

THE IMPACT OF THE WAR ON FOREIGN TRADE IN UKRAINIAN AGRICULTURAL PRODUCTS WITH THE EU

Natalya Sirenko^{ID}, *Kateryna Mikulyak^{ID}

Mykolayiv National Agrarian University, Ukraine

*Corresponding author's email: mikulyak@mnau.edu.ua

Abstract

Under modern conditions, studying the impact of the war on foreign economic operations is essential for understanding current challenges, adapting the agrarian sector to new realities and developing effective strategies to ensure the country's food security. In addition, the establishment of trade relations with EU plays a key role in ensuring the sustainable development of the industry and the integration of Ukraine into the global economy. The purpose of the study is to assess the impact of the war on the foreign trade of Ukrainian agricultural products and to determine the strategic guidelines for the development of trade relations with the EU. The article reveals the general state and changes in the dynamics of export-import operations of agricultural products under martial law. Based on the calculated forecast of the value of exported and imported products for the period until 2030, it is projected that there will be general economic growth and expansion of Ukraine's foreign economic activity, and the balance will remain positive, which is evidence of the excess of exports over imports and indicates an increase in the competitiveness of national goods on the international market. Strategic directions for the development of trade relations between Ukraine and the EU and the prospects for the import of agricultural products are considered, the volumes of which will largely depend on the domestic production and trade policy of Ukraine, which is influenced by factors of indirect action of the external environment.

Keywords: export, import, agricultural products, trade, impact of war.

Introduction

The war in Ukraine radically changed the structure and dynamics of international trade, especially in the agricultural sector. Ukraine is one of the world's largest exporters of cereals, oilseeds and other agricultural products, and the European Union is its key trading partner.

Export restrictions from Ukraine

Ukraine plays an important role in providing food to many countries of the world, and the war has threatened the stability of global markets. Restrictions on exports from Ukraine caused an increase in food prices, which was particularly felt by the countries of Africa, the Middle East and Asia.

The European Union has not only simplified the import of Ukrainian products, but also supports Ukrainian agricultural producers, which is of strategic importance for economic recovery.

Due to the blockade of Ukrainian ports on the Black Sea, trade has shifted to alternative routes: through Poland, Romania, Hungary and other EU countries. The 'Solidarity Roads' and the Danube Grain Corridor, which ensure the export of agricultural products, became important.

The EU provides Ukraine with duty-free access to its market, which is part of broader political support in war conditions, at the same time internal conflicts arise in the EU (for example, temporary bans on the import of Ukrainian grain by individual countries), which requires the search for compromise solutions.

Nechyporuk A., Kotova M. and Kochubei D. studied exports under martial law, in particular, considered alternative routes for the export of agricultural products from Ukraine via the Black Sea routes (through the revival of the Black Sea Grain Initiative and the creation of new routes with security guarantees for partner countries, including Turkey), land transport routes (due to the abolition of the ban on imports by

Eastern European countries, the increase in the capacity of rail transport, the operation of dry ports on the border with Poland and Romania), ports of the Danube region (due to the increase in the capacity of Danube ports through investments in infrastructure and the creation of new logical routes to Croatian ports) (Nechyporuk et al., 2023).

Motorniuk I. U. and Yaremchuk T. S. considered the issue of restoring Ukrainian exports under martial law through the introduction of new effective mechanisms to encourage export promotion, harmonization of certification with EU standards, development of logistics infrastructure, expansion of export services and attraction of investments (Motorniuk & Yaremchuk, 2022).

Scientists Rose A., Zhenhua C. and Dan W. studied the macroeconomic consequences caused by disruptions in grain exports as a result of the Russian-Ukrainian war. Using the multi-regional model of CGE GTAP, the authors state that this event creates significant cascading economic consequences in both sectors and regions of the world (Rose et al., 2023).

Ay H. M. and Söylemez A., for his part, emphasizes that Turkey's balanced foreign policy since the first days of the war and the emphasis that it can take on the mission of mediator between the parties has brought success in the grain corridor (Ay & Söylemez, 2023). So, after analysing scientific works, it can be argued that foreign trade is one of the main factors of the country's economic development.

