

IMPACT OF WTO ACCESSION ON AGRICULTURE SUSTAINABLE DEVELOPMENT IN THE RUSSIAN FEDERATION

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In the globalized context of the modern world, the phenomenon of regional integration is one of the most significant factors influencing every aspect of social and economic development of the society. In this regard, new economic relations are formed in Russia in all sectors of the economy, including its industrial agricultural complex. Russian economy as a whole and its agriculture are experiencing the effects of various factors that have both a global and regional perspectives.

Keywords: world trade organization, Russian agriculture, crop farming, animal husbandry

Introduction

In today's world of growing population, increasing demand for food results in changes in the global food market. The Russian Federation is currently the center of integration processes in the post-Soviet space, which tend to develop within the Eurasian Economic Community, and after Russia's accession to the World Trade Organization – with the European Union, including the countries of Central and Eastern Europe. Changes in agriculture will be the subject to the provisions of the agricultural agreements, which determined that the long-term goal is to establish «a fair and market-oriented trading system for agriculture, and that this process of reform should be initiated through the negotiation of commitments on support and protection, as well as by establishing more stringent and effective practical application of the rules and regulations of GATT». In the 2008–2012 State Program on the development of the domestic APK a 551 billion ruble budget was planned (or an average of 110.2 billion per year), from which the development of crop and livestock production, processing and marketing of these segments was determined the bulk of resources -64% of the total funding.

Material and methods

The research began with the initial list of statistical data for 5 years period found on a specific websites of agriculture and economics and using periodical publications, also report of „Russia's accession to the World Trade Organization consequence” analytical centre, report of the international scientific-practical conference „Development of integration processes in the agricultural sector of the Common Economic Space”.

Based on all this we can see the process how our country is carrying out structural reforms in the national economy, based on the comprehensive development of foreign economic relations of Russian agricultural enterprises and their partners in the framework of a harmonized international legal environment after Russia's accession to the World Trade Organization – with the European Union, including the countries of Central and Eastern Europe. These changes take place against the background of the development of competition among commodity producers of various governments.

Results and discussion

The gross agricultural product for 2008–2012 increased by 16.8% compared to 2007. The growth was observed in main types of agricultural products: in comparison with the period 2003–2007, wheat production has increased by 12.8%, sugar beets – 37.1%, vegetables – by 18.5%, potatoes – 1.7%, oilseed crops – by 10.6%, out of which sunflower seed production has increased by 28.8%, while the production of soybeans and canola more than doubled. Egg production increased by almost 10%, but the production of beef meat decreased, with an increase in pork and poultry production.

The analysis of economic performance has shown dependency on the availability and measures of State support. Where it was demonstrable, there had been rapid development of individual sectors on the basis of innovative technologies, but without them agriculture in its entirety worked with low-yield replacement level (with the profitability from -5 up to 5%).

Technological modernization of agriculture, innovative development, sustainable development of rural areas, including social development of villages and development of reclamation of agricultural land all had substantially less funds to implement these directions and, most importantly, reducing the funds.

In the same period, the EU focused on the creation of an attractive environment for the investment in agriculture, territorial cooperation, know-how and innovation. These activities were aimed at ensuring the quality, environmental protection and support to disadvantaged areas. Financing in the EU for this purpose during the period from 2000 to 2006 amounted to 8 billion Euros and in 2007–2013 – 12.6 billion Euros. Regional policy in the EU in 2007–2013 provided for use as the main instruments of the structural funds: the European Regional Development Fund (EFRE), the European Social Fund (ESF) and the Cohesion Fund (Kohäsionsfond). Agricultural policy, used instruments, the size of the allocated funding and its target allocation in the EU define the results in achieving the goals of the development of agriculture. Their analysis for the Russian Federation is one of the examples for the formation of the Russian policy of rural development, which proceeds with the active support of the government.

