

**Global and European Integration**

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**UKRAINE'S TRADE RELATIONS
WITH THE MIDDLE EAST
AND NORTH AFRICA****Abstract**

Ukraine's foreign trade is being restructured and geographically diversified. The countries of the Middle East and North Africa play a key role in these processes in their capacity as trade partners. Consistent revenues from export are especially important for Ukraine's recovery post-war, so the development of its foreign trade should entail a change in the approach to the Middle East and North Africa, namely a shift away from «casting a wide net» towards more targeted identification of emerging markets and concentrated efforts to deepen trade ties with these select countries. The research outcomes substantiate a comprehensive scientific and methodological approach to assessing the effectiveness of trade cooperation between countries. The proposed approach uses economic and mathematical modelling based on cluster analysis of existing cooperation features to benchmark the conditions of trade cooperation. Based on obtained results, it also allows for a continuous monitoring and assessment of the efficiency of implemented measures geared towards developing trade relations with the countries of the region.

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8 figures, 2 tables, 16 references.

Introduction

The intensive development of global economic relations remains an integral part of the modern world economy. Foreign trade activity is turning into the most important factor of economic development, which is clear in the increase in the volume of international trade, the liberalization of trade relations, and active participation of countries in the processes of international economic integration. After the annexation of Crimea and the temporary occupation of the Easternmost regions of Ukraine in 2014, and especially after the start of full-scale military aggression by the Russian Federation, Ukraine intensified the reorientation of foreign trade flows, in particular to those regions of the world that have significant potential for development. Two such regions are the markets of North Africa and the Middle East, where there is consumer demand for significant volumes of agricultural products and machinery, steel, cement, and fertilizers. Ukrainian manufacturers have the potential to supply these markets with goods and services competitive in terms of quality and price. But the Russian Federation's illegal export of Ukrainian grain, one of the main export items to the region, has a very significant negative impact on the further development of foreign trade. According to the forecast, the total gross harvest of all grain and leguminous crops in 2022 will amount to 38.9 million tons, which is 55% less than the figure of 2021 (85.7 million tons). At the same time, the volume of domestic exports of agri-food products to North Africa and the Middle East may decrease 3-5 times (Ukrinform, 2022). According to experts' estimates, the aggressor country plans to export almost 1.8 million tons of grain worth approximately \$600 million from the occupied

territories of Ukraine by the end of the year (see, for example NDR, 2022; Bie-secker et al., 2022).

In these conditions, qualitative systematic studies are becoming particularly relevant, designed to analyze the current state, trends and structural changes in Ukraine's foreign trade, especially in the context of identifying individual countries (the multidirectional geopolitical influence in the Middle East and North Africa region) in order to focus further efforts on the development of trade cooperation. Such research requires available objective statistical data and appropriate methodological support. It is necessary to increase the efficiency of Ukraine's trade cooperation with the Middle Eastern countries as it is a component of the post-war reconstruction strategy of the domestic economy. In this regard, it is especially relevant to carry out a comprehensive assessment of the existing cooperation with the aim of implementing systematic monitoring of the effectiveness of the proposed measures in the process of implementing this strategy.

Problem Statement and Literature Review

Many foreign and Ukrainian scientists have studied the problems of intensifying the trade cooperation between Ukraine and other countries (Amosha et al., 2021; Amadeo, 2017; Bohorodytska et al., 2020; Borzenko & Burlay, 2020; Goncharenko & Saed, 2014; Duginets, 2020; Wu, 2017; Fouda, 2012; Panchenko & Reznikova, 2016; Lester et al., 2016; Nebaba & Kolpina, 2020; Nipialidi, 2021; Khudoliy, 2017; Ukrainets, 2017; Smaliychuk & Subochev, 2020; Mikic & Gilbert, 2007). In the context of achieving the research goal, especially noteworthy are the works that identify the impact of global economic changes on the development of the Middle East, the strengths of the region and highlight the main factors of development, the main structural changes in the Middle East economies, etc. (see for example Wilson, 2021). Another group of studies is devoted to the regional analysis of the foreign direct investment flows, with the determination of its features for the countries of the Middle East and the group of countries with a high income. They indicate certain factors due to which FDI negatively affects economic growth and that these countries need, first of all, to reform their institutional system (see for example, Hussain et al., 2021).