Export achievements of Ukraine and forecast of the rules of the game on the EU market

In 2024, Ukraine demonstrated an increase in exports and imports of agri-food products, but it is already necessary to take all measures to maintain preferential trade conditions after June 5, 2025.

The share of agricultural products in the country's total exports was 60%, which, although slightly less than

the record figure of 2023 (62%), is still the second-best result in the history of independent Ukraine.

One of the key features of 2024 was the simultaneous growth of exports and imports of agricultural products. According to the State Customs Service of Ukraine, the total volume of foreign trade in agricultural products in 2024 amounted to 32.66 billion dollars USA, which is 11.5% more than in 2023.

Exports increased by 12.1%, reaching 24.84 billion USA. Imports increased by 9.7% and amounted to 7.82 billion USA. For the first time during the full-scale war, Ukraine managed to increase the volume of agricultural exports, largely due to the stable operation of the controlled sea corridor, through which about 60 million tons of agricultural goods were shipped.

However, in 2025, difficulties in foreign trade are expected due to possible changes in the terms of preferential trade with the EU.

Technical negotiations are ongoing in the European Union on new trading conditions for Ukraine, as the European Commission does not plan to extend the current preferential regime after June 5, 2025.

One of the options is to deepen cooperation within the Deep and Comprehensive Free Trade Area (DCFTA), which may provide for the establishment of quotas for certain categories of agricultural products and additional regulatory mechanisms. This will contribute to the gradual integration of Ukraine into the EU single market. European Commissioner for Agriculture Christophe Hansen noted that most agriculture ministers in EU countries support a more stable agreement within the DCFTA, which will provide for new volumes of exports and imports, instead of extending the current preferential regime.

The products of the agro-industrial complex are the basis of Ukrainian exports, so in conditions of instability associated with martial law, blockade of the sea, suspension of the Black Sea Grain Initiative, it is important to search for alternative ways of export implementation, using all possible types of transport and logistics supply chains.

The study of the impact of the war on export-import operations between Ukraine and the EU is extremely important for assessing the economic, political and social consequences, as well as for developing effective strategies for supporting and restoring Ukraine's agricultural sector.

The purpose of the study is to assess the impact of the war on the export and import of agricultural products and to determine strategic guidelines for the development of trade relations with EU countries.

The objectives of the study are:

1. To disclose the general state and changes in the dynamics of export-import operations of agricultural products, as well as to determine the impact of the war on the export and import of agricultural products with EU countries.

2. To forecast the cost of exported and imported agricultural products by Ukraine for the period up to 2030.

3. To determine the directions of support for exporters of agricultural products for their development in the future, as well as the prospects for importing products, considering the volume of production of such products in Ukraine.

Materials and Methods

The information base of the study is data from the European Commission, the Ministry of Agrarian Policy and Food of Ukraine (Minagro, 2025), State Statistics Service of Ukraine (State Statistics Service of Ukraine, 2025), and the Office for Entrepreneurship and Export Development.

To understand the problems and prospects for the development of export-import operations with the EU countries, a forecast of the value of exported and imported agricultural products by Ukraine for the period up to 2030 was made using MS Excel.

Before the forecasting procedure, the time series data for 2021-2024 were evaluated for structural integrity, volatility, and fulness. A seasonality analysis performed using the Excel auto-detection tool confirmed the presence of an annual additional seasonality typical of agricultural trade cycles. The missing values were populated using linear interpolation. The ETS (AAA) algorithm was chosen because of its suitability for short, variable data sets, especially in post-war economic conditions. The forecast was developed in MS Excel on the basis of official statistics of the State Statistics Service of Ukraine, as well as data from the European Commission, the Ministry of Agrarian Policy and Food of Ukraine, and the Office of Entrepreneurship and Export Development. The FORECAST.ETS function was used to predict the value of exports and imports of agricultural products from the EU until 2030. This method uses exponential smoothing with automatic determination of seasonality, a 95% confidence interval, and averaging for repeating values. The results reflect the most likely scenario of development, indicating a constant increase in trade volumes and indicating the economic recovery and expansion of Ukraine's foreign economic activity.

