

УДК 338.432(477.87)+339.92

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DOI: 10.32702/2306-6792.2025.15.195

ASSESSMENT OF TRANSFORMATIONAL CHANGES IN THE FOREIGN ECONOMIC ACTIVITY OF AGRICULTURAL ENTREPRENEURSHIP IN THE CONTEXT OF EUROPEAN INTEGRATION

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ОЦІНКА ТРАНСФОРМАЦІЙНИХ ЗМІН ЗОВНІШНЬОЕКОНОМІЧНОЇ ДІЯЛЬНОСТІ АГРАРНОГО ПІДПРИЄМНИЦТВА В УМОВАХ ЄВРОІНТЕГРАЦІЇ

The purpose of the article is an analytical assessment of the transformational changes taking place in the sphere of foreign trade in agricultural products with EU countries and the establishment of competitive advantages of agricultural entrepreneurship in the European market. A number of methods were used in the research process: abstract-logical — for formulating conclusions; comparative analysis — for comparing absolute and relative indicators of exports and imports of agricultural products with EU countries, determining indicators of import independence and raw material load; statistical — for systematization and structural analysis of data; display of structural indicators of exports of wheat, corn, rapeseed and sunflower oil to individual European countries; tabular — for visual display of the results obtained.

A significant increase in export flows of agricultural products to EU countries compared to the pre-war period has been established — almost 1.7 times — from 7.7 billion USD in 2021 to 12.8 billion USD in 2024. The growth rates of the share of EU countries in total agricultural exports have been determined (from 28.6% in 2021 to 51.7% in 2024).

A corresponding competitive rating has been formed by export-oriented types of products. Significant changes in the logistics of grain exports during the war have been established: an increase in the share of wheat exports to European countries from 1.7 to 40%, corn — from 32.7 to 65.2%.

A trend of strengthening Ukraine's competitive positions in the European rapeseed market has been established. During 2021—2024, the natural export indicators of this crop increased by 45.3% (from 2.7 to 3.9 million tons). It has been determined that the share of sunflower oil in Ukrainian exports to EU countries is stable at 85—90%. A trend of increasing imports of agricultural products from EU countries by 1.6 times has been established — from 2.4 to 4 billion US dollars. In contrast to the raw material export orientation, agricultural imports from the EU countries are dominated by finished processed products with high added value. Over the analyzed period, the share of these products in agricultural imports increased from 59.7 to 62.9%.

The overall ratio of agricultural import flows to exports in 2024 was 3.23, which is 58.5% or 1.19 points higher than the pre-war level. It was established that for 1 dollar of agricultural products imported from Europe, 3.23 dollars of exports are accounted for.

The emphasis have been on the need to reorient the raw material orientation of agricultural exports towards ensuring the processing of raw materials and the creation of products with high added value. The search for logistical routes for export and new sales markets for grown agricultural products is not a way out for the effective development of domestic agricultural entrepreneurship in the context of European integration.

Метою статті є аналітична оцінка трансформаційних змін, що відбуваються в сфері зовнішньої торгівлі агропродукцією з країнами ЄС та встановлення конкурентних переваг аграрного підприємництва на європейському ринку. У процесі дослідження було використано низку методів: абстрактно-логічний — для формулювання висновків; порівняльний аналіз — для порівняння абсолютних та відносних показників експорту та імпорту агропродукції з країнами ЄС, визначення індикаторів імпортої незалежності та сировинного навантаження; статистичний — для систематизації та структурного аналізу даних; відображення структурних показників експорту пшениці, кукурудзи, ріпаку та соняшникової олії за окремими країнами Європи; табличний — для візуального відображення отриманих результатів.

Встановлено значне збільшення експортних потоків агропродукції в країни ЄС порівняно з довоєнним періодом — майже в 1,7 раза — від 7,7 млрд дол. США у 2021 р. до 12,8 млрд дол. США у 2024 р. Визначено темпи зростання частки країн ЄС в загальному аграрному експорті (від 28,6% у 2021 р. до 51,7% у 2024 р.).

Сформовано відповідний конкурентоспроможний рейтинг видів продукції, що експортується в країни ЄС. Встановлено значні зміни в логістиці зернового експорту під час війни: збільшення частки експорту пшениці в європейські країни від 1,7 до 40%, кукурудзи — від 32,7 до 65,2%.

Встановлено тенденцію зміцнення конкурентних позицій України на європейському ринку ріпаку. Протягом 2021—2024 рр. натуральні показники експорту цієї культури збільшились на 45,3% (від 2,7 до 3,9 млн т). Визначено, що частка соняшникової олії в українському експорті до країн ЄС стабільно становить 85—90%. Встановлено тенденцію нарощування імпорту агропродукції з країн ЄС в 1,6 раза — від 2,4 до 4 млрд дол. США. На відміну від сировинної експортної спрямованості, в аграрному імпорті з країн ЄС переважає готова перероблена продукція з високою доданою вартістю. За аналізований період частка цієї продукції в імпорті агропродукції збільшилась від 59,7 до 62,9%.