The third group of studies is devoted to the analysis of the international political environment in the region and its influence on foreign trade relations, for example, how the states of the region act in conditions of uncertainty of multipolar international systems. Special attention is paid to relations with Saudi Arabia and Iran, the Syrian war and its consequences in the form of internal radicalization, as well as the Palestinian-Israeli conflict. The results of the study describe examples of hedging, when states seek to have good relations with everyone and minimize the risk of problematic intervention (see for example Burton, 2021).

Another group of articles analyzes foreign trade relations with European countries. Here, the focus is on the analysis of the region's exports to the EU economy, where relatively low indicators are observed compared to other regions of the world, despite geographical proximity and preferential trade agreements. The obtained empirical results suggest that effective governance generally contributes to the growth of exports from the region to the EU, relatively more so than for non-Arab exporters (see for example Sabry, 2022)

However, existing scientific developments of domestic and foreign researchers on this issue do not present a systematic focus on monitoring the current state of trade relations in the region.

The aim of the article is to study the problems in the development of Ukraine's cooperation with the countries of the Middle East and North Africa, in particular, to substantiate the need for constant monitoring and assessment of the effectiveness of the implemented measures.

Methodology

The aim of the study is achieved through the use of interconnected and complementary methods of scientific cognition, namely the structural-functional and system-structural methods, comparative and statistical analysis, and the method of economic-mathematical modeling based on cluster analysis.

The primary sources for the study include Ukrainian legislative and other normative acts on foreign trade regulation at all levels; statistical and analytical materials of the State Statistics Service of Ukraine, the World Trade Organization, the Organization for Economic Cooperation and Development, the World Bank Group, the International Monetary Fund, the Official Bureau of Statistics of the European Union, Economic and Social Council of the Arab League; informational and analytical collections, bulletins and reviews; factual information of state authorities; domestic and foreign studies; results of own scientific research; analytical and informational materials from open sources.

Research Results

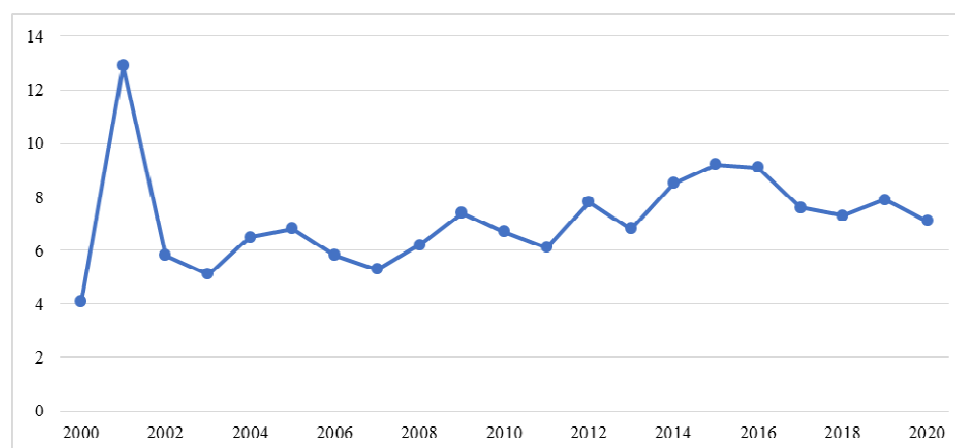
The trajectory of trade relations with Ukraine for each country of the Middle East and North Africa is shaped by its individual conditions and development factors. In order to determine prospects and strategic priorities in the relations with the specified countries, a comparative analysis of trade cooperation with each of them is necessary.

According to the main theoretical concepts, the closeness of bilateral trade cooperation is determined by indicators of trade intensity (Bacchetta et al., 2012; Grubel and Lloyd, 1975; Balassa, 1965). Indicators of the current state of trade flows and the structure of trade are formed through relevant indices and coefficients. The calculated indices can be used not only for the purpose of primary analysis of trade relations, but also when making decisions about the country's trade policy. These indicators also make it possible to determine the expediency of developing cooperation in certain, most promising sectors.

An analysis of the bilateral trade volumes between Ukraine and the countries of the Middle East and North Africa for the period from 2000 to 2020 indicates an increase in the region's share in total trade volumes of Ukraine (Fig. 1).