Results and Discussion

The factors that significantly influenced the volumes and directions of international trade in Ukraine during the war include the introduction of unilateral trade preferences by the EU in 2022, as well as the signing of a grain agreement and the creation of a Ukrainian maritime corridor after its termination.

In 2014, Ukraine and the European Union signed an Association Agreement, which led to the creation of a Complete and Comprehensive Free Trade Area, which contributed to the strengthening of trade ties between Ukraine and the EU (Center for Economic Strategy, 2024).

However, until June 2022, tariff quotas for agricultural products continued to apply. In June 2022, the EU implemented an unprecedented decision – temporarily

lifting restrictions on Ukrainian goods to support Ukraine's economy during the war. This made it possible to significantly increase the export of Ukrainian goods, mainly agricultural products, to the EU. In the process of European integration, Ukraine is actively adapting its legislation to the norms and

standards of the European Union, which is an important step towards EU membership. Particular attention is paid to the agricultural sector, regulation of product quality, protection of producers' rights and improvement of state control in the field of food safety (Table 1).

Table 1

Legislative steps adopted in Ukraine in 2022 related to EU integration in the agricultural sector

Months of 2022	Characteristic
September	The Law of Ukraine dated 06.09.2022 was published. No. 2572-IX 'On the peculiarities of the legal protection of geographical indications for agricultural products and food products, the protection of rights and the application of quality schemes, including traditional guaranteed features for agricultural products and food products'
October	The draft law 'On the Association of Agricultural Producers' was registered (No. 8149 dated 24.10.2022)
November	The Law of Ukraine 'On Materials and Items Intended for Contact with Food Products' (No. 2718-IX dated 03.11.2022) was signed and published; The Law of Ukraine 'On Amendments to Certain Legislative Acts of Ukraine Regarding the Bringing of Legislation in the Field of Protection of Rights to Plant Varieties and Seed and Breeding in line with the Provisions of the Legislation of the European Union' was signed and published (No. 2763-IX dated 16.11.2022)
December	The draft Law of Ukraine No. 4558 'On Amendments to Certain Laws of Ukraine Regarding the Improvement of State Regulation in the Field of Pesticide and Agrochemical Handling' (No. 4558 dated December 30, 2020) was submitted to the President of Ukraine for signature; The draft Law of Ukraine 'On Geographical Indications of Alcoholic Beverages' (No. 2800-IX dated December 1, 2022) was submitted to be signed by the President of Ukraine; Adopted as a basis the Law of Ukraine No. 5840 dated 05.08.2021 'On Amendments to the Code of Ukraine on Administrative Offences to Strengthen Responsibility in the Field of Handling Genetically Modified Organisms'

Such steps not only contribute to the development of the domestic market and increase the competitiveness of Ukrainian products but also strengthen Ukraine's position as a reliable partner in the international arena. The biggest problem for all subjects of the agrarian sector under martial law was the complication of logistics at each stage of the chain. Since the beginning of the full-scale invasion, the volume of exports of agricultural products of Ukraine has shown gradual growth, which indicates the adaptation of logistics routes and effective coordination of actions of the

government and international partners. If in March 2022, only 331.6 thousand tons were exported, then in September and October the indicator reached 6.87 million tons. In general, during the period there was a constant increase in export volumes, with the exception of November, where a slight decrease (up to 5.91 million tons) was recorded, which may be due to seasonal or logistical factors. Efforts to open new routes, the implementation of the grain initiative and international support have become key factors in stabilizing and activating exports (Table 2).

Table 2

Agrologistics since the beginning of a full-scale invasion

Months of 2022	Export, tons	Characteristics
March	331557	Negotiations between Turkey and Ukraine on uninterrupted supplies of agricultural products to traditional export-dependent markets
April	968316	The European Commission announced the abolition of duties and quotas for Ukrainian exports for the year; The Coordinating Council on Logistics in Agriculture was created, headed by the Minister of Agrarian Policy and Food of Ukraine (Resolution of the Cabinet of Ministers of Ukraine No. 427 of April 9, 2022)
May	1742621	Ukraine and Poland signed a joint statement on the export of Ukrainian grain; The work of EU leaders on the creation of green corridors; Ukraine's negotiations on the establishment of the Organization of Grain Exporting Countries; Agreement on the diversion of goods that went through Ukrainian ports to the sea terminals in Gdansk and Constanta