So, the government program for the development of agriculture of the Russian Federation for 2013–2020 involves the allocation of 1509 billion rubles, which is about 3 times higher than the financing of the previous

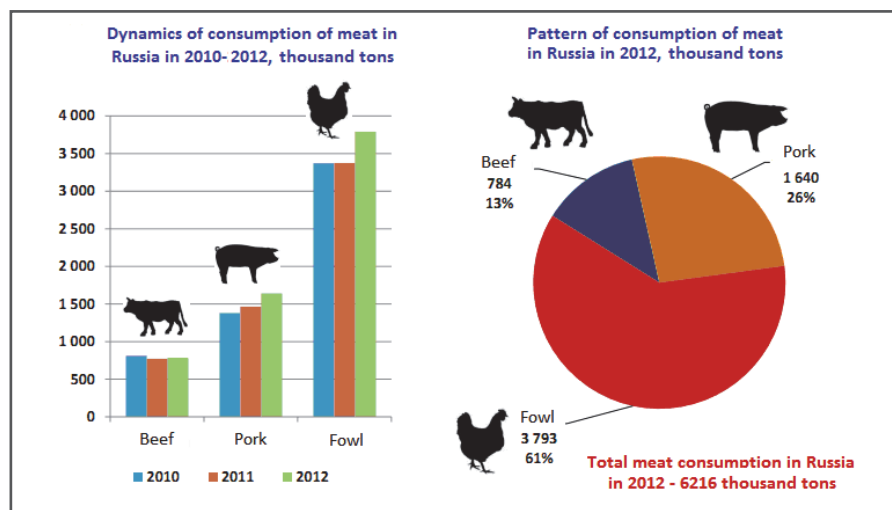


Figure 1 Traditional, poultry is the principal demand among meat

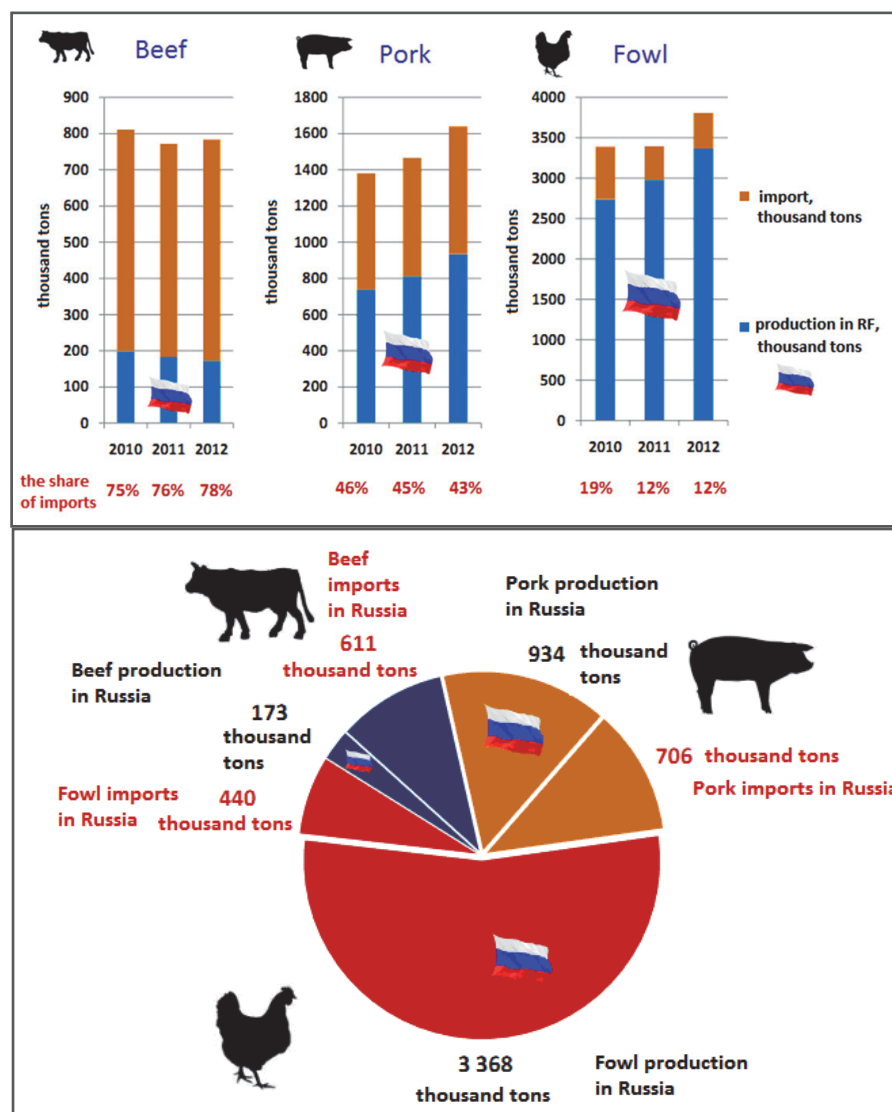


Figure 2a,b Meat production and import in the Russian Federation in thousand tons

Government program there is no focus on the important essential development of the national agriculture – on issues of the regulation of foreign trade activity, which in the conditions of Russia's WTO membership can be the key.

Russia has been making efforts to support its agriculture, but Russia's WTO membership brings into question the future of the domestic livestock and crop production. The development of foreign trade relations under the WTO, including the import and export of foodstuffs and agricultural products, shall be based on the provisions of the WTO agreement on agriculture, which implies that most of the goods must «go through the customs border without changing prices». This requirement is not explicitly recorded in the agreement, but it derives from a number of provisions and practices in the member countries of the WTO. Thus, nominal protection rates of consumers and producers, calculated as the ratio of world prices to domestic prices, as calculated by the OECD in the United States and the European Union are equivalent to the unit. It indicates that the internal and external prices in these countries are the same for both producers and consumers of agricultural products. In Russia livestock products (meat, milk) and sugar import prices rise sharply, and for the production of grains and oilseeds – when exporting. The nominal protection rates of meat, milk, sugar even out at 1.5–2.0, and producers of grain and sunflower – 0.7–0.9. Accordingly, consumers for meat and meat products (entrails and organs) are overpaid compared to consumers in the United States and the EU, and bread products and butter are cheaper than in other countries. Only with eggs do these coefficients normally protect the interests of producers and consumers in recent years as equal to about 1 and slightly fluctuate from year to year.

