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Iryna Solomakha, Liudmyla Svetenok, Alona Zhabynska

STATE AND TRENDS OF THE FLOWER MARKET IN UKRAINE IN THE ECONOMIC CRISIS ENVIRONMENT

Ирина Соломаха, Людмила Светенок, Альона Жабинська

СТАН ТА ТЕНДЕНЦІЇ РОЗВИТКУ КВІТКОВОГО РИНКУ В УКРАЇНІ В УМОВАХ ЕКОНОМІЧНОЇ КРИЗИ

Ирина Соломаха, Людмила Светенок, Алёна Жабинская

СОСТОЯНИЕ И ТЕНДЕНЦИИ РАЗВИТИЯ ЦВЕТОЧНОГО РЫНКА В УКРАИНЕ В УСЛОВИЯХ ЭКОНОМИЧЕСКОГО КРИЗИСА

The paper presents a detailed analysis of the flower market in Ukraine in the period from 2006 to 2014. The presented data characterize the dynamics of foreign economic activities and the state of the market in whole. Furthermore, the problems and prospects of development of the national flower business have been identified, taking into account economic factors.

Key words: *flower market, export and import of flower products, the volume of flower market, areas of flower industrial systems.*

Fig.: 9. Tabl.: 2. Bibl.: 7.

Представлено детальне дослідження квіткового ринку України за період затяжної економічної кризи з 2006 року по 2014 рік. Наведені дані характеризують динаміку зовнішньоекономічних показників та стан ринку в цілому. Також визначені проблеми та перспективи розвитку національного квіткового бізнесу з урахуванням економічних факторів.

Ключові слова: *квітковий ринок, експорт-імпорт квіткової продукції, обсяг квіткового ринку, площі квіткових промислових комплексів.*

Рис.: 9. Табл.: 2. Бібл.: 7.

Представлен детальный анализ цветочного рынка Украины за период с 2006 по 2014 год. Приведенные данные характеризуют динамику внешнеэкономических показателей и состояния рынка в целом. Также определены проблемы и перспективы развития национального цветочного бизнеса с учетом экономических факторов.

Ключевые слова: *цветочный рынок, экспорт-импорт цветочной продукции, объем цветочного рынка, площади цветочных промышленных комплексов.*

Рис.: 9. Табл.: 2. Библ.: 7.

JEL Classification: Q13, D40, L19

Formulation of the problem. Flowers are not necessities, but it is hard to imagine a person's life without them. Both developed countries and developing ones are engaged in flower growing, and for some of them (e.g. the Netherlands and Latin America) this activity represents a significant share of GDP. Economically developed countries having high demand for flower products provide the letter through imports, thus contributing to job creation in developing countries.

In Ukraine, flower products are grown mostly in modern greenhouses. It makes possible to avoid interruptions in the process of growing and receive a wide choice of goods the whole year round. But the domestic production capacities are able to meet consumers' demand only partially. Deficit of cut flowers and planting materials is imported from other countries and purchased by foreign currency. At present, the problems of great concern are switching the "green" trade to a civilized level and restoring the domestic flower growing, as it has its own traditions of cultivating of all kinds of flowers (except the specified exotic ones which are too difficult and expensive to cultivate in Ukraine). This will allow ensuring high standards of quality and storing of the products as well as offering a wide range of flower products at affordable prices.

Despite the stable development of the flower market in Ukraine, it depends directly on such an external factor as the crisis economic situation which affects all types of markets and especially the flower one.

Analysis of recent research and publications. Some issues of efficient functioning and development of agriculture have been highlighted in the works of leading domestic scientists, such as M. P. Butko, M. Y. Demianenko, S. M. Kvasha, I. V. Kobut, P. A. Laiko, V. P. Halushko, Y. Y. Luzan, O. M. Mohylnyi, D. S. Oliinyk and others. However, the market of flower products belonging to agriculture is still studied insufficiently. At present Ukrainian scientists S. V. Sorokina, V. A. Pavlova, O. O. Shubin, A. N. Cherniaieva,

ГАЛУЗЕВИЙ АСПЕКТ РОЗВИТКУ НАЦІОНАЛЬНОГО ГОСПОДАРСТВА

V. A. Khodarchenko are researching the trends of domestic production, import, problems of flower market in Ukraine, marketing strategies of supply of flower products, but that is not enough. Therefore, it is important to continue studying this particular sector of the economy with the prospect of its further improvement in the current economic risks environment.