Загальний коефіцієнт покриття імпортних потоків агропродукції експортом у 2024 р. становив 3,23, що на 58,5% або на 1,19 пунктів вище довоєнного рівня. Встановлено, що на 1 долар імпортованої з Європи агропродукції приходить 3,23 долара експорту.

Акцентовано увагу на необхідності переорієнтації сировинної спрямованості аграрного експорту в напрямі забезпечення переробки сировини та створення продукції з високою доданою вартістю. Пошук логістичних шляхів вивозу та нових ринків збуту вирощеної агропродукції — це не вихід для ефективного розвитку вітчизняного аграрного підприємництва в умовах євроінтеграції.

Key words: agricultural entrepreneurship, export, import of agricultural products, commodity structure, export-import coverage ratio.

Ключові слова: аграрне підприємництво, експорт, імпорт агропродукції, товарна структура, коефіцієнт покриття імпорту експортом.

THE PROBLEM STATEMENT IN GENERAL TERMS AND ITS CONNECTION WITH IMPORTANT SCIENTIFIC OR PRACTICAL TASKS

The export orientation of the agricultural sector of our country's economy in the conditions of war has significantly increased and has undergone tangible transformational changes. If before the war the share of agricultural exports was 40.7% (27.7 billion USD), then in 2022 this figure increased to 53% (23.4 billion USD), in 2023 it exceeded 60% of the country's total exports. In the past, in 2024, this figure was 59.7% or 24.7 billion USD. But the long-standing problem of excessive concentration of raw materials in agricultural exports during 2022—2024 is only intensifying. In turn, the colossal logistical problems caused by the full-scale war could not but affect the volumes and geographical structure

of export flows of agricultural products, which were noticeably transformed towards the EU countries.

It should be noted that the realities of the European integration processes taking place in Ukraine and its agricultural sector of the economy put forward fundamentally new requirements for the competitiveness and efficiency of the activities of agricultural business entities.

Therefore, conducting comprehensive monitoring of the structural components of the foreign economic activity of agricultural business with EU countries and assessing existing competitive positions does not lose its relevance.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

The issue of organizational, economic and logistical challenges faced by Ukrainian agri-

Table 1. Commodity structure of agricultural exports to EU countries, 2021–2024, million USD

Code and name of goods and product groups	2021	2022	2023	2024	2024 in % to 2021
I. Live animals; animal products	395,8	659,3	678,9	728,5	184,1
01 Live animals	0,8	0,9	0,7	0,6	75,0
02 Meat and edible offal	198,1	362,0	407,3	390,3	197,0
03 Fish and crustaceans	35,5	22,0	34,3	35,7	100,6
04 Milk and dairy products, poultry eggs; natural honey	149,4	262,5	227,0	290,4	194,4
05 Other animal products II.	11,9	11,9	9,6	11,4	95,8
Vegetable products					
06 Live trees and other plants	3835,7	7983,4	6903,1	6770,1	176,5
07 Vegetables	5,0	3,3	2,7	1,6	32,0
08 Edible fruits and nuts	60,1	40,1	43,0	51,7	86,0
09 Coffee, tea	310,0	262,2	198,4	295,1	95,2
10 Cereals	4,4	4,7	5,0	7,2	163,6
11 Products of the flour and cereal industry	1934,8	4672,2	4575,5	3917,8	202,5
12 Oilseeds and oil fruits	22,3	59,5	89,5	54,9	246,2
13 Natural shellac	1479,2	2906,6	1942,7	2408,6	162,8
14 Vegetable materials for manufacturing	2,2	1,7	0,9	1,0	45,5
III. 15 Animal or vegetable fats and oils	17,7	33,2	45,4	32,3	182,5
IV. Prepared food products	2362,6	3057,7	2981,5	3373,5	142,8
16 meat and fish products	1080,0	1206,3	1953,8	1975,9	183,0
17 sugar and sugar confectionery	7,8	15,4	12,0	16,1	206,4
18 cocoa and products thereof	95,8	212,4	487,1	302,5	315,8
19 prepared grain products	76,1	62,0	93,5	127,0	166,9
20 processed vegetable products	141,2	110,1	171,4	202,1	143,1
21 various food products	88,0	114,5	115,7	234,5	266,5
22 alcoholic and non-alcoholic beverages and vinegar	68,5	55,6	85,8	96,1	140,3
23 residues and waste of the food industry	122,1	113,4	180,4	180,8	148,1
24 tobacco and industrial tobacco substitutes	472,9	514,0	800,9	815,7	172,5
Total agricultural products	7,5	8,8	7,0	1,2	16,0
Share in total exports, %	7674,0	12906,6	12517,3	12848,0	167,4
export of raw materials	28,6	46,3	50,6	51,7	+23,1
Share, %	6594,1	11700,4	10563,5	10872,1	164,9
export of processed products	85,9	90,7	84,4	84,6	-1,3
Share, %	1080	1206,3	1953,8	1975,9	183,0
ratio of exports of raw materials to finished products	14,1	9,3	15,6	15,4	+1,3
I. Live animals; animal products	6,1	9,7	5,4	5,5	90,1

