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SOME ASPECTS OF REVIVAL OF THE AGRARIAN SPHERE OF UKRAINE

ДЕРЖАВНА ПІДТРИМКА АГРАРНОГО СЕКТОРА ЕКОНОМІКИ В УМОВАХ ВОЄННОГО СТАНУ

ANNOTATION

The agrosphere during the Russian-Ukrainian war remains one of the leading branches of the national economy of Ukraine in providing the population with food products, a component of the food security of the country and the countries of the world, which determines the relevance of the study. The development of the economy is hindered by modern problems: force majeure of the consequences of the war, the loss of human capital and material and moral values, and at the same time - the desire for recovery and further development, relying on European innovations and the institutional basis of the effectiveness of state regulation, taking into account the risks of the operation of agricultural sector facilities. Structured needs and investment in reconstruction and recovery. Formed features of the state support program for the agricultural sector of the economy in the conditions of the Russian-Ukrainian war of 2022–2024.

Keywords: agricultural sector, state regulation, losses of the Russian-Ukrainian war, needs for reconstruction and restoration.

АНОТАЦІЯ

Агросфера під час російсько-української війни залишається однією з провідних галузей національної економіки України у забезпеченні населення продуктами харчування, складовою продовольчої безпеки країни та країн світу, що зумовлює актуальність дослідження. Розвитку економіки заважають сучасні проблем: форс-мажор наслідків війни, втрати людського капіталу й матеріально-моральних цінностей, і в той же час - прагнення відновлення та подальшого розвитку, спираючись на європейські інновації та інституціональні підстави ефективності держрегулювання з урахуванням ризиків функціонування об'єктів агросектора. Обґрунтовані збитки України як наслідок російсько-української війни за класифікацією сільськогосподарські збитки, сільськогосподарської техніки, пошкодження зерносховищ, знищені/викрадені чинники виробництва та вироблена продукція, збитки, завдані багаторічним насадженням, а також збитки, завдані аквакультури

та рибальству, непрямі втрати та втрати через зниження виробництва однорічних, багаторічних культур і у тваринництві, збитки внаслідок зниження внутрішніх цін через перебої експорту, через збільшення виробничих витрат, втрати через витрати на рекультивацию, втрати рибальства та аквакультури. Структуровані потреби та інвестування в реконструкцію й у відновлення. Загальні потреби у реконструкції та відновленні розглянуті в контексті окремо як потреби в реконструкції та потреби у відновленні. Структура підтримки відновлення класифікована у розрізі негайного відновлення виробництва, довгострокового відновлення, підтримки сільськогосподарських інституцій. Чинниками форм-мажору впливу на стан українського ринку молока визначені перебої в енергопостачанні, зменшенні поголів'я корів в Україні, скорочення пасовищ та сировини, контент російсько-української війни, знищення людського капіталу, територій та майна, руйнування придатних для утримання корів земель, виробничих потужностей, господарської діяльності, демографічне скорочення населення, зниження кількості споживачів на внутрішньому ринку, соціально-економічна криза, інфляція та залежність від цінової динаміки світового ринку. Сформовані особливості програми державної підтримки аграрного сектора економіки в умовах російсько-української війни 2022–2024 років.

Ключові слова: аграрний сектор, державне регулювання, збитки російсько-української війни, потреби у реконструкції та відновленні.

Formulation of the problem. The Russian-Ukrainian war has far-reaching consequences for the Ukrainian economy, for Europe and the countries of the world, causing ruin, decline, environmental pollution of territories, refugees, disruption of trade relations. The war brought a humanitarian, socio-economic, energy, ecological crisis to Ukraine,

the loss of human capital and revealed the need to create innovative security architecture in Europe, taking into account Ukraine and its partners. The state of war put forward new requirements and criteria for the efficiency of state regulation and the revival of the agricultural sector of Ukraine as the basis of its and the world's food security.