Aim of the article. The main purpose of the article is to investigate the state, evolution and problems of the national flower market and to define main trends of its development in the economic crisis environment.

Description of the basic material. Flower market is one of the few markets in Ukraine characterized by the absence of large owners and network sales. Despite sales increase, the flower market can be described as spontaneous trade, lack of service and lack of modern technologies. In many ways, this situation is due to the global financial crisis and the low presence of production bases in Ukraine. Thus, according to official statistics the share of domestic companies accounts about 30 % of the domestic market. It should be noted that in Ukraine there are a lot of small flower farms and businesses which are virtually impossible to count. Therefore, the main problem of the Ukrainian flower growing sector is impossibility to estimate the actual production of flowers that may enter the market from these small farms. There is also a problem of high shadow growing as well as high shadow import of flower products.

The market of flower products in Ukraine averages more than 200 mln USD a year, while its intense growth is noted. Unfortunately, the share of imports in the flower business in winter ranges from 70 to 80 %, part of the flowers reaches the market illegally. According to various estimates, the share of smuggled goods in the Ukrainian flower market is from 40 to 60 %.

Introduction of recent Dutch technologies helped increase domestic production of flowers in Ukraine. Our country is the leader in terms of the pace of development among the post-Soviet countries. Ukrainian producers promote their products to the markets of Uzbekistan, the Russian Federation and the Republic of Moldova, but in recent years the exports have dropped significantly in value as well as in volume.

A characteristic feature of the demand in the flower market is seasonality. Thus, more than 40 % of annual sales fall on Valentine's Day and 8 March, and the number of „holiday” sales is increasing every year. The second feature of the market is elastic demand. Flowers are not a necessity and thus they dependent on people's income more.

According to the Ukrainian classification of foreign economic activity goods (UCFEAG), flower products are included in the group 06 „Live trees and other plants; bulbs, roots and similar parts of plants; cut flowers and decorative foliage”.

According to the State Statistics Service of Ukraine, imports of this group are significantly higher than exports. It indicates the low competitiveness of our country in the world market (Table 1). The largest exports of 06 group in value terms were observed in 2007, but because of the unstable situation in the country in 2014, the exports decreased by 35 % due to decrease of purchasing by Russian Federation (Figure 1). But in 2015 a trend of gradual increase in total exports appeared again. At the same time, according to the State Fiscal Service, during 2015 Ukraine exported 18 times less flowers than imported.

Table 1

*The total volume of exports and imports of the group 06 „Live trees and other plants”
UCFEAG*

| Year | Exports | | Imports | |
|------|---------|-----------|----------|------------|
| | ths USD | pcs | ths USD | pcs |
| 1 | 2 | 3 | 4 | 5 |
| 2006 | 666,7 | 343003,0 | 48338,9 | 24897287,7 |
| 2007 | 2179,4 | 1500391,0 | 64362,8 | 33895439,9 |
| 2008 | 2134,9 | 2747077,2 | 100444,7 | 40491866,7 |
| 2009 | 1599,0 | 1570793,8 | 62039,6 | 29263668,2 |

End table 1

| 1 | 2 | 3 | 4 | 5 |
|---------------------------|--------|-----------|----------|-------------|
| 2010 | 1782,1 | 46344,0 | 72322,6 | 130024545,0 |
| 2011 | 1857,2 | 30154,0 | 99651,3 | 162680433,0 |
| 2012 | 1594,0 | 23774,0 | 153572,6 | 175258017,0 |
| 2013 | 2124,5 | 116497,0 | 143172,8 | 199889068,0 |
| 2014 ¹ | 1414,4 | 18475,0 | 69078,4 | 128818276,0 |
| Jan-Oct 2015 ¹ | 1808,4 | 9130540,0 | 16703,2 | 12485860,3 |

¹Excluding the temporarily occupied territory of the Autonomous Republic of Crimea, the city of Sevastopol and the area of the antiterrorist operation.

