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PROSPECTS AND RISKS OF UKRAINIAN DOMESTIC COMMODITY MARKET DEVELOPMENT IN TERMS OF EUROPEAN INTEGRATION PROCESSES INTENSIFICATION

The basic problems of policy formation and development of the domestic commodity market in the context of the implementation of the Association Agreement between Ukraine and the European Union are set. The basic directions of the impact of the Agreement on retail trade in Ukraine are shown. The comparative analysis between retail market development of Ukraine and States-members of the European Union is made. Structural changes occurring in the internal trade are evaluated. Functioning disparities of commodity market are determined. Directions for implementation of policy of structural imbalances minimization are proposed.

Keywords: *domestic market, imbalances, competitiveness, the EU Member States, retailers, retail, the Association Agreement between Ukraine and the EU, commodities.*

ПОПАДИНЕЦЬ Назарій, КІТ Леся. Перспективи та ризики розвитку внутрішнього товарного ринку України в умовах активізації євроінтеграційних процесів

Встановлено основні проблеми політики формування та розвитку внутрішнього товарного ринку в контексті імплементації Угоди про асоціацію між Україною та Європейським Союзом. Розкрито основні напрями впливу Угоди на роздрібну торгівлю в Україні. Здійснено порівняльний аналіз між розвитком ринку роздрібної торгівлі України та країнами-членами Європейського Союзу. Оцінено структурні зміни, що відбуваються у внутрішній торгівлі. Визначено диспропорції функціонування товарного ринку. Запропоновано напрями щодо реалізації політики мінімізації структурних диспропорцій.

Ключові слова: *внутрішній ринок, диспропорції, конкурентоспроможність, країни-члени ЄС, рітейлери, роздрібна торгівля, Угода про асоціацію між Україною та ЄС, товари.*

Problem statement. Trade plays the important role at current stage of development of the internal market and in the economic crisis overcoming. By virtue of trade the balance between production and consumption is supported, a significant part of gross value added is formed and also economically active population is provided with places of work.

Market development of domestic trade in Ukraine is a complex and dynamic process that occurs under the conditions of transformational changes in the national economy under the influence of a number of exogenous and endogenous factors. This is especially actual today, as the Ukrainian economy changes the vector of its development towards European markets. Development of a civilized market of domestic trade in the regions of Ukraine is the factor for stability and economic competitiveness.

Analysis of recent research and publications. Such scientists as V. V. Apopij, M. P. Balaban, I. M. Popych, I. P. Mishchuk, K. Murali, O. O. Nestulya, O. V. Pustovoyt V. O. Tochylin made a significant contribution in these problems solving. In their works, the main focus is made on the study of the internal market, its needs, retail functions and its modern state. However, issues of development of domestic commodity market of Ukraine and influences of the States-mambers of the European Union (EU) on it, in terms of the Association Agreement between Ukraine and the EU, remain unresolved.

The aim of the article is to determine the effect of the Association Agreement between Ukraine and the EU on the development of the domestic commodity market of Ukraine and leading of comparative characteristics of retail development in Ukraine and EU States-members.

Main material. Signed Agreement of Association between Ukraine and the EU (further the Agreement) [19] and proximity to the markets of EU states-members, as well as the prospect of a free trade area (FTA) since 2016 actualize the necessity for determining major trends of domestic trade of the European market and study its impact on domestic commercial space and opportunities for domestic entrepreneurs. In the signed Agreement the entire chapter IV «Trade and trade related issues» is devoted to trade regulation. Implementation of this agreement entails the implementation of a number of tasks that are spelled out. To our mind, particularly important parts of the deal are: Chapter 1 «National Treatment and Access of Goods to Markets»; Chapter 2 «Trade

Security Means»; Chapter 3 «Technical Trade Barriers»; Chapter 5 «Custom Issues and Trade Facilitation»; Chapter 6 «Establishment of Business Activities, Trade in Services and E-commerce»; Chapter 13 «Trade and Sustainable Development» [19].

This agreement is an important legal document for Ukraine, where the Ukrainian authorities took the responsibility to solve economic problems and to bring domestic legislation in accordance with the requirements set by the EU States-members. Ukrainian side should implement these actions due to requirements of Articles of Chapter 1 «National Treatment and Access of Goods to Markets» Section IV of the Agreement and for unimpeded entrance of national commodities to the markets of EU State-members.

