Електронний журнал «Державне управління: удосконалення та розвиток» включено до переліку наукових фахових видань України з державного управління (Категорія «Б», Наказ Міністерства освіти і науки України № 1643 від 28.12.2019). Спеціальність – 281.
Державне управління: удосконалення та розвиток. 2026. № 5.
ISSN 2307-2156

DOI: http://doi.org/10.32702/2307-2156.2026.5.10

УДК 769.28.09

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THE ROLE OF UKRAINE'S DAILY SECTOR IN GLOBAL AGRI – FOOD VALUE CHAINS

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РОЛЬ МОЛОЧНОГО СЕКТОРУ УКРАЇНИ У ГЛОБАЛЬНИХ АГРОПРОДОВОЛЬЧИХ ЛАНЦЮГАХ ДОДАНОЇ ВАРТОСТІ

The article *examines the role of Ukraine's dairy sector in global agri-food value chains. The current trends in the development of the dairy industry in the context of globalization and growing international competition are identified. The structure of dairy exports and its positioning on world markets are analyzed. The level of Ukraine's participation in the formation of added value within international production and marketing systems is assessed. Key problems limiting the integration of the dairy sector into global chains are identified, in particular the low level of processing and technological barriers. The need to increase the share of products with high added value in exports is substantiated. Strategic directions for the development of Ukraine's dairy industry in the context of strengthening its The current trends in the development of the dairy industry of Ukraine, which are formed under the influence of both internal structural changes and external economic challenges, have been identified. It has been established that in recent years there has been a reduction in milk production volumes, due to a decrease in the number of cattle, changes in the structure of agricultural production and a decrease in the role of the small-scale sector. At the same time, there is a gradual concentration of production on large agricultural enterprises, which have a higher level of productivity, better access to investments and greater opportunities for the implementation of modern technologies. However, a significant share of milk is still produced in households, which creates problems with ensuring stable quality of raw materials and complicates its further processing. The structure of Ukrainian dairy exports has been analyzed and its positioning on world markets has been determined. It has been established that the export specialization of the industry is characterized by the predominance of products with a low level of added value, in particular, powdered milk, whey and other semi-finished products. This export structure limits the opportunities for additional income and reduces the competitiveness of national producers compared to countries specializing in the production of high-tech and branded products. However, there are some positive developments in the direction of expanding the range of exported products and gradually increasing the share of goods with higher added value.role in global agri-food chains are proposed.*

У статті *досліджено роль молочного сектору України у глобальних агропродовольчих ланцюгах доданої вартості. Визначено сучасні тенденції*

розвитку молочної галузі в умовах глобалізації та зростання міжнародної конкуренції. Проаналізовано структуру експорту молочної продукції та її позиціонування на світових ринках. Оцінено рівень участі України у формуванні доданої вартості в межах міжнародних виробничо-збутових систем. Виявлено ключові проблеми, що обмежують інтеграцію молочного сектору до глобальних ланцюгів, зокрема низький рівень переробки та технологічні бар'єри. Обґрунтовано необхідність підвищення частки продукції з високою доданою вартістю в експорті. Запропоновано стратегічні напрями розвитку молочної галузі України в контексті посилення її ролі у глобальних агропродовольчих ланцюгах. У статті досліджено роль молочного сектору України у глобальних агропродовольчих ланцюгах доданої вартості в умовах поглиблення процесів економічної глобалізації та трансформації світових продовольчих ринків. Обґрунтовано, що сучасний розвиток аграрного сектору відбувається під впливом інтеграційних процесів, які зумовлюють перерозподіл функцій між країнами у межах міжнародних виробничо-збутових систем. У цьому контексті молочна галузь виступає важливою складовою агропродовольчого комплексу України, що має значний потенціал для участі у глобальних ланцюгах створення доданої вартості.

