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Import of agri-food products to Ukraine

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► **Abstract.** Ukraine's foreign trade in agri-food products continues to develop despite the full-scale war. While the blocking of seaports at the beginning of the Russian invasion had an equally negative impact on exports and imports of Ukrainian food, it is now possible to speak of the stabilization of agricultural purchases abroad. The purpose of the article is to examine the current state of imports of agri-food products to Ukraine, including the most significant changes in its commodity and geographical structure that have occurred since 2022. The methods used were theoretical generalization, historical and logical, analysis and synthesis, comparative evaluation, statistical, expert evaluation, graphical and tabular. The dynamics of agricultural imports to Ukraine in 2013-2023 is presented, with the periods of recessions and growth highlighted. The article determines the share of food products in total imports, examines the situation with the balance of foreign trade by subgroups, analyses the geographical and commodity structure of foreign purchases with details on fruits and berries, fish and seafood, and beverages, pays special attention to imports from the European Union, classifies certain commodity items based on their impact on the domestic food market, and assesses future trends in agri-food imports to Ukraine based on primary data for 2024. The provisions of the article are aimed at identifying the specific features of imports of agricultural raw materials and foodstuffs to Ukraine and informing specialized Ukrainian companies and relevant public authorities about possible prospects for the development of foreign procurement based on the monitoring of relevant data

► **Keywords:** procurement; agricultural products; commodity groups; supplier countries; trends; problems; prospects

► Introduction

Ukraine is increasingly integrating into the global economy as a supplier and buyer of food on the world agricultural market. While Ukraine's exports have a distinct commodity structure dominated by a few items of mainly raw materials, its imports include a variety of food groups. In the third year of the full-scale war, the typical characteristics of purchases from abroad are generally observed, but new features are emerging due to drastic changes in the business environment of the entire agri-food sector.

Since 2022, Ukraine's imports of agricultural raw materials and food products have become even more dependent on supplies from the European Union, which have been crucial for fully meeting existing consumer needs, as discussed in monographs by Ukrainian scientists, in

particular O. Kozak *et al.* (2023), which comprehensively highlight its indicators and dynamics. The usual situation in Ukraine's foreign trade, including the food component, has been absent for the third year in a row, and has been replaced by permanent uncertainty and high risks resulting from the Russian-Ukrainian war (Shumska *et al.*, 2023). One of the measures taken by the Ukrainian government to respond to the new challenges was the introduction of food security monitoring, controlling the balances of all major food products, and providing support to sectoral producers (Polukhina, 2022).

Analysing the domestic food market of our country, the US Department of Agriculture draws attention to the peculiarities of its functioning during a full-scale war, the

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ability to recover even in conditions of constant force majeure, the need to take into account the reduced purchasing power of the population and the possibility of supplying food from premium segments, the demand for which continues to grow (Ukraine: Exporter Guide..., 2024). At the same time, professional international organizations make forecasts in their forward-looking reports on imports of major food groups to Ukraine for the next ten years, taking into account, firstly, the average procurement figures for the last three years (OECD and Food and..., 2024).

Of course, long-term forecasts or assumptions about the development of agricultural imports can serve as a guide for specialized procurement companies and potential suppliers from abroad. However, as recent experience has shown, in the current environment, the parameters of Ukraine's domestic market and the objective ability to fully exploit the potential of foreign trade change too quickly, so its value and quantity sometimes vary greatly within a few months of a single year, reducing the reliability of any forecasts.

Despite constant monitoring, the import of agri-food products to Ukraine requires a deeper study, as it is currently being formed not only under the influence of internal and external factors, but also in the realities of a full-scale war. The purpose of the article was to analyse the dynamics and structure of food supplies to Ukraine, taking into account the objective need and market conditions of the domestic food market. The study of imports of agri-food products to Ukraine should be based on a systematic assessment of its historically formed trends and new features that have emerged as a result of significant changes in the economic environment in recent years. For the overall optimization of the domestic food market, it is necessary to balance the relationship between foreign trade, production and consumption through self-regulation and state support of the most vulnerable sectors, as indicated in this article.