Analysis of recent research and publications. E. Vining, D. Weimer, D. Keynes, F. Kahne, K. Marks, A. Marshall, P. Samuelson, M. Friedman, P. Heine, F. Hayek, J. Schumpeter examined the effectiveness of state regulation of the national economy. Foreign researchers H. Dzwigol paid attention to the search for modern tools and mechanisms of strategic management; M. Kurtyka [10], G. Roth [9; 10]; A. Kwilinski [11]; R. Sliwinski [13], technologies of state regulation of the agrarian sector – Ukrainian scientists A. Babenko, V. Boyko, N. Biletska, M. Bulata, M. Latynina, A. Lisovyi, Yu. Kyrylova. Strategic management of innovative development of agriculture is presented by Ukrainian scientists Ya. Kosteckyj [14]; M. Zos-Kiorom [12]; N. Chernikov, O. Golovnina [5–8] and others. The trends of the European dairy market are considered: Borawski, Dunn, Harper, & Pawlewicz (2019); Borawski, Pawlewicz, Parzonko, Harper, & Holden (2020); Pouch & Trouve (2018). Trends, problems of the milk processing industry of Ukraine were studied by: Mostenskou T. L., Sabluk P. G., Skopenko N. S., Yemtsev V. I, Marchenko V. M. In particular, Kozak O. A. singled out the factors of “structural changes in influence” on the development of the dairy industry, and M.V. Misyuk and M.V. Zahodym analyze the general trends of the Ukrainian milk market to ensure food security of Ukraine. However, the force majeure of the Russian-Ukrainian war, the occupation of Ukrainian territories, the loss of property and population, environmental pollution, rising inflation, unemployment, and a decrease in the standard of living provoked new grounds for research in the field of finding optimization mechanisms for state regulation of the activities of agricultural companies, the formation of a

sustainable food security strategy, survival, recovery and development.

Highlighting previously unresolved parts of the overall problem. The Russian-Ukrainian war caused irreparable damage to Ukrainian agriculture and disrupted global supply chains. The restoration of immovable and movable property, human capital, technology and logistics will take decades. The World Economic Forum emphasizes the revision of the global security architecture [1]. The Center for Economic Strategy (Ukraine) focuses on the analysis of internal risks for Ukraine (economic losses, negative trade balance, population migration, drop in the level of economic activity and GDP) [2]. Accordingly, the existing approaches, methods, assessment of the management of the agricultural sector and human capital during the period of martial law require analysis and correction, the search for innovations of state support in the institutional, ecological, socialization spheres, mechanisms, management efficiency measures for the restoration and revival of the functioning of human and material reserves.

Formulation of the purposes of the article. The purpose of the article is a theoretical and analytical study of the peculiarities of the state regulation of the Ukrainian agricultural sector in the conditions of the Russian-Ukrainian war with real losses and the need for its restoration.

Presentation of the main research material. The task of state support of the agrarian sector of the economy in the conditions of martial law is to ensure a sufficient amount of harvest, reduce risks for food security in the country, and preserve the production potential for its post-war reconstruction. From 1914 to September 15, 2022, the total amount of agricultural losses, according to estimates by the FAO, the Ministry of Agrarian Policy of Ukraine and the Kyiv School of Economics, amounted to 6.6 billion dollars. USA.

The analysis of losses by classification features as of 2024 is provided in the table 1, structural characteristics of restoration needs - in table 2.