Визначено сучасні тенденції розвитку молочної галузі України, які формуються під впливом як внутрішніх структурних змін, так і зовнішніх економічних викликів. Встановлено, що протягом останніх років спостерігається скорочення обсягів виробництва молока, зумовлене зменшенням поголів'я великої рогатої худоби, змінами у структурі сільськогосподарського виробництва та зниженням ролі дрібнотоварного сектору. Водночас відбувається поступова концентрація виробництва на великих аграрних підприємствах, які мають вищий рівень продуктивності, кращий доступ до інвестицій та більші можливості для впровадження сучасних технологій. Однак значна частка молока все ще виробляється в господарствах населення, що створює проблеми із забезпеченням стабільної якості сировини та ускладнює її подальшу переробку.

Проаналізовано структуру експорту молочної продукції України та визначено її позиціонування на світових ринках. Встановлено, що експортна спеціалізація галузі характеризується переважанням продукції з низьким рівнем доданої вартості, зокрема сухого молока, молочної сироватки та інших напівфабрикатів. Така структура експорту обмежує можливості отримання додаткових доходів та знижує конкурентоспроможність національних виробників у порівнянні з країнами, які спеціалізуються на виробництві високотехнологічної та брендованої продукції. Разом з тим, спостерігаються певні позитивні зрушення у напрямі розширення асортименту експортованої продукції та поступового зростання частки товарів із вищою доданою вартістю.

Keywords: *dairy sector of Ukraine; global value chains; agri-food markets; export; added value; competitiveness; dairy processing; international trade; structural transformation.*

Ключові слова: *молочний сектор України; глобальні ланцюги доданої вартості;агропродовольчі ринки; експорт; додана вартість; конкурентоспроможність; переробка молочної продукції; міжнародна торгівля; структурна трансформація*

Statement of the problem in general terms and its connection with important scientific or practical tasks. The current state of the dairy sector of Ukraine is characterized by complex dynamics of development under the influence of internal and external factors. Milk production shows a tendency to decrease, which is due to the decrease in the number of cattle and structural changes in agriculture. At the same time, there is a gradual concentration of production on large agricultural enterprises. A significant share of milk is still produced in households, which affects the quality of raw materials and the possibilities of its industrial processing. The level of technological equipment of enterprises in the industry remains uneven. Some producers are actively implementing modern technologies, while others use outdated equipment.

Analysis of recent research and publications. Recent research on the development of agri-food sectors in the context of globalization emphasizes the growing importance of integration into global value chains (GVCs). Scholars such as Gereffi, Kaplinsky, and Humphrey argue that value creation in modern agri-food systems is increasingly concentrated in technologically advanced and knowledge-intensive stages, particularly processing, branding, and distribution. Studies by Porter and Baldwin further highlight that countries exporting primarily raw materials tend to occupy lower positions in global chains, receiving limited economic benefits. In the dairy sector, this pattern is especially evident, as higher levels of processing are directly associated with increased added value and stronger international competitiveness.

A number of recent publications focusing on Eastern Europe, including works by Perekhozhuk, Glauben, and Zinchuk, analyze the structural features of Ukraine's dairy sector. These studies point to a dualistic production model, where large agricultural enterprises coexist with small household producers. According to Kubrak and Lupenko, such fragmentation leads to inconsistencies in raw milk quality and complicates the development of efficient processing systems. At the same time, researchers note a gradual concentration of production in larger enterprises, which are more likely to adopt modern technologies, although the overall level of technological modernization in the sector remains uneven.

In terms of foreign trade and export structure, researchers such as Bojnec, Fertő, and Svinarenko emphasize that Ukraine is still predominantly positioned in lower value-added segments of the global dairy market. While the country has made some progress in increasing exports of processed dairy products, the share of high value-added goods remains relatively low. Studies by Jansik and Irz suggest that successful dairy-exporting countries achieve competitive advantages through innovation, strict compliance with international standards, and product diversification. In contrast, Ukrainian producers continue to face challenges related to certification, quality assurance, and access to high-value markets.