Figure 1

Share of bilateral trade in goods and services between Ukraine and the countries of the Middle East and North Africa in 2000-2020, %



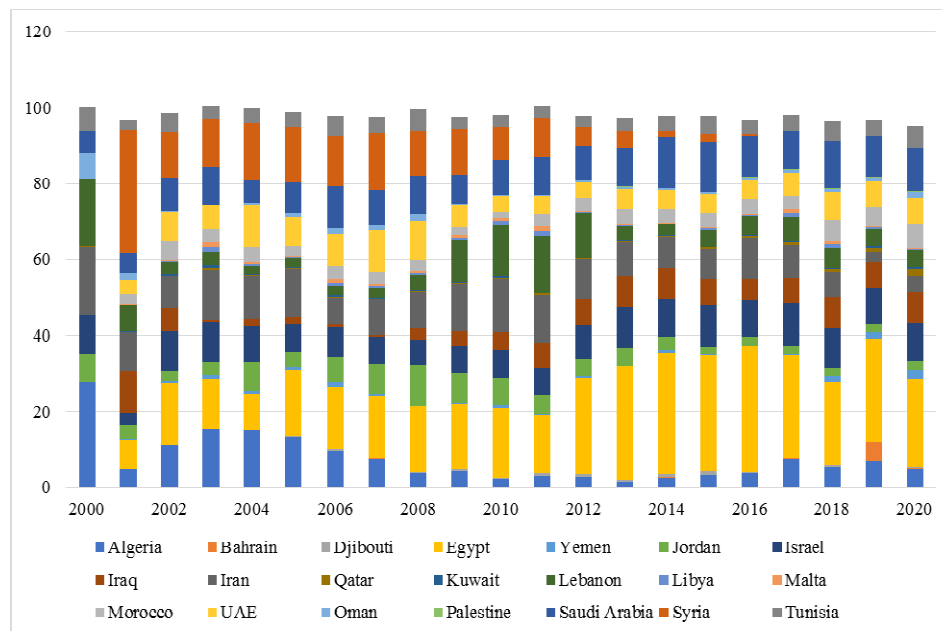
Source: calculated using the open-source data of the State Statistics Service of Ukraine.

The analysis of the bilateral trade of Ukraine with individual countries of the region allows us to conclude that Ukraine's largest trade partners as of 2020 are Egypt, Israel and Iraq.

Among the countries of the region, Egypt's share of trade is 23%, although the share of Ukraine's trade with Egypt in total Ukrainian trade volume is only 1.7% (Fig. 2).

Figure 2

Trade shares of individual countries of the Middle East and North Africa with Ukraine in 2000-2020, %



Source: calculated using the open-source data of the State Statistics Service of Ukraine.

It should be noted that in 2000, Ukraine's main trade partners in this region were Algeria and Iran. In the period from 2001 to 2011, Syria differed significantly in terms of volume, the largest share was observed at the level of 33% in 2001.

It is important to analyze the trade balance between these countries. The calculations show positive trends (from Ukraine's point of view) in the development of trade relations, since exports from Ukraine exceed imports from most countries (Table 1), despite the fact that in general the trade balance of Ukraine has a negative value.

The largest difference between Ukrainian exports and imports in 2020 was observed in trade with Egypt, Israel, Saudi Arabia, and Tunisia.

Table 1

**Trade balance of Ukraine with the countries
of the Middle East and North Africa, thousand USD**

Country / year	2000	2005	2010	2015	2020
Algeria	136325,4	613315,1	154473,1	188550,8	350097,1
Bahrain	0,0	5857,2	2186,7	664,4	7809,1
Djibouti	0,0	10687,9	10238,5	59773,4	21908,0
Egypt	0,0	765435,3	1243811,1	2024171,4	1536850,1
Yemen	0,0	28246,4	0,0	14689,0	172486,4
Jordan	36828,4	171296,2	497872,9	131056,4	174930,0
Israel	43933,0	227744,3	376107,9	427121,2	392480,4
Iraq	0,0	83104,2	344538,5	472495,4	597331,2
Iran	30015,6	558823,5	980833,6	503053,9	210627,1
Qatar	798,9	12850,3	10274,7	7637,7	124067,5
Kuwait	0,0	16026,5	22402,2	6870,1	35485,2
Lebanon	86236,3	100548,2	1029083,5	298824,7	323007,4
Libya	0,0	62814,9	201128,5	182646,8	285862,4
Malta	973,7	14813,6	36234,4	-4122,3	-5204,6
Morocco	0,0	123331,8	94305,5	184020,9	281029,1
UAE	0,0	335310,5	226391,2	244159,7	378151,8
Oman	33028,3	47444,8	15245,9	22075,6	62755,7
Palestine	0,0	0,0	1467,1	13667,2	26299,2
Saudi Arabia	27732,6	383444,4	607189,8	616602,8	617139,8
Syria	0,0	648437,4	602247,0	128042,4	-6143,6
Tunisia	22747,5	186359,4	228376,3	325026,0	401899,3