Chapter 2 «Trade Security Means» Section IV of the Agreement is the main task of this section. This task should not impede bilateral trade. At the beginning for implementation of actions of this chapter special institutional requirements should be followed, such as creation of a commission (public authority) on cooperation in the field of trade measures at the level of experts. Creating such a commission will provide control over the adoption of legislative acts that are necessary to protect domestic producers before entering into FTA. The Commission has to deal with all the subtleties of the signed Agreement and be ready to help domestic commodity producers to clarify points relating to trade protection at any moment. It also has to control law execution by Ukrainian domestic producers, which is the main base for trade defense in Ukraine and which was amended (corresponding to the EU acquis.) before Ukraine joined the WTO. The main ones are the Law of Ukraine «About protection of the national producer against dumped imports» [6], «About protection of domestic producers against subsidized imports» [7], «About application of special arrangements due to imports of Ukraine» [5].

For your information we should note that one of the most expected changes that will bring the signed agreement is reducing duty level on European cars. But we will have to wait until 2025, when zero rate of duty will be applied. A major task in 2015-2016 will be development of the action plan for the application of special measures about cars imports into Ukraine from EU [12, p. 6].

Chapter 3 «Technical Trade Barriers» section IV of the Agreement is aimed at reducing technical barriers for entrance of new types of domestic products to the EU internal market. In this area, cooperation between Ukraine and the EU should be aimed at reforming the national system of technical regulation, bringing it closer to EU technical regulations and systems of standardization, metrology, accreditation, conformity assessment and market surveillance EU (Art. 53-74 of the Agreement). Ukrainian side has made an important step in the implementation of this chapter by adopting the Law of Ukraine «About Technical Regulations and Conformity Assessment», which takes effect on Februay 10th 2016 [10]. Performing this law will help to create a legal framework and mechanisms for the adoption of EU Directives that will give the right to begin the transition to European standards and execution of all obligations of Ukraine in the industrial field. Adjustments to mandatory technical regulations will encourage unimpeded circulation of goods between Ukraine and the EU and will have positive impact both on Ukrainian producers and consumers. Also, this law complements the following laws: the Law of Ukraine «About Standardization» [9] and the Law of Ukraine «About metrology and metrological activity» [8]. Group of laws is aimed at removing technical barriers and legal obstacles at trade and will facilitate the opening of EU market for Ukrainian goods. As we can observe from EU experience, implementation of these laws in reforming the national system of technical regulation will not only remove barriers to the output of new products to the domestic market, but also will help to create reliable institutional barriers that make it impossible to import cheap and low-quality products of foreign producers. These measures will help to eliminate unfair price advantages of foreign producers importing low-quality but cheap commodity products at the domestic market, which destroys market competition [16, p. 59]. As a result, introduction of new technical regulation system based on European standards will cause not only improving of safety of goods and services, but will also contribute to a better institutional consumer protection in case of defective products.

Chapter 5 «Custom Issues and Trade Facilitation» Section IV of the Agreement denies the possibility of Ukraine's of active protectionist policies to expand inner markets of domestic goods and services. It implies that the process of introduction of new types of domestic products into the national market is governed solely by the action of market mechanisms and resource investment of Ukrainian companies, banks and foreign enterprises and cannot be stimulated by public policy measures [16, p. 59]. Therefore, signed Agreement requires the implementation of certain provisions of the EU customs legislation, which obliges Ukrainian side to implement the provisions of 70-80% into customs legislation of Ukraine. Thus, it is necessary to atsrt the implementation of the customs reform, which should include the following measures [12, p. 8]:

– simplification, complexity reducing of procedures and automation of customs;
– reducing of time of customs clearance;
– introduction of effective information exchange between customs authorities and companies;
– implementation of a system of rapid response to violations in the area of customs;
– applying actions aimed at prevention of corruption among customs officials, etc.

Implementation of these and other actions will fulfill the condition facing the Ukrainian side, namely for almost five years «reset» import duties on goods from EU countries listed in Addendum A and B to the Agreement. Also in the Agreement it is expected that producers from the EU member states will have access to the Ukrainian market of public procurement on the principle of national treatment at the country, regional and local levels for public contracts and concessions in traditional industries, as well as in public services (the conditions of Art. 148 Chapter 8 «State Procurement» Section IV of the Agreement).