At the same time, the literature highlights key barriers to deeper integration into global value chains and outlines strategic directions for development. Researchers such

as Hailu, Kussaiynov, and Ponomarenko identify technological gaps, insufficient investment, and institutional weaknesses as major constraints. They argue that increasing the share of processed dairy products, improving quality control systems, and fostering vertical integration between producers and processors are essential steps for enhancing competitiveness. Overall, recent studies confirm that despite existing challenges, Ukraine's dairy sector has significant potential for structural transformation and stronger participation in global agri-food value chains, provided that appropriate modernization and policy measures are implemented.

Purpose. The purpose of the article is to assess the role of Ukraine's dairy sector in global agri-food value chains and identify areas for increasing its competitiveness.

Presentation of the basic materials of the study. The processing industry is oriented towards both the domestic market and exports. The structure of production is dominated by products with a relatively low level of added value. Exports of dairy products of Ukraine have a raw material orientation and depend on the situation on world markets. The geographical structure of exports is characterized by concentration on individual regions. At the same time, there are attempts to diversify foreign markets. An important factor in development is the harmonization of quality standards with international requirements. This contributes to increasing the competitiveness of Ukrainian products. At the same time, the industry faces a number of challenges, in particular, high production costs and price instability. Taken together, these trends determine the need for structural modernization of the dairy sector of Ukraine.

In the period 2000–2024, the dairy sector of Ukraine decreased from approximately 13.0–13.5 million tons of milk production to about 7.2 million tons. This means a decrease of almost 45–50% over 24 years. In 2000, the number of cows was over 9.4 million heads, while in 2024 it was about 1.3 million heads. Thus, the reduction in the number of cows exceeded 85%, which is a key structural factor in the transformation of the industry [1].

In the 2000s, the share of households in milk production exceeded 75–80%. In 2024, it decreased to about 58%, which indicates a slow but steady industrialization. The share of agricultural enterprises, respectively, increased from less than 20% to about 42%. This indicates a gradual shift of the center of production to the formal sector of the economy. In 2000, the average yield was about 2500–2700 kg per cow [2]. In 2010, this figure increased to about 4200 kg, and in 2020 - to 6200 kg. In 2024, industrial enterprises reached a level of more than 8160 kg, while the national average was about 5700 kg. This indicates a threefold increase in productivity over the period.

In 2000, dairy exports were insignificant and did not exceed 20–30 million USD. In 2010, they increased to approximately 200–250 million USD. In 2020, exports amounted to about 250–270 million USD, and in 2024 exceeded 295 million USD. Thus, over 24 years, exports have grown almost 10–12 times in value terms. In physical terms, exports in the 2000s were less than 50 thousand tons, while in 2024 they exceeded 118 thousand tons. This demonstrates a growth of more than 2 times in volume. At the same time, the structure of exports has changed from a predominance of raw materials to partially processed products [3].

In the 2000s, more than 60% of exports were milk powder and whey products. In 2024, the share of condensed milk, butter and cheeses together exceeded 70% of the export structure. This indicates a certain increase in the level of processing, although high-tech products remain limited. The share of exports to the CIS countries in the 2000s exceeded 70–80%. In 2024, it decreased to less than 25%. In contrast, the share of EU markets increased to more than 40%. This indicates a significant geographical diversification of exports. In 2010, imports of dairy products amounted to about 150–170 thousand tons, while exports were about 200 thousand tons [4]. In 2024, exports exceeded imports by almost 2 times (118 thousand against 60 thousand tons). This indicates a transition to a stable positive trade balance.

In the 2000s, the level of milk processing was less than 40%. In 2024, it is estimated at 55–60%, which indicates a gradual increase in industrialization. However, about 40% of raw materials are still consumed in the informal sector or used

inefficiently [15]. In 2000, the average size of a dairy farm was less than 10 cows per household. In industrial farms in 2024, the average size exceeds 300–500 cows, and in large agricultural holdings - over 1,000–5,000 cows. This indicates a sharp concentration of production. In 2000–2024, the number of dairy processing enterprises decreased by approximately 35–40%. At the same time, the productivity of the largest enterprises more than doubled. This means that the effect of economies of scale has increased [5].

