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Vectors of Development of Basic Economic Activities in Ukraine in Conditions of Full-Scale War

Abstract. Russia's full-scale armed aggression has caused significant destruction and loss of assets of Ukrainian enterprises, especially industrial, agricultural and commercial ones. The shift in the vectors of business activity in the real sector under the influence of the great war resulted in significant transformations of the structure of the national economy and social processes. The purpose of the article is to assess the dynamics and results of the basic economic activities in Ukraine and to outline the prospects for their further development. In this context, the author analyzes the current trends in production and sales, labor productivity and efficiency in the industrial, agricultural and trade sectors of the national economy, in comparison with the losses incurred by these sectors in the context of a full-scale war. It is established that despite the generally positive trends in the production of the most crops, the efficiency of agriculture in Ukraine has significantly decreased due to the reduction of the added value of agricultural enterprises. The author emphasizes the positive transformation of the structure of industrial and, in particular, metallurgical production, as well as Ukraine's retention of high positions in the world ranking of the latter, despite the irreversible loss of production capacity in this industry segment. The changes in the export potential of the domestic processing industry are analyzed by production. The dynamic development of trade in Ukraine is diagnosed, which invariably occupies the largest share in the structure of sold products of economic entities by type of economic activity, and also demonstrates the highest indicators of value added, wages and the number of employees in the equivalent of full-time employment. The article reveals the predominance of the index of physical volume of retail trade turnover of retail trade enterprises (legal entities) over the index of physical volume of wholesale trade turnover, which was the result of the active development of retail and online sales. The prospects for the recovery and further development of the industry in Ukraine are outlined.

Keywords: economy, losses, industry, agriculture, trade, development

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1. The Problem Statement

Russia's full-scale armed aggression against Ukraine has dramatically changed the architecture of the global geopolitical space. This war has significantly transformed socio-economic processes and the social relations, shifted development vectors and poles of business activity. Some of these structural and spatial transformations are temporary and will gradually weaken in the course of the post-war reconstruction of the Ukrainian economy, while others will, on the contrary, significantly intensify. The war has caused significant destruction (in some regions, catastrophic) of energy facilities, industrial and social infrastructure, and assets of enterprises in various types of economic activity (TEA), the most notably the main ones, i.e. industry, agriculture and trade. However, with effective public management, sound strategic development priorities, and rational recovery criteria (national security and technological self-sufficiency), Ukraine has every chance to regain and increase its human, industrial, and scientific potential, becoming one of the economic and political leaders in Europe.

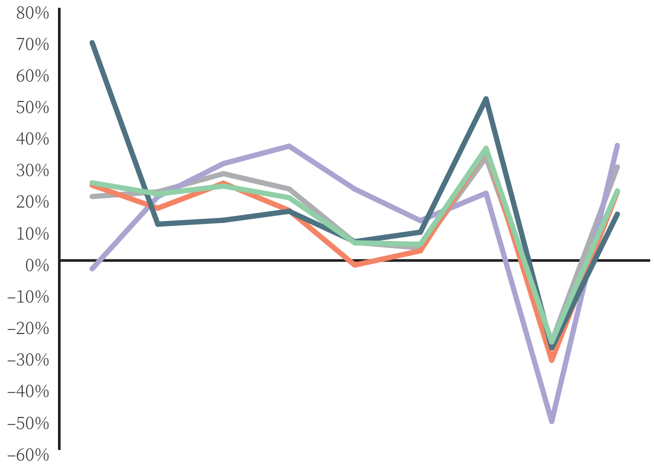
2. The Analysis of Research and Publications

