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Report Highlights:

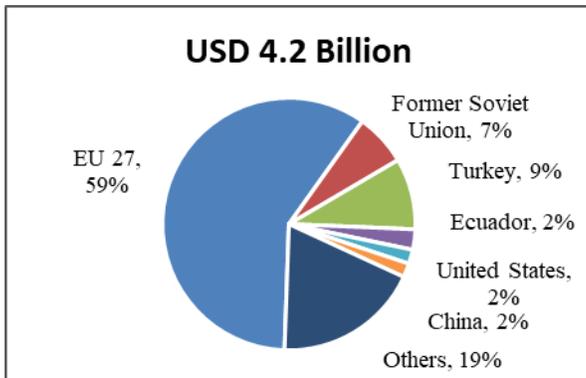
Ukraine is a lower-middle income country in Eastern Europe. Its economy is rebounding after the political and economic turmoil of recent years. Ukraine's imports of agricultural products grew over thirteen percent in the first eight months of 2020. As a major agricultural producer and exporter, Ukraine also possesses a large food-processing industry. The majority of agricultural import growth in the near future is likely to be concentrated in food ingredients. Although Retail, Hotel, Restaurant and Institutions sectors are opening multiple niche opportunities for U.S. higher value-added products, the spread of COVID-19 delayed this demand to spring-summer of 2021. Trends for Western-style food are profound and can create more import opportunities in the near future.

Market Fact Sheet: Ukraine

The World Bank classifies Ukraine as a [lower-middle income country](#). Ukraine has the potential to become a major European economy and is one of the world's largest grain and vegetable oil exporters. In 2020, Ukrainian GDP reached US\$155.6 billion, positioning the country as the 56th largest economy in the world. The relatively low percapita GDP of [\\$3,727](#) transfers into [\\$13,057](#) in purchasing power parity. In 2020, imports of agricultural and related products reached US\$ 6.93 billion, an increase of almost 12.5 percent compared to 2019. In 2021 these imports are expected to grow by 21 percent (imports from U.S. are expected to drop by eight percent). In 2014 Ukraine signed a Deep and Comprehensive Free Trade Area agreement (DCFTA) with the EU which dominates country's trade and regulatory agenda.

Fresh fruits, pet food, chocolate, wine and beer, coffee, dairy, fresh vegetables, and miscellaneous processed products constitute the majority of Ukraine's food imports in 2020.

Imports of Consumer-Oriented Products



Source: Trade Data Monitor

Food Processing Industry

Production of domestically processed food and beverages totaled \$20.1 billion in 2020, making it responsible for 34 percent of total processing output. Small and medium sized enterprises dominate the market, with a few large processors responsible for the majority of sales in the beer, soft drinks,

Food Retail Industry

hard liquors, condiments and confectionary sectors. Ukraine's food retail sales grew by 14.1% in 2020. Ukrainian chains are well established, possess significant market power and offer different retail formats and service levels for consumers of different incomes and preferences. E-commerce is developing fast in Ukraine with COVID-19 quarantine restrictions helping it grow even faster.

Quick Facts CY 2020

Imports of Consumer-Oriented Products (USD billion)

4.2

List of Top 10 Products That Have Seen Gains

- | | |
|----------------------|------------------------|
| 1) Food Preparations | 6) Wine |
| 2) Tobacco | 7) Nuts |
| 3) Fresh Fruits | 8) Fermented Beverages |
| 4) Cheese | 9) Chocolate |
| 5) Pet Food | 10) Pork |

Food Industry by Channels (USD billion) 2020

Food Exports – 3.0

Food Imports – 4.2

Top Ukrainian Retailers

- | | |
|-----------------------|----------------|
| 1. ATB | 2. Fozzy Group |
| 3. Metro Cash & Carry | 4. Auchan |
| 5. Novus | 6. Varus |
| 7. Wellmart | 8. Tavia V |

GDP/Population

Population (millions): 41.3; GDP (billions USD): 155.6;

