to 477.7 million US dollars, incl. exports of goods and services amounted to 141.5 million US dollars, and imports - 336.2 million US dollars [10].

3. Dynamics of Ukraine's foreign trade with Canada

| Indexes | 2004 | 2013 | 2014 | 2015 | 2016 | 2016 till 2004 |
|---|-------|--------|--------|--------|--------|----------------|
| Cost of goods export, mln.U.S. dollars | 82.6 | 52.3 | 72.6 | 30.2 | 28.9 | 34.9 |
| Cost of service exports, mln.U.S. dollars | 26.9 | 103.1 | 88.3 | 70.9 | 76.7 | In 2.8 times |
| Canadian share in total exports,% | 0.76 | 7.28 | 0.9 | 0.78 | 0, 87 | x |
| Cost of import of goods, mln. U.S. dollars | 44.4 | 236.5 | 191.5 | 206.3 | 217.3 | 4.9 times |
| Cost of import of services, mln. U.S. dollars | 21.4 | 56.1 | 78.9 | 43.8 | 40.0 | 186.9 |
| Canadian share in total imports ,% | 1.15 | 1.06 | 1.55 | 1.35 | 1.3 | x |
| Balance, mln. U.S. dollars | +43.7 | -137.2 | -109.5 | -149.0 | -151.7 | -195.4 |

Source: Calculated by authors for Foreign Trade of Ukraine. Statistical yearbooks of the corresponding years.

Poland, Cyprus, Turkmenistan, Slovakia, Turkey, Great Britain, Germany, Switzerland, the USA, and the Russian Federation remained the main export-import partner countries of goods and services from and to Ukraine in 2015-2016. The share of Canada's total exports and imports of goods and services amounted to about 0,9% (see Fig . 1).

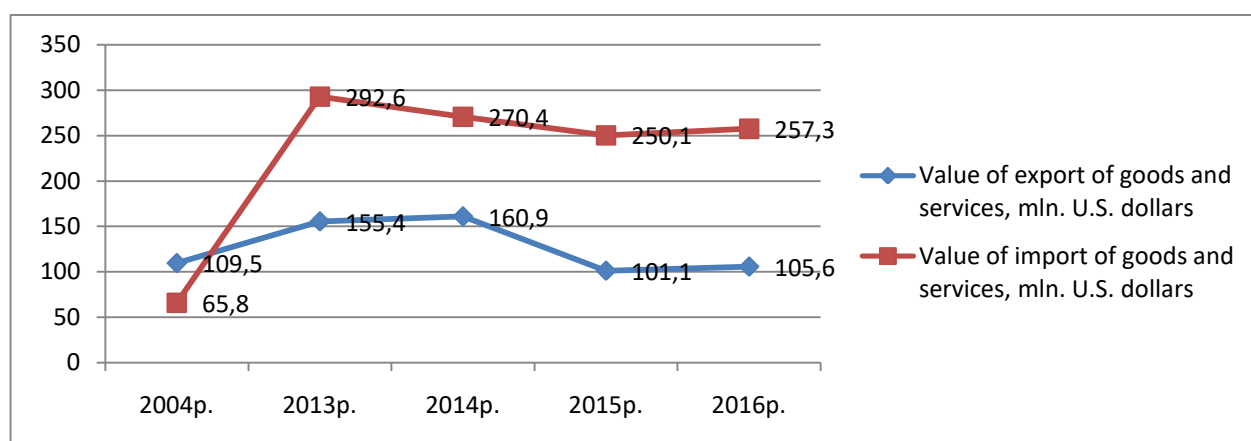


Fig . 1. Dynamics of volumes of export-import operations between Ukraine and Canada for 2004-2016, mln. U.S. dollar

Source: Calculated by authors for Foreign Trade of Ukraine. Statistical yearbooks of the corresponding years.

Among the types of Ukrainian goods that are traditionally in demand on the Canadian market, the following products are distinguished (see Table 4): products of metallurgical production, production of mechanical engineering and products of the domestic agro-industrial complex, the share of which in the structure of the total export potential is about 8.6% (4334.4 thousand USD).