The urgent issues of functioning of the Ukrainian economy in the context of a full-scale war and the prospects for its further recovery and development are a key topic of research by many domestic scholars, in particular, representatives of the National Academy of Sciences of Ukraine. Thus, a conceptual and practical plan for the reconstructive postwar recovery of the Ukrainian economy is presented in NAN Ukrainy (2022). The issues of state support for the post-war development of priority industries that are of strategic importance for the sustainable development of the economy and the defense capability of the state are discussed in Lunina, Bilousova & Nazukova (2023). The possibilities of post-war restoration of the scientific, technical and innovation spheres of Ukraine in the context of stimulating economic development and ensuring progressive structural changes in the economy, as well as directions for improving approaches to assessing the effectiveness of innovation activities are considered in Yehorov & Kindzerskyy (2023). In Kisterskyi (2023), the main strategic principles of post-war reconstruction of Ukraine are identified and analyzed. The author substantiates the need to create a specific recovery program agreed with donor countries that will allow Ukraine not only to rebuild on European principles but also to gain membership in Euro-Atlantic structures. The author outlines the contours of such a program and ways to implement it. In Ishchuk (2023), the author analyzes the transformation of the structure of the gross domestic product (GDP) of Ukraine, which occurred under the influence of full-scale armed aggression by the Russian Federation. The changes in the performance indicators of the construction and transportation sectors of the national economy in the regional context are diagnosed. The vectors are identified and the magnitude of changes in the dynamics of Ukraine's foreign economic operations, which led to a decrease in the coefficient of merchandise exports to imports, is calculated.

The purpose of the article is to assess the dynamics and results of the functioning of the basic types of economic activity in Ukraine and to outline the prospects for their further development.

3. The Results of the Study

The basic economic activities (BEAs) in Ukraine traditionally include industry, agriculture and trade. In 2021, these sectors of the national economy accounted for a total of 44.89% of GDP. However, under the influence of a full-scale war, the structure of Ukraine's GDP (in actual prices) has changed, in particular, in the direction of a significant (3.6-fold) increase in the share of public administration — up to



	2015/2014	2016/2015	2017/2016	2018/2017	2019/2018	2020/2019	2021/2020	2022/2021	2023/2022
Total	24.6	21.1	23.6	19.9	5.6	5.1	35.5	−25.8	22.1
Agriculture	69.0	11.5	12.7	15.6	6.0	9.0	51.2	−27.7	14.7
Manufacturing	23.8	16.6	24.5	15.9	−1.5	3.1	35.5	−31.6	21.7
Construction	−2.6	20.2	30.7	36.3	22.6	12.6	21.3	−51.0	36.4
Wholesale and retail trade	20.3	21.7	27.5	22.6	5.7	4.0	32.6	−25.7	29.6

Fig. 1. The growth rate of sold products in Ukraine, %
Source: Calculated according to SSSU (2024a)

22.15% in 2023. The value of services provided by these sectors (in actual prices) increased by 4.3 in times compared to 2021 and amounted to 144,8051 mill. UAH in 2023, which is 1.75 in times higher than the GDP generated in wholesale and retail trade, which was the leader in terms of this indicator before the war (Ishchuk, 2023). However, even despite this transformation of the national economy, the total share of basic TEA's in the structure of Ukraine's GDP in 2023 amounted to 37.31%, which indicates a gradual recovery of their production potential.

In 2023, the growth in the volume of products sold in Ukraine amounted to 23.32% (Fig. 1).

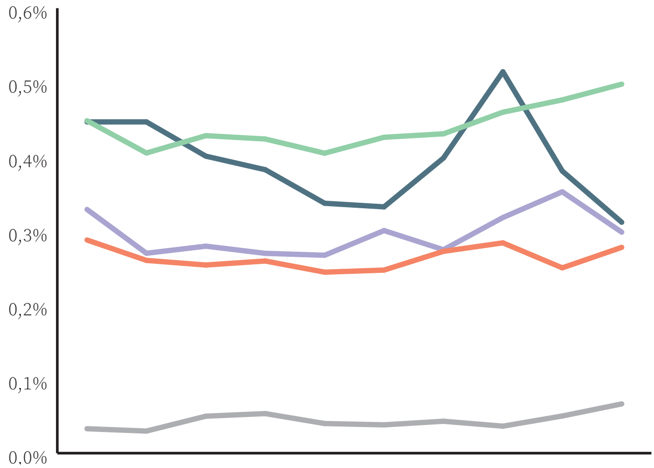
In value terms, the volume of sales in actual prices amounted to 90.56% of the value of 2021, in which the highest growth rate of sales in the national economy as a whole (+35.5%) and especially in agriculture, forestry and fisheries (+51.18%) was achieved for the analyzed period (since 2014). However, by the end of 2023, the volume of sales of this TEA amounted to only 82.95% of the pre-war level, which was the result of significant losses caused by Russian armed aggression.