► Materials and methods

A set of relevant methods was applied in the course of the study of imports of agri-food products to Ukraine. Thus, the method of theoretical generalization was used to identify the necessary prerequisites for buying food from abroad, including due to the absence or limited alternatives from domestic agricultural production, as well as to classify the main types of imports actually carried out by Ukraine. The method of analysis and synthesis was used to characterize the commodity and geographical structure of Ukraine's agrarian imports, with a focus on key product groups. The method of comparative assessment helped to identify differences between total food supplies from abroad and those made by the EU countries alone. The historical method was used to describe the dynamics of agricultural imports from 2013 to 2024, along with the calculation of its share in the total value of foreign supplies for the analysed period. The method of forecast estimates served as a transition from past and current results to predictions of fundamental trends in Ukraine's food imports in the near future. Graphical and tabular methods were implemented to ensure optimal visualization of statistical and analytical data.

The structure of the article includes three main stages, which are presented sequentially. Stage 1 is a general

description of the value of imports of agri-food products to Ukraine, including dynamics, share in total commodity purchases, and the balance of groups 1-24 of the Ukrainian Classification of Goods for Foreign Economic Activity (UCGFEA). The 2nd stage is the analysis of the commodity and geographical structure of agricultural imports. The 3rd stage is the identification the specifics of imports of agri-food products to Ukraine, its division into the most typical types, and assumptions about its development in the short term. The study was conducted to identify current trends in Ukraine's purchases of food abroad, to separate objectively necessary imports from those that can be met by domestic production, and to analyse the food market in our country in the context of demand for imported goods.

The information base for this research is made on publications by Ukrainian and foreign scholars, statistical data from the State Statistics Service of Ukraine (Official website of the..., n.d.), information materials of the Food and Agriculture Organization of the United Nations (Crops and livestock..., n.d.), and the International Trade Centre (List of products..., n.d.). Data from the European Commission (Monitoring EU agri-food trade..., 2024), the Foreign Service of the US Department of Agriculture (Ukraine: Exporter Guide..., 2024), and the author's own developments, observations, and conclusions were also used.

► Results and Discussion

Traditionally inferior in terms of the total value of exports, food imports to Ukraine have their own peculiarities, which are increasingly determined by the country's socio-economic situation and domestic market conditions (hryvnia exchange rate against foreign currencies, purchasing power of the population, activity of companies specializing in purchasing agricultural products on the international market, etc.), while being less affected by changes in the global agricultural sector.

During the analysed period (2013-2023), imports of agri-food products demonstrated many interesting statistical features. In 2013, its total value was the highest since independence, exceeding USD 8 billion. For the next two years, due to economic problems caused by the annexation of Crimea and the hostilities in Donbas, agricultural imports declined significantly (to almost USD 3.5 billion in 2015), but then grew steadily until 2021, reaching USD 7.8 billion. However, the full-scale Russian invasion led to a forced curtailment of foreign trade, which resulted in a 23% decline in food imports in 2022 (Official website of the..., n.d.). However, last year, the decline was overcome, replaced by an increase of USD 1 billion, so that Ukraine's agricultural imports amounted to almost USD 7 billion, becoming the fourth largest in history (Fig. 1).

The share of agri-food products in Ukraine's total imports is usually within 10%. Since 2013, its highest figure was 12% in 2020, and the lowest was recorded in 2017 – 8.7%. As of now, the situation remains unchanged: in 2022, agricultural products accounted for 10% of Ukraine's imports, and in 2023 – 11% (Official website of the..., n.d.). Another important point is the situation with the foreign agricultural trade balance, or rather, its ambiguity. The overall balance of foreign trade is positive, with exports significantly exceeding imports (by USD 14,899 million in 2023), but the result is already the opposite for most commodity subgroups.

