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PROBLEMS AND PROSPECTS OF THE DEVELOPMENT OF LIGHT INDUSTRY OF UKRAINE

Vlasenko I.G.*professor/професор*ORCID: <https://orcid.org/0000-0001-9995-2025>**Ternova A.S.***PhD, Associate Professor/доцент*ORCID: <http://orcid.org/0000-0002-7447-137X>*Vinnitsia Institute of Trade and Economics of**Kyiv National University of Trade and Economics**87, Soborna str., Vinnitsia, 21050, Ukraine,*

Abstract The article shows that light industry is one of the strategic segments of the national economy. The development of Ukrainian light industry is constrained by unequal conditions of competition in the domestic market, instability of tax legislation, outdated mechanism of product safety control, high dependence on imported raw materials and components; low price competitiveness of products. In order to generally support the development of light industry in Ukraine, it is necessary to restore the raw material supply of industries, create competitive conditions in the domestic market, eliminate the shadow trade.

Key words: light industry, textile materials, toll raw materials, imported raw materials

Introduction.

Light industry is one of the strategic segments of the national economy, which before the COVID-19 pandemic provided almost 5% of budget revenues and 2.6% of Ukrainian merchandise exports and had significant potential for further development. As a result of the pandemic, many companies lost a significant number of orders, laid off employees and closed their businesses. That is why the consideration of the problems of the industry, the search for ways to solve them is an urgent task, the solution of which will outline the prospects for the development of light industry.

The main text.

Today, Ukraine's light industry exports its goods mainly to the EU, which is 83.7% of total industry exports. Many of them are traditionally made to order by well-known brands, but there are also "pure" exports of Ukrainian brands of clothing and footwear [1,2].

If before the pandemic 75% of garment production in Ukraine worked on toll schemes to the West, then many companies lost their orders [3]. Thus, for 9 months of 2020, sectoral exports decreased by 11.4% and amounted to 788.4 million US dollars, while imports decreased by only 5.6% and amounted to 2155.3 million. At the same time, the domestic market of Ukraine consumed only 53.79 % of domestic production, while import dependence in the segment of final consumption of light industry goods was 87.22%.

It is worth noting that the development of light industry currently lags behind Poland - 6 times, Germany - 21 times, and Italy - 73 times [4].

In 2020, the purchase of clothing in Ukraine, according to various estimates, decreased by 50-60%. And orders of foreign companies for the manufacture of clothing in Ukraine fell by 30%. According to the results of 2019, the index of



industrial production of Ukraine fell by 0.5% and amounted to only 85% of the level of 2013 and 80.7% of the level of 2011. 2011 was the last peak of industrial growth, as the Russian Federation began taking certain restrictive measures against Ukrainian goods in 2012-2013 - in preparation for the signing of Ukraine's Association Agreement with the EU, which was then actively pursued by the Ukrainian authorities. In fact, in 2020 Ukrainian industry entered a state of crisis - in January the industrial index fell by 5.1%, in February - 1.5% and in March it received a devastating blow to the pandemic COVID-19 and the global economic crisis. As a result, in the first half of 2020 the industrial production index decreased by 8.3%. The industrial production index in the first half of 2020 amounted to only 80.6% of the level of the first half of 2013 and 77.7% of the level of the first half of 2013. Considering the dynamics of export-import operations for the period from 2016 to 2020, it becomes obvious reduction in exports (Table 1)

Table 1 - Dynamics of exports and imports of light industry of Ukraine for 2016-2020

Year	Exports, thousand dollars	Imports, thousand dollars
2016	955739,8	2010345
2017	1091175	2253795
2017 р. до 2016 р., %	114,2	112,1
2018	1220299	2661379
2018 р. до 2017 р., %	111,8	117,9
2019	1184636,2	3129621,0
2018 р. до 2019 р., %	97,1	117,6
2020	1078387,3	2967593,5
2020 р. до 2019 р., %	91,0	94,7

Compiled on the basis of [5].