4. Commodity structure of export of goods from Ukraine to Canada

| Indexes | 2014 | | 2015 | | 2016 | |
|--|----------------|--------------|----------------|--------------|----------------|--------------|
| | thousand USD | % | thousand USD | % | thousand USD | % |
| Products of the metallurgical complex | 32612.4 | 45.0 | 11006,1 | 36,5 | 16077.6 | 31.9 |
| Mineral products | 8704.1 | 11.9 | 171.5 | 0.6 | 1109 | 2.2 |
| Products of the chemical industry | 11074.4 | 15.3 | 2892.1 | 9.6 | 4183.2 | 8.3 |
| Industrial goods | 5060.3 | 6.9 | 2947.5 | 9.8 | 5140.8 | 10.2 |
| Agroindustrial products and food industry | 4678.2 | 6.4 | 3361.0 | 11,1 | 4334.4 | 8.6 |
| Light industry products | 1651.7 | 2.2 | 880.6 | 2.9 | 1612.8 | 3.2 |
| Machine building products | 7340.9 | 10.1 | 7292.4 | 24.2 | 11390.4 | 22.6 |
| Wood and paper mass | 1443.4 | 1.9 | 1609.3 | 5.3 | 1864.8 | 3.7 |
| Total | 72565.4 | 100.0 | 30160.6 | 100.0 | 50400.0 | 100.0 |

Source: Calculated by authors for Foreign Trade of Ukraine. Statistical yearbooks of the corresponding years.

The range of imported goods from Canada to Ukraine in recent years remains relatively constant and includes: oil and its products of industrial processing - 61.3%, pharmaceuticals - 9.2%, nuclear reactors, boilers and machinery - 7.5%, fish products - 6.9%, vehicles (except those for railways) - 4.2% [10].

Among the largest exporters of agro-food products in Ukraine today are the following companies: PJSC Chumak (Kherson oblast), PJSC "Shepetivka sugar refinery"(Khmelnysky region), Ukrainian vodka company "Nemiroff" (Vinnitsa oblast), PJSC "Donetsk macaroni factory" (m. Donetsk),PJSC "Kharkiv biscuit factory" (Kharkiv), PJSC "Obolon" (Kiev), Confectionery corporation "Roshen" (Kiev), PJSC AF Tavria (Kherson oblast), "Nibulon" Ltd. (Mykolayiv, PJSC Svitoch) (Lviv city), PP "Prykarpattya Gardens" (Ivano- Frankivsk Oblast Nb) [10].

In Ukraine, non-profit organizations are created and operate, including Ukrainian Food Export Board (UFEB), associations such as the Ukroliyprom, Ukrtsukor, Ukrainian Grain Association, to support the promotion of agricultural products for export.

International financial organizations play an important role in ensuring and improving the competitiveness of the domestic agrarian sector. Among the latter, it is possible to allocate IBRD, including IFC, EBRD, EIB, etc. Thus, in 2015 the EBRD has invested \$ 184 million in the agrarian sector, in 2017 it plans to increase to \$ 200 million. The priority areas are investing in the cultivation of grain, technical and other crops, that is, export-oriented products. Major recipients of capital are large public companies (Nibulon, Myronivska Hliboproduct or Kernel), as well as small and medium enterprises with export potential. [17].

The Free Trade Agreement between Ukraine and Canada (CUFTA) provides with a significant liberalization of the conditions for the export of Ukrainian products to Canada, in particular, the relaxation and imposition of import duties on the import of 98% of Ukrainian goods. For agricultural products, the Agreement provides with zero rates of customs duties for all its types, with the exception of 108 tariff lines that can be exported without customs within the limits of the global quota of Canada. This is besides fowl (incl. frozen, poultry fat), dairy products (milk, cream, yogurt, butter), eggs and egg products, cheese and sugar. Ukraine, in turn, cancels duties on 72% of imports from Canada. Import duties on agricultural and industrial goods for Canada are also cancelled, but with transitional periods of 3 years (live sheep and poultry, beef , lamb, nuts, flour, cereals), 5 years (individual offal of pigs, fruits and seeds of oilseeds, vegetable oil and other fats) and 7 years (pork, poultry, cream milk, eggs, honey, vegetables, sausages) [12].

The strategy for developing and increasing the export potential of Ukraine today should be based on the following organizational and economic measures:

- diversification of the commodity structure of agrarian exports by increasing the share of value added products (for example, processed foods);
- diversification of geographical export markets for Ukrainian agrarian products by opening new countries and expanding the range of goods that are already being supplied to those or other countries;
- the expansion of the circle of exporters of agrarian and food products at the expense of a large number of small and medium-sized producers and processors who are able to export;
- raising the level of competitiveness of Ukrainian producers and processors in order to enter the external markets.

The Ministry of Economic Development and Trade of Ukraine has begun work on the creation of a national export strategy, as well as an action plan for the next five years. It is reported that a strategy to help fund Western NIS Enterprise Fund (WNISEF) under the "Ukraine: The leadership, promotion of exports, investment and development" (ULEAD). In this strategy it is appropriate to provide support for diversified development of agrarian enterprises, possible new markets for value-added products, the formation and development of export cooperatives SME agro-food sector, improve infrastructure and logistics market of agricultural products and foodstuffs, etc.