This is explained by the high concentration of Ukraine's agri-food exports, where grains, oilseeds, oils, processing residues, and poultry meat account for almost 90% of its value, while the remaining items are characterized by very small amounts of foreign sales (Kovalenko *et al.*, 2024). As a result, last year the balance was negative in subgroups 01, 03, 05, 06, 07, 08, 09, 13, 16, 18, 20, 21, 22, 24 (Kryvenko *et*

al., 2023). In addition, the ratio of exports to imports for many traditional products for the domestic agriculture and food industry remains negative for Ukraine – live poultry, pork, lard, some vegetables (tomatoes, cucumbers, onions, cabbage), fruits (grapes, pears, apricots, peaches, plums), cheeses, seed sunflower, and fruit and berry seedlings (statistics and registers, n.d.; Ihor Vishtak: Ukraine..., 2024).

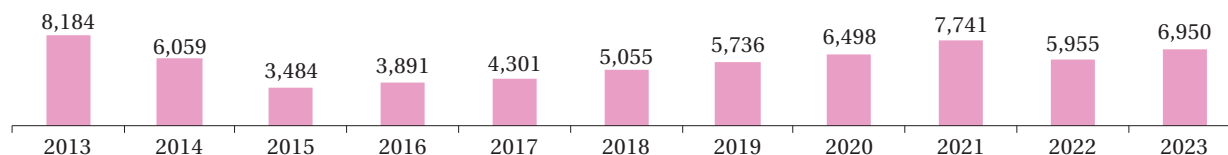


Figure 1. Dynamics of imports of agri-food products to Ukraine, USD million

Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

The geographical structure of Ukraine's food purchases is shaped by a pronounced focus on the European Union, which accounts for more than half of the value of imports. In 2023, the European Union supplied agricultural raw materials and finished food products to our country worth USD 3,680 million, or almost 53%. Imports of food from other parts of the world were significantly lower: from Asia they amounted to USD 1,365 million (19.6%), Latin America – USD 511 million (7.4%), and Africa – USD 326 million (4.7%). Thus, these four regions accounted for almost 85% of Ukraine's agricultural imports (Statistics and registers, n.d.; Official website of the..., n.d.). Poland was traditionally the main supplier of agri-food products to Ukraine last year, with sales worth

USD 950 million. The top ten partners in agricultural imports also included: Turkey – \$627 million, Germany – \$534 million, Italy – \$337 million, Norway – \$304 million, France – \$282 million, the Netherlands – \$278 million, the United States – \$252 million, Spain – \$233 million, and China – \$216 million (Official website of the..., n.d.). The overall structure of Ukraine's external purchases of agri-food products has a significant feature: the largest volumes by value are not raw materials, but ready food products (subgroups 16-24 of UCGFEA). The year 2023 was no exception, as they accounted for about 47% of Ukraine's agricultural imports. At the same time, oils and fats accounted for the smallest share of supplies, within 4% (Table 1).

Table 1. Commodity structure of agricultural imports to Ukraine, mln USD

	2015	2020	2021	2022	2023
Products of animal origin	548	1,258	1,592	1,176	1,342
Products of plant origin	1,146	1,989	2,130	1,928	2,113
Fats and oils	182	280	444	294	247
Ready-to-eat food products	1,608	2,971	3,576	2,558	3,252

Source: compiled by the authors on the basis of the Official website of the State Statistics Service of Ukraine (n.d.)

Last year, despite the war, fruit and berry products remained the main commodity groups in our agricultural imports, with the value of purchases totalling USD 812 million, along with fish and seafood (USD 804 million), alcoholic and non-alcoholic beverages (USD 719 million).

Also, significant in value terms were Ukraine's purchases of tobacco products, various food products, oilseeds, animal feed, processing industry waste, vegetables, and cocoa products. Together, they accounted for 70% of imports of agri-food products in monetary terms (Fig. 2).