In 2017, the volume of imports compared to 2016 increased by 112.8% and amounted to more than 2.25 billion dollars. US dollars, and exports increased by 114.2% and amounted to about 1.1 billion dollars. USA. Also, some growth occurred in the following years - in 2018, imports increased by 117.9%, and exports - by 111.8. In 2019, the volume of imports continued to grow, namely by 117.6% compared to the previous year, but the volume of exports decreased to 97.1%. In 2020, there was a reduction in imports to 94.7% and exports to 91.0%.

If we consider the volume of exports and imports of light industry goods by subsectors, it becomes obvious that the largest share are textiles and textile products. Thus, in 2020, this group of goods accounted for 72.2% of total exports of light industry and 77.1% of imports. A much smaller percentage belongs to such goods as footwear, hats, umbrellas - 15.3% of total exports and 14.7% of imports in 2020. In addition, hides and skins are untreated, leather is made up of 12.5% of total exports of light industry and 8.2% of imports [6]. If we consider the dynamics of production, exports and imports of light industry products in Ukraine, it becomes clear the decline in 2020.



Thus, Covid-19 really hit the world demand. Ongoing outbreak coronavirus has already plunged the world economy into recession, causing a sharp decline oil prices, and as a consequence affected the reduction in consumption of products from polyester such as textiles, garments, shoes and accessories. Now, consumption of clothing and footwear in the world has declined.

According to statistics, before the pandemic in Ukraine there were more than 2.3 thousand small and medium enterprises of light industry, which involved about 85 thousand workers. Annual volumes of their products reached UAH 22 billion. Last year alone, the industry lost approximately 20,000 jobs. Retail brands have been particularly hard hit.

According to the Ukrlegprom Association, sectoral wages in 2020 were only 57% of the average wage in industry. The largest increase in production, exports and capital investment in light industry was recorded in 2017, when this figure reached 71%.

In 2020, the light industry quickly reshaped itself and many manufacturers launched the production of protective equipment on their own resources. Hoping for the promises of the state leadership to quickly agree at the state level on the terms of mechanisms for the supply of personal protective equipment, volumes and clear lists of products for procurement, prices, certification requirements [7].

As a result, the issue of speculative prices and social tensions was removed in a short period of time. Unfortunately, despite the significant success of Ukrainian companies in the development and manufacture of the latest protective materials and products, as well as the wild demand of other countries for personal protective equipment produced in Ukraine, preference is given to imports. And at the same time with a long ban on the export of similar Ukrainian goods.

At present, the light industry has appealed to the Cabinet of Ministers of Ukraine to abolish simplified procurement procedures, whereby public funds are spent mainly on imported products (China, etc.), despite the fact that such production has long been established in Ukraine.

The development of Ukrainian light industry is constrained by unequal conditions of competition in the domestic market, instability of tax legislation, outdated mechanism of product safety control. And high dependence on imported raw materials and components; low price competitiveness of products [8,9].

In addition, a significant part of production is focused on the manufacture of toll raw materials. After all, most Ukrainian companies still do not export ready-made national products, but only provide services for sewing clothes or shoes. Cooperation with European partners is based on the implementation of certain labor-intensive operations, while procurement, sales, design and logistics are performed by the customer.

The second important factor hindering development is the internal market. The purchasing power of the domestic market in the mass segment is critically low. This affects the volume of production and, consequently, the cost.

No less important factor is access to finance. Active development of the system is impossible without the involvement of external resources. New opportunities are emerging in Ukraine, but investors and donors are very cautious.



The main support programs today are aimed at developing business associations, clusters and associations. Players in the light industry market are designers, individual tailoring studios, designer brands, big fast fashion brands and retailers. When calculating the cost of factory services, experienced customers clearly know the effective cost of production. Classically, the minimum rate of return is added to this figure and this is the final price that customers announce to the performers at the negotiations.

Due to the high risks and very low activity of our companies in communication with foreign companies, orders are concentrated in intermediaries, and there may be several in a row. Thus, the profit of enterprises directly depends on their activity, circle of communication and ability to organize the operational process.