Source: compiled based on data from the State Statistics Committee of Ukraine [11].

cultural exports since the start of the full-scale war has been the subject of research by many authors. O. Lotysh [1] devoted her research to assessing the role of Ukraine in the world grain market and analytical monitoring of challenges and threats that have had a destructive impact on the country's grain economy.

T. Ostashko [2] investigated a number of priority problems that arose in the export sector of the grain market since the start of the full-scale war. The author identified the risks and real scale of the impact of losses in grain export markets on the Ukrainian economy, assessed the impact of the war on the global grain market and food security in the world.

S. Ishchuk and L. Sozansky [3] devoted their research to assessing the impact of the war on the

dynamics and structure of commodity exports from Ukraine. We fully agree with the authors' conclusions that the raw material orientation of Ukrainian exports (grains, oilseeds) significantly increased during the war.

R. Batyuk [4] devoted his study to the prospects for increasing and strengthening the export potential of the agricultural sector of the Ukrainian economy. The author proposed a comprehensive model of foreign economic interaction of domestic agricultural enterprises with foreign counterparties, including on the European market. I. Gavriyuk devoted her work to the assessment of current trends in Ukraine's foreign trade with EU countries in wartime conditions [5]. A thorough analysis of the realities, prospects and

measures aimed at supporting the agricultural sector of Ukraine's economies in the context of Euro integration processes was carried out in their analytical study by O. V. Sobkevych, A. V. Shevchenko [6], Kh. Prytula, I. Kyryk [7], Z. Makogin, Z. Atamanchuk [8], S. Dotsiuk [9].

At the same time, comprehensive monitoring of absolute and structural indicators of foreign trade in agricultural products with EU countries and determination of competitive positions of agricultural entrepreneurship in European markets requires further research and systematic assessment.

FORMULATION OF THE OBJECTIVES OF THE ARTICLE (STATEMENT OF THE TASK)

The purpose of the article is an analytical assessment of the transformational changes taking place in the sphere of foreign trade in agricultural products with EU countries and establishment of competitive advantages of agricultural entrepreneurship in the European market.

PRESENTATION OF THE MAIN STUDY MATERIAL

A significant increase in export flows of agricultural products to EU countries has been established compared to the pre-war period. Thus, the total volume of agricultural exports from Ukraine to the European Union during 2021—2024 increased by almost 1.7 times — from 7.7 billion USD in 2021 to 12.8 billion USD in 2024.

The commodity structure of domestic agricultural exports to Europe has the following structure. The first place in terms of volume is occupied by crop products — 52.7%. Over the analyzed period, the dynamics of increasing exports of plant products was 1.8 times — from 3.8 to 6.8 billion UAH. In second place in terms of export volumes in monetary terms is the commodity group of fats and oils — 26.3%, which is also 3.5 billion USD.

Accordingly, the next place in the commodity structure is occupied by ready-made food products with a share of 15.4%. It should be noted that in 2021—2024, the export of ready-made food agricultural products to European countries, as products with high added value, increased almost 2 times — from 1.1 to 2 billion USD.

The smallest share in agricultural exports to the EU is occupied by livestock products — 5.7%, which is 0.73 billion USD. During the war, the growth rate of exports of animal products exceeded 1.8 times — from 396 million USD in 2021 to 729 in 2024 (Table 1).

A significant increase in the share of EU countries in total agricultural exports from Ukraine has been established. Thus, if in the pre-war 2021 this indicator was 28.6%, then in 2024 it reached a maximum of 51.7% (+23.1%).

As already noted, the significant raw material load of agricultural exports to EU countries is problematic. During the analyzed period, the share of exports of raw materials (grain, sunflower, rapeseed, sunflower oil and other types of products) is on average 85%). Accordingly, the determined ratio currently has a value of 5.5. In other words, for 1 dollar of finished food products, 5.5 US dollars of raw materials account for 1 dollar.