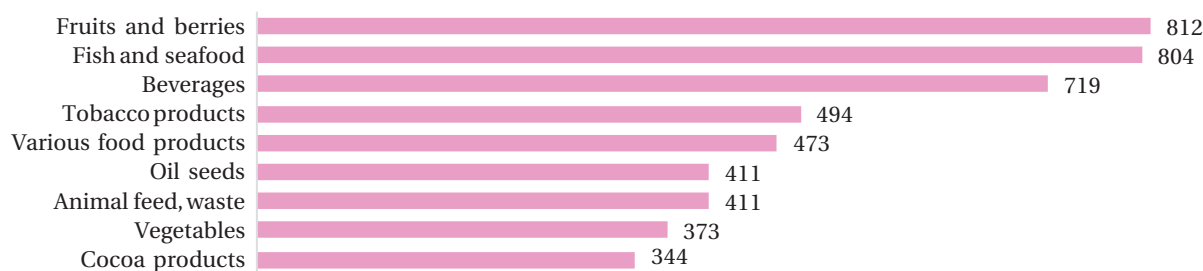


Figure 2. Commodity structure of imports of agricultural products to Ukraine (2023), USD million

Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

At the same time, our importers spent the most on purchases of animal feed, frozen fish, spirits, tobacco

products for direct use, citrus fruits, sunflower seeds, coffee, bananas, cheese, fresh and chilled fish (Table 2).

Table 2. Products with the highest value of imports to Ukraine (2023), USD million

Products for animal feeding	387
Frozen fish	386
Ethyl alcohol, < 80 vol. %	330
Reconstituted tobacco and its substitutes	278
Citrus fruits	276
Sunflower seeds	232
Coffee	218
Bananas	202
Cheeses	201
Fresh or chilled fish	199

Source: compiled by the authors based on Statistics and registers (n.d.)

The total volume of imported fruit and berry products last year was 706 thousand tonnes, mainly including 271 thousand tonnes of various citrus fruits and 201 thousand tonnes of bananas. Smaller quantities were imported of stone fruits (46 thousand tonnes), grapes (41 thousand tonnes), watermelons and melons (30 thousand tonnes), and other exotic fruits and nuts.

In 2023, the leading suppliers of fruit to Ukraine were Turkey, Ecuador, Greece, Costa Rica, Spain, and Colombia (Table 3). It is worth noting that Turkey traditionally specializes in the sale of citrus fruits, while Latin America supplies bananas. These six countries accounted for about 64% of Ukraine's imports of fruit and berry products in monetary terms.

Table 3. Imports of fruits and berries to Ukraine in 2023

Country	Volume, thousand tonnes	Value, USD million
Turkey	218	226
Ecuador	115	115
Greece	49	56
Costa Rica	40	43
Spain	28	39
Colombia	33	38

Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

In 2023, purchases of fish and seafood abroad totalled almost 300 thousand tonnes (including 214 thousand tonnes of frozen fish, 37 thousand tonnes of fish fillets, 25 thousand tonnes of fresh and chilled fish, and

13 thousand tonnes of crustaceans). The largest purchases in this group were made from Norway, Iceland, the United States of America, the United Kingdom, Spain, Ecuador, and Canada (Table 4), with a combined share of 71%.

Table 4. Imports of fish and crustaceans to Ukraine in 2023

Country	Volume, thousand tonnes	Value, USD million
Norway	70	295
Iceland	61	108
USA	23	68
United Kingdom	12	26
Spain	10	25
Ecuador	5	24
Canada	9	24

Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

Imports of alcoholic and non-alcoholic beverages exceeded 370 thousand tonnes. It included sweet and mineral waters (138 thousand tonnes), beer (65 thousand tonnes), grape wines (62 thousand tonnes), and beverages

with an alcohol content of less than 80 vol. % (92 thousand tonnes). Italy, the United Kingdom, Poland, Georgia, Germany, and France as the main suppliers had a total share of 57% last year (Table 5).