Source: calculated using the open-source data of the State Statistics Service of Ukraine.

The efficiency of trade relations is more clearly demonstrated by the export-import coverage ratio (the share of exports in relation to the value of the realized imports) ($R_{e/i}$). The calculations show that trade relations with Palestine are characterized by the largest ratio ($R_{e/i}=26402,9$), followed by Iraq ($R_{e/i} = 2070,9$), and Yemen ($C_{e/i} = 799,8$). Exports significantly exceed imports in trade with Djibouti ($R_{e/i} = 175,1$), Algeria ($R_{e/i} = 49,7$), Kuwait ($R_{e/i} = 46,2$), and Tunisia ($R_{e/i} = 32,1$). In 2020, the value of the ratio was less than 1 only for Malta and Syria – 0.6 and 0.4, which indicates a negative trade balance (Table 2).

Table 2

Export-import coverage ratio of Ukraine in 2017-2021

	2017	2018	2019	2020	2021
Turkey	1,99	1,37	1,12	1,00	1,27
Egypt	23,80	16,09	19,92	20,04	13,18
Saudi Arabia	2,83	4,01	3,47	7,06	4,41
Iraq	2708,93	29274,45	9573,97	2065,41	5364,59
Israel	3,61	2,73	3,01	3,30	3,36
UAE	6,49	6,14	6,52	7,14	6,33
Tunisia	22,87	16,61	19,10	32,13	9,22
Morocco	5,67	8,49	2,92	3,98	4,15
Algeria	96,16	19,16	43,24	49,56	9,16
Libya	1882,26	3072,33	101,70	7,81	2,89
Lebanon	183,80	145,10	118,32	76,59	87,72
Jordan	16,60	11,80	7,89	25,89	25,44
Qatar	3,78	7,16	9,76	17,13	8,05
Oman	6,49	8,37	8,24	3,77	11,12
Kuwait	11,76	2,88	4,31	46,25	18,92
Bahrain	81,91	42,36	38,96	20,60	12,97

Source: calculated using the open-source data of the State Statistics Service of Ukraine.

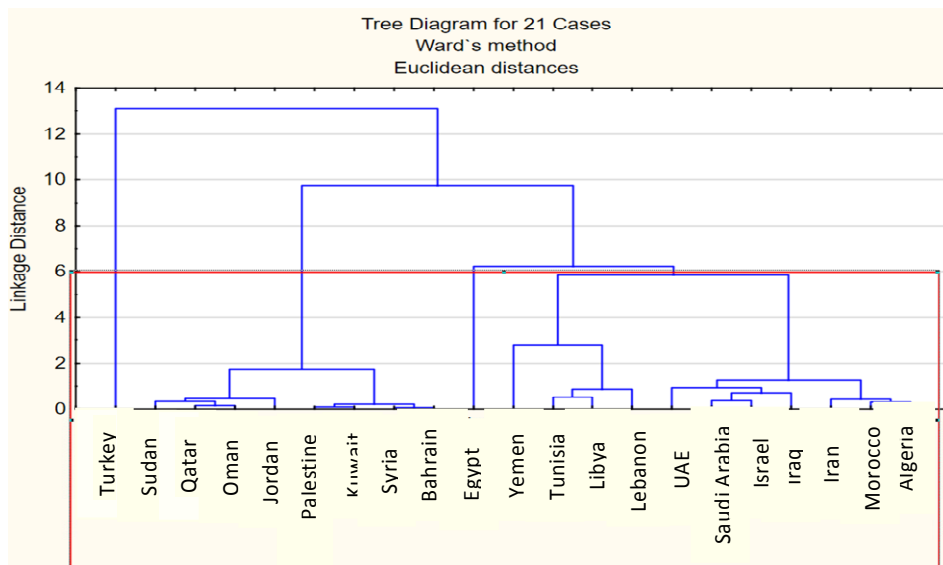
The development features of Ukraine's trade relations with countries from the specified region are better highlighted if the countries are divided into clusters. Clustering was carried out for two periods – 2011 and 2021, the interval – 11 years. The following data were selected for cluster analysis: foreign trade turnover; balance of the trade balance; the share of exports to the country in the total volume of exports of Ukraine; the share of imports from the country in the total volume of imports of Ukraine; trade intensity index.