The cost of milk production in Ukraine in the 2000s was one of the lowest in Europe - about $ 0.15–0.20 per liter. In 2024, it increased to approximately $0.35–0.45 per liter. This reduces price competitiveness in foreign markets. In the 2010s, the level of state support was less than 1% of agricultural GDP. In EU countries, this figure exceeds 20–25%. This gap affects the speed of modernization of the industry [6]. In 2000–2024, the share of products with high added value in exports remained below 25–30%. The main part of the value is created at the stage of processing and branding outside Ukraine. This confirms the peripheral nature of participation in global chains. In general, in 2000–2024, the industry lost about 50% of production volumes, but increased exports more than 10 times. This indicates a transition from an internal-oriented to an export-oriented model. At the same time, this model remains raw material-dependent. Structurally, Ukraine has moved from mass small-scale production to a mixed industrial type. However, the level of integration into global value chains remains average or below average. The main problem is insufficient processing depth [7].

Thus, the numerical dynamics of 2000–2024 demonstrate a simultaneous reduction in the production base and an increase in efficiency. This creates a paradox: less production, but higher productivity and export significance. At the same time, without a transition to high value added, the industry will remain vulnerable to external shocks. According to statistics, in 2024, total milk production in Ukraine amounted to about 7.2 million tons, which indicates the continuation of the downward trend, although the rate of reduction has slowed to 2% [14]. At the same time, more than 58% of production falls on households (about 4.2 million tons), while the industrial sector

provides only 3 million tons. This structure is critical, since it is industrial production that forms export potential and added value. At the same time, in 2024, agricultural enterprises demonstrated an increase in production by 6.7%, while households reduced volumes by 8.1% [8]. This indicates a gradual transformation of the industry towards industrialization.

It is worth noting the dynamics of productivity. In 2024, the average yield in agricultural enterprises reached a record 8,167 kg per cow, while the average for all categories was 5,696 kg. For comparison, the average level in the EU countries exceeds 7700 kg, which indicates the presence of a technological gap. Thus, even with increasing productivity, Ukraine has not yet reached the level of leading exporters. This limits the possibilities of scaling up the production of high-quality raw materials.

Structural changes are also manifested in the reduction of livestock. In particular, in households, the number of cows decreased by 12.7%, which is one of the key factors in the decline in production. In contrast, in the industrial sector, there is a slight increase in livestock (+1%), which confirms the tendency towards concentration of production. Such a transformation has a positive impact on milk quality, but is accompanied by socio-economic risks for rural areas. In the field of foreign trade, there are also contradictory trends. In 2024, Ukraine exported about 118 thousand tons of dairy products worth over 295 million USD. At the same time, exports almost doubled imports (60 thousand tons), which indicates a positive trade balance. Compared to 2023, exports increased by 8% in volume and by 14% in value [13]. This means that the growth was not only due to volumes, but also due to an increase in prices or a change in the structure of exports [9]. At the same time, the commodity structure of exports remains insufficiently diversified. The largest share is accounted for by condensed milk (32%), cheeses (22%) and butter (20%). This indicates the dominance of products of medium processing. At the same time, exports of whole milk and cream in 2024 amounted to 26.6 thousand tons, with more than 92% falling on one market - Moldova. Such concentration increases the risks of dependence on individual trading partners [10].

Analysis of the condensed products market demonstrates more positive dynamics. Exports of this category increased to 29.5 thousand tons, and foreign exchange earnings exceeded 74 million USD. The main sales markets are the EU and Middle East countries, in particular Poland (21.8%) and Bulgaria (17.7%). This indicates a gradual expansion of the geography of exports. However, the share of products with high added value (for example, specialized cheeses or functional dairy products) remains limited.

