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Development of the Export Potential of Agricultural Products During the War: Structural Changes

Abstract. This study aims to investigate the structural changes in Ukraine's agricultural exports that occurred during the active phase of the war (2021–2024). Drawing on statistical data, the dynamics of agricultural export growth were analyzed, and export-oriented production sectors in Ukraine were identified. Changes in the structure of agricultural commodity exports were calculated. The findings indicate an increase in the share of certain agricultural products in Ukraine's export basket in recent years (in 2024, nearly half of Ukraine's total exports). An analysis of Ukraine's customs statistics was conducted to determine the changes in the geographical structure of selected agricultural exports in 2024 compared to 2021. The study concludes that, despite significant threats, risks, and the unstable political and economic situation in Ukraine, agriculture continues to develop actively and remains a key export-oriented sector of economic activity. Although structural shifts in agricultural exports occurred, they point to the continued growth of export potential in spite of the unstable political and economic climate.

Keywords: agricultural products, export, export orientation, export structure, geographical structure of exports

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1. Introduction

Following the outbreak of the full-scale war in Ukraine in 2022, significant transformations took place in both the domestic and external political and economic environment. Enterprises faced severe threats and risks in their operations: some industries were physically destroyed, others sustained substantial losses, and many businesses significantly reduced their efficiency. These changes negatively affected export development, resulting in a decline in export volumes, disruptions in logistics routes, deterioration of trade relations with certain countries, and increased transportation costs.

Agriculture is one of the key sectors of Ukraine's economy, accounting for a substantial share of the country's export potential. Accordingly, shifts in agricultural export trends may have a profound impact on shaping Ukraine's overall export capacity. It is therefore essential to determine the role of agricultural products in the country's commodity exports and to analyze the structural changes that have taken place in recent years.

2. Analysis of Researches and Publications

The export of agricultural products remains one of the most relevant topics in the current context, as agriculture continues to be Ukraine's most active export-oriented sector, despite the challenging economic conditions. For instance, several scholarly works are devoted to analyzing the current state of agricultural exports (Sozanskyy, 2025; Perehuda, 2023), as well as to enhancing the efficiency of agri-food exports (Havrylyuk, 2024) and supporting export potential under wartime conditions (Vovk & Voroblevs'kyy, 2024). These materials outline the general trends in the development of Ukraine's agricultural export potential in the present environment.

This study employs data from the State Statistics Service of Ukraine (SSSU, 2024) as well as from the State Customs Service of Ukraine (SCSU, 2024).

3. Research Results

Ukrainian agriculture remains an export-oriented sector of the economy. Despite the serious challenges faced by farmers at the onset of the full-scale war (logistical disruptions, physical threats, energy shortages, etc.), agricultural production continues to play a crucial role in the country's economic development. Notably,

exports of certain agricultural products not only returned to 2021 levels but even grew beyond them (Table 1).

Table 1. Growth rate of agricultural product exports, %

Dynamics	2022/2021	2023/2022	2024/2023	2024/2021
Total exports	-35.16	-18.02	15.34	-38.69
I. Live animals; products of animal origin	9.41	-7.38	20.56	22.18
01 Live animals	-5.01	-21.21	24.66	-6.70
02 Meat and edible offal	9.25	-3.41	17.99	24.51
03 Fish and crustaceans	-25.94	-43.84	96.81	-18.14
04 Dairy products, bird eggs, natural honey	19.45	-10.74	21.26	29.29
05 Other animal-origin products	-35.93	-11.95	26.33	-28.74
II. Products of plant origin	-13.29	-13.03	15.46	-12.94
06 Live trees and other plants	-39.05	-19.98	-5.98	-54.15
07 Vegetables	-47.78	10.58	42.83	-17.52
08 Edible fruits and nuts	-15.00	-17.98	40.81	-1.83
09 Coffee, tea	-30.99	2.40	77.48	25.43
10 Cereals	-26.21	-8.80	13.38	-23.70
11 Milling industry products	-6.00	12.91	-15.08	-9.86
12 Oilseeds and oleaginous fruits	54.31	-24.97	20.37	39.36
13 Natural shellac	-34.03	-8.10	-23.33	-53.52
14 Plant materials for manufacturing	83.17	35.91	-27.55	80.37
III. 15 Fats and oils of animal or vegetable origin	-15.47	-5.03	1.90	-18.20

Source: SSSU (2024)

The largest increase in exports in 2024 compared to 2021 was observed in the following categories: plant materials for manufacturing – 80.37%, oilseeds and oleaginous fruits – 39.36%, dairy products, bird eggs, and natural honey – 29.29%, coffee and tea – 25.43%, and meat and edible offal – 24.51%. Exports of other categories of agricultural products declined.