Chapter 6 «Establishment of Business Activities, Trade in Services and E-commerce» Section IV of the Agreement involves actions aimed at expanding of possibilities for the development of investment and trade cooperation with the EU through the implementation of the changes on the establishment of entrepreneurship. Entrepreneurship development strategy – an important step in this – should be developed by the government, NGOs or other stakeholders, which would take into account all the requirements and provide the signed agreement about future legislative and institutional changes that apply to the business environment. The next stage that will contribute to the development of entrepreneurship, is to reduce the number of supervisory authorities, most leading to corruption. The first step in addressing this issue was already made in 2014, when there was a significant reduction of amount of bodies with the regulatory functions from 56 to 27, but changes in number of organs, functions and staff do not automatically mean improving the quality of public services [17]. According to this, the government will have to work extra, although it was the beginning of public bodies optimization. It should be noted that the implementation of this Chapter and Chapter 8 «State Procurement» Section IV of the Agreement obliges the government to provide Ukraine with restriction of state aid to support the domestic commodity production. This is especially actual for companies that sell their products in the domestic industry markets, where competing products from EU state-members are represented Thus, on the one hand, this may result in termination of uncompetitive industries and on the other – it will encourage entrepreneurs to seek investment for manufacturers introducing innovative production of domestic goods.

Another issue that concerns this Chapter is e-commerce. An important step that was made by Ukrainian side is adoption of the Law of Ukraine «About electronic commerce» [4], which determines organizational and legal foundations of e-commerce in Ukraine, establishes the order of electronic transactions using information and telecommunication systems and defines the rights and obligations of participants of relations in the field of electronic commerce. The adoption of this law is essential, because, as experts estimate, the market volume of e-commerce in 2013 was about $ 2 billion, in 2014 – $ 1.6 billion. According to forecasts of Ukrainian Association of Direct Marketing, in 2015 the market volume of e-commerce in dollars will reduce approximately by 45% to $ 1.1 billion [21]. Sales reduction in the domestic online stores is coursed by devaluation of hryvnia and declinig of purchasing power of citizens. So, new law is aimed to eliminate many problems and open up new opportunities for this market. For example, in Poland in 2014 the market volume of e-commerce was $ 4.7 billion. This shows that Ukraine is still much in progress in this direction. Internet penetration in the regions of Ukraine also plays an important role in the growth of online sales. According to the EY survey, this measure increased from 46% to 49% for 2015 compared to 2014 [21]. That is a half million citizens of Ukraine will theoretically buy products online.

According to Chapter 13 «Trade and Sustainable Development» Section IV of the Agreement, preference is given to production and trade, carried out according to the principles of sustainable development (satisfaction of needs of present generations should not jeopardize the possibility of future generations to ensure their needs). Introduction of the system of international promotion of Ukrainian producers, including through international exhibitions, as well as promotion of Ukraine as an external production place for global markets and as a research platform for high-tech multinational corporations; promotion of domestic agricultural products and foodstuffs on external markets, including their participation in international exhibitions [3].

Implementation of the Agreement will have a significant impact on the domestic commodity market, so its members, especially retailers, should adapt their strategy in order to maintain its market share and profit. In addition, they will have an impact on markets in developing countries, as European retail chains are well represented in Ukraine.

Therefore, analyzing the current pace of development, we can identify several trends that will have a decisive influence on the retail market of EU member states and we can also determine how national players can get into this market. Main of them are:

– The adoption of the technology supply chain. Supply chain in the logistics systems enable retailers to produce, buy and sell products throughout the world. In terms of effectiveness and retail strategies we need to focus on the following areas of work: supply chain and costs reducing; information sharing and data transparency; cooperation, partnership and inter-organizational communication; globalization and cross-border supply chains with multistage structures; technologies for tracking, protection and control of cargo traffic (eg, RFID, barcodes) [13, p. 290].

– Competitive environment changes. Moderate inflation and uncertainty may lead to caution consumers. As a result, the retail market operators need to find strategies that will allow them to differentiate from their competitors in the retail segment.