Table 1

Losses of Ukraine-2024 as a result of the Russian-Ukrainian war

Name of losses of Ukraine	The amount of damages, billion dollars USA / structure, % / rank
1	2
Agricultural losses	10,3 / 0,6 / 9
Damage to agricultural machinery	5,8 / 0,3 / 10
Damage to granaries	1,8 / 0,1 / 12
Destroyed/stolen factors of production and manufactured products	1,97 / 0,1 / 12
Damage caused by perennial plantings	398 / 21,4 / 2
Damage to aquaculture and fisheries	35 / 1,9 / 6
Indirect losses	69,8 / 3,8 / 5
Losses due to reduced production of annual crops	34,3 / 1,8 / 7
Losses due to reduced production in animal husbandry	5,6 / 0,3 / 10
Losses due to reduced production - perennial crops	769 / 41,4 / 1
Losses due to lower domestic prices due to export disruptions	24,1 / 1,3 / 8
Losses due to increased production costs	4,4 / 0,2 / 11

End of table 1

1	2
Losses due to remediation costs	329 /17,7 / 3
Fisheries and aquaculture losses	170 / 9,1 / 4
Total costs	1859,07/ 100

Source: formed on the basis of [3]; https://kse.ua/wp-content/uploads/2024/02/RDNA3_ukr.pdf

Table 2

Needs for restoration of the agricultural sector of Ukraine - 2024

Reconstruction and restoration needs	billion dollars USA – structure, %
General needs for reconstruction and restoration, including:	56,1 – 100 %
– reconstruction needs	9,4 – 16,8 %
– recovery needs	46,7 – 83,2 %
Characteristics of the recovery support structure:	46,7 – 100 %
– support for immediate production recovery	6,1 – 13,1 %
– supporting long-term recovery	35,5 – 76,0 %
– support of agricultural institutions	5,02 – 10,7 %
– other	0,08 – 0,2 %

Source: Compiled based on [3]; https://kse.ua/wp-content/uploads/2024/02/RDNA3_ukr.pdf

The first rank, namely, 41.4 % of the total amount of losses in the war in Ukraine is occupied by losses due to a decrease in production – perennial crops, the second rank, namely, 21.4 %, is occupied by losses caused by perennial plantings, the third rank – 17.7 % losses due to reclamation costs are taken up. The total needs for the reconstruction and restoration of the agricultural sector of Ukraine amounted to 56.1 billion dollars as of 2024. USA, including 16.8 % for reconstruction needs and 83.2 % for recovery needs (13.1 % immediate recovery, 76 % long-term, 10.7 % for agricultural institutions).

According to expert assessments, the vulnerability of the agricultural sector of Ukraine is determined by the impossibility of carrying out field work in the zone of military conflict, mining, directing shelling at agricultural machinery, granaries, warehouses, logistics infrastructure, field territories, the fuel market crisis, blocking the export of products by sea, which reduces the profitability of activities, export income, leads to global food inflation, famine in some countries, migrations, interruptions in the provision of food to citizens in the occupation and on the territory of hostilities, a lack of financial assets, a decline in the application of fertilizers and plant protection products.

The agrarian sphere depends on the biology of the development of plants and animals with the maximum duration of payback of costs, limiting the momentary orientation of the production of other products, operative adjustment of plantings of winter crops. The structure of agricultural crops is differentially changed depending on the time of planting crops. Land plots of crops for export agricultural products have undergone changes. Complications in the logistics of corn caused a decrease in plantings for the year: under “sunflower” by 1.8 million hectares (a high total

value of 4.7 million hectares), corn to 4.6 million hectares. According to the assessment of the National Institute of Strategic Studies, the cost of expenses per hectare, sales for domestic needs, yield per hectare, maximum price per ton (the advantage is for oil crops) influenced the restructuring of crops. The freezing of sea ports led to a drop in sales from 6–7 million tons per month on average to 1.5 million tons, which led to the bankruptcy of farmers, a reduction in exports, and the lack of preservation of grain crops to 15 million tons. The challenges for the agrarian sector of Ukraine were recovery, creation of new economic cycles, support of competitive processing of agricultural products, unblocking and expansion of sea ports, alternative export routes; stability of participants in the agro-industrial sector, guarantee of quality infrastructure and investment attractiveness, safe physical and ecological condition of lands, reduction of shading; measures of climate neutrality, green deal, rational fulfillment of Ukraine’s obligations at the expense of harmonization of institutional foundations with EU legislation within the framework of the Association Agreement.