Overall, the data suggest a gradual recovery of Ukraine's agricultural export potential following the severe downturn of 2022, when exports of nearly all agricultural product categories fell sharply. This recovery was facilitated by the flexibility of exporters' management strategies and their rapid adaptation to changing market conditions. However, not all producers were able to achieve positive export growth.

See Table 2 that illustrates the changes in the share of agricultural products in total merchandise exports and highlights shifts in structural proportions. The most notable increases in 2024 compared to 2021 were recorded in oilseeds and oleaginous fruits (+4.55 percentage points), cereals (+4.43 p.p.), fats and oils of animal or vegetable origin (+3.46 p.p.), and meat and edible offal (+1.28 p.p.).

Table 2. Share of agricultural products in Ukraine's merchandise exports, %

Commodity code and product group (HS classification)	2021	2022	2023	2024	2024-2021 (Δ, p.p.)
Total exports	100.00	100.00	100.00	100.00	–
I. Live animals; products of animal origin	1.98	3.33	3.77	3.94	1.96
01 Live animals	0.06	0.09	0.08	0.09	0.03
02 Meat and edible offal	1.24	2.09	2.47	2.52	1.28
03 Fish and crustaceans	0.08	0.10	0.07	0.11	0.03
04 Dairy products, bird eggs, natural honey	0.56	1.02	1.12	1.17	0.62
05 Other products of animal origin	0.03	0.03	0.04	0.04	0.01
II. Products of plant origin	22.83	30.53	32.38	32.41	9.59
06 Live trees and other plants	0.01	0.01	0.01	0.01	0.00
07 Vegetables	0.29	0.23	0.31	0.39	0.10
08 Edible fruits and nuts	0.54	0.71	0.71	0.87	0.33
09 Coffee, tea	0.02	0.02	0.03	0.05	0.02
10 Cereals	18.13	20.64	22.96	22.57	4.43
11 Milling industry products	0.22	0.32	0.43	0.32	0.10
12 Oilseeds and oleaginous fruits	3.58	8.51	7.79	8.13	4.55
13 Natural shellac	0.01	0.01	0.01	0.00	0.00
14 Plant materials for manufacturing	0.03	0.08	0.13	0.08	0.05
III. Fats and oils of animal or vegetable origin	10.34	13.48	15.61	13.79	3.46
Total Sections I+II+III	35.15	47.34	51.76	50.14	14.99

Source: SSSU (2024)

The growth in the share of agricultural products in Ukraine's export structure was driven both by higher export volumes and by the relative decline of other export categories.

A closer examination of the export structure reveals that seven agricultural products accounted for the largest share: maize, sunflower/safflower/cottonseed oils, wheat, rapeseed, soybeans, poultry meat and edible offal, and barley. Collectively, these products represented 31.77% of total merchandise exports in 2021, rising to 44.67% in 2024 (Table 3). The leading positions in 2024 were maize (12.15%), sunflower/safflower/cottonseed oil (12.27%), and wheat (8.95%).

While the export growth rates of barley, wheat, and maize decreased in 2024 compared to 2021 (by -56.30%, -26.37%, and -13.92%, respectively), these commodities maintained a high share in total exports. The decline was primarily linked to disruptions in port operations caused by the war. Despite partial normalization of seaport activity in 2023–2024, ongoing security risks continue to hinder stable grain exports. Similarly, the export growth rate of sunflower oil declined (-19.82%), although its share in total exports increased.

Table 3. Agricultural exports: analysis of dominant positions

HS code and product group	Growth rate (2024/2021)	Share in structure, % 2021	Share in structure, % 2024	Δ, p.p.
207 Poultry meat and edible offal	34.38	1.05	2.31	+1.26
1001 Wheat	-26.37	7.45	8.95	+1.50
1003 Barley	-56.30	1.87	1.34	-0.53
1005 Maize	-13.92	8.65	12.15	+3.50
1201 Soybeans	121.66	0.89	3.22	+2.33
1205 Rapeseed	9.41	2.48	4.43	+1.95
1512 Sunflower, safflower or cottonseed oils	-19.82	9.38	12.27	+2.89
Total	-13.86	31.77	44.67	+12.90

Source: SCSU (2024)

By contrast, exports of poultry meat (+34.38%), soybeans (+121.66%), and rapeseed (+9.41%) showed both quantitative growth and structural strengthening, making them key drivers of Ukraine's future agricultural export potential.

According to customs statistics, significant shifts occurred in the geography of Ukrainian agricultural exports between 2021 and 2024 (Table 4).