At the first stage, tree clustering was applied to combine countries into groups based on the calculation of distance or similarity between indicators. Ward's method was used to determine the distance measure between objects. The obtained results allow us to see 4 clear clusters (Fig. 3), which combine trading partners from the analyzed region that are similar in certain characteristics.

Using *k*-means clustering, we divided *n*-cases from an R^n set into *k*-clusters; each case belongs to the cluster to which it is closest to the center (centroid). The results of the *k*-means clustering are presented in Fig. 4.

Figure 3

Cluster dendrogram of trading partners according to the 2021 data



The list of cases included in each of the clusters is shown in Fig. 5.

There are two clusters with only one country included – cluster 1 (Turkey) and cluster 4 (Egypt). This is explained by the nature and efficiency of Ukraine's trade relations with them, which significantly differ from others. In terms of trade volumes, these countries are far ahead of others: Turkey in first place and Egypt in the second, but the trade balance is the largest for Egypt.

The second cluster includes Bahrain, Jordan, Kuwait, Oman, Qatar, the State of Palestine, Sudan, Syria, and the UAE. They are characterized by small trade volumes compared to other clusters, as well as low trade intensity indicators, which points to low efficiency.

The third cluster comprises Algeria, Iran, Iraq, Israel, Lebanon, Libya, Morocco, Saudi Arabia, Tunisia, and Yemen. With these countries, Ukraine has average trade volumes, but at the same time, high indicators of trade intensity and the share of exports in the total volume of Ukrainian exports.

Figure 4

Plot of means for each cluster in 2021

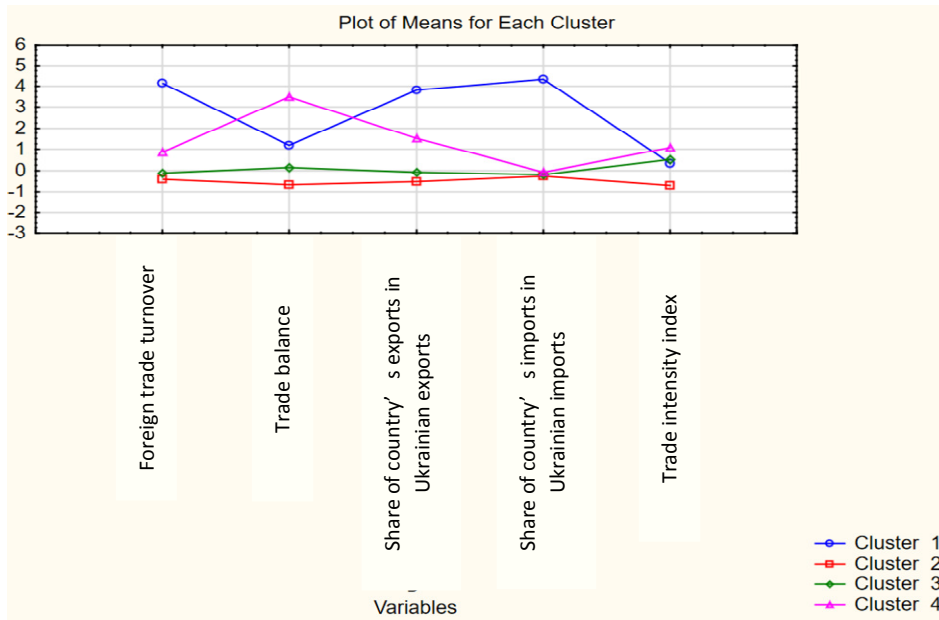


Figure 5

Cases included in clusters one to four (2021)