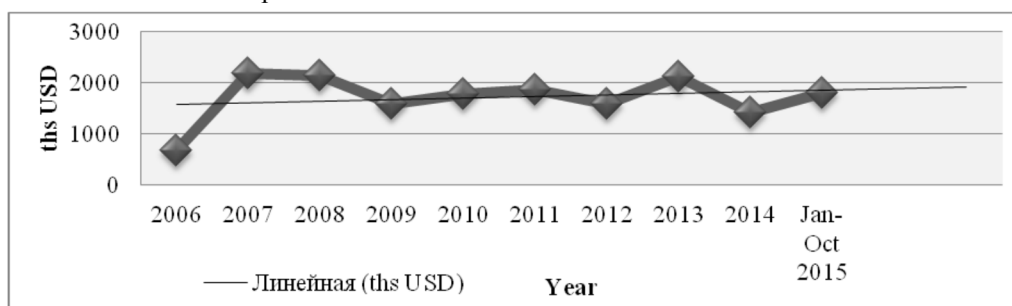


Fig. 1. Dynamics of exports of the group 06, „Live trees and other plants” UCFEAG, ths USD

In comparison with 2006, in 2014 the total volume of imports increased by nearly 43%. However, the dynamics of imports is directly dependent on the general economic situation in the country and on people's income, as shown in Figure 2.

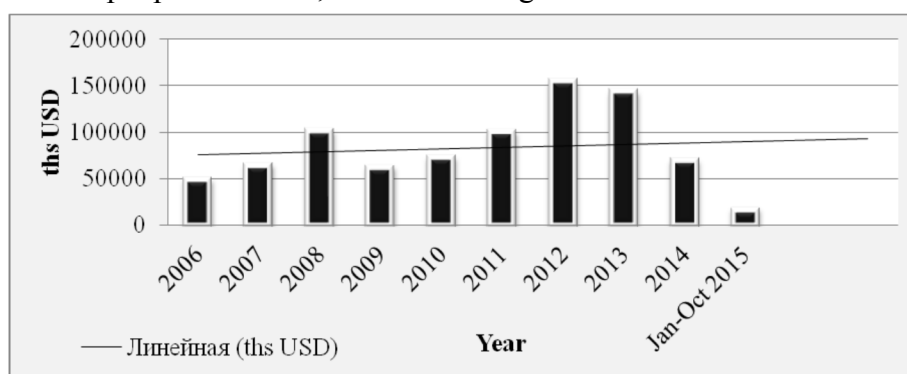


Fig. 2. Dynamics of imports of the group 06 „Live trees and other plants” UCFEAG, ths USD

Among the regions of Ukraine, the largest volume of imports of the group 06 “Live trees and other plants” in the period of 2010-2014 came to Kyiv and Lviv regions and the city of Kyiv (Figure 3). Thus, the largest volume of flower products was exported from Kyiv, Zakarpattia and Odesa regions (Figure 4).

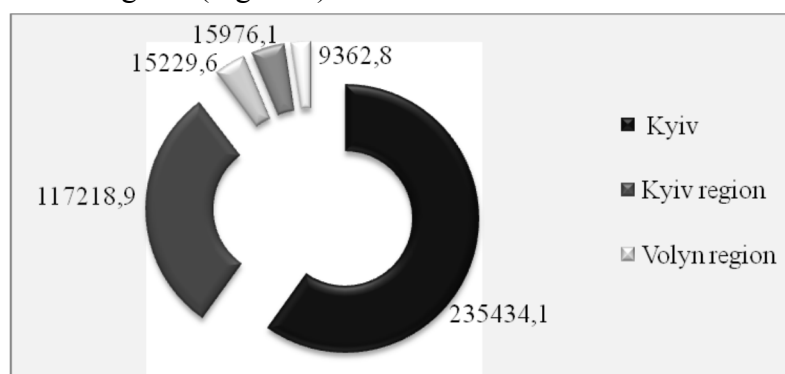


Fig. 3. Structure of imports of the group 06 „Live trees and other plants” UCFEAG by the regions-leaders of Ukraine in 2010–2014 ths USD