GDP per capita (USD): 3,727

Sources: World Bank, Trade Data Monitor, UkrStat.Gov

Strengths/Weaknesses/Opportunities/Challenges

| Strengths | Weaknesses |
|--|---|
| <ul style="list-style-type: none"> - Ukraine is one of the most populous markets in Eastern Europe. - U.S. products are viewed as high quality products by Ukrainians. | <ul style="list-style-type: none"> - Low disposable incomes push imported products into high-end segment. - High trade risks due to political instability make imports difficult. |
| Opportunities | Threats |
| <ul style="list-style-type: none"> - Ukraine's retail sector is recovering. - Import tariff levels for food products are comparatively low. - Increased home cooking due to COVID-19 restrictions expands e-trade creating new niche for new to the market products | <ul style="list-style-type: none"> - U.S. exporters face competition from zero import duty products from EU and Canada - Ukraine adopts EU regulations limiting market access for many U.S. products - COVID-19 spread negatively impacts HRI demand 2022. |

Data and Information Sources: Trade Data Monitor (TDA), State Statistics Service of Ukraine

SECTION I. MARKET SUMMARY

Ukraine is typically referred to as a “high risk – high reward” country for international businesses. A turbulent political environment, corruption, and an on-going conflict with Russia-backed separatists in the east, can make it a challenging place to do business. To minimize risks, most U.S. exporters rely on their Ukrainian partners for customs and food safety clearance, in-land transportation, storage, product placement, marketing, and promotion. Demand for imported food products remains strong despite COVID-19. Sales in the Ukrainian retail and e-commerce sectors offset the drop in demand from Ukrainian hotels and restaurants. E-retailers noted a higher average check value in 2021 as people are trying to “reward” themselves for missed joy in restaurants and other public establishments.

In recent years, some regulatory reform progress has been achieved. The Ukrainian marketplace has become more predictable and business oriented. Many of the new norms and regulations mimic EU rules, therefore U.S. businesses working in the EU market may find many requirements familiar. Ukraine introduced a single window custom clearance process and somewhat streamlined import procedures in 2018. Although new rules made trade more transparent, the EU-like regulations have, in some cases, resulted in the introduction of existing U.S. – EU trade restrictions into U.S.-Ukraine trade.

Ukraine will likely remain a lower-middle income country in 2022-23. The market is price-sensitive and lower-priced products and products with optimal price/quality ratio will have a better sales perspective in all segments. However, quality requirements remain quite high as domestic industry competes with many imports offering similar products at lower prices. U.S. suppliers should either find a niche market for their products or be prepared to face fierce competition.

Country Overview

Ukraine is a country that has been in political and economic transition since 2014. Despite the military conflict in the East, Ukraine’s economy is recovering. Significant economic reforms are supported by the international community and have resulted in a relatively stable currency and recovery of disposable income. After some COVID-19 related slowdown in 2020 the country returned to upward trend.

Ukraine’s global imports of agricultural and related products grew by 12.6 percent in 2020, valued at USD 19.6 billion. Imports of consumer-oriented agricultural products totaled USD 4.2 billion, an increase of 19 percent compared to 2019. The COVID-related economic drop slowed in the last quarter of 2020 resulting in steady economic growth in 2021 despite multiple lockdowns.