According to the monitoring of the Canadian market of agricultural production and food products, local consumers prefer and are willing to pay a higher price for products that meet the following parameters: 1) traditional cereal foods - 41% of consumers; 2) products without artificial coloring - 48%; 3) products without antibiotics - 45%; 4) products produced according to the stable principles of development - 56%; 5) organic products - 52%. [10].

In addition, the potential opportunities for Ukrainian exporters to enter the Canadian market (see Figure 2) include the well-developed and well-known information and logistic database of Canadian importers whose resources, in terms of product mix and geographical features, provide information on intermediaries for Ukrainian business Canadian market.

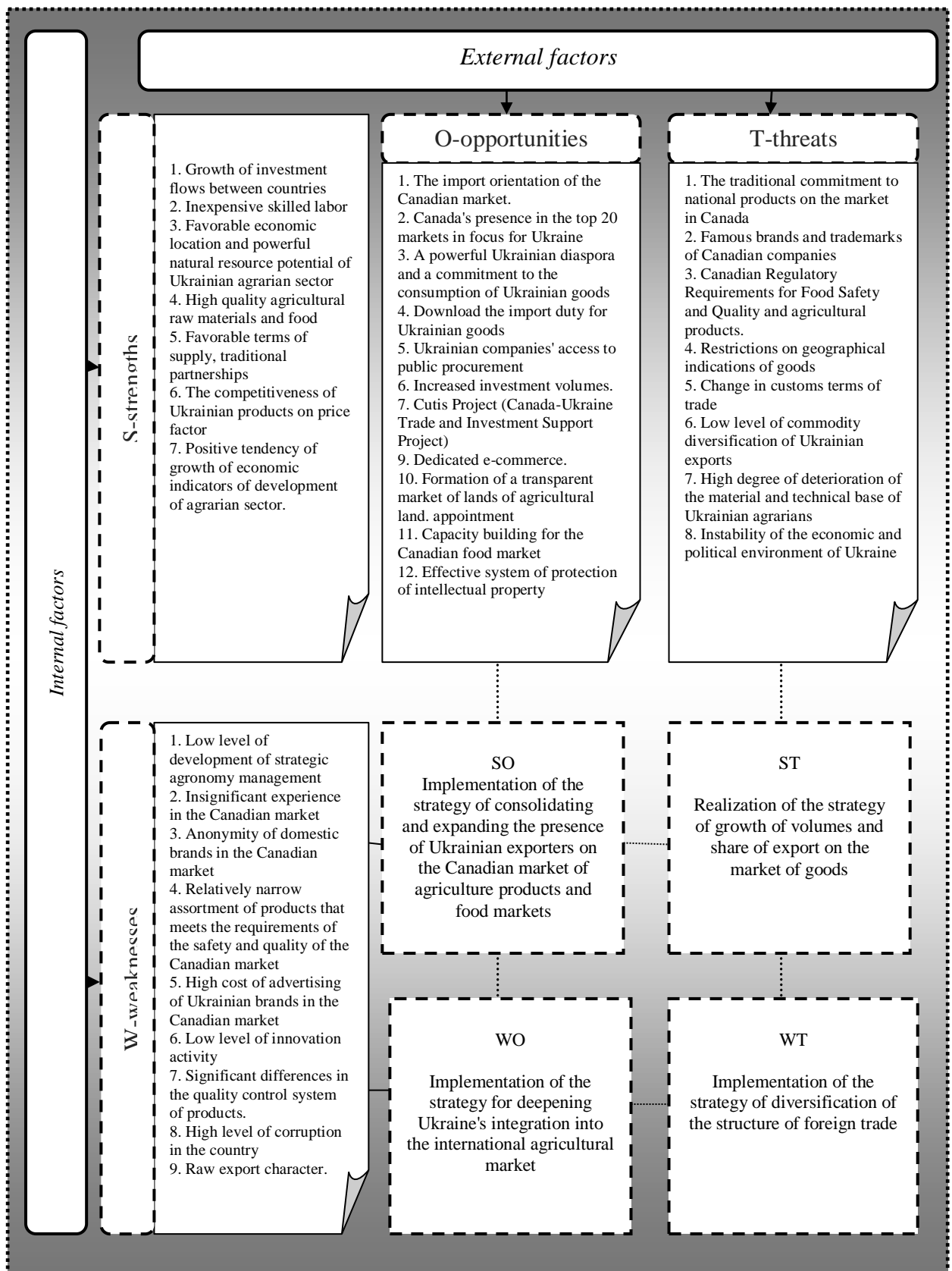


Fig. The analysis of strategic prospects for the exit of agrarian products of Ukraine on the Canadian market

Source: Developed by the authors.