Sales channels have changed. If earlier buyers bought goods at Fashion Weeks, then due to lockdowns they were forced to create modern digital channels and B2B platforms. And brands like Prada and Dior have opened online showrooms in general. Thus, according to the international report of the State of Fashion, in 2020 there was a change in offline sales channels to online and social networks. 30% of companies have survived, about 56% of buyers expect significant discounts, and companies have to reckon with this. And digital sales in the world grew by 700%.

The main challenge for the whole industry now is the free trade agreement with Turkey, which abolishes import duties on ready-made clothing and imports of fabrics. According to the USAID report on the possible consequences of this agreement, one of the industries that will lose the most will be light industry.

At the same time, experts note that this is a classic light industry and the domestic market. In addition, they advise to use this situation. For example, to get the fabric duty free, it is enough to process it in Ukraine, get a certificate of origin and sell it to European countries duty free. For strong brands, this will be another advantage.

At the same time, during 2021 the Ukrainian light industry (13-15 NACE) demonstrates positive dynamics of production recovery. For January-September 2021 we have a total of 103.5% to the corresponding period of 2020. Remote operation of a significant part of consumers has shifted the greatest demand in the field of home textiles, comfortable knitwear, casual, homewear, so we have the highest production rate in the textile industry - 118.1%, in particular due to the production of bedding, dining, kitchen linen -121 .6%. This even led to the dominant role of textile production - 41.2% of total sales of industrial products (of which - 36.8% - the share of home textiles). On the other hand, the most significant segment of clothing production was 34%, footwear - 14.3%, leather and leather goods - 10.6%.

Due to unequal conditions of competition in the domestic market, manufacturers, especially clothing and footwear, export-oriented to foreign markets. With the revival of business activity in Europe, where more than 80% of Ukrainian exports are directed, foreign orders have intensified, in addition, we see increasing demand and willingness to export finished Ukrainian goods, finding alternatives to Asian suppliers [10,11].

The volume of sectoral exports for 9 months of 2021 reached 900 million US dollars, which is 14.1% more than last year, however (from 2.2% to 1.9%) decreased



the share of the sector in the structure of merchandise exports of Ukraine. This is due to the negative (-4.9%) key indicator of textile clothing exports. On the other hand, the above-mentioned consumer trends led to an increase in exports of knitted clothing - by 20.7%, footwear - by 13.5%, knitted fabrics - by 53.3%, home textiles - by 28.7%, carpets - by 42.2%. %.

The volume of imports exceeds exports almost three times, reaching almost 2.6 billion US dollars or 5.1% in the structure of merchandise imports [12]. It should be noted that 44% of this volume are groups of raw materials - various yarns, fabrics, textiles, as well as hides / skins processed in Ukraine - and in general their imports increased by 19% during this period. There is also an increase in imports of knitted clothing - by 22.7%, textile clothing - by 8.9%, footwear - by 31.6%, carpets - by 23.9%, leather products - by 38.1%.

Conclusions

In order to generally support the development of light industry in Ukraine, it is necessary to restore the supply of raw materials. And also to create competitive conditions in the domestic market, to eliminate shadow trade. Weakening the fiscal and regulatory press is also needed as an incentive for business. This will significantly improve the business climate and reduce the cost of finished products.

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У статті показано, що легка промисловість є одним із стратегічних сегментів національної економіки. Розвиток легкої промисловості України стримується нерівними умовами конкуренції на внутрішньому ринку, нестабільністю податкового законодавства, застарілим механізмом контролю безпеки продукції, високою залежністю від імпортової сировини та комплектуючих; низька цінова конкурентоспроможність продукції.

Для загальної підтримки розвитку легкої промисловості в Україні необхідно відновити сировинне забезпечення галузей, створити конкурентні умови на внутрішньому ринку, ліквідувати тіньову торгівлю.