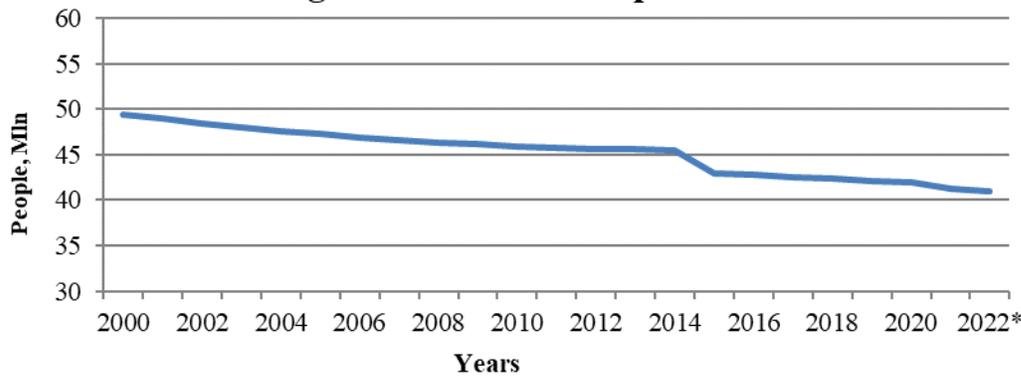
Table 1: Major Economic Indicators

| INDICATORS | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 (projection) |
|---|--------|--------|--------|--------|--------|-------------------|
| GDP (% Growth) | 2.30% | 2.50% | 3.3% | 3.23% | 4.02% | 3.5% |
| GDP per capita, PPP (USD) | 11,148 | 11,871 | 12,629 | 13,341 | 13,056 | 13,600 |
| Inflation (% Growth) | 12.4% | 13.7% | 9.8% | 4.1% | 5.0% | 9.8% |
| Exchange rate (Hryvnas) | 25.6 | 26.5 | 27.2 | 25.8 | 27.2 | 28.0 |
| Total Imports from U.S. (Billions of USD) | 1.6 | 2.5 | 2.9 | 3.3 | 2.9 | 3.4 |
| Total Exports to U.S (Billions of USD) | 0.4 | 0.8 | 1.1 | 0.9 | 0.9 | 1.4 |

Source: World Bank, Ukraine’s State Budget 2021, Trade Data Monitor, EBRD, Post Estimates

The population of Ukraine is in decline, with one of the highest world annual depopulation rates of -0.5 percent. Primarily due to the loss of control over the Crimean Peninsula in 2014, resulting in a decrease in population of 2.3 million. Moreover, the real number of potential consumers is smaller than the official population numbers suggests because an additional 2.5 to 3 million people are located in eastern Ukraine which is not controlled by the central government, and another 2.5-3.0 million Ukrainians work abroad. Remittances from abroad amounted to \$12.0 billion in 2020. Due to COVID some workers returned to Ukraine in 2020, but remittances continued to grow in 2021.

Figure 1: Ukraine's Population

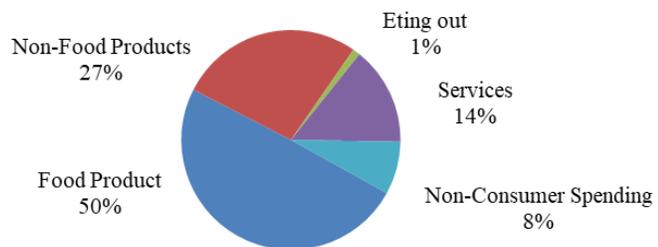


Source: State Statistics Service of Ukraine

The Ukrainian financial sector has been improving since 2016. During the political and economic shocks in 2014 and 2015 the Ukrainian currency – the Hryvnia (UAH) - experienced an abrupt devaluation that increased currency exchange risks, complicating trade. These trade risks have significantly diminished, but they remain a consideration to trade.

While currently the share of food expenditures is nearly half of all spending, the share of the average consumer’s budget spent on food is decreasing as disposable incomes grow. Staple foods consume the largest share of family incomes. Semi-subsistence farming plays an important role in rural areas and backyard production and serves as an income-supporting activity and a cushion for the economic crises that shook Ukraine over the last ten years.

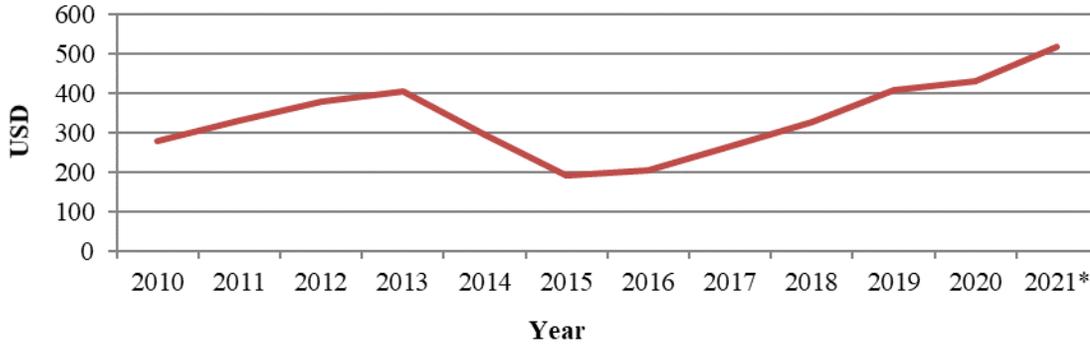
Figure 2: Monthly Household Spending in the First Half of 2021, 396.0 USD



Source: State Statistics Service of Ukraine

¹Average household is 2.1 persons.