The analysis of the structural dynamics of agricultural exports allowed forming a corresponding competitive rating by type of product. A stable dominance of grain exports has been established (the main ones are wheat and corn) with a share of 30.5% in the overall structure (or 4 billion USD per year).

The second place is occupied by the export of vegetable and animal fats with absolute dominance in the commodity structure of sunflower oil with a share of 26.3% (or 3.4 billion USD). Accordingly, the share of oilseed exports (sunflower, rapeseed) is 18.7% (or 2.4 billion USD).

The commodity group of finished food products is dominated by residues and waste of the food industry (7.5% of total agricultural exports or 0.82 billion USD). Moreover, during 2021—2024, the export of these products increased by 1.7 times. At the same time, export revenues from the sale of meat remain insignificant. During the analyzed period, they do not exceed 400 million USD, and their share in total European agricultural exports is 3—4%. The main meat export product remains chicken, and annual exports of beef, veal and pork do not exceed 4.5 million US dollars, which is less than 0.1% in the structure of European agricultural exports.

During the war, significant changes occurred in the export activities of agricultural enterprises in terms of the most exported types of agricultural products.

The blockade of the ports of the Black and Azov Seas, the partial solution to this problem thanks to the grain agreement, and a number of large-scale challenges faced by our farmers forced them to intensify their search for alternative land and river channels for grain sales. The colossal logistical problems caused by the full-scale war could not but affect the volume and structure of grain exports. If in 2019-2021, the

Table 2. Dynamics of wheat exports from Ukraine to European countries

Country	2021		2022		2023		2024	
	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD
Belgium	—	—	—	—	22,2	2,9	36,1	5,7
Greece	—	0	201,7	34,77	318,1	55,13	210,1	39,6
Ireland	—	—	—	—	24,0	3,4	114,6	20,2
Spain	158,7	40,93	1154,4	228,34	4011,0	679,1	5681,5	980,1
Italy	126,5	29,02	396,7	77,95	595,9	101,7	700,4	126,6
Latvia	—	—	—	—	55,7	11,0	8,7	2,02
Lithuania	—	—0	35,6	7,93	39,3	7,9	0,3	0,04
Malta	—	—0	—	—0	79,2	12,6	22,7	4,2
Netherlands	43,9	12,04	11,4	4,29	106,6	20,8	175,4	31,8
Germany	3,0	1,66	38,2	12,37	81,6	17,7	115,4	21,5
Poland	3,0	96,3	577,7	131,49	97,6	14,81	3,2	0,9
Romania	—	—	1466,1	331,47	2268,1	417,3	8,9	1,45
Slovakia	—	—	—	—	42,2	8,1	3,8	0,6
Czech Republic	0,3	4,2	—	—	6,2	0,9	7,7	1,1
Switzerland	10,8	21,3	39,6	11,02	50,1	9,0	4,9	1,53
Total to European countries	332,1	84,0	4250,4	1014,1	7803,8	1421,1	8342,2	1501,6
Share of European exports, %	1,7	1,7	37,9	37,9	48,3	48,3	40,4	40,2
Total	20071,3	5074,8	11215,6	2675,6	16151,7	2941,0	20664,8	3736,3

Source: compiled based on data from the State Statistics Committee of Ukraine [10].

structure of wheat exports was steadily dominated by African countries with a share of 36.4%, then in 2023 this figure decreased to 11.5%, and in 2024 it increased to 19.9%. Before the war, more than 55% of wheat was exported to Asian countries. In 2022, this figure decreased to 37.9%, and in 2023 — to 35.5%, in 2024 there was a relative increase to 39.7%.

The logistics of wheat exports shifted towards European countries. If before the war the total share of wheat exports to European countries did not exceed 3%, then after the full-scale Russian invasion it is approaching 50%. The corresponding trend is also observed in the second dominant export crop — corn. The share of European countries importing our corn exceeded 60% during the war.

According to the results of 2024, the structural transformation of wheat exports has almost not changed — the share of European countries is 40.4%, Asian countries — 39.7%, African countries account for 19.9% of total exports.

In corn exports in 2024, the share of European countries increased to a record 65.2%, 21.4% (6.3 million tons) of corn was exported to Asian countries, 13.4% (almost 4 million tons) to Africa.

According to the results of 2024, the largest buyers of Ukrainian wheat among European countries are Spain with a share of 65.3% (or 980 million USD), Italy — 8.4% or 126.6 million USD),

the Netherlands — 2.1% or 31.8 million USD and Germany — 1.4% or 21.5 million USD (Table 2). It should be noted that Spain and Italy were the largest buyers among European countries even before the full-scale invasion.