As of 01.07.2024, the indirect financial losses of Ukrainian agriculture are estimated at 83 bill. USD (KSE, 2024). The largest share of these losses (46.5 bill. USD) is due to the reduction in crop production, which accounts for more than 80% of the structure of domestic agricultural production. In addition, the amount of direct losses from the loss of assets, in particular, the destruction of the Kakhovka dam, partial or complete destruction of storage facilities, fisheries and aquaculture, perennial crops, forced slaughter of livestock, as well as the destruction and theft of production resources and products is estimated at 10.3 bill. USD

In 2022–2023, Ukraine saw a decrease in the total area under crops by 20.2%. In particular, the area under cereals and legumes decreased by 31.3%, sunflower –21.2%, vegetables by 13.7%, potatoes — 5.7% and the area under fruit and berry crops decreased by 13.8%. At the same time, the area under sugar beet increased by 10.1% (Ishchuk & Lyakhovska, 2024). The dynamics of sown areas correlated with the volumes of production (gross harvest) of agricultural crops in physical terms, which in 2023 amounted to: cereals and legumes — 59772 thousand tons (−30.5% compared to 2021, in particular, wheat −32.74%), sugar beet — 13130 thousand tons (+21%), sunflower — 12760 thousand tons (−22.2%), potatoes — 21359 thousand tons (at the level of 2021), vegetables — 8297 thousand tons (−16.5%), fruit and berry crops — 1996 thousand tons (−10.7%).

In 2024, the acreage of certain crops increased, the most notably soybeans (+44.2%), which ranks third after corn and wheat among the exported products of Ukrainian agriculture. Thus, at the end of 2023, the share of soybeans in Ukraine's agricultural exports (which includes I, II, III and IV commodity groups) amounted to 5.8% (compared to 2.2% in 2021), corn — 22.6% (compared to 21.3%), and wheat –13.4% (compared to 18.3%). The company sold 74% of the soybean harvest, 85% of corn, and more than 70% of wheat abroad. Also, the volume of wheat produced increased slightly (+4%), while the sown area increased by 4.9%. Given the high export orientation of these crops, there are reasons to believe that the volume of domestic agricultural exports will remain high.

Despite the generally positive trends in the production of most crops, the efficiency of agriculture, forestry, and fisheries in Ukraine as a type of economic activity has significantly decreased since the beginning of the full-scale war. For example, the share of value added in terms of production costs in the volume of output of this economic activity decreased by 1.65 in times in 2022–2023 (Fig. 2).



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	0.45	0.40	0.43	0.42	0.40	0.43	0.43	0.46	0.48	0.50
Agriculture	0.45	0.45	0.40	0.45	0.38	0.34	0.33	0.40	0.38	0.31
Manufacturing	0.29	0.26	0.25	0.26	0.24	0.25	0.27	0.28	0.25	0.28
Construction	0.33	0.27	0.28	0.27	0.27	0.30	0.27	0.32	0.35	0.30
Wholesale and retail trade	0.03	0.03	0.05	0.05	0.04	0.04	0.04	0.04	0.05	0.07

Fig. 2. The share of value added in the volume of output in Ukraine, fractions of a unit
Source: Calculated according to SSSU (2024b, 2024c)

The negative dynamics of this indicator was caused by a 2.3-fold decrease in the volume of value added over the decrease in production in agriculture, forestry, and fisheries (–53.28% vs. –22.83%) during the analyzed period.

Instead, the active recovery of industrial production in Ukraine is evidenced by the return of the share of value added in the volume of manufacturing output to the level of 2021 (28%). At the same time, the fact that the war and its direct and indirect consequences are dramatically changing the domestic industry is illustrated by the current indicators of industrial production dynamics. Thus, after a significant decline in 2022 (−21.7%), the volume of industrial products sold in Ukraine in 2023 reached an increase of 16.5%, which, however, slowed down somewhat and amounted to 9.7% in the first half of 2024 (SSSU, 2024a). The highest growth rates in the sales in 2023 and 2024 were demonstrated by the manufacturing industry (+21.6% and +16.8%, respectively) and the highest — by the production of finished metal products, except for machinery and equipment (+64.5% and +57.9%). The result of this dynamics was a very positive transformation of the structure of metallurgical production towards an almost 3-fold increase in the share of finished metal products: from 10.25% in 2021 to 30.05% in the first half of 2024. The vast majority of these products, including bunkers, armor protection for vehicles, mine trawls, bulletproof vests, etc. are an integral part of the country's defense system.