The agricultural sector of Ukraine today has a high level of support from the world community, which is interested in the revival of Ukraine as one of the world’s guarantors of national security. The recovery of the Ukrainian agricultural sector is based on value marketing innovations [4–8] and will provide an impetus to the expansion of related industries: mechanical engineering, services, trade, transport, chemical industry, hydrotechnical land reclamation with a 2–3 times increase in crop yields. The forecast for productivity growth per 1st employee is a 6-fold increase with increased processing and increased use of digital technologies.

The land market will activate the capital-intensive production of berries and orchards, which will expand land reclamation, infrastructure,

and increase soil fertility. Pre-war traditional challenges remain relevant: the difficulty of connecting to the engineering network, protective agricultural borders when exporting agricultural goods to international markets (taking into account EU quotas), lack of legislative adaptation in the field of security, veterinary and phytosanitary monitoring to EU standards, blocking of tax invoices. The requirements of agricultural producers do not meet the existing norms of capacities for logistics, overloading, and transportation of agricultural goods.

The market of milk and dairy products in Ukraine has become a prospective component of the agro-industrial complex of the twenty largest global milk producers [1]. The relevance of dairy products for the population is determined by the features of its lifelong consumption from the moment of birth and the importance of its composition for restoring health during life. According to the nutritional value structure, “250 ml of whole cow’s milk contains 146 calories, 8 g of protein and 8 g of fat, 28 % of the daily norm of calcium, 24 % of vitamin D, 26 % of vitamin B2, 18 % of vitamin B12, 22 % of phosphorus, 13 % of selenium and 10 % of the daily norm of potassium” [2]. The Ukrainian dairy market is characterized by diversity and high competition. 15 large competitors and more than several hundred small local producers form the price policy of the Ukrainian dairy market. In April 2024, Ukraine exported 10.42 thousand tons of dairy products worth \$21 million. Natural exports increased by 18% in March 2024 and by 35 %, respectively, in April 2023. Cash revenue for delivered goods increased by 14 % compared to March 2024 and by 10 % compared to April 2023. The price of the product in Ukraine depends on the export of raw milk in 2023. Despite the current trends in the growth of the import of dairy products, the Ukrainian market is formed by national products. The strengthening of the competition of commodity producers with the appearance of imports on the domestic market caused the adaptation of Ukrainian farmers to the European technological standards of production, quality control of products, which led to an increase in quality and prices.

Today, the problems of the milk market are caused by energy supply, the decrease in the number of cows in Ukraine, the “urgent” land reform, the reduction of pastures and raw materials, the force majeure of the Russian-Ukrainian war, the destruction of territories and property, the destruction of land suitable for keeping cows, production facilities, economic activity, the demographic decline of the population, the decrease in the number of consumers in the domestic market, the socio-economic crisis, inflation and dependence on the price dynamics of the world market, “the limited possibilities of the EU regarding the export of Ukrainian dairy products, the increase in the

cost price, primarily of cheeses, problematic settlements with trade networks, the lack of effective lending to the industry, suspension of certain state programs” [9, 10, 11]. According to estimates, the increase in the price of raw materials and the cost of energy carriers will lead to an increase in prices for dairy products by 20–25 % [3]. The Ukrainian land market has become incomprehensible to the population, has led to the curtailment of the dairy sector in order to concentrate finances and reduce livestock as much as possible. This reduced the number of cows in Ukraine for 1981–2022 by 6 times and the production of milk (Figs. 1, 2).