Ключові слова: легка промисловість, текстильні матеріали, давальницька сировина, імпортна сировина



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UKRAINE'S FOREIGN TRADE IN GOODS WITH EUROPEAN UNION COUNTRIES: PROBLEMS AND PROSPECTS

Ternova A.S.*PhD, Associate Professor/доцент*ORCID: <http://orcid.org/0000-0002-7447-137X>**Vlasenko I.G.***professor/професор*ORCID: <https://orcid.org/0000-0001-9995-2025>*Vinnitsia Institute of Trade and Economics of**Kyiv National University of Trade and Economics**87, Soborna str., Vinnitsia, 21050, Ukraine,*

International trade as a form of international economic relations is a component of balanced economic development. A large share of Ukraine's foreign trade in goods and services belongs to EU countries. The structure of exports of goods from Ukraine is dominated by agricultural products, raw materials and low value-added goods. For the successful development of international trade, it is necessary to create transnational companies, strengthen the level of legislative support to increase the competitiveness of domestic products, improve the program of cooperation with other countries.

Keywords: *international trade, export of goods, import of goods, competitiveness*

Introduction.

In the context of globalization, foreign trade is becoming increasingly important in filling the state budget. It is international trade as a form of international economic relations is a component of balanced economic development, which enhances the competitiveness of the national economy, improves living standards and provides the fullest satisfaction of its needs [1].

The main text.

The general indicators of foreign trade in goods during 2018-2020 changed ambiguously (Table 1).

Thus, the overall indicator of trade in goods and services in 2018 amounted to 108.9% from the previous year. In the following 2019, it amounted to 111.8%, but in 2020 it decreased and amounted to only 92.7%. The balance remained negative and amounted to -6212.8 million in 2018, -3689.1 million in 2019 and -677.8 million dollars in 2020. USA. The export coverage ratio was 0.90 in 2018, 0.95 in 2019 and 0.99 in 2020.

A large share of Ukraine's foreign trade in goods and services belongs to EU countries. During the study period, there is a negative balance between exports and imports, namely: -3470 in 2018, -4573.7 in 2019 and -4701.5 in 2020. The export coverage ratio of imports is declining and ranges from 0.87 in 2018 to 0.82 in 2020. The share of exports in total is gradually decreasing - from 40.3 to 37.7 and 37.2%, respectively, in the studied years, and the share of imports is growing, respectively - from 41.8 to 42.4 and 44.6%.

If we consider the dynamics of the main indicators of Ukraine's foreign trade in goods, it becomes noticeable decline in total trade and trade with EU countries (Table 2). Exports of toll raw materials are growing year by year [3].



Table 1 -Dynamics of the main indicators of Ukraine's foreign trade in goods and services

	2018	% to the previous year	2019	% to the previous year	2020	% to the previous year
In general, in Ukraine						
exports, million dollars	57280,9	115,3	64050,3	106,7	59367,9	88,6
imports, million dollars	63493,7	115,3	67739,4	106,7	60045,7	88,6
including EU countries (28)						
exports, million dollars	23100,1	114,6	24164,7	104,6	22085,2	91,4
imports, million dollars	26570,1	113,9	28738,4	108,2	26786,7	93,2

Compiled on the basis of materials [2].

The general dynamics of Ukraine's foreign trade balance during the study period is shown in Table 3. The balance shows ambiguous dynamics. Thus, if the indicators of trade in general in 2019 increased compared to 2018, then in 2020 there was a significant decline. This also applies to trade in goods with EU countries.

Table 2 - Dynamics of the main indicators of Ukraine's foreign trade in goods

Indicators of trade in goods	2018	2019	2020
exports, million dollars	47335,0	50054,6	49191,8
% to the previous year	109,4	105,7	98,3
imports, million dollars	57187,6	60800,2	54336,1
% to the previous year	115,3	106,3	89,4
balance, million dollars	- 9852,6	- 10745,6	- 5144,3
Import export coverage ratio	0,83	0,82	0,91
number of enterprises engaged in foreign trade in goods, units			
export	16652	16682	16615
imports	28732	31579	32500
number of partner countries, units			
export	202	201	209
imports	211	218	221
toll raw materials, million dollars			
export	47,5	67,2	86,3
imports	3249,5	3127,3	2863,7
specific weight in total, %			
export	0,1	0,1	0,2
imports	5,7	5,1	5,3



products made from toll raw materials, million dollars			
export	4688,5	4572,0	4220,5
imports	13,6	26,6	34,4
specific weight in total, %			
export	9,9	9,1	6,9
imports	0,0	0,0	0,1
including EU countries (28)			
exports, million dollars	20157,0	20750,7	18604,9
% to the previous year	115,0	102,9	89,7
imports, million dollars	23216,5	25012,2	23859,7
% to the previous year	111,6	107,7	95,4
balance, million dollars	-3059,5	-4261,5	-5254,8
Import export coverage ratio	0,87	0,83	0,78
specific weight in total, %			
export	42,6	41,5	37,8
imports	40,6	41,1	43,9

Compiled on the basis of materials [2].