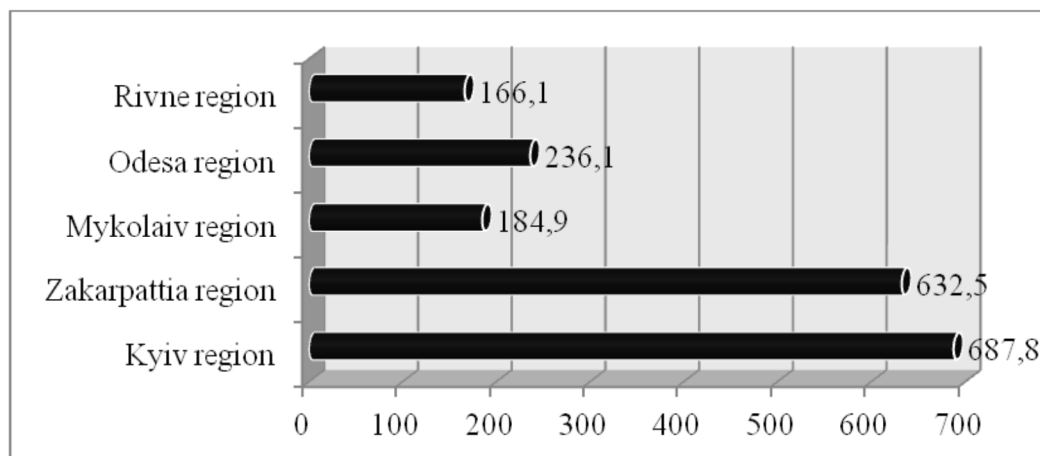


Fig. 4. The largest volume of exports of the group 06 „Live trees and other plants” UCFEAG among regions of Ukraine, in 2010-2014, ths USD

Considered separately, the subgroups of the group 06 „Live trees and other plants” UCFEAG, the largest exports in 2006-2014 had the subgroup 0602 „Other live plants (including their roots), cuttings and rootstocks; mushroom mycelium” (Figure 5).

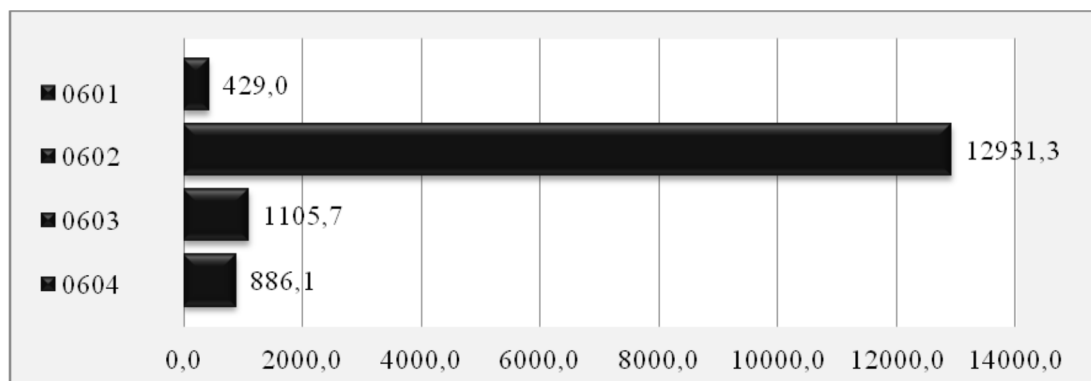


Fig. 5. The structure of total exports of the group 06 „Live trees and other plants” UCFEAG in the context of commodity subgroups, in 2006-2014, ths USD

However, the largest imports among the subgroups of the group 06 „Live trees and other plants” in 2006-2014 had the subgroup 0603 „Cut flowers and buds suitable for bouquets or decorating, fresh, dried, bleached, dyed or otherwise treated” and the subgroup 0602 „Other live plants (including their roots), cuttings and rootstocks; mushroom mycelium” (Figure 6).

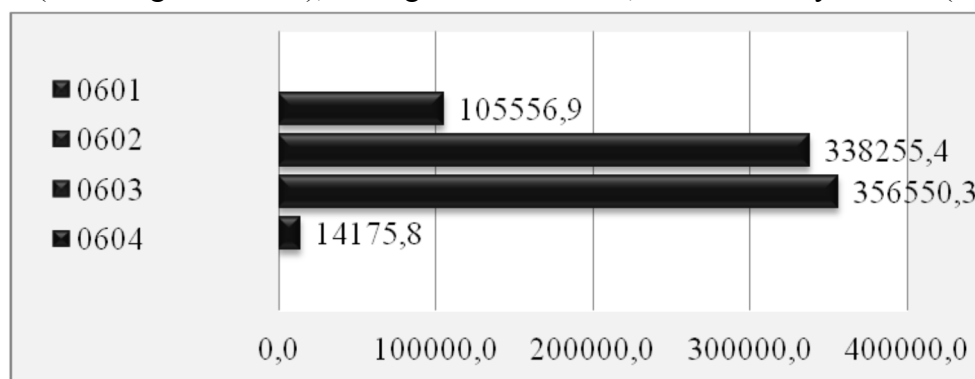


Fig. 6. The structure of total imports of the group 06 „Live trees and other plants” UCFEAG, in the context of commodity subgroups, in 2006-2014, ths USD