– Demographic shifts. These are changes in population structure, which determine the most important aspects of retail, because they influence and change consumer needs and demands. Shifts open new market niches and help retailers, who do not want to lose market share or want to expand their business, to create new brands, expand or deepen their range, adapt its pricing philosophy, policy service, change the design and layout of its stores.

– Increasing of health and wellbeing role. Health, safety and welfare become more important in Europe for the last time and probably will become even more important due to the increasing diseases that affect lifestyle.

– Increasing demand for domestic services. The technology requires new models of services offered over the Internet. In the EU growth in demand for consumer services includes such subtendencies: individualisation / personalization and e-commerce [20]. Individualization and personalization of products and services mean that EU consumers are confident, mobile and well-informed, they have individual wishes and needs and demand to be taken seriously. This concerns not only to purchases of specific products in specialized stores (segments), but also everyday purchases in supermarkets or stores. Implementation of Chapter 6, Section IV of the Agreement and adopted Law of Ukraine «About electronic commerce» [4] will provide an opportunity to develop such activities.

– Increasing of regulatory pressure. According to this we understand how economic policy affects the activity of retail trade and determines the product characteristics.

– Growing disquietude of consumers about sustainability. Consumers are aware more of products they buy and what they consume. They want to be better informed about products and stores [13, p. 293]. However, they retailers are considered to be responsible for the social and environmental consequences of consumption of products they sell; production; processes and technologies used (eg, whether the company violates environmental standards), from where the product is delivered (for example, whether the product comes from a country where probably child labor is used).

– Deficit of natural resources. Population growth in the world and the rapid increase of the middle class in low and middle income affects the price and availability of natural resources such as energy, water, natural ingredients and materials, food [18]. Retailers, who want to stay on top of trends, should investigate their options and improve product design, manufacturing processes, packaging materials, transportation, product use and impact of its processing.

It is important to understand that these trends are the most significant. They influence each other, and their cumulative effect may lead to new trends arising.

Evaluating the level of development of national retail and European countries, we can make it possible to determine the real strategic orientations growth of this industry and to eliminate those structural imbalances that currently exist, such as: the imbalance between the location of trade and consumer demand due to lack of wholesale markets that pursue policies retail at wholesale price; discrepancy of quality of domestic products and consumers needs and their capabilities; insufficient interaction between retailers and suppliers, which leads to delays in filling the market with goods; uneven demand for high-quality and low-quality products to the low purchasing power of the population and the imperfect pricing.

Analysis of the latest research on these issues suggests the existence of common and different tendencies inherent for national and European retailers.

In Ukraine share of the largest operators of retail chains increases gradually (today it is 55-60% of retail market) (Table 1).

Table 1

The largest retail networks in the retail market of Ukraine [14, p. 298]

Company name	Office location	Turnover, mln grn.		Turnover increase, %	Market share (%)	
		2012	2013		2012	2013
Fozzy Group	Kyiv	11385	15900	140	4,95	5,8
«ATB-market»	Dnipropetrovsk	8900	12960	146	3,9	4,7
Metro Cash & Carry	Kyiv	8400	8770	104	3,65	3,2
«Furshet»	Kyiv	6200	6850	110	2,7	2,5
«Auchan-Ukraine»	Kyiv	5660	6000	106	2,46	2,2

Although the retail market shows positive dynamics of development, investors do not hasten to invest in its development and they are waiting for further steps of the government. First of all, it is coursed by the risk and insufficient guarantee to investors to freely compete in the Ukrainian market.

Having analysed the investment attractiveness of Ukraine for the development of distribution network we should note that there is a steady decline over the past few years. According to A.T. Kearney, in 2005 and 2006. Ukraine took respectively 3rd and 4th place, in 2009 – 17th place, in 2011. – 18th, in 2013 – 20th, and in 2014 – 24th place [15, p. 103].

In our view, important factors that hinder the active expansion of large international retail operators are relatively low income, a difficult investment climate, significant problems in obtaining land and implementation of development projects, the deficit of professional commercial premises and high rents on them. That's why foreign retailers are often not ready to work with all difficulties, mentioned above, and prefer to work with more stable markets of Bulgaria, Poland and the Czech Republic. Some operators reduce the number of commercial properties in Ukraine and even choose location out of European space. According to A.T. Kearney, Ukraine was not even included to the list of the thirty most promising countries for the development of the retail sector in 2012. This list is led by Brazil, India, China, Chile and Uruguay [18].