Table 5. Imports of beverages to Ukraine in 2023

Country	Volume, thousand tonnes	Value, USD million
Italy	41	110
United Kingdom	21	106
Poland	70	58
Georgia	44	56
Germany	25	41
France	10	39

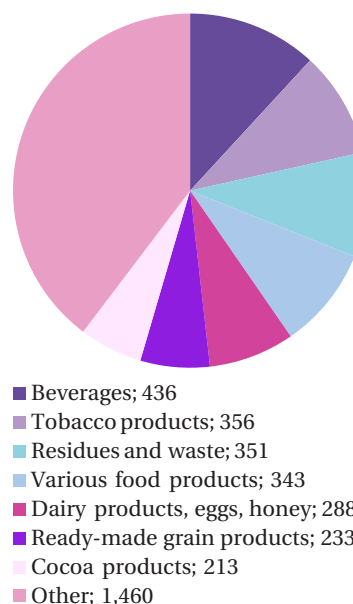
Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

Among other key commodity groups in imports, the authors of this study would like to mention purchases of oilseeds in the amount of over 86 thousand tonnes, where the largest volumes were sunflower seeds (30 thousand tonnes) and rapeseed (20 thousand tonnes), as well as peanuts (22 thousand tonnes). In addition, 197 thousand tonnes of animal feed were imported, which formed the absolute majority in the structure of the residues and waste group (List of products..., n.d.). Since 2022, as a result of the occupation and hostilities in the south of Ukraine, in particular in Kherson, Mykolaiv, and Zaporizhzhia regions, there has been a shortage of vegetables for the domestic market, which was compensated for by imports. In 2023, there was still a high dependence on purchases of this group of products from outside Ukraine. Thus, the total imports of vegetables amounted to 338 thousand tonnes, with the main commodity items being tomatoes (95 thousand tonnes), onions and garlic (76 thousand tonnes), carrots and other root vegetables (32 thousand tonnes), cabbage (30 thousand tonnes), and cucumbers (29 thousand tonnes).

Objectively, there is no alternative to importing cocoa products, coffee, tea, and spices from abroad. Last year, Ukraine imported 73,000 tonnes of cocoa products (mostly chocolate, cocoa paste, powder and butter), 45,000 tonnes of coffee, 12,000 tonnes of tea, and over 4,000 tonnes of black pepper (Official website of the..., n.d.). Regarding imports of agri-food products from the European Union as our key supplier, it is worth noting that its dynamics are very similar to the general trend. The continuous increase for six years (2016-2021) stopped in 2022, when the value of supplies from the countries of this regional grouping decreased by 17% to USD 3,376 million. However, 2023 again brought an increase in purchases by Ukrainian importers by \$300 million, which totalled \$3,680 million. The authors of this study mention a certain stabilization of the logistics of food supplies to Ukraine from the EU (Official website of the..., n.d.). According to the European Commission, in 2023, the EU's agricultural exports to Ukraine amounted to €3,455 million, and our market was the fourteenth largest in terms of sales value in the geographical structure of the neighbouring country's sales (Monitoring EU agri-food trade..., 2024).

Last year, the largest expenditures of Ukrainian importers of food products originating in the EU countries were in the groups of beverages (primarily wines, spirits, beer, sweet waters), tobacco products (mainly e-cigarette kits), residues and waste from the processing industry (in fact, in the form of animal feed), various food products (mainly extracts and concentrates of tea and coffee,

sauces, etc.), dairy products, eggs (mainly cheese), prepared grain products (including bakery confectionery, malt extracts and flour products), cocoa products (mainly chocolate), which together accounted for exactly 60% (Fig. 3). It is noteworthy that, in contrast to the general structure of our agricultural imports, the main supplies from the European Union do not include fruits and berries, along with fish and crustaceans, but are instead supplemented by dairy and grain processing.

**Figure 3.** Commodity structure of imports of agricultural products to Ukraine from the EU in 2023, USD million

Source: compiled by the authors based on Statistics and registers (n.d.); Official website of the State Statistics Service of Ukraine (n.d.)