The main exporter of commodity subgroup 0601 “Bulbs, tubers, root tubers, corms, rhizomes, including branched rhizomes, in a state of vegetative rest, in a state of growth or

ГАЛУЗЕВИЙ АСПЕКТ РОЗВИТКУ НАЦІОНАЛЬНОГО ГОСПОДАРСТВА

flowering; seedlings, plants and roots of chicory” in 2006–2014 was the Russian Federation, and importers were EU (40 %) and the Netherlands (38 %) (Figure 7).

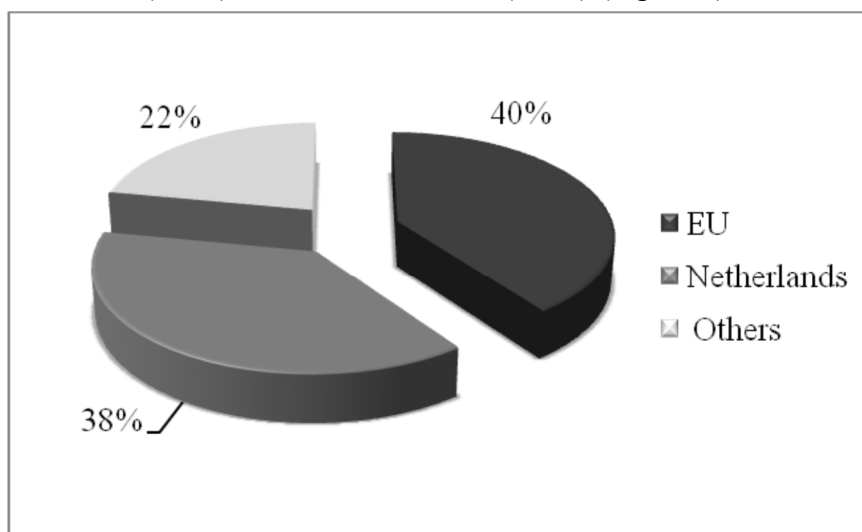


Fig. 7. Major importers of the subgroup 0601 in 2006–2014, ths USD

Most of the products of the subgroup 0602 were exported to Russia and Belarus, and imported from Europe and the Netherlands. Most of the products of the subgroup 0603 were exported to Russia and imported from Europe, the Netherlands and Ecuador.

Unlike the previous groups, most of the products of the subgroup 0604 “Leaves, branches and other parts of plants, without flowers or buds, grasses, mosses and lichens suitable for drawing bouquets or for ornamental purposes, fresh, dried, bleached, dyed otherwise treated” in 2006–2014 were exported by Ukraine to Europe and Asia. Thus, the largest volume of imports in Ukraine belongs to Europe and the Netherlands.

Since 2011 State Statistics Service has been keeping records of exports and imports of cut roses, carnations, orchids and chrysanthemums, and since 2014 it has been keeping records of cut lilies. Thus, in 2014, cut roses and chrysanthemums were imported to Ukraine in larger volumes than other flowers (Figure 8) [1; 2].