June	2168434	Launch by the European Commission of a platform to optimize the export of Ukrainian grain – Grainlane; Consideration by EU governments of the possibility of providing Ukraine with temporary storage facilities for grain; The Verkhovna Rada of Ukraine ratified the Agreement on the abolition of duties and quotas in trade with the United Kingdom (The Verkhovna Rada of Ukraine, 2025)
July	2751656	Construction of more than 20 transshipment companies in areas where new logistics routes were built – Poland, Romania, Hungary, Slovakia; The passage for vessels transporting agricultural products through the channel of the mouth of the Bystre was restored; Signing of a grain agreement between Turkey, the UN and Ukraine
August	4563043	During the full-scale war, the first ship with 26 thousand tons of corn left the port of Odesa
September	6867997	During the month of operation of the grain corridor, Ukraine shipped more than 60 thousand tons of wheat as part of the WFP; Between the UN, Ukraine and Poland agreed to build an oil duct to Gdansk
October	6867997	Ukraine simplified the procedure for grain fumigation for export
November	5910039	The grain corridor was extended for 120 days. The EU allocated up to 1 billion euros for the ‘Ways of Solidarity’ (European Commission, 2024a). Ukraine launched the program ‘Grain from Ukraine’

In order to alleviate the logistical difficulties faced by domestic producers and exporters after Russia’s unjustified military aggression, in May 2022 the EU agreed to suspend import duties, quotas and trade protection measures for Ukrainian exports to the EU – ‘autonomous trade measures’ (ATM).

Due to the emergence of logistical difficulties in Bulgaria, Hungary, Poland, Romania and Slovakia caused by wheat, corn, rapeseed and sunflower seeds originating from Ukraine, exceptional and preventive measures for their import began on a temporary basis on May 2, 2023. In 5 countries bordering Ukraine, there were no more market distortions, so these precautionary measures expired on September 15, 2023. Nevertheless, Ukraine agreed to introduce effective measures to control the export of four groups of goods from September 16 to prevent market distortions in neighboring member states.

On June 6, 2024, the European Union introduced updated autonomous trade measures for trade with Ukraine, under which all duties and quotas for Ukrainian exports to the European market were

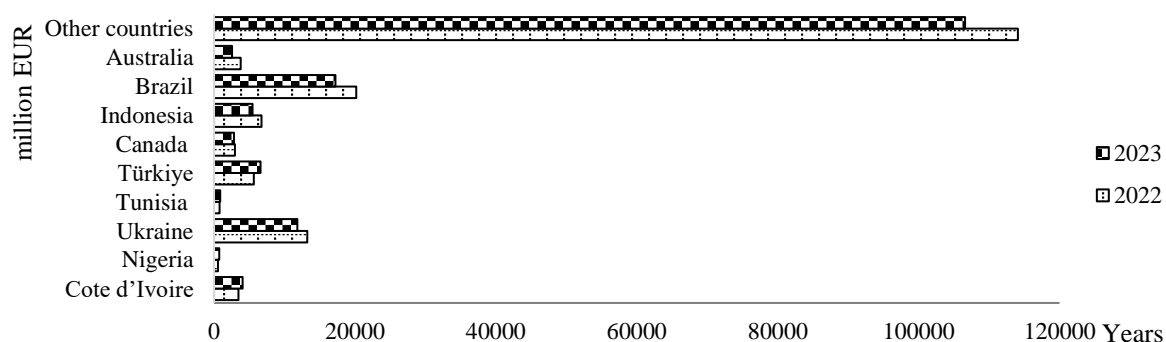
suspended for another year. At the same time, the updated ATZs contain preventive restrictive measures to protect the European market, which can be applied to products such as chicken eggs, chicken, sugar, oats, corn, cereals and honey. Fuses were automatically applied if the volume of imports of these goods reached the average annual volume of imports from Ukraine to the EU in the period from July 1, 2021, to December 31, 2023.