Milk production decreased the most in Kyiv region by 15 %, in Vinnytsia by 9.7 %, in Zaporizhia – 9.7 %, in Mykolaiv – 9.6 %, in Chernihiv – 9.1 %, in Cherkasy – 8.6 %, in Volyn – 8.3 %, in Zhytomyr – 7.6 %. The production of Ukrainian milk in 2022 decreased by 12.1 % and amounted to 7.6 million tons, the decrease in the product on dairy farms amounted to 3.7 %, to the level of 2.72 million tons, with annual losses of 37.8 thousand tons. production of raw milk took place in most regions of Ukraine. The largest structural decline occurred among the farmers of Transcarpathia, 40 % per year. However, this is relatively the poorest region for milk with a production of 2 thousand tons of milk per year, losses of 800 tons were insignificant. In the Chernivtsi region, production decreased by 20 % to 2.8 thousand tons of milk, in the Rivne region by 14.3 % to 10.9 thousand tons. The years 2020–2024 are characterized by a reduction in raw milk production. According to expert V. Vintonyak, the war changed the dairy industry due to a 17 % reduction in raw material supplies in 2022, population migration and economic decline, a 27 % drop in domestic demand for milk, a general decrease in export-import, and an increase in exports in the case of EU preferential sanctions and the increase in the price of milk and the change in the geography of export [11, 13, 14]. Features of the formation of factors of the development of the dairy market of Ukraine are considered in fig. 3.

In 2022, the supply of dairy products increased due to production by 1.8 % with a reduction in stocks by 23.3 % and imports by 0.8 % with a reduction in demand: in the domestic market (0.1 %) and per capita consumption (1.9 %), consumption of industrially processed milk by 8.1 % - and export growth by 11.7 %. Toning of finished dairy products on the market is estimated at 20–25 %. A significant amount of dairy products is falsified, including butter, cheese, and other products that reduce its quality. The diversification of the price policy allowed to export significant volumes of cheese, 15 % to the EU, however, 2023 became less for the import of cheese according to 2022. SWOT analysis of the state and prospects of the dairy sub-complex of the agricultural sector of Ukraine is considered in fig. 4.

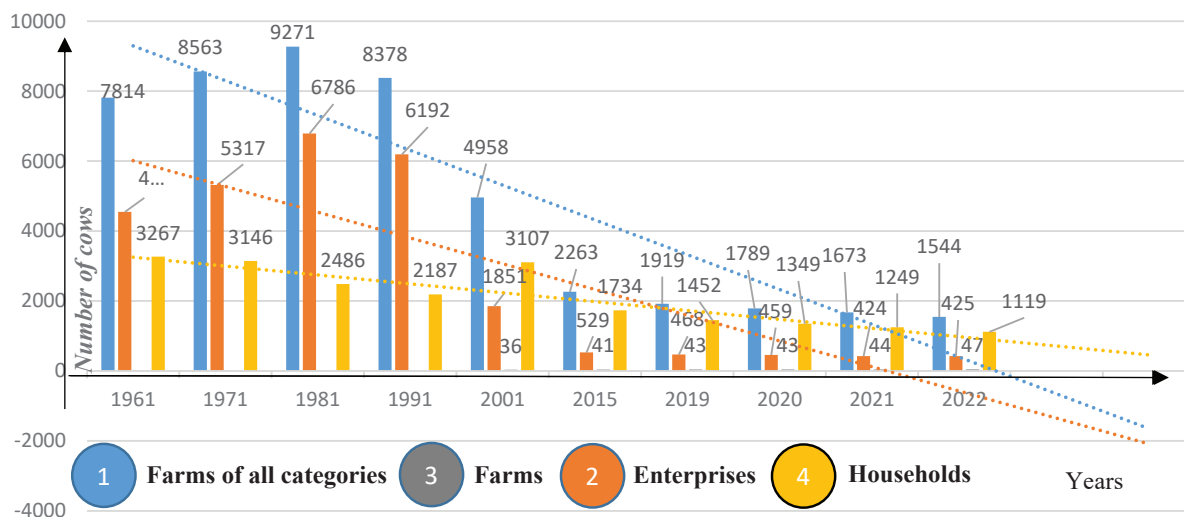


Figure 1. Dynamics of the cow population in Ukraine for 1961–2022, million head

Source: formed from: [12]