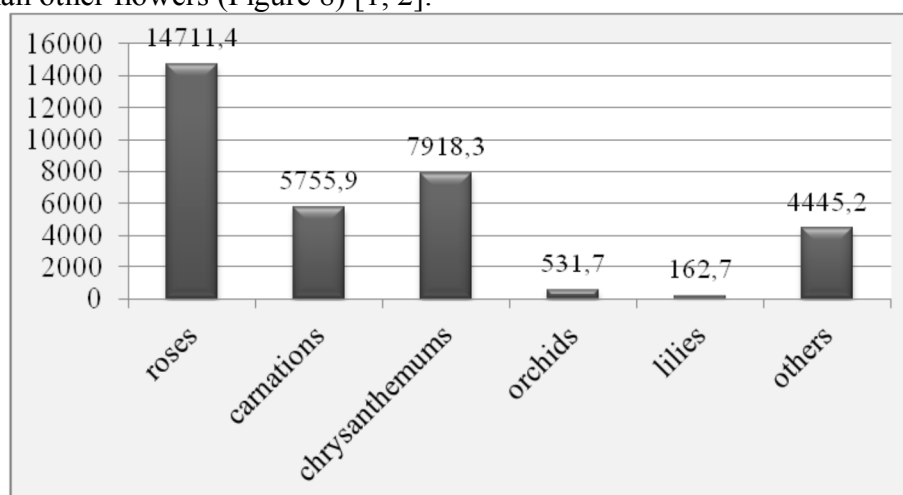


Fig. 8. Imports of fresh cut flowers in 2014, ths USD

Today flower products are grown mainly in greenhouses equipped with modern computer climate controlling systems. It enables not to interrupt the growing process, to protect the products from unforeseen weather conditions and receive a wide range all the year round. But the lingering economic crisis has slowed significantly the development of flower industry in

ГАЛУЗЕВИЙ АСПЕКТ РОЗВИТКУ НАЦІОНАЛЬНОГО ГОСПОДАРСТВА

Ukraine. Till 2007 the production of flower growing in Ukraine increased steadily by 25 % per year, displacing imports, but since 2008 the market has started declining. Due to the drop in demand, in the same period, the area of greenhouses for growing flowers reduced 1.4 times. They were reconstructed to be used for growing vegetables. In 2009, because of the crisis, flower market of Ukraine fell to 2006 levels, giving businesses 160 mln USD. In 2008, in addition to this, the duties for flowers were raised and as a result, imports of flowers immediately halved. The flowers, which continued to be imported, rose in price sharply due to dollar rate. As a result, some players left the flower market of Ukraine. A similar steep decline in imports of flower products happened during the crisis 2014.

Till 2007–2008, the areas for growing flowers and import volumes of flowers (roses in particular) were increasing steadily, but since 2008 there has been a steady decline (Figure 9).

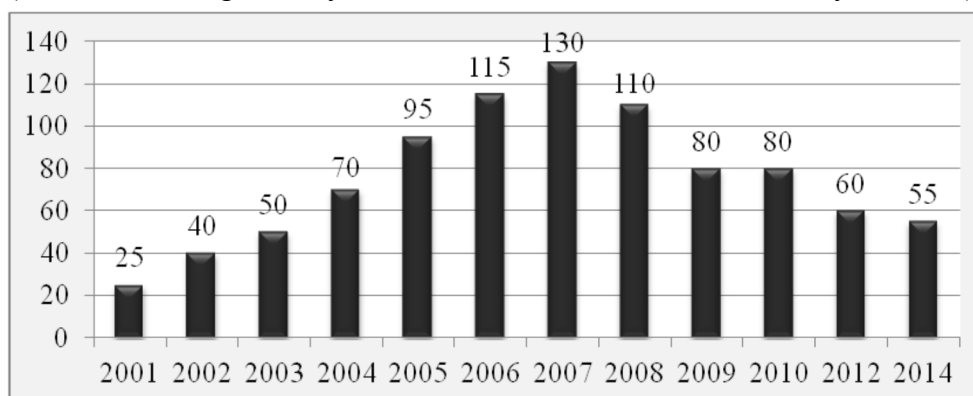


Fig. 9. Areas of industrial greenhouses in Ukraine used to grow flower products (cut flowers), ha

Reducing of the areas of greenhouses led to changes in the structure of crops: now 80 % of the remaining greenhouses are used to grow roses – a perennial crop, whereas in 2008 there were solely 60 % of such greenhouses. However, this did not protect the market from overproduction because roses prevail in imported products as well. It is noted that in good times Ukraine consumed not less than 140 mln pcs of roses (including import) per year, and in 2009 – about 127 mln pcs. The reason for this trend is reduction of people's income. If in 2008 every Ukrainian bought 5 roses a year, in 2009 this number fell 4.

In early 2010 the situation in Ukraine continued to worsen. Extremely low temperatures caused the situation that flower sellers earned by 40 % less than at the beginning of 2009.