In Russia and in other countries of the Customs Union the liberalization of import and export of agricultural products is reinforced under conditions of WTO.

So, for all companies working in agriculture and the processing industries, Russia's accession to the WTO was a key event and has defined the «rules of the game» for a long time – up to the year 2020. Russian animal husbandry and industry now will evolve in the face of global competition. According to many experts, the inefficient production will not save any measures of government support, which now are limited and regulated. On the other hand, for large and efficient companies there are opportunities for growth, development and entry into foreign markets.

government program, but in constant prices of 2012 this volume will be around 1.2 trillion rubles. Areas of the program as a whole follow the directions of the previous program, but they

highlight the subprogram of «Development of Cattle Breeding», which is important for the development of not only farming, but also of the development of grain production. Alas, in this

In the Russian market the meat industry is developing rapidly in recent years, as is its consumption (figure 1). The main demand for meat has traditionally been poultry.

The main driver of growth has traditionally been poultry, but more recently the pork industry has demonstrated a powerful dynamic with many investment projects. At the same time investment intensified in medium-sized and large complexes of cattle breeding.

Animal husbandry has established a positive trend over the past three years in Russia. On the charts we see positive dynamics of the growth of poultry meat and pork production in the Russian Federation, though not significantly, but the growth is observed, and the share of imports in contrast is reduced. The same cannot be said about beef, which Russia imports in large quantities. Beef production in the Russian Federation fills a small fraction of demand. Russia remains dependent on the import of meat, mostly beef, while internal poultry demand is almost entirely met by domestic producers (figure 2).