Figure 3: Average Official Monthly Salary in Ukraine

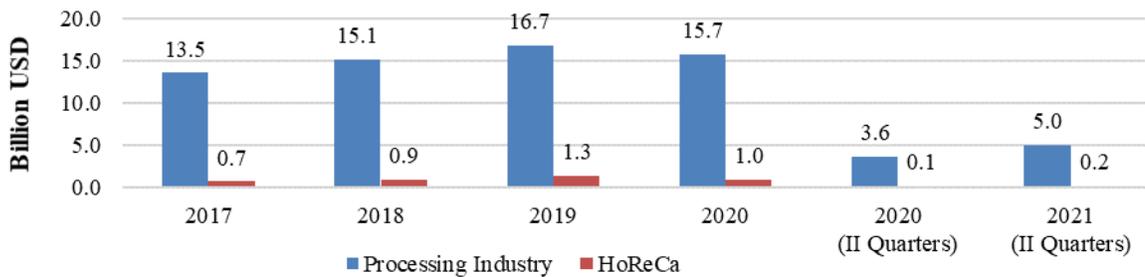


*Source: State Statistics Service of Ukraine; *Forecast*

In 2019, Ukrainian average monthly salaries exceeded the pre-2014 crisis level, while in 2021 it reached historic high numbers. Despite COVID, this increase resulted in a significant growth of spending on food imports. The Ukrainian currency remained strong throughout 2021, appreciating against the U.S. dollar and other reserve currencies.

There are opportunities for U.S. exports, both for retail and further processing. The potential product list is extensive and includes tree nuts, fish, seafood, tobacco, cocoa, tea, coffee, spices, certain alcoholic beverages, fresh and canned fruits and many other products. Many of these products are staple foods, consumed daily. The food processing industry offers better opportunities because competition is lower as many input ingredients are not produced domestically. Some opportunities may be hindered by competition from EU suppliers and food-safety control system reform aimed at compliance with EU rules and norms.

Figure 4: Ukraine's Processing Industry and HoReCa Output



Source: State Statistics Service of Ukraine

Advantages and Challenges Facing U.S. Products

| Advantages | Challenges |
|---|---|
| Structural changes in consumption lead to greater demand for value added food products. | Disposable incomes remain low, limiting imports to consumer-oriented food products and seafood. |

| | |
|---|--|
| Recent deregulation in SPS area along with removal of TBTs, accompanied by anti-corruption efforts, single window for importers led to some simplification of customs procedures. | High trade risks due to the previous volatile exchange rate and political instability in the country, arbitrary custom valuation practices and corruption make imports of food products cumbersome. HoReCa industry needs time to recover from COVID-19 shock. |
| Investment growth in the food processing industry increases demand for additives and other ingredients not produced in Ukraine. | Strong competition in the local market from domestic producers and increasing imports from EU. Only EU-based producers can benefit from many zero import tariffs and import tariff-rate quotas. |
| Average import tariff level for intermediary and consumer-oriented and processed food products are low. | Ukrainian regulatory framework changes aimed at compatibility with EU regulations create SPS and TBTs for U.S. suppliers. |
| Growth of international fast food and franchising restaurant chains in Ukraine that use standard procurement systems and that source some food ingredients from the U.S. | High distribution and shipping costs, currency devaluation of 2013-2015 made supermarket chains switch to local suppliers. |
| The retail sector is looking for innovative high value-added food imports. | Low awareness of U.S. products; extremely low presence of U.S. products on the shelves of supermarkets and discounters. |

SECTION II. EXPORTER BUSINESS TIPS

Local Business Practices and Customs

Nearly all U.S. food and agricultural exporters work through Ukraine-based subsidiaries, importers, or buyers. Importers are typically responsible for the entire logistical chain and inland transportation. Due to frequent changes in Ukrainian legislation, customs clearance rules, and SPS and veterinary procedures, it is common for the Ukrainian partner to handle all logistics.

Ukrainian market research for specific product groups can be difficult to access. Some Ukrainian retailers have very sophisticated consumer data research through their loyalty programs, but this data is not made available. Ukraine does not have large food shows. Mass market products have a smaller chance of attracting an importer's attention than unique products. The EU is often preferred due to its geographical proximity and wide variety of well-established food producers that propose niche products of unique tastes. Select U.S. products may also enter the Ukrainian market via an EU-based intermediary. By splitting large product shipments, EU distributors can provide Ukrainian buyers with smaller U.S. shipments that suit business needs.