In 2012, the volume of flower market reached approximately \$150 mln USD, with the annual growth – 15–20 %. A tenth of this volume is covered by the Kyiv market. About 70 % of the retail flower market is represented by stalls and kiosks. The remaining 30 % are distributed between the middle level flower shops (20 %) and more expensive flower salons (10 %). At the same time buying flowers online makes about 1 % of the total market so far. According to the estimates of the Ukrainian Union of Florists, in 2012, the average production of roses in Ukraine was 3,5–6 pieces per person per year; a total permanent flower production was concentrated in several greenhouse complexes, which total area under flowers was estimated 55–60 ha.

Thus, the production of seedlings of flowers in Ukraine is carried out mainly by individual departments of large greenhouse complexes and by small greenhouses of local scale, due to difficulties in transportation and storage of planting material. The domestic production of cut flowers in Ukraine is presented by the companies *Kamelia* (c. Kyiv), *Askania-Flora* (c. Kyiv), *Ukraflora* (c. Kyiv), *Frezia* (Kharkiv region) and others.

Thus, in 2013, the largest area for growing flower products, was possessed by a greenhouse enterprise *Askania Flora Ltd.* (22,4 hectares) (Table 2).

Table 2

Area and location of greenhouse complexes of Ukraine engaged in growing flower products

| Enterprise | Region | Area, ha |
|------------------------------------|-----------------------|-----------------|
| <i>Askania Flora Ltd.</i> | Kyiv region | 22,4 |
| <i>Ukraflora</i> | Kyiv | 18,0 |
| <i>Ukraflora-Vinnytsia</i> | Vinnytsia region | 12,0 |
| <i>Kamelia</i> | Kyiv region | 11,0 |
| <i>Frezia</i> | Kharkiv region | 4,5 |
| <i>Viktoria</i> | Dnipropetrovsk region | 4,5 |
| <i>Agrofirm Prolisok LTD</i> | Kyiv region | 4,2 |
| <i>Holandski Troiandy</i> | Poltava region | 4,0 |
| <i>AIC Avsen</i> | The Crimea | 3,5 |
| <i>The farm Kivity Zakarpattia</i> | Zakarpattia region | 0,5 |

Large producers of flowers are able to survive in crisis times. They invest in the development of the enterprises and modernization of equipment imported from Holland, Israel, Poland and Germany. This enables to reduce production costs, improve quality and expand the range of products, reduce dependence on imports and, on satisfying domestic demand, to focus on exports.

Since 2015, not only the number of sold bouquets has decreased, but also the pricing has changed markedly. Previously, experts noted that the average cost of the bouquet was 200 UAH, but now buyers are willing to spend on flowers no more than 150 UAH, and even less. To date imported flowers are not popular at all, they are mostly supplied to order. Tulips, roses, chrysanthemums, flowers in ornamental flowerpots are still preferred by buyers; on the other hand, more expensive flowers virtually disappeared from the shelves of the shops, as it is too expensive for shop owners to transport them. Entrepreneurs in this field point that imports of the products halved compared to the previous year. For this reason, Ukrainian producers were able to sell their products albeit at a high, but more reasonable price than import suppliers. However, despite the shift in sales to domestic products, floral shops are still closing, and the remaining ones reduce the range by several items.

But despite the difficult conditions in which modern flower growers have to work, they still manage to grow high-quality flowers in Ukraine. This is confirmed by Western experts who come to Ukraine for the annual International Exhibition for Flower Business, Horticulture, Landscape design and Floristry *Flowers & HorTech Ukraine*, organized by exhibition companies *Company "Misto Mrii" LTD* and *OTU Exhibitions BV* under the auspices of the Ukrainian charitable organization *Union of Ukrainian florists*. Sometimes even experts fail to distinguish a rose grown in Holland, from our domestic one. Ukraine tries to keep up with flower fashion, getting all breeding innovations, but it's impossible to develop something new yet because the state support is required [3; 4; 5; 6].

A feature of flower trade is that products are sold not by direct producers but by sales agents located in offshore areas, which makes foreign trade operations non-transparent. Thus, direct contracts (contracts with direct producers) allowed importing to Ukraine only 35 % of the total number of live plants and flower products.

Another problem is the quality of declaring of the imported flower products. By analysis of customs registrations, there are inconsistencies of weight of the goods with their quality characteristics.