Table 3 - Dynamics of Ukraine's foreign trade balance (million USD)

Indicator	Year		
	2018	2019	2020
	Export		
Total	57280,9	64050,3	59367,9
of them EU countries (28)	23100,1	24164,7	22085,2
Cargo	47335,0	50054,6	49191,8
of them EU countries (28)	20157,0	20750,7	18604,9
	Imports		
Total	63493,7	67739,4	60045,7
of them EU countries (28)	26570,1	28738,4	26786,7
Cargo	57187,6	60800,2	54336,1
of them EU countries (28)	23216,5	25012,2	23859,7
	Balance		
Total	-6212,8	-3689,1	-677,8
of them EU countries (28)	-3470,0	-4573,7	-4701,5
Cargo	-9852,6	-10745,6	-5144,3
of them EU countries (28)	-3059,5	-4261,5	-5254,8

Compiled on the basis of materials [2].



The main partner countries in exports of goods in 2019–2020 were countries such as China (doubled from 7.2 to 14.4%) and Poland (Figure 1). The export rate with the Russian Federation decreased from 6.5 to 5.5%. Cooperation with Turkey, Germany, India and Italy continued.

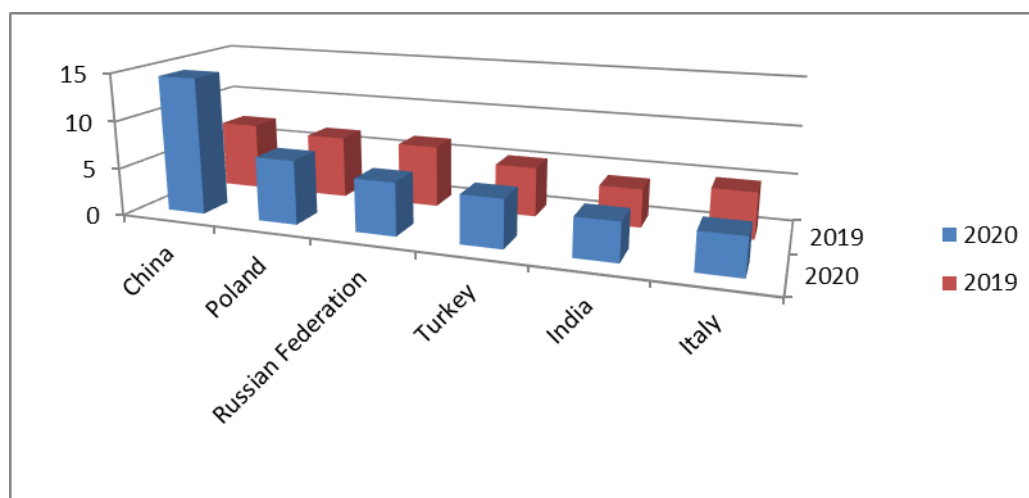


Figure 1 - The main partner countries in the export of goods in 2019-2020 [2].

The main partner countries in the import of goods during 2019-2020 were China, Germany, the Russian Federation, Poland, the United States, Belarus and Turkey (Figure 2).