The metallurgical production suffered the biggest drop as a result of the full-scale war. In particular, a 60.2% decline in the volume of steel products sold in 2022–2023 led to a more than twofold decrease in the share of this basic segment in the structure of Ukraine's industry: from 16.0% in 2021 to 7.0% in 2023. However, despite the irreversible loss of production capacity, Ukraine retained its 20th position in the World steel global steel producer ranking. In January-October 2024, the domestic enterprises produced 6.49 mill. tons of steel, up to 25.7% year-on-year. Ukraine also remained in 13th position among 40 countries in terms of pig iron production with a result of 5.36 mill. tons in 10 months of 2024 (+21.9%) (Ukrmetprom, 2024). At the same time, rolled metal production increased by 20.6% to 5.3 mill. tons during this period.

The steel industry has traditionally been the most export-oriented segment of the national economy: in 2021, the share of steel products sold outside Ukraine in total sales of these products was 63.2%. Accordingly, the decline in exports of metallurgical products in 2022–2023 by a total of 73.6% (with a decrease in total sales by 60.2%) led to a decrease in the level of export orientation of metallurgical production by 21.2 percentage points (pp.) to 42.0%. However, the resumption of exports of metallurgical products in 2024 (+22.9% in the first half of the year compared to the same period in 2023) due to the availability of sea transportation increased the value of this indicator to 47.8% (SSSU, 2024a).

In general, in 2022–2023, the volume of industrial products sold outside Ukraine decreased by 46.2%, including 42.2% for manufacturing products. At the same time, the export orientation of the industry, i.e. the share of products sold outside the country in total sales, decreased by 11.7 pp. (to 16.7%) over the period. In the first half of 2024, these indicators improved slightly. Thus, a 26.7%

increase in the volume of industrial products sold outside Ukraine (with a 9.7% increase in total sales) increased the level of export orientation of this sector of the national economy to 20.6%.

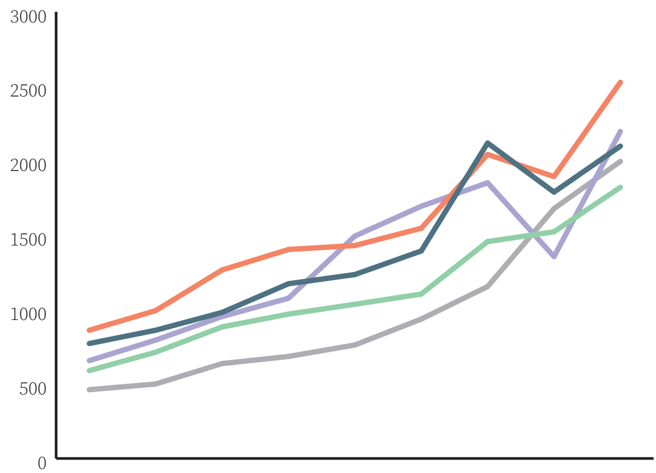
The most export-oriented segments of the Ukrainian industry were furniture production (in 2024, 61.7% of its products were sold outside the country) and the production of motor vehicles, trailers and semi-trailers (54.7%), but their total share in total industrial sales is only 2.4%. Currently, the food industry has the greatest export potential, accounting for 23.9% of industrial sales in Ukraine in the first half of 2024 (compared to 18.9% in 2021) and demonstrating relatively high (+16.4%) growth rates in total sales and products sold abroad (+38.9%).