Exporters of high value-added products must note that larger Ukrainian retail chains have very efficient product selection strategies. Many chains do not work with independent distributors. Instead, they use their own procurement centers, procuring directly from suppliers. They may start importing through a distributor and then later refuse distributor service and shift toward direct imports if sales potential appears to be good. Independent importers supply mainly niche products and new-to-market products that have higher market risk. Independent distributors often face high shelving and marketing fees.

General Consumer Tastes and Preferences

Consumer preferences differ significantly among various incomes and age groups. Young consumers tend to experiment with new products, but many of them remain at the “tasting level.” Middle-aged and elderly consumers often treat new products with caution. Consumers of all ages and income groups are highly patriotic in their choices and often prefer domestic brands over imports. Consumers in urban centers tend to be more sophisticated and have significant disposable income.

The geographic proximity of the EU influences Ukrainian consumer’s preferences. Tourism in the EU combined with a growing popularity of European cuisine create consumer demand. Some foreign and well-established local geographic indicators (GIs) are recognized by consumers. Under the DCFTA, Ukraine committed to EU practices in recognition and registration of GIs, which covers a wide range of GI protected products. The shift of Ukraine’s regulatory environment toward the EU further improves EU’s food products position.

Ukrainians are very familiar with organic products, however, there are misconceptions about their quality and safety. Household or small farmer-produced products are often associated with “organic.” In 2018, Ukraine developed legislation related to “organic” claims (see [FAIRS Narrative 2021](#)) and steps toward a certification system were initiated in 2019. Consumers know the EU’s Green Leaf logo and it is officially accepted as equivalent to Ukraine’s organic certification. However, USDA’s organic certification is not officially recognized despite the EU-U.S. organic equivalence agreement. The concept of “locally produced” is not popular yet in Ukraine but some upscale retail chains are using an association with a farmer or a small company name.

There is a widespread belief among consumers that preservatives, stabilizers, colorants and flavoring agents should be avoided. The trend toward a health-conscious diet is slowly emerging in Ukraine and is mainly found in urban areas and among high-income consumers. A new food labeling law, that highlights nutritional value of food products, was implemented in Ukraine in late 2019 (see [FAS FAIRS Labeling Report 2021](#)). Food product labeling regulations require labeling of GE content in food products if that ingredient exceeds 0.9 percent of the total content.

Over 60 percent of women (age 15-64) are employed, contributing to an increase in demand for meals consumed away from home, easy to cook and ready-to-eat products. The market trend for frozen and convenience food is relatively new in Ukraine, but with a large proportion of two-income families this market segment will likely grow. Demand for frozen fruit, particularly berries, and vegetables is rapidly developing. According to a recent Nielsen study, one-fifth of Ukrainians are concerned about food

prices. While safety and health remain top priorities, more than 70% of consumers buy products to indulge themselves. Such categories as chocolates, cookies, juices, beer/wine/spirits, and carbonated soft drinks are at the top of the list. At the same time, 31% of the population live in rural areas and tend to be low income and elderly. They rely on subsidized household plots to provide staple foods (potatoes, vegetables and fruits) and demand for high end imports is limited.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

For explanations of Ukrainian Food and Agricultural Import Regulations and Standards, a prospective exporter should refer to FAS Kyiv's [FAIRS Annual Report](#).

Ukraine is in the process of reforming its food safety system to adopt the best international practices and to simplify production and trade in agricultural and food products. In 2014, the modernization of the Ukrainian safety system was altered with the signing of the Deep and Comprehensive Free Trade Area agreement ([DCFTA](#)) with the European Union (EU) that imposed additional obligations for compliance of Ukrainian food safety rules with EU rules. A number of Ukrainian laws and regulations implemented after DCFTA adoption declared Ukraine's adherence to both "international and/or EU norms." Major regulatory efforts conducted in the last three years have made Ukrainian food import regulations more EU-like. An abbreviated review of Ukrainian import regulations and food standards is provided below:

Import Regulations

All products of animal origin and seafood need to be accompanied by a bilateral health certificate, without exception. For the explicit list of HS headings that need to be accompanied by International Certificates, refer to GAIN [FAIRS Certificate Report](#). Processed food products imported into the customs territory of Ukraine must be accompanied by an "international certificate or another document issued by the exporting country competent authority." The law does not provide other options.