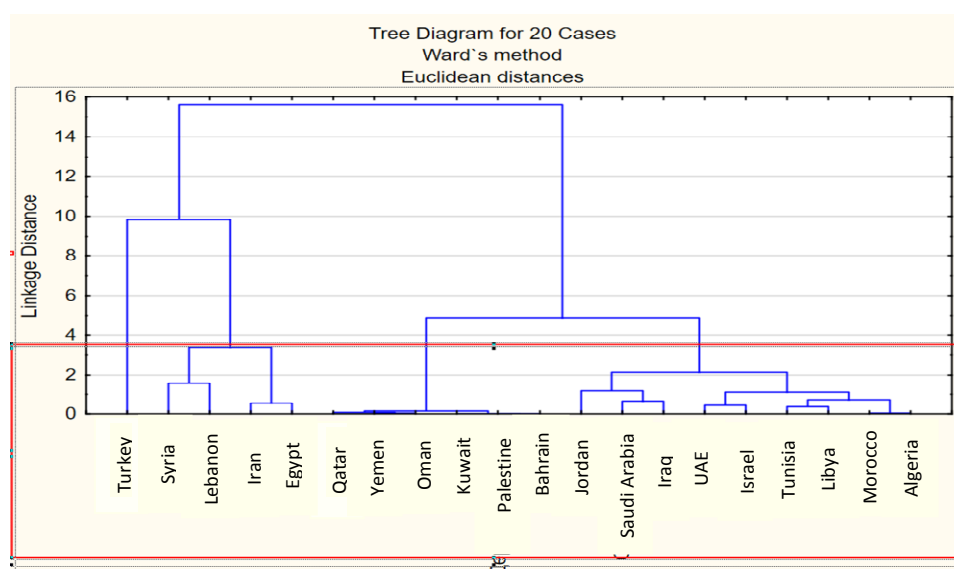
Members of Cluster Number 1 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 1 cases		Members of Cluster Number 3 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 10 cases		Members of Cluster Number 4 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 1 cases	
	Distance		Distance		Distance
Turkey	0.00	Algeria	0.243170	Egypt	0.00
		Iran	0.214014		
		Iraq	0.406783		
		Israel	0.412886		
		Lebanon	0.465760		
		Libya	0.290651		
		Morocco	0.323853		
		Saudi Arabia	0.547998		
		Tunisia	0.128512		
		Yemen	1.190679		

Members of Cluster Number 2 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 9 cases	
	Distance
Bahrain	0.188118
Jordan	0.241326
Kuwait	0.138592
Oman	0.121047
Qatar	0.063053
Palestine	0.129823
Sudan	0.127001
Syria	0.203589
UAE	0.444453

A similar clustering was carried out based on the data of 2011 in order to compare how the trends in the development of Ukraine's trade partnership with the above countries have changed. Based on the indicators, 4 clusters were also selected based on the construction of the dendrogram (Fig. 6).

Figure 6

Cluster dendrogram of trading partners according to the 2021 data



The results of the *k*-means clustering are presented in Fig. 7.

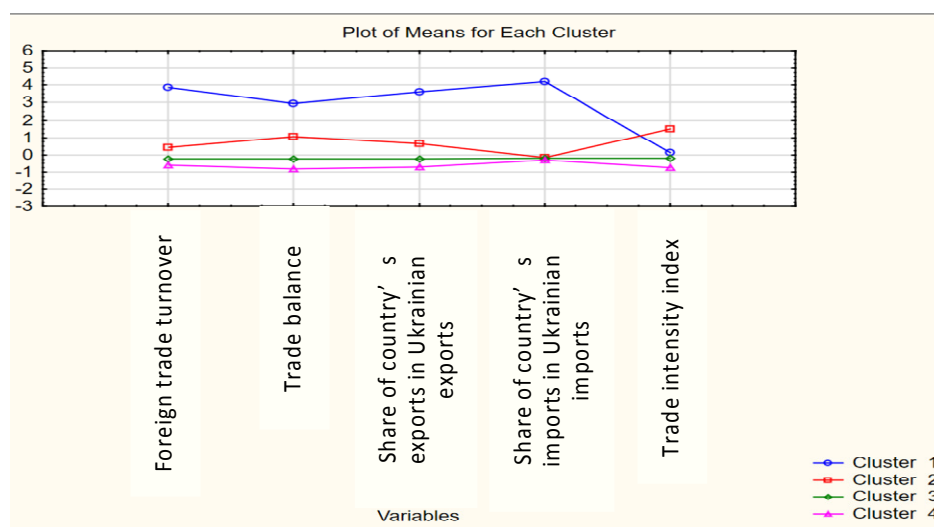
The list of cases included in each of the clusters according to the data of 2011 is shown in Fig. 8. Sudan was excluded from clustering as data are either insignificant or not reported in official UNCTAD studies.