Major state operators monopoly takes an important place at trade organizing, which affirms the concentration of the network, common style of management and technology in services, possibilities of innovation in trading. Table 2 shows five largest enterprises-monopolists-retailers in Europe.

Table 2

The largest retailers in Europe [11]

Range in 2013	Company	Country of origin	Revenues from retail sales (mln. USD)	Group revenues from retail sales (mln. USD)
1	Carrefour S.A.	France	113,19	115,27
2	Tesco PLC	Great Britain	101,57	103,24
3	Metro AG	Germany	92,90	92,90
4	Schwarz Unternehmens Treuhand KG	Germany	87,84	87,84
5	Aldi Einkauf GmbH & Co. oHG	Germany	73,37	73,37

In Ukraine only company «Eurotech» has joined major retailers list. It managed to consolidate more than 70 shops and five retail brands, including «Furshet», «Arsen», «Souz», «Quartal» and «Fresh-market» through successfully implemented in recent years M&A (mergers and acquisitions) [14, p. 299].

Ukraine has great potential for further growth of modern retail formats. According to results of survey in 2013 modern retail formats (hypermarkets, supermarkets, discounters, Cash & Carry) took 3% more of Ukrainian market and occupy 22%. However, comparing with other countries, modern formats retain great potential for further growth. In 2014 trend of increasing the share of modern formats also took place; hypermarkets and discounters made the main contribution [1].

In 2014 the share of modern formats in terms of value amounted 22% of the total market of consumer goods. At the same time the traditional trade (convenience stores and traditional stores) occupied 27%, markets and street vending – 39%.

Experience of other countries shows that the more developed country is, the greater part of modern retail formats it occupies. According to this statement, leaders on this indicator in Europe are Austria (81%) and Germany (77%). As for Central and Eastern Europe, the share of modern retail formats in Slovakia is 67%, Hungary – 61%, Poland – 56%, Romania – 53% [1].

If the share of supermarkets in total trade in Ukraine is already close to that of neighboring countries, the share of hypermarkets and discounters is much lower. That is a discount store format, which aims to sell products at the lowest prices and it is almost absent in Ukraine. They support significant proportion of purchases in Romania, Poland, Hungary and the Czech Republic. But in Bulgaria, unlike other EU countries, a significant share of purchases takes place in grocery stores, which is nonexistent in Slovenia and Poland. For comparison, in neighboring Poland buyers leave in the discounter 23% of their money, in supermarkets – 17%, hypermarkets – 15%. At the same time in Ukraine the first place goes to supermarkets, which occupy 13%, the second place is occupied by discounters – 6%, while hypermarkets have only 1% [20].

In addition, operators engaged in food products sales play very important role in modern retail formats formation. Different structure of operators is used in various European countries. Supermarkets occupy the main share in the acquisition of food retail formats in Ukraine. Nearly 48% of food purchases are carried out in these stores. Hypermarkets and home shopping are preferred a bit less by domestic customers. Characteristically, in Ukraine, over 10% of food purchasing is carried out at markets and street trading enterprises.

Unlike in Ukraine, in Romania and the Czech Republic the overwhelming share of food products sales is made in hypermarkets. Hypermarkets, providing a wide range of products at relatively low prices, satisfy greatly the needs of food products in Poland and Hungary.

Changes in sales of food products are determinative in trade turnover. In 2014 the total turnover decreased by 12.07%, comparing with 2006. Among European countries, this figure was lower in Spain and Hungary. The growth of the total retail turnover was observed only in Belgium, the Netherlands, Poland and France. The positive trend in turnover dynamics by increasing trade with food products is admitted in Austria, Britain and Germany.

Talking about organization of retail trade in agricultural products we should draw attention to wholesale markets that pursue retail policies at wholesale price. In Ukraine «Shuvar» (Lviv) and «Stolychnyy» (Kyiv) are the most wellknown markets of such kind. These markets are competitors to supermarkets and hypermarkets, as turnover of fruit and vegetables products through the Ukrainian network of supermarkets and hypermarkets does not exceed 4.5% of the total turnover. In EU countries average share of those products is considered 15-20% of the total turnover. Ukrainain retailers plan to achieve this level in the nearest future.