The largest volumes of corn in 2024 were exported to the following countries: Spain — 39.6% or 874.1 million USD, the Netherlands — 23.1% or 508.6 million USD, Italy — 22.3% or 492.5 million USD, Germany — 4.7% or 103.1 million USD, Portugal — 4.7% or 102.7 million USD and Greece — 3.3% or 73.3 million USD (Table 3).

Separate attention should be paid to the expansion of the market niche of seed corn by our agrarian exporters. Thus, in 2024, according to the State Statistics Committee, the export of corn seeds to the countries of the European Union increased almost 30 times compared to the pre-war 2021 and exceeded the mark of 120 million USD. The largest buyers of seed corn are currently France, Spain, Portugal, the Netherlands, Belgium. During the war, the geography of exports expands, domestic entrepreneurs cover the relevant markets of Latvia, Lithuania, the Czech Republic and Romania.

As in the production of grain crops, Ukraine during the war also occupies leading positions in the rapeseed market. Domestic producers have a fairly strong position in the European sales market, competing with traditional producers and exporters — Canada and Australia.

Table 3. Dynamics of corn exports from Ukraine to European countries

Country	2021		2022		2023		2024	
	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD
Austria	0,3	1,7	71,8	27,1	104,1	48,4	60,5	34,7
Belgium	639,2	155,6	217,2	57,3	156,2	33,2	521,5	89,0
Bulgaria	0,4	0,2	19,0	3,9	2,6	0,8	46,5	9,7
United Kingdom	597,0	135,4	153,4	38,1	78,7	15,4	131,0	22,2
Greece	9,5	2,5	96,4	19,5	176,5	28,1	394,0	73,3
Ireland	296,1	66,6	161,1	38,6	37,8	7,8	210,3	33,1
Spain	2466,6	582,9	2756,1	656,8	3972,1	683,2	5243,4	874,1
Italy	889,6	204,7	1438,1	324,0	2476,6	446,8	2884,2	492,3
Cyprus	33,6	7,3	98,9	20,8	250,8	41,9	344,7	61,0
Latvia	6,4	1,5	7,5	1,9	10,0	1,9	2,9	1,1
Lithuania	28,8	7,4	220,5	49,7	112,6	23,3	21,2	4,1
Netherlands	2266,3	538,7	1407,1	330,0	1803,6	332,0	2928,1	508,6
Germany	173,0	40,8	484,1	118,7	648,1	120,4	583,3	103,1
Norway							22,1	3,8
Poland	6,3	2,3	2055,5	488,0	566,1	119,0	2,2	4,6
Portugal	648,3	150,0	307,2	72,8	838,7	158,9	617,0	102,7
Republic of Moldova	0,7	1,2	74,8	13,7	22,6	6,0	0,8	2,6
Romania	0,5	1,3	3387,2	819,4	2858,6	572,9	14,2	24,3
Hungary	17,1	5,5	1324,6	335,9	647,6	174,0	7,7	23,8
France	0,1	0,3	3,8	9,3	17,9	33,1	9,8	26,2
Czech Republic	9,8	1,3	31,4	8,2	29,4	5,6	23,0	4,3
Switzerland	0,3	0,1	32,3	9,0	72,2	11,0	43,8	7,0
Total to European countries	8068,3	1926,7	14605,9	3474,7	14983	2822,8	19309,7	3305,8
Share of European exports, %	32,7	32,7	58,5	58,6	56,8	56,8	65,2	65,2
Total	24675,9	5892,7	24946,1	5934,2	26366,9	4966,4	29623,7	5072,4

Source: compiled based on data from the State Statistics Committee of Ukraine [10].

Table 4. Dynamics of rapeseed exports from Ukraine to European countries

Country	2021		2022		2023		2024	
	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD
Austria	0,8	0,6	9,8	5,7	2,2	0,9	2,2	1,5
Belgium	361,6	223,9	252,6	136,0	259,6	105,5	1010,0	473,8
Bulgaria	14,5	6,6	24,8	9,2	6,7	3,1	1,3	0,5
United Kingdom	238,4	155,6	119,4	66,0	57,4	18,0	351,7	171,3
Greece			28,1	13,8	52,0	15,3	78,6	34,5
Spain	8,6	5,4	4,1	2,3	30,7	9,3	37,3	16,5
Italy	—	—	1,2	0,7	8,1	3,1	4,1	1,7
Latvia	—	—	36,9	16,7	86,0	32,7	18,3	6,7
Lithuania	—	—	24,8	12,3	43,2	18,1	4,5	1,7
Malta	—	—			62,8	24,6		
Netherlands	169,9	108,3	53,1	31,5	236,5	90,8	509,5	234,7
Germany	813,9	535,3	368,2	199,4	854,1	350,9	1350,1	667,3
Poland	82,3	51,0	688,2	378,2	93,3	50,5		
Portugal	92,0	62,9	22,0	7,7	8,3	2,2	48,9	21,1
Romania			838,4	343,3	650,7	228,5		
Slovakia			109,0	55,8	9,9	4,9		
France	245,9	153,4	172,3	85,1	232,0	88,8	314,0	152,2
Czech Republic			49,1	31,4	77,6	33,4	73,0	35,4
Switzerland			5,3	2,8	45,7	17,0		
Total to European countries	2080,3	1337,2	2902,8	1443,2	2763,1	1075,9	3811,3	1821,7
Share of European exports, %	77,9	79,1	93,2	93,7	91,3	92,1	98,2	98,5
Total	2670,7	1690,9	3115,2	1540,2	3027,0	1168,3	3879,9	1850,0