Ukraine is not among the largest food importers in the world, in particular, before the full-scale war, in 2021, being in 49th place in this ranking (Crops and livestock..., n.d.). However, for some items, Ukraine is still among the top 25 buyers in terms of quantitative volumes, namely in the segments of citrus fruits, bananas, tomatoes, cucumbers, frozen fish, tobacco-containing products for electric heating, and spirits (List of products..., n.d.). The first half of 2024 was a continuation of the main trends in agricultural imports to Ukraine that emerged in the previous year (Statistics and registers, n.d.). The total value of imported agricultural goods was USD 3,738 million, which is 8% more than in January-June last year. Specialised importing

companies continue to spend the most on fish and seafood (USD 441 million), fruits and berries (USD 413 million), and various beverages (USD 364 million). The geography of supplies from abroad is traditionally based on the European Union, where food worth USD 1,956 million was purchased. Purchases from Asia (USD 759 million) also stand out, significantly exceeding those from Latin America and Africa. Poland (\$436 million), Turkey (\$334 million) and Germany (\$318 million) are the top countries from which the largest supplies of agricultural products are made.

Summing up the above statistics for the period under review, it is necessary to pay attention to the characteristic features of agricultural imports to Ukraine. It has demonstrated a generally high unpredictability, which is only getting stronger over time. In 2014-2015, its value decreased by more than 2 times after the peak in 2013, while the decline in exports was not as significant. During the height of the coronavirus pandemic and related international trade restrictions in 2020, our exports of agricultural products and food essentially stopped growing, while sectoral imports continued to grow. Having adapted to these new conditions, imports grew significantly in sync with exports the following year. The absolute consequence of force majeure in the form of a complete blockade of seaports and a temporary collapse of the entire logistics system was a drop in incoming and outgoing food trade flows in 2022. Another difference between imports and exports was in 2023 in the form of a rapid increase in imports amid a slowdown in the ongoing decline in agricultural exports.

It is absolutely clear that the global economy and Ukraine as an integral part of it are facing systemic organisational imbalances, including one of the most significant problems caused by massive population migration due to ongoing military operations (Chernobay & Malibroda, 2024). When there are large-scale military confrontations involving key players in the global food market, as in Ukraine, agribusinesses are generally forced to adapt, but global food security becomes vulnerable, primarily reflected in rising food prices (Kutsmus *et al.*, 2024). As the social and political circumstances in Europe are still too unstable to affect the economic environment, the ongoing transition period for Ukraine is likely to drag on for a longer time (Dalampira & Nastis, 2020).

Since 2022, under martial law, the Ukrainian agricultural market has been facing new challenges and problems, so it is advisable to apply additional measures of state sectoral policy that will help stabilise it over a certain period of time (Boiko, 2022). Dramatic changes in the socio-economic sphere against the background of accelerating integration processes require appropriate structural transformations for the agri-food sector (Lupenko *et al.*, 2022). Researchers rightly believe that the development of the sector will be supported by improved investment potential, digitalization, and further international integration.

Even in the face of extremely difficult challenges, sectoral enterprises should try to implement modernization measures within the framework of planned strategic initiatives, including integration into the European Union (Yatsenko *et al.*, 2024). In this context, the long-term Strategy for the Development of Agriculture and Rural Areas until 2030 should be as consistent as possible with the EU's Common Agricultural Policy (Popova, 2024). The

process of food imports is directly related to a group of risks – supply, demand, production, management, operational, logistics, infrastructure, political, regulatory and financial. To minimize their negative impact or avoid them altogether, it is necessary to properly assess and group risks by the degree of impact (Baranauskaitė & Jurevičienė, 2021). At the same time, in many cases, the interpretation of the ranking of unfavourable factors can differ significantly, as well as the ways to solve them.

C. Tortajada & F. González-Gómez (2022) argue that international agricultural trade is closely linked to the environment. Its development and increase in volumes are currently occurring mainly at the expense of developing countries. However, the increase in production has had a negative impact on the environment. The Russian aggression has further exacerbated this problem for Ukraine, so the environmental component is becoming increasingly important. While climate change may reduce productivity and yields, it may also open up new supply chains as a result of global warming, which may expand traditional maritime routes (Martínez-Martínez *et al.*, 2023). It should be agreed that any improvement in logistics routes is critical for companies specializing in foreign trade.