The gradual recovery of industrial processing in Ukraine was the result of the stabilization of a significant number of enterprises, the completion of relocation processes, the formation of new logistics links and the establishment of systematic production. This recovery is primarily driven by an increase in defense production. The constant growth of defense industry needs has stimulated the accelerated development of machine building, primarily the production of computers, electronic and optical products (+61.3% in the first half of 2024), the production of electrical equipment (+21.7%) and the production of the other vehicles (+36.3%). The latter includes the production of military vehicles. The result of this positive trend was an increase in the total share of machine-building production in the structure of sales to 7.1% in 2024 (up from 5.7% in 2021).

In general, in the structure of sales of business entities by TEA in Ukraine, the largest share (~40%) is invariably occupied by such TEA's as wholesale and retail trade, repair of motor vehicles and motorcycles. As a result of the full-scale war, indirect financial losses of domestic trade amounted to almost 525 bill. USD (KSE, 2024). These losses are associated, in particular, with the outflow of a significant part of the population abroad, changes in the volume and structure of consumption, and disruption of supply chains. However, despite the enormous losses, in 2023, the volume of sales of this type of export-import activity increased by 30%. At the same time, the index of physical volume of wholesale trade turnover amounted to 103.7%, the index of physical volume of retail trade turnover — 117.0% and the index of physical volume of retail trade turnover of retailers (legal entities) — 113.4%. Compared to 2021, the retail trade turnover in Ukraine increased by 28.5%, while the wholesale trade turnover of wholesale trade enterprises (legal entities) increased by only 0.14%.

In the first half of 2024, the index of physical volume of retail trade turnover averaged 115.4% and the index of physical volume of retail trade turnover of retailers (legal entities) was 119.6%. The higher dynamics of the latter index indicates, among the other things, the active development of retail in Ukraine. According to the Retailers Association of Ukraine (RAU), which includes 108 companies, as of September 2024, they operated 22,073 retail facilities in 8 main retail segments, which include, in particular, food and non-food retail, pharmacy, fashion, hardware and electronics stores, gas station chains, jewelry stores, and the building materials, household goods stores (RAU, 2024). The number of operating retail outlets (RAU members) in Ukraine continues to show a positive trend — in January-September 2024, their growth amounted to 1276 units.

E-commerce is also actively developing in Ukraine. Online sales increased by 41.1% in 2022–2023 and reached 182 bill. UAH. Their share in retail turnover in 2023 amounted to 9.8% (compared to 8.9% in 2021). In particular, in the first half of 2024, sales through mobile devices in Ukraine increased by 25%. Expanding the online sales network is an effective tool for preserving and developing domestic trade. During the war, a key factor in the stability of the latter was well-established logistics. The full-scale invasion of the aggressor country forced Ukrainian companies to reorient their supply chains to the domestic market and local suppliers, which helped avoid shortages of goods. On the other hand, this has stimulated the development of domestic production. According to the forecasts of the Inweb Digital Marketing Agency (InwebMedia, 2024), these positive trends will only intensify in 2025.



	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	590.18	713.76	883.43	969.62	1035.67	1104.09	1456.71	1522.48	1821.04
Agriculture	771.98	861.30	980.85	1173.36	1235.27	1393.51	2118.40	1788.91	2097.67
Manufacturing	861.16	992.86	1265.81	1403.42	1430.24	1546.00	2041.87	1893.31	2526.35
Construction	656.86	795.13	953.23	1076.17	1493.60	1693.69	1851.64	1355.77	2196.50
Wholesale and retail trade	461.88	500.24	637.30	685.06	762.08	935.98	1154.58	1677.93	1995.12

Fig. 3. The labor productivity in Ukraine, thousand UAH/person.
Source: Calculated according to SSSU (2024c, 2024d)

The 2.30-fold increase in value added in the trade in 2022–2023, with a 1.26-fold increase in output, is evidence of the high efficiency of this TEA, even in the context of a full-scale war (see Fig. 1). The prospects for further development of the trade sector in Ukraine are also evidenced by a 1.73-fold increase in labor productivity in this TEA compared to 2021 (Fig. 3). At the same time, the average monthly salary of full-time employees in the trade sector increased by 1.53 in times during this period.

4. The Conclusions

Operating in the unprecedentedly difficult geopolitical and socio-civilizational conditions in which Ukraine has been for more than 10 years and which have critically escalated after February 24, 2022, the national economy continues to develop. Two of its main export-oriented sectors (agriculture and metallurgy), which suffered huge losses as a result of Russia's full-scale invasion, are once again showing positive trends in production indicators.