Ukraine implemented a single food safety authority model for its food and animal safety control, as well as consumer protection. The single regulatory agency is called the State Service of Ukraine on Safety of Foodstuffs and Consumer Protection (SSUFSCP). The SSUFSCP is responsible for the safety of veterinary drugs, feed, products of animal origin for food and non-food consumption, other processed and unprocessed food products and phytosanitary issues (plant quarantine).

Import Procedures

An imported product will not be granted clearance until all requirements are met. In 2018 Ukraine implemented a "Single Window Custom Clearance System" that allows for one-point document submission. For food safety clearances an importer must submit a bill of lading (for all products), an original shipment document, an original international certificate (veterinary or phytosanitary certificate when applicable) and properly completed product entry document ([Common Veterinary Entry](#)

[Document](#) for products accompanied by veterinary certificates or [Common Entry Document](#) for all other food products).

Attention: *This list does not contain all documents necessary for custom clearance. The exporter is advised to be in touch with the importer regarding the customs clearance document package.*

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Retail Sector

The share of organized retail trade (supermarkets and convenience stores of different sizes) exceeds 70 percent of Ukraine's internal trade. Family-owned small shops are responsible for the largest share of remaining trade. The market share for open-air markets is less than seven percent. Further growth of supermarkets will require spatial expansion into smaller towns and rural areas. Overall retail turnover is expected to grow over eight percent in 2021. In the recent year, the retail sector has experienced more concentration, with three midsize players being bought out by larger competitors. Larger chains have invested significant money into regional distribution centers, "green" stores and cold storage facilities attracting external financing, including loans from the European Bank for Reconstruction and Development (EBRD) and private investment. These retailers have also effective in the development of private labels. Some retailers have multiple private label lines covering low-tier, mid-tier and high-tier price categories. During quarantine measures, consumer demand for private label products increased as consumers' priorities shifted.

The proportion of imports in wholesale and retail chains varies both by specific commodity group and by the type of trade enterprise. Ukrainian supermarkets have the widest product mix and the largest proportion of imports in all categories of goods. In the last fifteen years, imported food products increased their presence from 6 to over 15 percent. Basic food products, not produced in Ukraine, occupy the largest share of food imports.

Food Processing Sector

The Ukrainian food processing industry accounts for over 20 percent of total manufacturing and employs nearly 15 percent of the Ukrainian labor force. The Ukrainian food processing industry relies heavily on small and medium size enterprises (SMEs). However, a few large processors are responsible for the majority of sales. Such large processors particularly dominate in beer, soft-drinks, hard liquors, condiments, and the confectionary sectors.

Ukraine is a large importer of agricultural inputs needed for its growing agricultural sector. Imports of many bulk inputs (planting seed) are expected to shrink as large international suppliers build domestic production facilities and distribution centers in Ukraine. Others (livestock genetics, tree shrubs, vegetable seed) are expected to grow as their exports remain profitable. Imports of some inputs are defined by low cost-driven consumer markets. For example, as one of the largest vegetable oil exporters

in the world, Ukraine imports significant quantities of palm oil that is substituted for more expensive domestic sunflower oil and butterfat in the confectionary industry.

HRI Sector

Independent establishments dominate the Ukrainian foodservice market. Ukrainian fast-food and pizza chains are developing quickly, with the Ukrainian franchises being quickly established all over the country. Many Ukrainian fast-food restaurants and chains are called “fast service restaurants” to disassociate with a slightly negative perception toward fast-food chains. The presence of international food chains is growing. McDonalds, Dominos, Nathan’s Famous, and KFC, all operate in Ukraine. In 2020, COVID-19 restrictions slowed down HRI developments leading to significant losses. In 2021, the situation improved with many chains reporting revenues comparable to 2019 levels.

Despite fears over the spread of COVID-19, there are some new modern cuisine restaurant chains at different stages of development moving into the middle-class and high-end restaurant segments (especially ethnic or specialized food establishments) in urban areas. Cheaper street food stalls and kiosks, are slowly moving into provincial towns with less prosperous and less demanding consumers.