Source: compiled based on data from the State Statistics Committee of Ukraine [10].

Table 5. Dynamics of sunflower oil exports from Ukraine to European countries

Country	2021		2022		2023		2024	
	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD	thousand tons	million USD
Austria	4,8	7,1			15,6	19,5	15,4	17,9
Albania	5,9	8,8	5,7	10,4	11,1	11,4	10,3	11,3
Belgium	6,5	7,8	6,1	10,4	4,5	5,0	20,8	18,5
Bulgaria	4,1	5,3	245,6	280,2	206,2	158,2	282,4	211,2
United Kingdom	137,8	177,5	42,1	56,4	49,4	46,3	28,5	25,3
Greece	7,6	10,9	3,4	4,6				
Estonia	4,9	6,8	2,4	3,6	1,9	1,7	2,7	2,8
Spain	377,7	469,4	211,1	261,3	290,9	247,4	687,0	586,7
Italy	255,2	328,7	264,6	320,2	270,8	232,1	470,1	415,4
Latvia	2,6	4,0	3,8	6,1	6,4	7,2	5,4	6,2
Lithuania	11,7	15,7	48,7	68,3	14,9	14,2	20,3	18,4
Malta	1,1	1,8	0,4	0,7	1,9	2,3		
Netherlands	541,7	670,3	277,1	388,8	375,6	349,2	512,2	452,1
Germany	6,8	7,6	25,4	44,5	45,6	43,1	19,0	18,8
Norway	0,9	1,4	0,8	1,5	3,6	5,3	4,2	5,5
Poland Portugal	84,5	110,8	373,4	487,5	10,0	8,3	411,9	348,4
Republic of Moldova	25,5	29,9	0,1	0,2	416,3	354,6	34,7	33,6
Romania Slovakia Hungary	4,0	6,0	29,7	44,3	3,1	2,5	59,3	39,1
Austria	2,4	3,7	349,1	421,5	14,6	12,1	571,8	470,8
Albania	9,2	13,4	12,4	20,7	1171,3	957,8	11,7	12,6
Belgium	0,7	1,1	66,8	106,1	33,8	29,2	15,2	13,6
France	157,8	198,0	110,9	167,8	58,9	71,1	176,5	175,5
Czech Republic	7,2	9,2	17,9	29,7	11,2	12,4	16,5	15,9
Switzerland	3,0	4,2	17,6	25,4	9,0	7,2		
Total to European countries	1665,2	2101,9	2135,8	2792,1	3052,5	2626,1	3301,6	2812,8
Share of European exports, %	32,4	32,9	49,8	51,1	53,2	52,4	54,9	54,9
Total	5132,1	6387,6	4290,3	5460,5	5740,8	5006,9	6008,5	5121,6

Source: compiled based on data from the State Statistics Committee of Ukraine [10].

It should be noted that in the European market, Ukraine competes with Australia. Canada, as the world leader in the production of this oilseed crop, produces a genetically modified version of rapeseed — canola, which is contrary to EU requirements regarding the level of GMO content in products.

Annual rapeseed exports to European countries fluctuate at 3—3.5 million tons, and in 2024 a record level of almost 3.9 million tons was reached. In 2021—2024, the natural indicators of exports of this crop increased by 45.3% (from 2.7 to 3.9 million tons), while export revenue increased by only 9.4% — from 1.7 billion USD in 2021 to 1.9 billion USD in 2024.

The largest buyers of domestic rapeseed are currently Germany — 36.6% or 667.3 million USD, Belgium — 26.0% or 473.8 million USD, the Netherlands — 12.9% or 234.7 million USD, the United Kingdom — 9.4% or 171.3 million USD, France with a share in total exports of 8.4% (152.2 million USD) (Table 4).

The main competitor for our agricultural business entities in the EU market is Australia due to the expansion of its own production of rapeseed with GMO content, which is permitted by EU regulations.