Despite the enormous losses (direct and indirect), Ukraine's trade sector, especially retail, is actively developing. Consistently occupying the largest share (~40%) in the structure of sales of business entities, this economic activity demonstrates positive trends not only in terms of output, value added, and wages, but also in the number of employees in full-time equivalent. This is primarily due to the accelerated development of retail, as well as the growth of E-commerce.

The recovery of the industrial sector of Ukraine's economy is mainly driven by an increase in defense production. The steady growth of defense industry needs has stimulated the accelerated development of all segments of machine building, the most notably the production of computers, electronic and optical products, motor vehicles, trailers and semi-trailers, and the other vehicles. The latter includes the production of military vehicles. In turn, the opening of the Office of Defense Innovation in Kyiv laid the foundation for deeper strategic cooperation in research and development between Ukraine and the EU and will facilitate the gradual integration of the Ukrainian defense industry into the EU defense the technology and industrial base, as well as the EU defense equipment market. These facts create the basis for optimistic forecasts of structural transformation (in the medium and long term) of the industrial sector of the national economy towards an increase in the share of high-tech industries, especially machine building. This will allow Ukraine to restore and further increase its industrial and, in particular, defense potential on a new technological basis.

Despite significant military risks, Ukraine remains very attractive for foreign investment, especially in the defense sector. In the near future, it will be able to play the role of a regional production hub in Eastern Europe. Accordingly, the author's further research will be aimed at scientific substantiation of the priority (according to the criteria of socio-economic efficiency) directions of development of the domestic industry.

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Kierunki rozwoju podstawowych gałęzi gospodarki Ukrainy w warunkach wojny totalnej

Streszczenie. Pełnoskalowa agresja zbrojna Rosji spowodowała znaczne zniszczenia i straty majątkowe ukraińskich przedsiębiorstw, zwłaszcza przemysłowych, rolniczych i handlowych. Zmiana kierunków działalności gospodarczej w sektorze realnym pod wpływem wojny spowodowała znaczące przemiany w strukturze gospodarki narodowej i procesach społecznych. Celem artykułu jest ocena dynamiki i wyników podstawowych działań gospodarczych w Ukrainie oraz nakreślenie perspektyw ich dalszego rozwoju. W tym kontekście autorka analizuje aktualne trendy w produkcji i sprzedaży, wydajności pracy i efektywności w sektorach: przemysłowym, rolniczym i handlowym gospodarki narodowej w porównaniu ze stratami poniesionymi przez wskazane sektory w kontekście wojny na pełną skalę. Ustalono, że pomimo ogólnie pozytywnych trendów w produkcji większości upraw efektywność rolnictwa w Ukrainie znacznie spadła z powodu zmniejszenia wartości dodanej przedsiębiorstw rolniczych. Autorka podkreśla pozytywną transformację struktury produkcji przemysłowej, a w szczególności metalurgicznej, a także utrzymanie przez Ukrainę wysokich pozycji w światowym rankingu tej ostatniej, pomimo nieodwracalnej utraty zdolności produkcyjnych w tym segmencie przemysłu. Zmiany potencjału eksportowego krajowego przemysłu przetwórczego przeanalizowano według produkcji. Diagnozuje się dynamiczny rozwój handlu w Ukrainie, który niezmiennie ma największy udział w strukturze sprzedawanych produktów, a także wykazuje najwyższe wskaźniki: wartości dodanej, wynagrodzeń i liczby pracowników w przeliczeniu na pełne etaty. W artykule ujawniono przewagę wskaźnika fizycznej wielkości obrotów przedsiębiorstw handlu detalicznego (osób prawnych) nad wskaźnikiem fizycznej wielkości obrotów handlu hurtowego, co było wynikiem aktywnego rozwoju sprzedaży detalicznej i internetowej. Nakreślono perspektywy ożywienia i dalszego rozwoju przemysłu w Ukrainie.

Słowa kluczowe: gospodarka, straty, przemysł, rolnictwo, handel, rozwój