Given the commodity mix of Ukraine's purchases of agri-food products from abroad and the conditions of their implementation, four typical types of imports can be distinguished: 1. *Critical* – products that, for objective reasons, cannot be produced due to the lack of traditions, experience, natural and climatic conditions for their cultivation, growing, and the inability to satisfy even a small share of the domestic market needs (sea fish, various types of crustaceans, molluscs; exotic fruits of tropical and subtropical latitudes, for example, according to official statistics, more than 62 thousand tonnes of oranges last year, as well as tangerines, lemons, kiwi, persimmons; coffee, tea, cocoa, spices, and palm oil). A characteristic feature of this type of imports is their urgent need for the domestic food market, as the demand for them is stable and established, so there is a real need for their constant purchases. 2. *Market-driven* – products that have historically been produced in Ukraine and were quite well-developed, but over time have suffered a decline, reorientation and lost their positions in the domestic market (breeding animals; seedlings of fruit and berry crops; certain types of meat and offal, including more than 24 thousand tonnes of lard and fat in 2023; oilseeds and grains). This includes all goods without which the normal functioning of the food market is impossible, so their supply must be ensured. 3. *Point* – represented by analogue goods that are produced in the country, sometimes in sufficient quantities to meet demand throughout the calendar year, but are regularly imported due to better consumer quality, price advantages, and seasonal demand (fruits and vegetables typical of Ukraine's natural and climatic conditions, various cheeses – about 34 thousand tonnes last year). The peculiarity of this group is that it does not have a critical impact on food security, and supplies from abroad are almost always a response to the special needs of a certain circle of consumers who are willing to pay higher costs for a particular product, including those imported from another country. 4. *Unpredictable* – any agri-food product from the rest of the product groups for which there is a sudden rush or

unexpected shortage (buckwheat, ginger, etc.). This type of imports appears spontaneously or may be absent for a long time, often characterized by even single cases. However, its occurrence is almost never predicted in advance, so it is accompanied by a sharp increase in selling prices for goods that have to be imported on an emergency basis.

It is an objective fact that the consumption of most basic food groups by the population of Ukraine remains insufficient (Kvasha *et al.*, 2024). The ongoing full-scale war and the resulting decline in household incomes significantly worsen the availability of the food basket. In order to assess possible imports, the list of classified types will be used to determine the current and future characteristics of the Ukrainian food market related to the overall state of the economy (Hrubá *et al.*, 2021). In the structure of Ukraine's foreign agricultural trade, imports develop according to their own patterns, which distinguish them from exports. The indicators of food purchases by Ukrainian companies from abroad are the objective needs of the domestic market based on the purchasing power of the population (Semenda *et al.*, 2022). At the same time, the fluctuations recorded in previous years were caused by systemic changes in the economic environment, which were quickly restored after a sharp deterioration. Imported products are of secondary importance for the food supply of the Ukrainian population, mostly only supplementing the supply in non-core segments.

However, regardless of the circumstances, it is worth increasing the number of bilateral and multilateral trade agreements that directly improve mutual food trade performance, especially when there is a need and clear economic benefits of imports (Newman *et al.*, 2023). For Ukraine, in the current highly challenging circumstances, it is vital to build resilience of its agri-food system to shocks and crises, which is achieved by adhering to three main principles: preparedness for disruptions, implementation of a multifaceted and cross-sectoral approach to multiple risks, and consideration of different issues and policy components (Pohorielova, 2024). In any case, the long-term perspective for the development of Ukraine's economy and agri-food sector in the post-war period will involve reconstruction with the direct interest of foreign partners, among which large multinational companies will play a key role (Bilyk *et al.*, 2023). The situation with imports of food and agricultural raw materials will remain potentially dynamic and correlated with logistical problems until the end of the war, but periodic trade restrictions by some European countries cannot be ruled out (Ukraine: Exporter Guide..., 2024; This game can be played..., 2024). Nevertheless, quantitative limits on Ukrainian agricultural exports to the EU are foreseen for the next year, 2025.