Ukraine continues to be among the three most influential exporters of agricultural products to the EU countries, while Ukraine accounts for 8% of the total agricultural imports of the European Union (Ukrinform, 2024).

The EU is reducing imports from some traditional suppliers, such as Brazil, Indonesia and Australia, instead increasing imports from African countries (Nigeria, Cote d’Ivoire, Tunisia) and Turkey. Ukraine retains an important role in the supply of agricultural products, although its volumes decreased slightly in 2023, Figure 1 (European Commission, 2024b).

Figure 1

Import of EU agri-food products - countries with the most important changes in 2022-2023 (million euros)



In 2023, the import of EU agri-food products decreased compared to 2022, as evidenced by the reduction in the indicators of most countries such as Brazil, Indonesia,

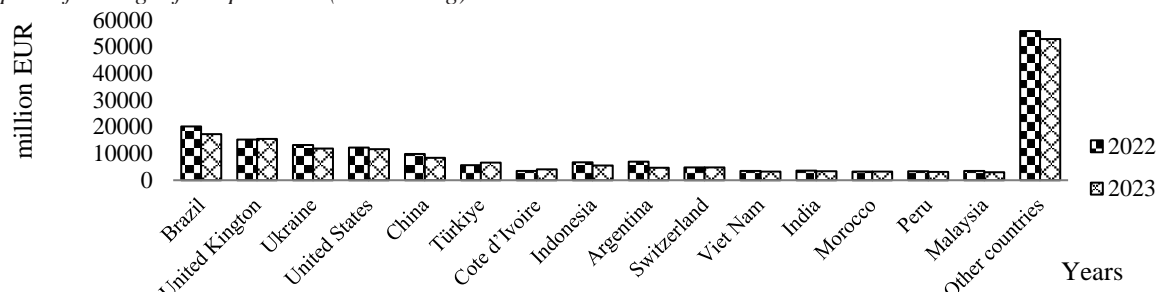
Australia, while there was an increase in imports from some countries (Nigeria, Ivory Coast, Tunisia, Turkey). Ukraine is characterized by a slight decrease in imports

from 13.214 million euros (2022) to 11.816 million euros (2023), but the country is still a key partner of the EU. In terms of the absolute volume of agricultural exports to the EU, in the period from January to August

2024, Ukraine was second only to Brazil and Great Britain and was ahead of countries such as the USA, China and Turkey, Figure 2.

Figure 2

Import of EU agri-food products (total rating) in 2022-2023



This trend indicates the stability of global agricultural markets and the growing importance of Ukraine as a supplier of agricultural products. Table 3 shows

changes in EU agri-food imports for January-August 2023 and January-August 2024.

Table 3

Imports of EU agri-food products - countries with the most important changes (million euros) (January-August 2023, January-August 2024)

Trading Partners	Jan 2023-Aug 2023	Jan 2024-Aug 2024	Difference	
Total agri-food	107907	111009	3102	3%
Cote d'Ivoire	2733	4166	1433	52%
Nigeria	468	1144	676	144%
Ukraine	7964	8583	619	8%
Tunisia	539	998	459	85%
Türkiye	4163	4598	435	10%
Canada	1973	1556	-417	-21%
Indonesia	3831	3048	-783	-20%
Brazil	11901	11307	-594	-5%
Australia	2070	1349	-721	-35%
Other countries	72265	74260	1995	3%

Thus, total imports increased by 3% (+3.1 billion euros), while the largest growth was shown by Nigeria (+144%), Ivory Coast (+52%) and Tunisia (+85%). Ukraine increased exports by 8% (+619 million euros), confirming its important role in the EU's food security. There was a decrease in imports from Australia (-35%), Indonesia (-20%), Canada (-21%) and Brazil (-5%). In general, the EU agri-food import market demonstrated growth dynamics of supplies from key partners, in particular Ukraine. In January 2024, the European Commission recommended extending autonomous trade preferences for Ukraine from June 2024 to June 2025. However, the new project also included a clause on 'automatic precautions' (restoration of tariff quotas) for Ukrainian goods that could significantly affect EU markets. The final list of goods covered by these measures included poultry, eggs, sugar, oats, corn, cereals and honey. In 2023, these goods accounted for 16.6% of the value of Ukrainian exports to the EU, of which 14.1% was corn. With the exception of the latter, the precautionary

measures do not apply to other key items of Ukrainian exports to the EU, in particular, sunflower oil and wheat, which in 2023 accounted for 7.7% and 5.2% of the total value of Ukrainian exports to the EU, respectively. The main European partners for Ukraine in 2024 were Spain, Poland, the Netherlands, Germany, Italy, Romania, France and Belgium. These countries accounted for 80% of the total domestic trade turnover of agri-food with the European Union.