Cluster 1 included only Turkey, which as of 2011 was Ukraine's largest trading partner out of the analyzed countries, with trade indicators that significantly exceeded those of the other states. The second cluster includes Egypt, Iran, Lebanon and Syria, whose trade volumes are second only to Turkey, but which even exceed it in terms of the trade intensity index. The third cluster includes Algeria, Iraq, Israel, Jordan, Libya, Morocco, Saudi Arabia, Tunisia, and the UAE. Although these countries are characterized by small volumes, trade

with them is relatively intensive. The fourth cluster is represented by the countries of Bahrain, Kuwait, Oman, Qatar, the State of Palestine, and Yemen. The intensity of trade with these countries is low, as are the shares of trade in the total volume of Ukraine's foreign trade.

Figure 7

Plot of means for each cluster in 2011



Comparing the results of the analysis for 2011 and 2021, it should be noted that a stable trade partnership between Ukraine and Turkey has been preserved; today it continues to maintain its leading position. At the same time, the effectiveness of trade cooperation with Egypt has increased, which together with Turkey formed separate clusters in 2021. Syria shifted to the cluster of the least significant partners according to the data of 2021 from the cluster comprised of the most significant trade partners for Ukraine from the analyzed region according to the data of 2011. Iran, Lebanon, Algeria, Iraq, Israel, Libya, Morocco, Saudi Arabia, Tunisia and Yemen have maintained their relatively stable trade positions in relations with Ukraine. Thus, Turkey and Egypt are the most promising trade partners of Ukraine from the countries of the Middle East and North Africa, while the countries of the 2021 third cluster are quite promising and have certain advantages despite the small trade volumes.

Figure 8

Cases included in clusters one to four (2011)

Members of Cluster Number 1 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 1 cases	
	Distance
Turkey	0,00

Members of Cluster Number 2 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 4 cases	
	Distance
Egypt	0,439143
Iran	0,533565
Lebanon	0,761227
Syria	0,335847

Members of Cluster Number 3 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 9 cases	
	Distance
Algeria	0,191769
Iraq	0,245683
Israel	0,184133
Jordan	0,380905
Libya	0,300490
Morocco	0,197859
Saudi Arabia	0,404665
Tunisia	0,138520
UAE	0,215640

Members of Cluster Number 4 (Spreadsheet3) and Distances from Respective Cluster Center Cluster contains 6 cases	
	Distance
Bahrein	0,014762
Kuwait	0,018542
Oman	0,010332
Qatar	0,023101
Palestine	0,014303
Yemen	0,027533

Conclusions

The war in Ukraine has a huge impact on the state of its foreign trade. That is why an effective policy of stimulating Ukrainian exports is necessary, which should include strengthening Ukraine's position as a global food exporter, especially through the implementation of the Black Sea Grain Initiative signing new international agreements to ensure the safe exit of Ukrainian ships from seaports during active military operations. Moreover, the innovative development of agricultural enterprises should be stimulated by introducing Aggrotech elements, which will improve the level of manufacturability and increase the competitiveness of products of the agricultural sector. The main change in this context should be the transition from "casting a wide net» towards more targeted identification of emerging markets and concentrated efforts to deepen trade ties with these select countries of the Middle East and North Africa.

Four groups of countries were identified through cluster analysis. It was concluded that there is a significant potential for the strategic development of Ukraine's trade relations with Turkey, but at the same time, the effectiveness of

trade cooperation with Egypt has increased. Meanwhile, by 2021, Syria entered the cluster of the least significant partners (it had noteworthy potential in 2011). Other countries of the region have maintained their consistently insignificant trade positions in relations with Ukraine.

It should be noted that since Ukraine does not seem to be transitioning from the raw material exports to science-intensive technological products, further research should be directed to the identification and justification of directions for increasing existing trade volumes, including at the expense of joint investment projects. This will make it possible to effectively use the comparative advantages of multilateral cooperation.

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