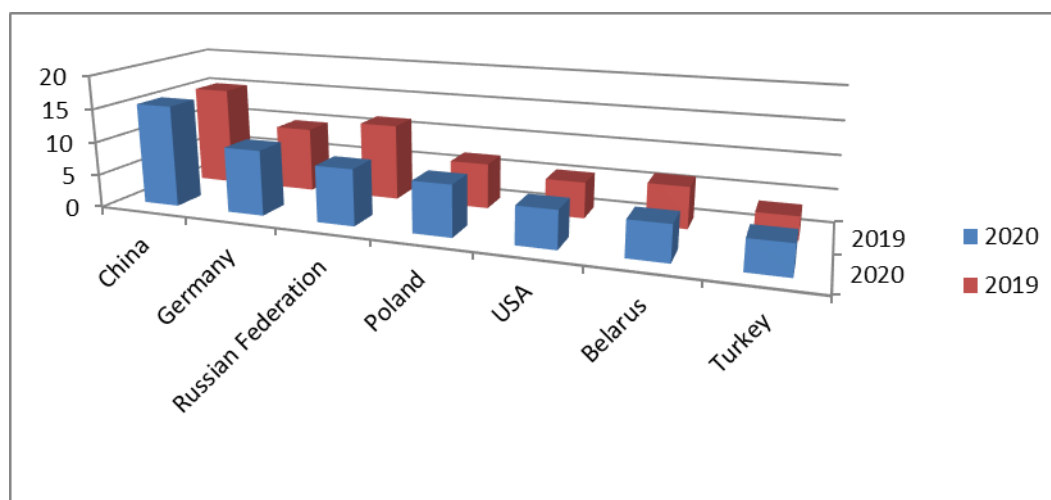


Figure 2 - The main partner countries in the import of goods in 2019-2020 [2].

Poland, Germany, Italy, the Netherlands, Hungary, Spain and Romania were among the main European export partners. (Fig. 3).

The main European partner countries of Ukraine in the import of goods were Germany, Poland, Italy, France, Hungary, Slovakia, the Czech Republic (Figure 4).

The structure of exports of goods from Ukraine is dominated by agricultural products, raw materials and goods with low added value (Table 4).

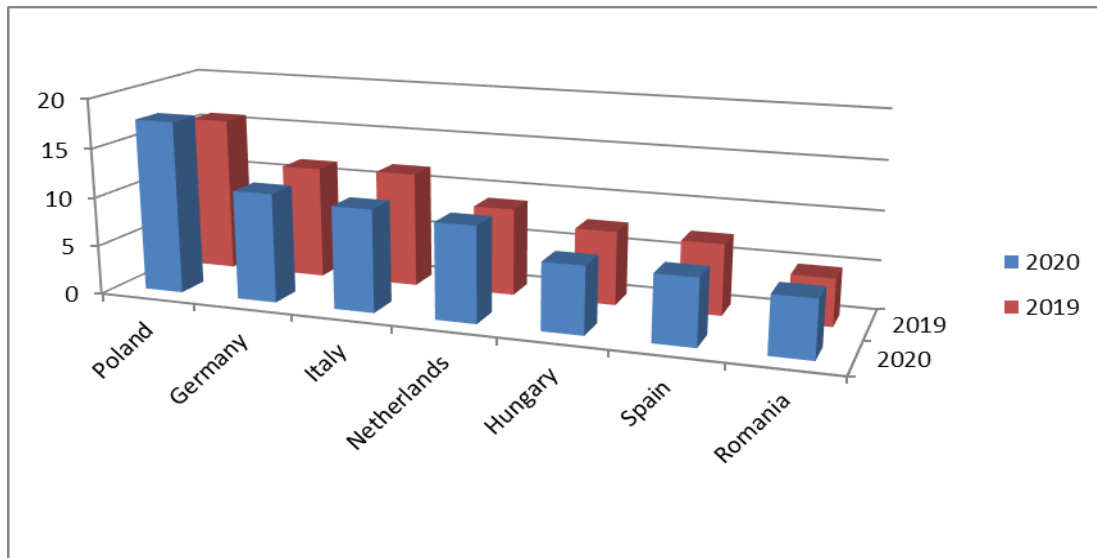


Fig.3 - The main partner countries of the EU in exports of goods in 2019-2020 [2].