According to official Rosstat's (Russian Statistics Committee) data, in 2012, the total production of livestock and poultry for slaughter in all categories in terms of carcass weight amounted to 8,090,300 tons of meat, which is 6.5% or 570,800 tons more than in the year 2011. Poultry meat production amounted to 45%, pork – 31% and beef share in the total volume amounted to just over 20%.

Animal husbandry is the main industry of agricultural production of the Russian Federation, it is 45% of total production, and it occupies 75% of the basic production assets and 70% of the agricultural labor force. The value of livestock is also defined by how it provides for the necessary and biologically valuable components of the human diet.

The Russian livestock structurally consists of poultry, pigs and the development of strong cattle production.

Pig production remains one of the main sectors, even the world economic crisis did not significantly reduce performance in this sector. By 2012, the pig population rose by 1.5 million compared to 2006, and in turn, to 2013, the number rose by 19.6 million pigs on the farms of all types.

For example, a significant problem for Russian pork producers remained fierce competition with suppliers of live pigs for slaughter of the kind that have been subject to quotas and not subjected to very low fees. However, beginning in 2010, the Russian Federal Government increased duties on the import of live

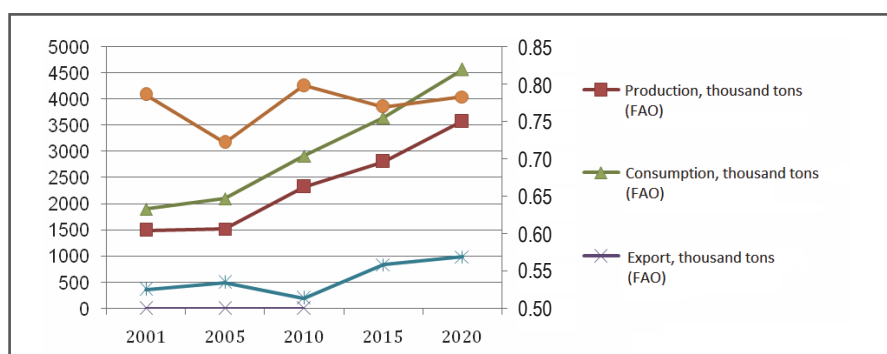


Figure 3 The forecast of a condition of the market of pork in Russia for 2015–2020

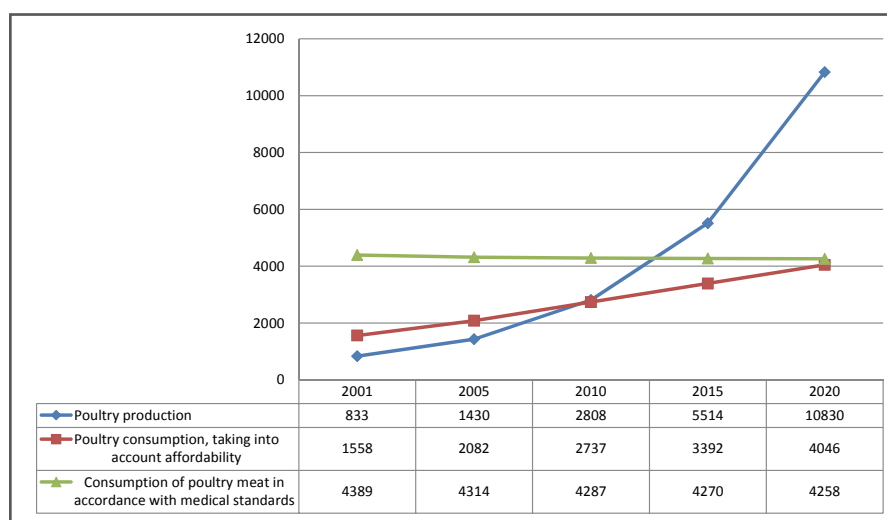


Figure 4 Forecast of a Condition of the Market of poultry in Russia for 2015–2020

pigs (from 5% in 2009 to 40% in 2010), and the domestic producers of pork looked confidently ahead to an official entry of Russia into the WTO.