According to the survey, made by company GFK, the annual outflow of consumer markets to retailers is 10% in Ukraine. According this survey of supermarkets consumers, 52% of visitors of supermarkets buy fruits and vegetables in supermarkets outside the mass season. During the season, this measure is 16%. Considering foreign experience, supermarkets will continue dictating their rules to fruits and vegetables producers and supermarkets private quality standards on fruit and vegetables will increasingly define consumer expectations to all fruits and vegetables in Ukraine.

In Ukraine 40% of food products are sold through markets. Although there has been a tendency of outflow of customers from the markets, mainly in autumn-winter period (10% per year). A policy of street markets takes place. Practice of street markets reducing has been implemented in EU countries for a long period of time. For example, more than 90% of fruits and vegetables are sold through supermarkets in the Netherlands, almost 73% through a network of supermarkets, hypermarkets and discounters in Germany, in France – 67% [18].

The main differences between the retail market of Ukraine and EU states-members are: the absence of national operators in the market of civilized trade network (in Ukraine this figure is around 25%, while in the UK – 80%, Germany – 65%, France – 85%) [2, p. 310]; partial shift of European manufacturers and suppliers to other sales channels (discounters, mini discounters, convenience store, retail linear, traditional markets, visiting trade). A number of enterprises have stepped up their work on creation of their own networks (company stores); lack of quality retail space in Ukraine; low efficiency of advertising materials (in Ukraine, the figure is only 9%); limited access to foreign markets (domestic retailers are presented only on the domestic market, while championship in the development of foreign markets belongs to European retailers); preservation of the position of traditional retail formats (Ukrainian consumers (22%) still prefer largely to buy food products on the market, while among European buyers this percentage is much lower).

Conclusions. So, while entering the European market our retailers' shoud follow rules and requirements that are spelled out in the Agreement, because in the future the signed document solves many problems that now exist between the two markets.

Firstly, reforming the national system of technical regulation, bringing it closer to EU standards will encourage the unhindered circulation of goods between Ukraine and the EU State-members and will remove barriers while leading new products to the domestic market through the retail trade and prevent imports of cheap and poor quality products of foreign manufacturers [12]. That is, at the domestic market these measures will help to eliminate unfair price advantages of foreign producers importing low-quality but cheap commodity products, destroying market competition.

Secondly, the implementation of certain provisions of the EU customs legislation, which obliges Ukrainian side to implement the provisions of 70-80% of the customs legislation of Ukraine. Customs reform, in particular, will facilitate time reducing of customs clearance and the creation of a system of rapid response to violations in the area of customs.

Thirdly, actions spelled out in the Agreement will promote the development of investment and trade cooperation with the EU through the implementation of the changes at process of the establishment of entrepreneurship. This will allow developing new enterprises, manufacturing products of high quality and unhindered their realization though European markets, as Agreement's rules and requrements execution will eventually lead to a zero rate of duty.

Fourthly, the development of e-commerce will provide manufacturers with new clients and domestic consumers will gain greater access to the right products. The recently adopted Law of Ukraine «About electronic commerce» defines the rights and obligations of parties of relations in the field of e-commerce, thereby controlling and warning participants of e-commerce.

Consequently, domestic retailers have to be configured not only on growth in emerging markets, but also to look for innovative solutions in a multichannel strategy, mobility and data analysis to maintain or increase their market share in developed countries.

Thus, performing of provisos of section IV of the Association Agreement between Ukraine and the EU and their implementation in Ukrainian reality will allow to gain the success in implementing the policy of domestic commodity market and will ensure entrance of goods of Ukrainian manufacturers to the EU market. The maximum impact of the Agreement on the development of internal trade market in the region and Ukraine is possible in case of optimization of its implementation procedure. Therefore, first and foremost those provisions of the Agreement should be implemented, which reduce the risk of investment and narrow the opportunities for additional revenue to illegal markets of traditional products.

In this case it was gained further study of the issues of a detailed analysis of the impact of the Agreement on the development of the domestic commodity market of Ukraine in the context of product groups and also issues about determination of the prospects and risks for retailers in terms of validation of economic part of the Agreement on January 1st 2016.

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