Ukraine's geographical proximity to this sales market gives domestic producers a competitive advantage in supplying rapeseed and processed products to the EU. Another competitive advantage is the ability to supply goods with the level of GMOs permitted in the EU.

Domestic exporters have significant competitiveness in the sunflower oil market, accounting for 40% of all world exports of this product. As for the share of sunflower oil in Ukrainian exports to the EU countries, in 2018—2024 it will remain at 90% with a slight decrease in 2024 to 85%.

Over the analyzed period, annual volumes of sunflower oil exports to Europe fluctuate within 5—6 million tons. (except for 2022, when this indicator decreased to a minimum of 4.3 million tons) (Table 5).

In total exports, the share of sunflower oil to European countries increased from 32 to 55% in 2021—2024, and export flows of this product in physical terms almost doubled — from 1.7 to 3.3 million tons. The growth rate of export revenue during the war was 1.3 times (from 2.1 to 2.8 billion USD).

According to the results of 2024 The largest buyers of sunflower oil on the European market

Table 6. Dynamics of the coefficients of coverage of commodity groups of agricultural imports from EU countries by export flows, 2021–2024

Code and name of goods and product groups	2021	2022	2023	2024	2024 in % to 2021
I. Live animals; animal products	0,53	1,10	1,12	1,15	219,4
01 Live animals	0,01	0,01	0,01	0,01	77,6
02 Meat and edible offal	0,97	1,75	3,06	4,27	440,2
03 Fish and crustaceans	0,33	0,26	0,34	0,28	85,6
04 Milk and dairy products, poultry eggs; natural honey	0,43	1,08	0,79	0,91	209,6
05 Other animal products II. Vegetable products	1,31	1,72	1,45	1,19	90,8
06 Live trees and other plants	5,83	11,69	10,07	9,15	157,1
07 Vegetables	0,08	0,08	0,07	0,03	38,8
08 Edible fruits and nuts	0,56	0,22	0,29	0,40	70,4
09 Coffee, tea	2,76	2,50	1,55	2,12	76,9
10 Cereals	0,04	0,04	0,04	0,04	109,1
11 Products of the flour and cereal industry	21,05	61,72	81,71	76,82	364,9
12 Oilseeds and oil fruits	1,30	3,74	4,32	2,06	158,6
13 Natural shellac	10,11	23,07	13,29	14,82	146,6
14 Vegetable materials for manufacturing	0,16	0,14	0,06	0,06	39,6
III. 15 Animal or vegetable fats and oils	177,0	332,0	227,0	323,0	182,5
IV. Prepared food products	26,67	31,14	32,66	32,82	123,1
16 meat and fish products	0,48	0,69	0,87	0,79	165,5
17 sugar and sugar confectionery	0,10	0,18	0,14	0,17	177,6
18 cocoa and products thereof	1,19	4,85	7,84	4,54	382,0
19 prepared grain products	0,29	0,39	0,44	0,44	149,8
20 processed vegetable products	0,57	0,53	0,73	0,78	138,0
21 various food products	0,67	0,82	0,70	1,44	214,9
22 alcoholic and non-alcoholic beverages and vinegar	0,18	0,19	0,25	0,24	133,8
23 residues and waste of the food industry	0,30	0,37	0,41	0,37	125,7
24 tobacco and industrial tobacco substitutes	1,65	1,77	2,28	2,29	138,9
Total agricultural products	0,02	0,04	0,02	0,02	15,7
I. Live animals; animal products	2,04	4,13	3,44	3,23	158,5

Source: compiled based on data from the State Statistics Committee of Ukraine [11].

are the following countries: Spain with a share of 20.9% (586.7 million USD), Romania — 16.7% (470.8 million USD), the Netherlands — 16.1% (415.4 million USD), Italy — 14.8% (415.4 million USD), Poland — 12.4% (348.4 million USD), France — 6.2% (175.5 million USD).

Ukrainian producers have suffered significant losses due to the catastrophic rate of increase in the price of fuel, fertilizers, other components of the production process and the cost of logistics. However, the internal and external price situation for export-oriented products does not contribute to the effective reproduction of the production processes of rural producers.

Regarding the problems of external markets, it should be noted that the reorientation of logistical grain flows from sea routes to Asian and African countries towards the EU has led to a noticeable decrease in grain prices in European countries. It is quite clear that the main reason for this is a significant imbalance in the comparison of the set of indicators of agricultural management in Ukraine and the EU countries — the quality of land resources, labor costs, cost structure, and the effect of the scale of production.

During 2018–2024, the volume of imports of agricultural products increased by 1.6 times — from 2.4 to 4 billion US dollars. During the war, the total volume of agricultural imports did not change significantly — the increase was only 5.7% — from 3.76 billion USD in 2021 to almost 4 billion in 2024. The share of agricultural imports in total imports to Ukraine is on average 10–12%.