As for August 23, 2012 when Russia joined the WTO, official customs barriers fell on import of animal husbandry products. After the entry into WTO tariffs decreased eight times on the import of live pigs, import duties within quotas for pork meat dropped from 15% to zero, customs duties on pork products were reduced from 25 to 15%.

The experts of the Agrarian center of Eurasian Economic Community, the State Russian Research Institute of Rural Economics forecasted the development of meat production and import till 2020 using FAR-FOOD-AREA modeling complex

and databases of Federal Customs Service, FAPRI (Foods and Agricultural Policy Research Institute) (Table 1).

The general principle of the commitments to the liberalization of the Russian market of meat is the preservation of import quotas on existing or nearly level figures until 2018, including: beef – 570,000 tons, pork – 430,000 tons, poultry meat – 350,000 tons. Relative to the projected import – it is about 20–40% of its value. Customs duties within and outside the quotas are differentiated: for beef – at 3.7 times, on poultry meat – at 3.2 times. Pork is a different situation, which provides for a zero rate within quota, i.e. duty-free import of 430,000 tons so after the lifting of the quota on pork in 2020 there

Table 1

	2001	2005	2010	2015	2020
Production in one thousand tons	1498	1520	2331	2810	3580
Consumption in one thousand tons	1905	2104	2920	3650	4570
Export in one thousand tons	0.02	0.01	0.06–	–	
Import potential in one thousand tons	370	504	200	840	990
Coefficient of food independence	0.79	0.72	0.80	0.77	0.78

will be the single customs duty at the rate of 25%, on a flat rate tariff there will be 37.5% and beef – 27.5%.

This will affect domestic pork production. Implications of such reductions in tariffs can already be observed in Ukraine – a market that is filled with imported lard, and many Ukrainian pig-breeding farms have gone bankrupt.

Importers held back in anticipation of the entry of low import duties, but started from the end of August to implement licenses and pork deliveries, saving on customs duty. After 23 August in this regard, there has been a sharp increase in imports. In August 2012, Russia imported 59,400 tons of pork, of which 29,400 tons up to 23 August, and 29,000 tons for the remaining nine days of August. As a result, by August of this year, indicators were 17% higher compared to last year's level. In September 2012 the volume of deliveries was 71,000 tons, which is 34% higher than that of the last year. All this can lead to the fact that European producers will seek to deliver a never-ending stream of pork into Russia. Domestic organizations need to be prepared for this.

What do these terms mean for each sector?

Pig raising loses more than other industries from membership in the WTO. The most sensitive item here: the reduction of duties of live animals import from 45 to 5%. Previously, pork producers have asked to raise it to 75% because there were many instances whereby the Baltic countries, Poland and neighboring countries were dumping live cattle into Russia.

It is obvious that in the current situation, the pork producers can count on government financial assistance. However, the money should be targeted only to those enterprises which correspond to the modern technological level.

Many predicted that as a result of Russia's joining the WTO its pork industry will lose about 20–30 billion rubles. The loss of these budgets will be approximately 6 billion and all the other losses will be borne by the private sector.

In 2012 for the first time in six years the price is dropped for commercial pigs. According to experts, it ended when it was more profitable to sell live pigs than to slaughter them. From September to December 2012 the prices for pigs of Category I commodity dropped from 93 rubles/kg to 76 rubles/kg net of VAT, which was exactly 21%. Pork side during this period dropped from 130 rubles/kg to 113 rubles/kg to 113 rubles/kg net of VAT, or 13%. The drop in prices (up to 30%) happened in the Central Federal District of Russia, where more than 50% of the total domestic product of pork is produced. In other parts the drop was not as significant.

At the same time with the lowering of the domestic price of live cattle in September–December 2012 wholesale prices for imported pork cuts began to drop in the Russian market. The wholesales prices during this period fell by an average of 7%, while the more popular items, such as hams and shoulders dropped in price considerably less to 4–6%. Other items, such as production of pork carcass in Brazil and the EU, during these four months decreased in price by 11 percent. However, consumer prices in retail stores continued to grow to the end of the year.