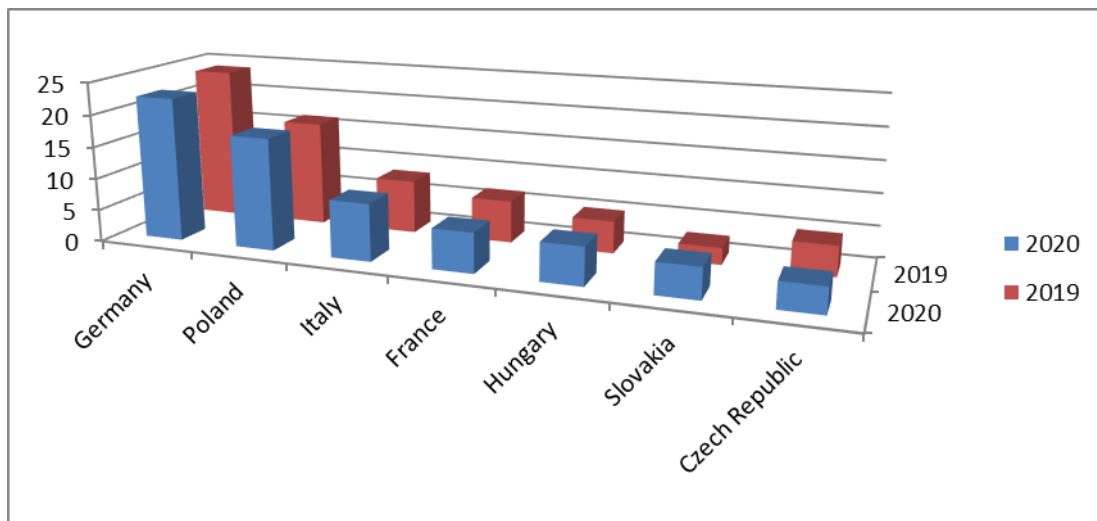


Fig.4 - The main partner countries of the EU in imports of goods in 2019-2020 [2].

Table 4 - Structure of exports of goods from Ukraine in 2018-2020

Group of goods	2018	2019	2020
cereals	15,3	19,2	19,1
change to the previous year,%	111,4	133,0	97,7
ferrous metals	21	17,5	15,6
change to the previous year,%	114,7	87,9	88,0
animal or vegetable fats and oils origin	9,5	9,5	11,7
change to the previous year,%	97,6	105,2	121,4
ores, slag and ash	6,4	7,2	9,0
change to the previous year,%	110,9	118,3	123,1
electric machines	6,2	5,5	5,2
change to the previous year,%	115,0	94,6	92,8
nuclear reactors, boilers, machines	-	-	3,9
change to the previous year,%	-	-	113,1
other goods	41,6	41,1	35,5

Compiled on the basis of materials [2].



To increase Ukraine's share of exports, attract foreign investors, develop foreign economic relations with partner countries, it is necessary to export not only raw materials but also finished food products, according to European standards; to support the agro-industrial sector at the national level through development programs; to improve the material and technical base of farmers in order to create competitive products [4]. An important factor in successful development is state support for medium and small farmers; strengthening cooperation with other countries in order to expand markets.

Conclusions.

For the successful development of international trade, it is necessary to create transnational companies, whose activities will open new prospects for the economy of our country in terms of integration into the world market, will help increase competitiveness. An important task is to modernize key export-oriented sectors of the domestic economy, whose activities will help improve the country's export opportunities. At the state level, it is necessary to strengthen the level of legislative support to increase the competitiveness of domestic products in both foreign and domestic markets in the face of inflation, rising energy prices. Measures should be developed to provide state support for multi-vector export expansion of Ukrainian products to the world market; taking into account international experience, strengthen the practice of anti-dumping and special measures on trade protection of domestic producers; to improve the program of cooperation with other countries, as well as the practice of using instruments of contractual settlement of foreign trade, reducing protectionist measures between countries (duties, quotas). The implementation of these measures will help the successful development of Ukraine's international trade and help strengthen its competitiveness on the world market.