The commodity structure of agricultural imports is dominated by the commodity group of finished food products. In 2021–2024, the share of these products is stable at an average of 60%. In the war, this relative indicator experienced a slight increase of 1.8% — from 60.1 to 62.9%, respectively. By commodity structure of finished food products, the largest volumes of imports in monetary terms are alcoholic and non-alcoholic beverages — with a constant share of 19–20% in the commodity group and 10–12% in the total structure of agricultural imports from EU countries.

The second place in the structure of imports of finished food products is occupied by various food products with a share of 16–18%. During 2018–2024, the import turnover of this group of products

increased by 1.7 times or by 1.1 billion US dollars.

During the war, imports of various food products increased by 10.6% and reached 400 million US dollars in 2024.

The share of plant products during the analyzed period averages 18—20% of total agricultural imports. In 2018—2024, the volumes of these imported types of products increased by 1.5 times (from 484 to 740 million US dollars), and during the war the corresponding growth was 12.3% or 81.3 million US dollars. Also imported from Europe to Ukraine are coffee, tea (165 million USD), seeds and oilseeds (162.6 million USD), fruits, nuts (139 million USD), vegetables (130 million USD).

Imports of animal products account for 16–18% of total agricultural imports. It should be noted that during the war, imports of such products decreased by 16.1% or 121.4 million USD. In the commodity structure the animal products, 50.4% are dairy products. The next place is occupied by fish and fish products — 20% (or 126 million USD). It has been established that during the war, imports of these products increased by 17.4% or 18.7 million USD. Accordingly, the share of the commodity group of fats and oils in total agricultural imports from EU countries is the smallest — 2.5% or 102.8 billion USD.

It was found that the share of imports of raw materials from EU countries is currently 37.1%, and the corresponding ratio has a value of 0.59. Thus, for every 1 US dollar of imports from European countries of processed agricultural products, there is 0.59 US dollars of imports of raw materials. It was determined that this indicator decreased by 11.1% compared to the pre-war year of 2021.

Unlike the raw material export orientation, finished processed products with high added value prevail in agricultural imports from EU countries. Over the analyzed period, the share of these products in agricultural imports increased from 59.7 to 62.9%.

A study of indicators of coverage of the commodity structure of agricultural imports from EU countries by relevant export flows revealed the following trend. The total coverage ratio of agricultural import flows by exports in 2024 was 3.23, which is 58.5% or 1.19 points higher than the pre-war level. The highest value of this indicator was in 2022 — 4.14. Thus, for 1 dollar of agricultural products imported from Europe, there are 3.23 dollars of exports (Table 6).

The highest level of import independence was established for the commodity group of fats and oils — 33.82, and during the war this indicator

increased by 23.1%. The level of import security of the group of plant products is 9.15. This indicator reached its maximum value in 2022, and during the war it increased by 57.1% — from 5.83 to 9.15 points.

The indicator of import independence of animal products before the war generally had a negative (less than 1) value. During 2021–2024, this indicator increased 2.2 times and reached the level of 1.15 — for 1 dollar of imports of unprocessed animal products, respectively, there are 1.15 dollars of domestic exports.

For the commodity group of processed agricultural products, a trend of import dependence was identified, which slightly decreased during the war — by 65.5% or by 0.31 points. Currently, for every \$1 of finished goods imported from Europe, domestic entrepreneurs export \$0.79 of Ukrainian products with high added value (before the war, this figure was 0.48).

CONCLUSIONS AND PROSPECTS FOR FURTHER RESEARCH

The problem of finding ways to reorient the raw material orientation of the agricultural sector of the Ukrainian economy towards ensuring the processing of raw materials and creating products with high added value was particularly acute during the full-scale war. Only the search for channels, logistical routes for exporting and new sales markets for grown agricultural products is not a solution for the effective development of domestic agricultural entrepreneurship.

It should be noted that the EU is increasingly becoming a key export partner of our country. That is why it is so important to adapt Ukrainian production to EU standards, which will allow not only to increase the volume of exports, but also to optimize its structures in terms of reducing the raw material orientation and increasing the cost of Ukrainian products. Unfortunately, today the majority of agricultural products do not meet the established standards. Because of this, Ukrainian agricultural business entities sell it at prices lower than European ones — as a result, the country's budget does not receive a significant part of the income, and the efficiency of agricultural business entities decreases. Prospects for further research include substantiating the prospects for the development and integration of agricultural business to the European market on the basis of increasing added value and reducing the raw material load.

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Стаття надійшла до редакції 27.07.2025 р.