It should be noted that Russia's WTO membership will require the investment in the pork production industry in the amount of 140 billion rubles over the next 2–3 years. If this is not done, then until 2020 Western commerce will completely oust the Russian product, due to its lack of competitiveness.

Another negative for the industry situation is the return to some degree of customs duties on pork products from 25% to 15%. Currently, the country imports about 500,000 tons of these items, and this volume is comparable to the amount of the import quota. However, because it was unable to defend either a quota mechanism or prohibitive duties, the subject of importation of fat and edible entrails and organs does not appear in the negotiations. The

increase in the production of domestic pork also means increased production of domestic lard, which will lead to overstocking the market and will result in losses for the industry.

It proved unsuccessful during negotiations to close the access to the Russian market and the so-called «high quality» beef, which entered in excess of the quota, but it carried 15% in-quota duty. A few years ago, the minimum price for beef rose from 3 to 8 euro/kg, which was the great victory of specialized business. Now, however, it is not permitted to apply this measure to beef from the United States, Canada and Argentina. Apparently, this practice will spread to other countries. There is a real opportunity for exporters under the guise of «high-quality» beef to import to Russia over the usual quota of beef cuts and even trimming at dumping prices.

Problems of beef production are rooted in the challenges that the sector is simply showing a negative growth. In other words, from 2006, with mixed success, head of livestock is reduced, and volume of production falls. This is due primarily to the culture of consumption of this meat, as well as with low investment appeal – as raising a cow is more complex than raising a pig or a chicken. The number of cows in the agricultural organisations of the country fell more markedly – by 2.5% (to 3,670,000). Over the past 7 years (relative to March 1, 2006) live head of cattle in the country fell by 6.1%. Two years after 2011, the situation in this regard has not changed – the recession continues. It should be recalled, however, that in recent years a whole series of major projects was announced in the field of the industrial production of beef. Particularly noteworthy here is the Bryansk project Miratorg, which will be able to cover 10% of demand for this type of meat. (Miratorg built a cattle livestock farm for 4,000 head, thereby increasing its number of platforms to 27). It can be predicted that with the introduction of these projects into operation, the production figures in this segment will start to grow again.

In view of the fact that, after the entry into WTO, all current problems not only remain, but will worsen, it can be predicted that the share of imports here to 2015 will exceed the average values of all the other sectors, as well as with the whole of Russian livestock production. However, one positive fact is that no significant changes in terms of quota imports of beef ever happened. The quota for chilled beef in accordance with the agreements of the WTO is 40,000 tons for an indefinite period. The quota for frozen beef will remain at the level of 530,000 tons. Thus, import provisions will be based upon these indicators.

In such a situation it is impossible to actually accept the instructions of high-ranking officials that by 2020 year Russia should increase the production of beef, about 2.5 times to 4 million tons, as was produced in the USSR in the 1980s. The production rate is now 1.7 million tons as this trend is going to continue, there will be a decrease.

Up to 2020, the Russian poultry market received favorable protective conditions: imports will not exceed 10%. However, intra-industry competition increased. One of the weaknesses of poultry production is paucity of the range of products. Russian poultry farmers have stopped producing carcasses weighing 1.5 kg, while cutting to produce larger carcasses, to 1.8–2.2 kg. In addition, currently in the world market the carcass weight of 0.8–1.0 kg is used for grilling. If one does not pay attention to changes in demand, the economic performance of poultry breeders can rapidly deteriorate next year, because the market poultry meat is approaching the level of saturation.

The average price of weighed of poultry meat in Russia in 2012 has reached record levels over the previous ten years, rising from 73 rubles in May to 93 rubles per kilogram in August (full body parts). The main cause of rising prices is the increased use of poultry meat as raw material in meat-processing and the rising demand for poultry meat in the developing retail trade and public catering services. However, the rise in prices changed to a sharp fall in

October, which lasted until the end of the year. At the same time, the Russian market has increased imports of poultry meat, as well as seen a sharp fall in domestic prices in commodity of pork that was yet another blow to poultry farmers.