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Міжнародна торгівля як форма міжнародних економічних відносин є складовою збалансованого економічного розвитку. Значна частка зовнішньої торгівлі України товарами та послугами припадає на країни ЄС. У структурі експорту товарів з України переважають сільськогосподарська продукція, сировина та товари з низькою доданою вартістю. Для успішного розвитку міжнародної торгівлі необхідно створювати



транснаціональні компанії, посилювати рівень законодавчого забезпечення підвищення конкурентоспроможності вітчизняної продукції, удосконалювати програму співпраці з іншими країнами.

Ключові слова: міжнародна торгівля, експорт товарів, імпорт товарів, конкурентоспроможність.

**CONTENTS****Innovative economics and management**

- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-014> **3**
SOCIAL COMMUNICATIONS AS THE MAIN TOOL OF MODERN
MANAGEMENT
Meshko N.P., Klochko M.V.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-016> **10**
CURRENT TRENDS IN GARLIC GROWING IN THE WORLD
Tomashevskaya O., Zuikova A.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-026> **15**
ACCOUNTING INFORMATION SUPPORT OF INNOVATION
MANAGEMENT IN THE INSURANCE BUSINESS
Palchuk O.V., Savchenko V.M.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-033> **23**
INNOVATIVE INFORMATION MANAGEMENT TECHNOLOGIES
AT SMALL BUSINESS ENTERPRISES
Smirnova N.V., Smirnova I.V.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-035> **29**
INNOVATIVE TECHNOLOGIES AND ENTERPRISE MANAGEMENT
INFORMATION SYSTEM: PROBLEMS AND PROSPECTS
Kononenko L.V., Gai O.M.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-038> **34**
ASSESSMENT OF THE ECONOMIC AND ECOLOGICAL
SAFETY'S LEVEL OF POLISSYA ECONOMIC DISTRICT
Averkyna M.F., Zahoruiko O.V.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-039> **42**
LEGISLATIVE REGULATION OF THE INDICATIVE LIST OF
ISSUES RESOLVED BY FORENSIC ECONOMIC EXPERTISE
OF ACCOUNTING, TAXATION AND REPORTING DOCUMENTS
Puhachenko O. B., Fomina T. V.
- <http://www.moderntechno.de/index.php/meit/article/view/meit19-02-041> **51**
EFFECTIVE IMPLEMENTATION OF INFORMATION AND
COMMUNICATION TECHNOLOGIES IN THE FORMATION
OF FOREIGN LANGUAGE COMPETENCE OF STUDENTS OF
AGRICULTURE
Shcherbyna Y.



http://www.moderntechno.de/index.php/meit/article/view/meit19-02-049	55
UKRAINE'S FOOD SAFETY AND ITS ENSURING COMPONENTS IN THE CONTEXT OF GLOBAL CHALLENGES	
<i>Averkyna M.F., Soltys-Sholudko N. V.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-052	61
DIGITAL MARKETING AS A TECHNOLOGY OF HOSPITALITY DEVELOPMENT	
<i>Marusei T.V., Belinska K.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-060	66
PROSPECTS FOR THE DEVELOPMENT OF THE TOURIST INDUSTRY OF UKRAINE	
<i>Vlasenko I.V.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-061	70
PROBLEMS AND PROSPECTS OF THE DEVELOPMENT OF LIGHT INDUSTRY OF UKRAINE	
<i>Vlasenko I.G., Ternova A.S.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-062	76
UKRAINE'S FOREIGN TRADE IN GOODS WITH EUROPEAN UNION COUNTRIES: PROBLEMS AND PROSPECTS	
<i>Ternova A.S., Vlasenko I.G.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-068	83
THE WTO GPA ACCESSION IN THE LIGHT OF THE REFORMS IN THE PUBLIC PROCUREMENT SECTOR	
<i>Dorina Jitaru</i>	
Innovations in agriculture, biology	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-008	105
TECHNOLOGIES FOR THE PROCESSING OF NUTRITIOUS RESIDUES	
<i>Tomchuk V.V.</i>	
http://www.moderntechno.de/index.php/meit/article/view/meit19-02-020	121
INNOVATIVE ACTIVITY OF THE ORGANIZATION AND DEVELOPMENT OF ENTERPRISES IN THE WINERY INDUSTRY	
<i>Padalko T.O.</i>	



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