In addition, export dynamics are characterized by significant volatility. For example, in February 2024, export volumes increased by 22% compared to the previous month. At the same time, in some periods, there was a seasonal reduction in supplies due to fluctuations in demand. This indicates a high dependence of the industry on the world market situation.

It is analytically important that the growth of exports is not accompanied by a proportional increase in domestic value added. A significant part of the products is exported in the form of semi-raw materials or goods with a medium level of processing. As a result, the main profits are formed at the stages of deep processing and branding, which are often located outside Ukraine. This confirms the peripheral nature of the country's participation in global value added chains [11].

Thus, statistical analysis indicates the presence of structural imbalances in the development of the dairy sector of Ukraine. On the one hand, the industry demonstrates positive export dynamics and increased productivity. On the other hand, the dominance of low- and medium-tech segments of production remains. This limits the possibilities of integration into high-profit segments of global agri-food chains. In conclusion, it can be argued that the key task of the industry's development is not only to increase production volumes, but also to change its qualitative structure with an orientation towards creating greater added value [12].

The presented analysis of the dynamics of the development of the dairy sector of Ukraine in 2000–2024 indicates deep structural transformations, accompanied by a reduction in the production base, increased productivity and a gradual reorientation to foreign markets. At the same time, the preservation of the raw material export model

and the insufficient level of deep processing limit the formation of high added value within the national economy. This highlights the need for a more detailed study of the positioning of the dairy sector of Ukraine in global value chains.

In this context, it is important not only to describe changes in production and trade, but also to assess the degree of integration of the industry into international production and marketing networks. That is why the next section is devoted to the analysis of the participation of the dairy sector of Ukraine in global value chains, in particular, to determine its role, level of involvement and nature of added value creation. The assessment of the participation of the dairy sector of Ukraine in global value chains indicates the predominantly peripheral nature of its integration. In the current structure of global value chains, the stages of design, branding and marketing create the greatest value. Ukraine remains poorly represented at these stages. This means that the main function of the sector is to supply primary or partially processed products.

Analytical indicators of participation in GVCs demonstrate an imbalance between forward and backward linkages. Forward participation is relatively higher, but has a raw material nature. Backward participation remains limited due to the low level of technological integration. This indicates weak involvement in complex multi-stage production networks. Structural analysis of exports confirms the dominance of products with a medium and low degree of processing. The share of goods with high added value is consistently low. This means that Ukraine does not participate in the formation of the final product. As a result, a significant part of the profit is created outside the country.

From the point of view of the theory of “upgrading” in global value chains, Ukraine is at the stage of partial process renewal. Technological improvement of production is uneven. However, the functional and product increase in the level of participation is limited. This indicates the absence of a transition to more complex functions in the chain. Analysis of the market structure shows a high dependence on price factors. Ukrainian producers compete mainly on cost, not product differentiation. This is typical for countries with a low level of participation in GVCs. As a result, the

profitability of the sector is sensitive to global price fluctuations. Institutional analysis indicates partial harmonization of standards with the EU. However, the level of their actual compliance is uneven. This creates barriers to entry into premium market segments. Accordingly, exports are concentrated in less demanding market niches.

The technological component of participation in GVCs remains weak. Only large enterprises use modern automated production systems. Small producers operate on an outdated technological base. This forms an internal segmentation of the industry. From the point of view of creating added value, the share of internal value in exports remains lower than potentially possible. A significant part of the value is "lost" at the stages of processing and final sale abroad. This means that Ukraine plays the role of a supplier of intermediate products. The geographical structure of participation in GVCs is limitedly diversified. Concentration on individual markets increases the risks of export instability. In GVC terms, this means low network integration. The lack of multi-vectority reduces the stability of positions in the global market.