Table 4. Geographical structure of selected agricultural product exports, %

HS code and product group	2021 (Top importers)	Share	2024 (Top importers)	Share
207. Poultry meat and edible offal	Saudi Arabia (SAU)	26.52	Netherlands (NLD)	23.16
	Netherlands (NLD)	19.04	Saudi Arabia (SAU)	16.13
	Slovakia (SVK)	5.59	Slovakia (SVK)	8.46
	Other	48.86	Other	52.25
1001. Wheat	Egypt (EGY)	16.91	Spain (ESP)	26.23
	Indonesia (IDN)	14.42	Indonesia (IDN)	12.75
	Turkey (TUR)	8.80	Egypt (EGY)	9.63
	Other	59.87	Other	51.39
1003. Barley	China (CHN)	53.16	China (CHN)	37.98
	Turkey (TUR)	16.07	Spain (ESP)	11.04
	Saudi Arabia (SAU)	6.24	Libya (LBY)	9.12
	Other	24.53	Other	41.86
1005. Maize	China (CHN)	31.79	Spain (ESP)	17.24
	Spain (ESP)	9.89	Turkey (TUR)	11.90
	Netherlands (NLD)	9.14	China (CHN)	10.88
	Other	49.18	Other	59.98
1201. Soybeans	Turkey (TUR)	28.03	Egypt (EGY)	23.40
	Belarus (BLR)	18.94	Turkey (TUR)	18.37
	Netherlands (NLD)	14.21	Netherlands (NLD)	12.81
	Other	38.82	Other	45.42

HS code and product group	2021 (Top importers)	Share	2024 (Top importers)	Share
1205. Rapeseed	Germany (DEU)	31.66	Germany (DEU)	36.07
	Belgium (BEL)	13.24	Belgium (BEL)	25.61
	Pakistan (PAK)	11.67	Netherlands (NLD)	12.69
	Other	43.43	Other	25.63
1512. Sunflower, safflower or cottonseed oils	India (IND)	29.83	India (IND)	13.88
	China (CHN)	14.36	Spain (ESP)	11.46
	Netherlands (NLD)	10.49	Romania (ROU)	9.22
	Other	45.32	Other	65.44

Source: SCSU (2024)

The data shows that by 2024, Spain, the Netherlands, and Turkey had become leading importers of Ukrainian agricultural products. Compared with 2021, export geography changed markedly due to logistical challenges and the need to diversify export destinations.

4. Conclusions

The structural analysis underscores the strategic importance of agricultural products in shaping Ukraine's export potential. Despite severe political and economic challenges, Ukraine's agricultural sector is demonstrating resilience, recovery, and gradual adaptation to wartime conditions.

Key findings include:

- ▶ A gradual recovery in export volumes of several product categories after the dramatic decline of 2022.
- ▶ A significant increase in the share of oilseeds, cereals, oils, and poultry products in the export structure.
- ▶ The dominance of seven agricultural commodities (maize, wheat, sunflower oil, rapeseed, soybeans, poultry, and barley), which together accounted for nearly 45% of total exports in 2024.
- ▶ Geographical reorientation of exports toward European and Mediterranean countries (e.g., Spain, the Netherlands, Turkey, Egypt), reflecting both market opportunities and logistical constraints.

These results suggest that Ukraine's agricultural exports are adapting to wartime conditions and aligning with global trade dynamics. While the risks associated with logistics and seaport operations remain significant, the sector contin-

ues to strengthen its position in international markets, laying the foundation for further development of Ukraine's export potential.

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Rozwój potencjału eksportowego produktów rolnych w czasie wojny – zmiany strukturalne

Streszczenie. Celem przeprowadzonego przez autorów badania była analiza zmian strukturalnych w eksportie rolnym Ukrainy podczas aktywnej fazy wojny (2022–2024). W oparciu o dane statystyczne przeanalizowano dynamikę wzrostu eksportu rolnego i zidentyfikowano sektory produkcji zorientowane na eksport na Ukrainie. Obliczono zmiany w strukturze eksportu towarów rolnych. Wyniki wskazują na wzrost udziału niektórych produktów rolnych w koszyku eksportowym Ukrainy w ostatnich latach (w 2024 roku prawie połowa eksportu Ukrainy). Przeprowadzono analizę zmian w strukturze geograficznej wybranych produktów rolnych w 2024 roku w porównaniu z rokiem 2021. Badanie wykazało, że pomimo znacznych zagrożeń i ryzyka rolnictwo nadal aktywnie się rozwija i pozostaje kluczowym sektorem gospodarki zorientowanym na eksport. Zmiany strukturalne zachodzące w eksportie rolnym wskazują na ciągły wzrost potencjału eksportowego pomimo niestabilnej sytuacji politycznej i gospodarczej.

Słowa kluczowe: produkty rolne, eksport, orientacja eksportowa, struktura eksportu, struktura geograficzna eksportu