Often, regular exhibitions of fairs of finished products that take place in Canada and create a potential basis for establishing branch contacts between Ukrainian agrarians and Canadian partners also play a significant role in this aspect. Among such exhibitions are agricultural and food products: SIAL (Salon International de Palimentation) - specialization on the products of agricultural raw materials; CPMA (Canadian Marketing Association) - specialization in fresh production; GIO - a continuation of Canadian innovations of cucumber; CHFA - Canadian Health Food Association; CFGI (Canadian Federation of Independent Grocers) - Canadian Association of Independent Producers; Grocery & specially food - food and delicacies like.

Conclusion. The article shows that Ukraine is powerful country on the agro-food market in the world. Ukrainian commodity producers have achieved the greatest success in expanding oil exports from ostrich to grain crops. The market of dairy products, meat and meat products, including chicken, soybean oil, nuts and edible fruits, canned goods, etc. The main exporters of Ukraine in the most important segments are the powerful exporting countries: Russia, the USA, the EU, Russia, Canada, Australia, on the market for sunflower oil.

Along with this, volumes of foreign trade in goods of the agrarian sector between Ukraine and Canada remain insignificant (about 0.9% in the structure of the total volume of export-import).

In the future, a scenario of development is desirable, according to which domestic agricultural enterprises diversify the process of production and will supply to the external markets not primary products, but final consumption products. It makes sense under these circumstances the functioning and further development of vertically integrated agricultural companies.

In order to realize the prospects for the development of trade and economic relations between Ukraine and Canada in the field of agro-industrial cooperation, the key aspects should be:

1. Diversification of the geographical direction of the export orientation of the agrarian sector of the Ukrainian economy.
2. Increase in the share of exporters (producers) certified in accordance with Canadian standards of quality and safety of food products and agricultural raw

materials. Elimination of the imbalance of the national and international standards system.

3. Further development of the infrastructure of the agrarian market of Ukraine and increasing the effectiveness of its logistics. So, according to Global trade enabling index Ukraine today ranked 95th out of 136 countries by the Integrity Index of the National Economic Environment of Foreign Trade Development [13,14]. The weakest position in the integral index determines the operating environment (125th place) and access to external markets (110th place). Activation of cooperative and integration ties within the agro-industrial complex of Ukraine.

4. Development of export and investment portfolio of the Ukrainian agrarian sector.

5. Organization of business forums to enable interested companies to establish direct B 2 B contacts with potential partners.

4. Handling the mechanism to create a free trade zone with Canada and increase export quotas for Ukraine by main types of agricultural raw materials and products of its industrial processing. Opening of quotas for duty-free supplies of agricultural products to the Canadian market.

5. Increasing the level of commodity diversification of Ukrainian agrarian exports. Reducing the competitive risks of the domestic agricultural export potential by increasing the level of innovation activity of Ukrainian producers (up to 50%).

6. Improving the safety of agricultural raw materials, complying with sanitary, phytosanitary and technical requirements applicable to the import of agricultural products in the Canadian agricultural market.

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Крюкова И.А., Замлинський В.А., Калина Т.Е. Аграрный потенциал Украины в контексте экономического сотрудничества с Канадой: современное состояние и перспективы наращивания

Цель статьи - анализ современной товарной и географической структуры экспорта продукции аграрного сектора Украины и обоснование перспектив выхода на канадский сельскохозяйственный рынок.

Методика исследования. Используются универсальные и специфические методы научного исследования: экономико-статистический (для оценки объемов международной торговли агропродукцией в Украине), абстрактно-логический (при исследовании современных тенденций развития национального аграрного экспортного потенциала, формулирования выводов и предложений), метод индукции и дедукции (при осуществлении SWOT-анализа стратегических перспектив выхода агропродукции Украины на рынок Канады), монографический (при исследовании товарных предпочтений канадских потребителей).

Результаты исследования. Исследована географическая и товарная структура аграрного экспорта Украины, проанализирована динамика и объемы внешней торговли Украины с Канадой. Осуществлен SWOT-анализ стратегических перспектив выхода украинской агропродукции на канадский рынок. Обоснованы стратегические направления наращивания экспортного аграрного потенциала Украины в современных условиях мировой торговой интеграции.

Элементы научной новизны. Усовершенствована сущность дефиниции «экспортный потенциал» через систематизацию его ключевых содержательных характеристик, в частности, с точки зрения наличия стратегических фактических и латентных возможностей наращивания конкурентных экспортных аграрных мощностей, необходимых для закрепления на мировом рынке.

Практическая значимость. Определены основные конкурентоспособные виды агропродукции, установлены основные препятствия и преимущества стратегических перспектив выхода украинской агропродукции на рынок Канады. Обоснованы предложения по организационно-экономическим мероприятиям наращивания аграрного экспортного потенциала Украины в стратегической перспективе. Табл. 4. Рис. : 2. Библиогр.: 20.

Ключевые слова: экспортный потенциал, аграрный сектор, конкурентоспособность, экспорт, импорт, агропродукция, торговля.