Thus, the State Customs Service of Ukraine was forced to take additional measures to strengthen control over customs clearance of live plants and flower products. One of these measures was the concentration of customs registrations of live plants and flower products in the area of the Kiev regional customs (Order of the State Customs Service of 19.08.2010 no. 937). According to it, the customs clearance of the goods imported by foreign economic

ГАЛУЗЕВИЙ АСПЕКТ РОЗВИТКУ НАЦІОНАЛЬНОГО ГОСПОДАРСТВА

operators located in areas of the Kyiv regional, Vinnytsia, Zhytomyr, Poltava, Cherkasy and Chernihiv customs will be carried out by the Kiev regional customs. The mentioned measure will not cause additional complications in the procedure of customs clearance, but it will provide a unified approach to accuracy and completeness of the declaration of these products, monitoring their classification and accuracy of determining their customs value [7].

Conclusions and suggestions. Having examined the development of the market of flower products, we can conclude that for the last decade flower growing in Ukraine developed quite rapidly, but the crisis has slowed its development significantly. The growing of flower products increased in 2007–2008, the flower business declined during the crises (2009–2010 and 2014–2015) and its growth was accelerating gradually in the post crisis periods. Even now flower business belongs to one of the dynamic sectors of the economy, which continues to develop and expand, despite the very challenging economic conditions and imperfect legal regulation. The crisis period is characterized by the following factors: product range in the market slightly reduces, sales volumes decrease, prices go up, market share of domestic producers and cheap products increases, market share of expensive exotic flower products increases.

The demand for flowers and decorative plants was determined to differ unevenly. Tentatively, it consists of two components: the relatively permanent one, which is formed by the demand generated by such needs as gifts for family get-togethers or other events; and the seasonal one which arises before holidays – March 8, February 14, the New Year, the beginning of the academic year and so on.

In the overall structure of the domestic flower growing there are several problematic segments: smugglers supplying illegal products and small producers growing flowers in their own mini-greenhouses – without paying taxes. Small flower growers must comply with applicable laws and their activities should be taxed under the simplified system.

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ГАЛУЗЕВИЙ АСПЕКТ РОЗВИТКУ НАЦІОНАЛЬНОГО ГОСПОДАРСТВА

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Solomakha Iryna – PhD in Economics, Associate Professor, Associate Professor of the Department of Commodity, Examination, Customs and Trade, Chernihiv National University of Technology (95 Shevchenko Str., 14027 Chernihiv, Ukraine).

Соломаха Ірина Володимирівна – кандидат економічних наук, доцент, доцент кафедри товарознавства, експертизи, митної справи та торгівлі, Чернігівський національний технологічний університет (вул. Шевченка, 95, м. Чернігів, 14027, Україна).

Соломаха Ірина Владимировна – кандидат экономических наук, доцент, доцент кафедры товароведения, экспертизы, таможенного дела и торговли, Черниговский национальный технологический университет (ул. Шевченко, 95, г. Чернигов, 14027, Украина).

E-mail: iveria60@mail.ru

Svetenok Liudmyla – Senior lecturer of the Department of Foreign languages for Specific Purposes, Chernihiv National University of Technology (95 Shevchenko Str., 14027 Chernihiv, Ukraine).

Светенок Людмила Костянтинівна – старший викладач кафедри іноземних мов професійного спрямування, Чернігівський національний технологічний університет (вул. Шевченка, 95, м. Чернігів, 14027, Україна).

Светенок Людмила Константиновна – старший преподаватель кафедры иностранных языков профессиональной направленности, Черниговский национальный технологический университет (ул. Шевченко, 95, г. Чернигов, 14027, Украина).

E-mail: liudmila_svetenok@ukr.net

Zhabynska Alona – Master Student of the Department of Commodity, Examination, Customs and Trade, Chernihiv National University of Technology (95 Shevchenko Str., 14027 Chernihiv, Ukraine).

Жабинська Альона Валентинівна – студентка магістратури кафедри товарознавства, експертизи, митної справи та торгівлі, Чернігівський національний технологічний університет (вул. Шевченка, 95, м. Чернігів, 14027, Україна).

Жабинская Алёна Валентиновна – студентка магистратуры кафедры товароведения, экспертизы, таможенного дела и торговли, Черниговский национальный технологический университет (ул. Шевченко, 95, г. Чернигов, 14027, Украина).

E-mail: aly-zhabinskaya@yandex.ua