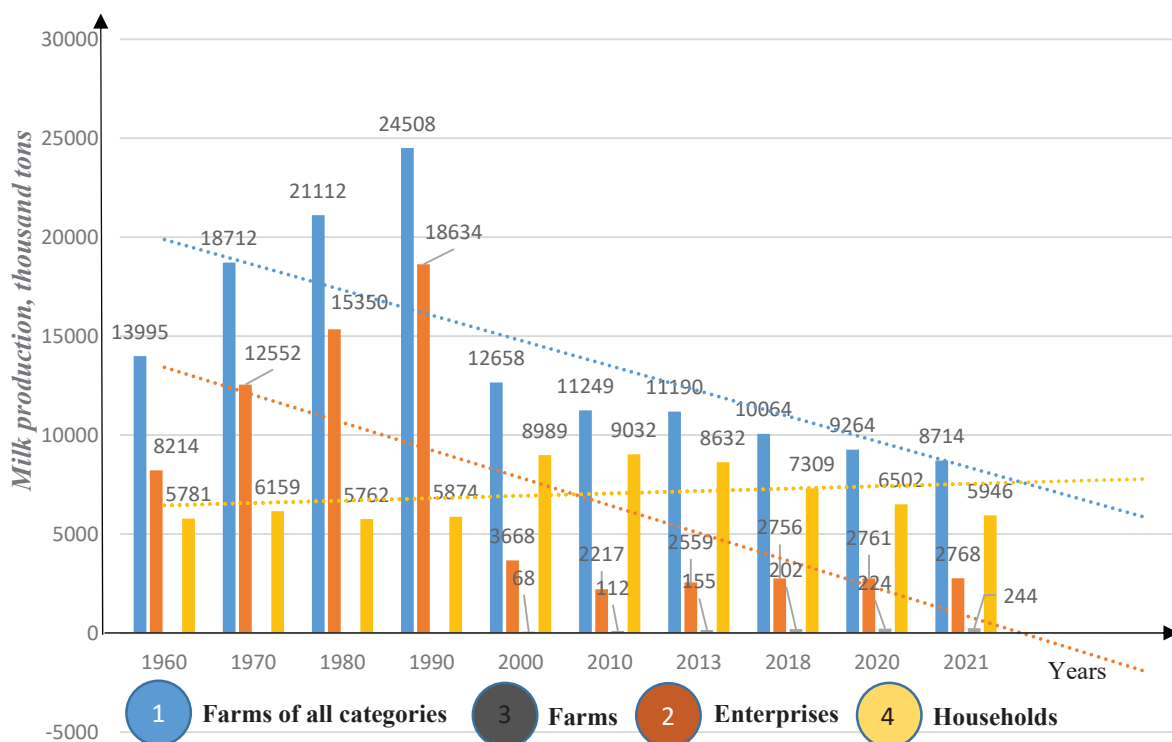


Figure 2. Dynamics of milk production in Ukraine by farms of all forms of ownership from 1960 to 2021, thousand tons

Source: formed from [12]

Peculiarities of state regulation and policy of agricultural companies, depending on the actualization of opportunities and threats, are presented in the table. 3. Therefore, the physiological standards of human existence, norms of consumption of dairy products, international conditions of standardization are the reality of the functioning of the milk market. State support for producers and consumers, efficiency of the dairy market are the main measures to improve the supply of its processing.

Conclusions from the research. Therefore, the main levers of influence on the agricultural market, including the supply of dairy products, today are quotas on the volume of sales of products on the market, setting affordable prices, state support for producers and consumers in conditions of a decrease in the standard of living of the population and war. The proposed conclusions of the study can be useful in justifying the Marketing of the values of increasing the competitiveness of Ukrainian agricultural companies.