It should be noted that poultry products are the most sustainable in relation to imported products. This branch of the industry is developing rapidly. According to Rosstat, production of meat and edible organs and entrails of slaughtered animals in Russia in the first half of 2012 year amounted to 600,000 tons, up 8.3% from the same period in 2011. The production of meat and edible organs and entrails of poultry in the reporting period rose by 16.5% to 1.6 million tons.

Over the past 7 years, the average annual growth rate was 18%. Last year, there has been an increase in imports of poultry meat, according to the Russian Ministry of Industry and Trade, at one and a half time. The reason was the lifting of the embargo on the import of poultry meat from the United States. As a result of this, the volume of imports has increased from 10 to 14%, and the volume of the Russian market has risen by more than 12%.

Thus, specific changes in this sector are not expected. In the next five years, market dynamics will remain positive, projected growth rates will be 5%, due to increased domestic production, with a gradual increase in exports.

Because the markets for poultry, beef, pork and other meats are functioning as a unit and have a mutual influence on each other (on volume of consumption and on pricing), the assignment of Russia to lower tariffs on pork could adversely affect the development of not only pork but other livestock industries. If beef and pork begin to become cheaper, poultry producers will need to reduce prices so as to maintain demand for their products. Price reduction of 5–7 rubles/kg will cost producers 22 billion rubles per year. But that is not the only problem. The poultry production has increased by 2.3 times over the past 6 years. Already this year, domestic and imported poultry in the market will be more than it could be consumed domestically: 140,000 tons. Every year the surplus meat will grow. Therefore, once the market could not absorb all the available volume of meat, it will need to create opportunities for the export of domestic products.

With the increase of trade with major consumers of poultry meat after its entry into WTO, Russia will be able to establish a full export of these products. Poultry will be the only Russian product of its agriculture, which will be able to benefit from this. A huge plus for the Russian market of poultry meat is that price differences with Western countries are not so essential; therefore, exportation of poultry to Russia should not be as profitable as their exportation of pork.

Currently, our market is not burdened with imported poultry products. One would need to specifically explore markets in other countries from the point of view of possible deliveries from there to Russia and its exports from Russia. Poultry meat and eggs are consumed by people of any religion (unlike the pork), and in the light of the financial crisis in many countries, Russian products will be in demand and in accordance with price parameters. Iran, South Korea, Bulgaria, India, Finland, United States, Belgium, Lithuania, Serbia, Hungary, Moldavia have already expressed an interest in such deliveries.

The impact of Russia's accession to the WTO on cereal production may be negative:

1. Entry into the WTO has a negative effect on the domestic pork and poultry industries, which are the main consumers of our grain (about 35–40 million tons annually). In the process of the growth of import the demand for grain will fall. However, the main problem of cereals – changes in the meat industry: if there is a sharp rise of the import of pork and beef, it significantly reduces domestic consumption of grain,

2. At present the Government of the Russian Federation actively supports domestic crop production, there are a number of structural reforms aimed at enhancing the efficiency of the industry. Part of the measures used by the Government of the Russian Federation will be attributed to the «amber box» and with limitations. In its turn, development will have the «green box» measures.
3. However, there are positive prospects: improved access to external markets, our country may be able to supply more grain for export, including EU countries.

Above all, the rational consumption of milk and dairy products is 340 kg annually, while the actual level in Russia is 250 kg (in terms of milk). The actual amount of milk and dairy products is kept at the level of 32 million tons per year from 2008 onwards and does not change significantly. In turn, demand for milk and dairy products in terms of milk is 41.8–42 million tons of milk annually. To ensure this demand there will be needed at least 10 years of heavy work into the production of milk and dairy products, this work will be effective only if there is a real support, provided by the Government, with legislative and institutional measures. However, as with previous markets, a number of governmental protective measures will be classified as instruments of «amber box» and with limitations.