In the value of food imports from the EU countries, 61% were the following product groups: beverages – for 484 million dollars USA; tobacco products – for 385 million dollars USA; products for animal feeding, residues and waste – for 356 million dollars USA; cocoa and chocolate products – for 289 million dollars USA; dairy products – 277 million dollars USA (8% more than in 2023). In particular, the import of cheeses amounted to 225 million dollars USA; ready-made products from grain – 258 million dollars USA. As for the export of organic agricultural products to the EU, according to the report of the

European Commission, Ukraine retains its place among the five largest suppliers, occupying the fifth position among 125 countries. Ukraine has consistently maintained its place in the TOP-5 since 2018, which indicates a high level of exports of organic products to the EU. The total volume of imports of Ukrainian organic products to the EU in

2023 was 173,720 tons, which is 20.7% less than in 2022, when the volume of imports amounted to 219,125 tons (Table 4). The dynamics of foreign trade depends on macroeconomic factors, in particular global crises, changes in the geopolitical situation, trade restrictions and internal economic reforms (Sirenko et al., 2024).

Table 4
Export of organic products by country of export

Exporting country	Years		Change (%)
	2022	2023	
Ecuador	345522	359554	4.1
China	194101	200170	3.1
Dominican Republic	251378	191788	-23.7
Peru	197297	182270	-7.6
Ukraine	219125	173720	-20.7
Turkey	104041	150012	44.2
Colombia	120875	120189	-0.6
Togo	125619	104068	-17.2
India	139243	68109	-51.1
United Kingdom	52917	56471	6.7

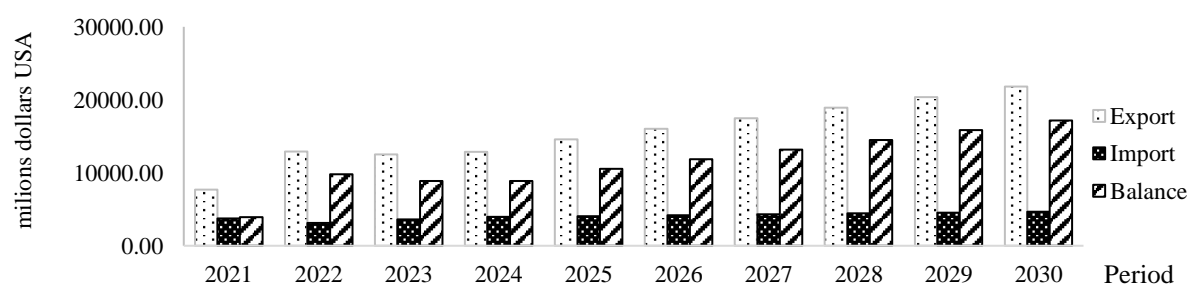
A comparative analysis with the dynamics of trade in other countries of Eastern Europe (e.g., Poland, Romania) shows that while the economies of these countries experienced structural failures, the export of agricultural products of Ukraine demonstrated comparatively greater adaptability, mainly due to EU solidarity measures and rapid logistics restructuring. The results of the forecast of the cost of exported and imported agricultural products by Ukraine with EU countries for the period up to 2030, see Figure 3, coincide with the forecasts obtained in other empirical studies (e.g., Rose et al., 2023), which suggests that

countries that have access to diversified trade corridors and regional agreements will see a faster recovery of export opportunities for agri-food products. These results also confirm the conclusions of Motorniuk and Yaremchuk (2022) regarding the effectiveness of harmonization of certification and investment in logistics as key factors in restoring exports under martial law.