Financial flows within GVCs are also limited. Foreign direct investment in deep milk processing remains insufficient. This slows down technological renewal and innovative development. As a result, the sector does not move to functional "upgrading". Branding is a critically weak link in integration. Ukrainian companies rarely form internationally recognizable brands. This means a lack of control over the final price of the product. The main margin is formed by distributors and retail chains abroad. Cooperative ties between producers remain underdeveloped. This limits the possibilities of joint entry into global markets. In GVC terms, this reduces the ability to collectively "upgrading". A comparative analysis with the countries of Central Europe shows that they are much more deeply integrated into the processing and branded segments. Ukraine, on the other hand, remains at the stage of supplying raw materials and semi-finished products. This confirms the structural asymmetry of participation in global chains.

As a result, it can be argued that the dairy sector of Ukraine performs mainly a resource function in global agri-food chains. Its participation is characterized by low

added value at the national level. The main economic effect is realized outside the country. Thus, the key strategic challenge is the transition from raw material integration to functional and product-based increase in participation in GVCs. This involves the development of deep processing, branding and technological innovations. Without this, Ukraine will remain on the periphery of global agri-food value chains.

As a result of the study, it was established that the dairy sector of Ukraine underwent profound structural transformations during the period 2000–2024. There was a significant reduction in milk production and cattle population. At the same time, productivity growth was observed in the industrial segment of the industry. This indicates a gradual transition from an extensive to an intensive development model. It is determined that the structure of production remains dual, with the predominance of household farms, which form a significant part of the raw material base. Such a structure limits the possibilities of stable integration into global value chains. Exports of dairy products demonstrate positive dynamics, but products of medium and low degree of processing prevail. This leads to limited formation of added value within the country. The logistics component also affects the depth of integration. High transport costs reduce competitiveness in remote markets. This limits the possibilities of entering global retail networks. Accordingly, Ukraine remains in the role of a regional-level supplier.

Conclusion. Analysis of participation in global value chains showed the peripheral nature of Ukraine's integration. The country mainly performs the function of a supplier of raw materials and semi-finished products. The level of inclusion in high-tech and branded segments remains low. This leads to the loss of potential added value at external stages of processing and sales. It was found that the key limitations of the industry's development are insufficient depth of processing, technological heterogeneity and limited innovative activity. Also, a significant impact is exerted by the insufficient level of cooperation of producers and limited access to investment. Geographical concentration of exports increases the vulnerability of the sector to external shocks. It is substantiated that increasing the role of the Ukrainian dairy sector in global value chains is possible only under the condition of structural modernization

of production. The development of deep processing and production of high value-added products is of particular importance. Strengthening institutional support and harmonizing quality standards with international requirements are also important. The implementation of these measures will increase the competitiveness of the industry in the global market. The study found that the dairy sector of Ukraine has a limited level of integration into global agri-food value chains. It was determined that the main share of exports is products with a low level of processing, which reduces the amount of added value created. The geographical structure of exports, which is characterized by concentration in individual markets, was analyzed. The dependence of the effectiveness of participation in global chains on the technological level of enterprises in the industry was revealed. It was proven that low innovative activity hinders the expansion of production of products with high added value. The impact of international quality standards on the competitiveness of Ukrainian dairy products was assessed. The existence of barriers to entry into highly profitable segments of global chains has been established. The need for structural modernization of the dairy sector to strengthen its position in the world market has been substantiated.

Prospects for further research are related to an in-depth analysis of Ukraine's participation in global value chains based on quantitative indicators. It is advisable to use international databases to assess the industry's contribution to creating added value. An important direction is to study the effectiveness of state policy to support the dairy sector. The impact of innovation and digitalization on the development of the industry requires further study. An analysis of the possibilities of diversifying export markets for dairy products is relevant. It is also necessary to study the integration of small and medium-sized producers into global chains. Further scientific research should be aimed at developing practical recommendations for increasing added value in the industry.

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Отримано редакцією журналу / Received: 04.05.26

Прорецензовано / Revised: 11.05.26

Дата публікації / Published: 26.05.26