Three main scenarios of the agro-industrial complex development after the entry into WTO in the short and medium term may be suggested:

1. Growing import of substitution products. This scenario assumes that WTO membership will have a negative impact on the Agricultural Sector of the country (as well as a number of other industries).
2. Modernization and technological upgrading. Entry into WTO and increasing competition, improving access to the world market of export-oriented companies, technological upgrading and increasing production capacity will allow Russian companies to strengthen their position in the market.
3. Modernization and technological upgrading in view of the difficulties of the transition period. Membership in the WTO will contribute to a gradual change and competitiveness of agricultural enterprises. Many companies must, to varying degrees, change their development strategy, adapting to the new conditions.

When it joined the WTO Russia was insufficiently prepared from an economic point of view.

The obligations assumed by Russia in connection with the entry into the WTO can be divided into four groups. The first obligation is associated with declining rates of import duties and import quotas. The second obligation is associated with the removal of administrative barriers to access for foreign companies to domestic markets. The third obligation is associated with a reduction of export duties. Finally, the fourth obligation is linked to the reform of legislation and the system of State regulation.

It should be noted that the mere entry into WTO does not address one of the major problems of the investment climate in Russia – an undeveloped institutional environment (transparency and fairness of the legal system, the protection of the investor's property assets). This factor, together with a weak financial system may be the key which deters investment in the Russian economy.

The main advantages of Russia joining the WTO are the following:

1. Accession to the WTO will provide Russian manufacturers equivalent access to the world market of ferrous metals, chemical products; it will reduce the number of restrictive measures against Russian goods. This will lead to a strengthening of the position of the Russian metallurgical enterprises on the world market.

2. The average rate of import tax would be reduced from the current 10% to 7.8% (report of the Working Group on Russia's entry to the WTO). This will increase the import of foreign products and reduce internal prices for it, which is a favorable factor for the consumer (however, considering Russia's pricing conditions on consumer goods, one can likely predict that lower prices will not affect the lower end retail prices).

3. Foreign investment will create new jobs.

Against the background of entering WTO, certain risks should be highlighted:

1. Russian companies in the field of agriculture, the food industry, light industry, mechanical engineering will most acutely feel increased competition on the domestic Russian market.
2. Russia has no effective mechanisms to assist domestic businesses in disputes with rivals in the WTO. Disputes within the WTO are expensive and require powerful legal departments in government agencies, corporations and associations of producers, as well as at the level of the producers themselves. The formation of such an infrastructure is not done in one year. Acceleration of the process of self-organizing producers after entrance into WTO is a major task, without which it is impossible to provide effective protection as individual manufacturers (branches of industry) and as the national economy as a whole..
3. Promotion of domestic products in foreign markets due to restrictions on the use of public instruments (such as subsidies), the presence of obstacles in the form of international technical regulations.
4. The ability to reduce the rate of the ruble to encourage exports had limited the Russian monetary policy.

In general, according to the calculations of the Russian Ministry of Economic Development, the World Bank, School of Russian Economics, Institute of National Agricultural Prognosis-Research RAN, a consequence of the reduced import rates and removal of administrative barriers to trade in the long term was supposed to be a small win: ranging from 1% to 4% of GDP.

Conclusions

The focus of the Government must be moved towards the rapid modernization of the economy and the prevention (reduction) of the negative effects: the removal of administrative barriers and corruption on the part of the supervisory and regulatory authorities, the establishment of a transparent and effective judicial system, ensuring the economy long-term, low-interest loans, increasing investment in education, development of small and medium business, creation of enterprises – activity in each of the basic sectors of the economy, which will continue to assist small businesses, the building of institutions to promote small and medium-sized enterprises on foreign markets, simplification of export operations for small and medium-sized enterprises, establishment and development of the appropriate institutions to protect domestic producers within the framework of the WTO.

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