Thus, to ensure the sustainable development of the economy, it is necessary to comprehensively improve trade policy, in particular in terms of stimulating exports and reducing critical dependence on imports.

Figure 3

Actual data (2021-2024) and forecast values (2025-2030) of the value of exports, imports and trade balance of Ukraine



The analysis of actual and forecasted data indicates a stable growth in Ukraine's foreign economic activity in the period up to 2030. The volume of exports increased from 7674.0 million dollars USA in 2021 to 12906.6 million dollars USA in 2022, which is associated with the gradual overcoming of logistical barriers caused by the war and, according to forecasts, will reach 21835.25 million dollars USA in 2030. Imports show moderate growth – from 3,764.1

million dollars USA in 2021 to the projected 4675.39 million dollars USA in 2030. The positive balance of foreign trade for this period will increase from 3909.9 million dollars USS to 17159.86 million dollars USA, which indicates an increase in export potential and a general economic recovery of the country. In order to improve the trade balance, it is advisable to stimulate export activities, reduce dependence on imports and develop our own production of competitive goods. In

order to promote exports to foreign markets, the Office for Entrepreneurship and Export Development provides entrepreneurs and exporters with assistance in establishing partnership and cooperation between domestic and foreign business, promoting domestic goods and services in the external market environment, and developing export competencies of domestic business. The strategic directions for the development of Ukraine's trade relations with the EU include the following factors: deeper integration into the European market (expansion of the Association Agreement); development of logistics infrastructure (modernisation of transport corridors, customs procedures and border infrastructure to facilitate trade); diversification of the export structure by reducing dependence on raw material exports by supporting the production of goods with high added value, in particular in the field of processing agricultural products; support for small and medium-sized business programs and digitisation of trade, as well as adapting the Ukrainian economy to EU environmental standards. The prospects for the import of agricultural sector products in Ukraine largely depend on domestic production and trade policy of Ukraine. Taking into account the production volumes of domestic agricultural products, several key trends and challenges can be identified:

- dependence on domestic production and demand (import of fruits, vegetables, meat and dairy products increases due to insufficient level of own production or seasonal factors);
- the impact of external factors on imports (logistical restrictions caused by the war lead to an increase in the price of imported products);
- currency fluctuations and economic instability may restrain imports due to an increase in the cost of production (changes in the customs policy of the EU and other partners after 2025 may affect the conditions of food imports);
- competition between imported and domestic products (producers in Ukraine are trying to replace imports by expanding domestic capacities; however, the import of exotic products remains stable due to the impossible or economically disadvantageous production in Ukraine).

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Conclusions

In the context of a full-scale war, Ukraine continues to be among the three most influential exporters of agricultural products to the EU countries, while Ukraine accounts for 8% of the total agricultural imports of the European Union.

The gradual integration of Ukraine into the EU single market will be facilitated by deepening cooperation within the Deep and Comprehensive Free Trade Area (DCFTA), which may include the establishment of quotas for certain categories of agricultural products and additional regulatory mechanisms.

The study conducted by the authors allows us to draw the following conclusions:

1. The overall state and dynamics of export-import operations of agricultural products by domestic agricultural commodity producers underwent changes in the conditions of a full-scale invasion, which manifested itself in a reduction in export volumes in 2023 compared to 2022. The EU took an important step in overcoming logistical difficulties by introducing 'ATM' in May 2022.
2. According to the results of the forecasting of the value of exported and imported agricultural products by Ukraine with the EU countries for the period up to 2030, it was established that the value of both exports and imports will increase significantly, which indicates the overall economic growth and expansion of Ukraine's foreign economic activity. The balance of foreign trade will remain positive throughout the period, which is evidence of the excess of exports over imports and indicates the competitiveness of national goods on the international market.
3. The strategic directions of development of trade relations between Ukraine and the EU include: deeper integration into the European market, development of logistics infrastructure, diversification of the export structure, support for small and medium-sized business programs and digitisation of trade, as well as adaptation of the Ukrainian economy to EU environmental standards. The prospects for the import of agricultural sector products in Ukraine largely depend on the domestic production and trade policy of Ukraine, which are influenced by the factors of indirect action of the external environment.

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