Thus, agricultural imports to Ukraine continue to play an important role in terms of the adequacy of the assortment of the domestic food market. Its quantitative and value indicators for key groups are closely interrelated,

depending on the stability of the economy. In the current environment, purchases of raw materials and ready-to-eat products of foreign origin are subject to many risks and force majeure circumstances, but still in the required volumes.

► Conclusions

Ukraine's imports of agri-food products are significantly inferior to sectoral exports, but have many of their own characteristics, which have been repeatedly confirmed over the period 2013-2023. In the absence of structural shocks in social and political life, imports have consistently shown a clear positive trend. However, in 2020-2021, the presence of severe and prolonged restrictions on foreign trade related to the coronavirus pandemic did not prevent its continued growth. In addition to alternating ups and downs due to shock events for the entire economy, its value exceeds exports in most groups 1-24 of UCGFEA, the vast majority of the structure is occupied by prepared foods, the European Union remains the main regional supplier, and Poland has been the largest supplier by value for several years. However, food purchases in Asia, Latin America and Africa also have a distinctive pattern. The available value indicators of aggregate agricultural imports give grounds to classify Ukraine as a significant participant in the global market, which meets the vast majority of its food market needs on its own. Traditionally, the largest expenditures of specialized Ukrainian importers are on fish and seafood, along with fruits and berries, and various beverages. Since the start of the full-scale war, vegetables have been added to the list of major food imports. The domestic food market for coffee, tea, cocoa and some other products is practically dependent on imports. All food imports can be divided into four groups of different sizes, ranging from the clearly foreseen to the completely unexpected. Given the trends of recent years and the situation as of the first half of this year, 2024, there are signs of stabilization of imports, which in the short term have the potential for moderate growth while maintaining the foundation of the existing economic situation in Ukraine. It will be determined by the further adaptation of businesses focused on foreign economic activity to operate in conditions of force majeure and constantly high risks.

Promising further research on the import of agricultural products to Ukraine should include determining the approximate share of foreign goods in the domestic food market and the possibility of developing domestic production of those segments or individual items that can quickly replace currently imported ones while maintaining an optimal balance by use.

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► Conflict of interest

None.

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► **Анотація.** Зовнішня торгівля України агропродовольчою продукцією продовжує розвиватись, незважаючи на повномасштабну війну. Якщо блокування морських портів на початку російського вторгнення однаково негативно впливало на експорт та імпорт українського продовольства, то в даний час можна говорити про стабілізацію саме закупівель сільськогосподарських товарів за кордоном. Метою статті було розглянути актуальний стан імпорту агропродовольчої продукції в Україну, включаючи найсуттєвіші зміни в його товарній і географічній структурі, які відбулись з 2022 року. Було використано методи теоретичного узагальнення, історико-логічний, аналізу і синтезу, порівняльної оцінки, статистичний, експертних оцінок, графічний і табличний. Наведено динаміку аграрного імпорту в Україну за 2013-2023 роки з виділенням періодів спадів і підйомів. Визначено частку продовольчої продукції в загальному імпорті, розглянуто ситуацію з сальдо зовнішньої торгівлі в розрізі підгруп, проаналізовано географічну й товарну структуру закордонних закупівель з деталізацією по плодах та ягодах, рибі і морепродуктах, напоях, окрему увагу приділено імпорту з Європейського Союзу, класифіковано окремі товарні позиції на основі їх впливу на внутрішній продовольчий ринок, здійснено оцінку майбутніх тенденцій агропродовольчого імпорту в Україну, базуючись на первинних даних 2024 року. Положення статті спрямовані на визначення характерних особливостей імпортних поставок сільськогосподарської сировини і продуктів харчування в Україну та інформування спеціалізованих українських компаній і відповідних органів державної влади щодо можливих перспектив розвитку закордонних закупівель, виходячи з моніторингу актуальних даних

► **Ключові слова:** закупівлі; сільськогосподарська продукція; товарні групи; країни-постачальники; тенденції; проблеми; перспективи