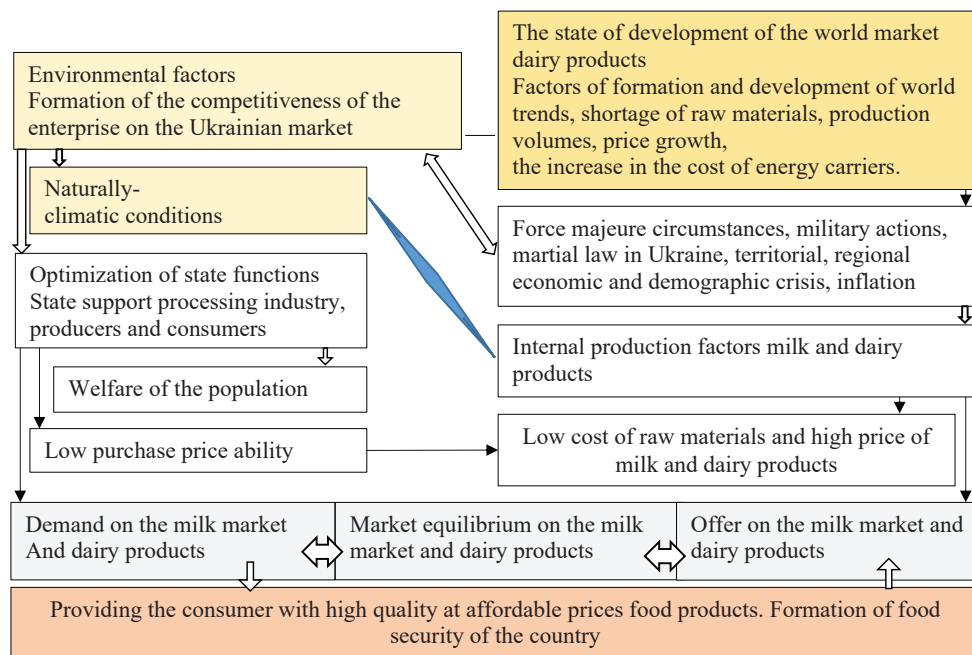


Figure 3. Factors of formation of the Ukrainian dairy market

Source: author's development

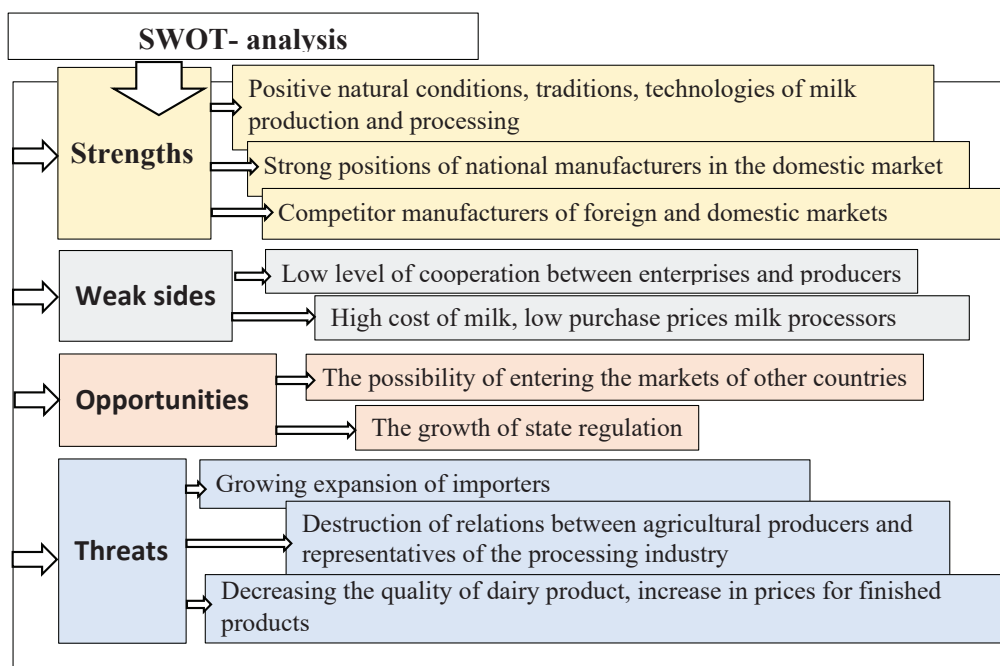


Figure 4. SWOT analysis of the dairy sub-complex of the agricultural sector of Ukraine