The state institutional sector is a significant food product consumer. Schools, hospitals, army, state penitentiaries and other government institutions have their own procurement guidelines, often based on old soviet product standards and requirements. The use of new centralized, more transparent, procurement systems significantly simplifies access to this market. Continued income growth will continue to drive expansion of the sector, especially outside of urban areas.

International investment in the hotel industry has allowed for the construction of multiple four- and five-star hotels in the capital and larger cities. Like cafes and restaurants, COVID-19 restricted industry development in 2020 with a subsequent rebound in 2021. E-commerce development facilitated mass-market inflow of cheaper private apartments. The continued development of the tourism sector, as well as further income growth, will encourage more growth in the hospitality sector.

SECTION IV. AGRICULTURAL AND FOOD IMPORTS

Table 2: Ukraine’s Top Seven Food Imports from the United States, USD Million

| HS Code | Commodity Group | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------|----------------------------|-------|-------|-------|-------|-------|
| 120600 | Sunflower Seeds | 58.5 | 64.6 | 74.8 | 104.2 | 94.1 |
| 0303 | Seafood | 39.0 | 56.6 | 62.3 | 65.3 | 69.1 |
| 80211/2 | Almonds Dried | 5.7 | 7.0 | 10.9 | 16.9 | 19.4 |
| 210690 | Food Preparations | 10.2 | 11.0 | 12.8 | 14.4 | 20.5 |
| 220830 | Whiskies | 6.6 | 6.1 | 8.5 | 9.8 | 10.0 |
| 240120 | Tobacco | 13.4 | 12.9 | 15.3 | 7.6 | 7.7 |
| 120991 | Vegetable Seeds for Sowing | 4.5 | 5.0 | 5.1 | 6.9 | 7.7 |
| | Other Products | 29.3 | 29.0 | 40.6 | 49.0 | 69.6 |
| | Total | 165.9 | 191.1 | 226.4 | 265.4 | 286.5 |

Source: Trade Data Monitor

BEST PRODUCT PROSPECTS CATEGORIES

Ukraine is a good market for U.S. food exports, such as frozen fish and seafood, dried fruits, nuts, cereal products, snacks, beef, pork, food ingredients, and other prepared food products. There are emerging trends in urban areas and niche products that currently sell in small quantities but have significant future sales potential. Demand for healthy, organic, and/or natural foods is increasing. Demand is growing for niche products that target specific health issues, such as diabetes or celiac disease (gluten-free food). Likewise, demand is growing for vegetarian and vegan products. In urban areas, high quality and high-end food products have demonstrated an increase in sales and significant future prospects. Market share for seafood, high-end alcohol products and quality beef products have also been expanding.

Table 3: Best High-value, Consumer-Oriented Product Prospects Categories

| In the market and have good sales potential | Not present in significant quantities, but which have good sales potential | Not present because they face significant barriers |
|---|--|--|
| <ul style="list-style-type: none"> • Fish and seafood • Beef • Nuts • Dried fruits (cranberries) • Alcohol (whiskey, beer) • Snacks • Pet food • Pomegranate juice • Vegan and vegetarian products | <ul style="list-style-type: none"> • Premium dessert products such as premium chocolate bars, cookies • Wine • Sauces • Organic food • Gluten free products • Plant-based proteins | <ul style="list-style-type: none"> • Cheese and ice-cream due to difficulties with logistics which increases products' price • Fresh fruits/vegetables due to strong competition from EU countries, Turkey, Georgia. |

SECTION VI: KEY CONTACTS AND FURTHER INFORMATION

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| <p>United States Department of Agriculture Embassy of the United States of America Foreign Agriculture Service – Kyiv Tel: +38 044 521 5496</p> <p>E-Mail: agkyiv@usda.gov Website: www.fas.usda.gov, www.fas-europe.org</p> | <p>Links to government sources: Ukraine Import Tariffs Ukraine: Country Commercial Guide by Foreign Commercial Service State Statistics Service of Ukraine (in Ukrainian) Ministry of Economy of Ukraine State Service of Ukraine on Food Safety and Consumer Protection (SSUFSCP)</p> |
|--|--|

For questions or comments regarding this report, or assistance exporting to Ukraine, please contact the Foreign Agricultural Service in Kyiv – agkyiv@usda.gov; <http://www.fas.usda.gov>

Attachments:

No Attachments