Source: author's developmen

Table 3

State regulation of the development of the dairy industry of Ukraine – 2024

Competitive factor	Opportunities and threats	State regulation and policy of agricultural companies
1	2	3
Substitute goods	Substitute products are not of high quality, differ in taste and value. Substitutes for cow's milk are: goat's, sheep's, vegetable substitutes (soy, almond, rice, oat, coconut milk), which cannot compete with the traditional analogue due to high cost and low prevalence.	Monitoring the ring regarding changes in consumer tastes. Social formation of opinion and development of the culture of consumption of dairy products.

МАРКЕТИНГ

Continuation of table 1

1	2	3
Characteristics of the Supplier Market competition	<ol style="list-style-type: none"> 1. Seasonality of the milk market. Reduction of purchase prices in the spring-summer period. 2. Non-compliance with modern quality standards, a significant share of milk in households. 3. A long cycle of reproduction of animal life, the population has decreased significantly. 4. Reducing the amount of raw materials required for the production of dairy products. 5. Non-compliance with sanitary conditions: milk production, transportation, cooling. 6. High cost of raw materials and price of products. 	<p>Increasing the number of cows, livestock products with innovations, effective technologies, world experience. Coordination of production conditions and volumes with market requirements. Quality, restoration of large-scale production based on the creation of new, restoration of livestock complexes. Integration of agricultural firms with dairies.</p>
Market competition	<ol style="list-style-type: none"> 1. Oligopoly: in Ukraine, 80 % of the raw materials market is controlled by 50 enterprises, a large part of which is part of large holdings. 	<p>State regulation of the agricultural market, dairy products through the mechanism of influence on exports, innovations, production incentives, profitability.</p>
	<ol style="list-style-type: none"> 2. Problematic search for sales markets. Lack of a formalized comprehensive sales strategy 3. The main marketing strategy is the cost leadership strategy 4. Quality – perspective profitability on the domestic and foreign markets of Ukraine 	<p>Expansion of production, coordination of the assortment with the requirements of the importing countries. Aggression in replacing traditional exporters, demand exceeds supply, prices are rising. Competitive strategy of the value leader in the foreign market.</p>
New competitors	<ol style="list-style-type: none"> 1. Strong industrial brands have reduced the emergence of new competitors. 2. Technology and product differentiation require significant investment. 3. Marketing strategies: low costs and differentiation, limitations in price growth. 	<p>Assessment of supply and demand. Readiness for short-term minimum profit, prohibition of new enterprises entering the industry for long-term sustainability of industry competition. Under oligopoly - non-price competition.</p>
Consumers	<ol style="list-style-type: none"> 1. The change in tastes and uneven consumption of dairy products requires its differentiation according to different segments of consumption. 2. A significant share of food expenses in total household expenses has led to real poverty of the population and refusal to purchase dairy products. 3. Price and income elasticities limit the use of a price increase strategy. 4. The presence of the problem of malnutrition with products that are absolutely necessary for human health. <p>The result is deprivation and a decrease in well-being.</p>	<ol style="list-style-type: none"> 1. Value marketing. 2. Optimizing the price and its availability for the consumer. 3. State support: formation of human capital at the level of physiological capital, producer and consumer – to ensure availability of goods, profitability, recovery of production and consumption. 4. Compliance with international quality standards <p>Expected result: increase in the level of well-being.</p>

Source: author's developmen

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