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THE IMPACT OF WAR ON THE FOREIGN ECONOMIC ACTIVITIES OF AGRICULTURAL ENTERPRISES: CHALLENGES AND POSSIBLE SOLUTIONS

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Ukraine's agro-industrial complex has traditionally played an important role in global food security. Before the full-scale invasion, Ukraine was one of the leading exporters of grain, sunflower oil, and other agricultural products. However, the war has significantly impacted this sector, creating new challenges for agribusiness and the state. A significant share of Ukrainian agricultural exports relied on Black Sea ports. Still, the temporary blockade of those ports and military operations in maritime trade routes forced Ukrainian producers to seek new logistical solutions. Infrastructure destruction, rising transportation costs, financing issues, and cargo insurance problems have led to a decline in export volumes and, consequently, losses for the national economy. At the same time, the crisis has created the preconditions for developing alternative export routes, diversifying markets, and strengthening international cooperation.

The relevance of this study lies in the need for a thorough analysis of the problems faced by Ukrainian agricultural exports during the war, an assessment of their impact on the national economy, and the development of possible solutions to preserve and expand export potential.

The war has significantly impacted Ukrainian agricultural exports, leading to declines in volumes due to port blockades, infrastructure damage, and rising logistical costs. The loss of access to maritime routes forced a shift to rail and road transport through Ukraine's western borders, slowing deliveries and increasing export costs. Additionally, there was a need to seek new markets to replace traditional trade routes.

Key problems facing the agricultural sector during the war include the destruction of infrastructure such as grain storage facilities, transport hubs, and production capacities, which complicates the effective distribution of products. Logistical difficulties stemming from route changes and limited capacity at rail and road border crossings have driven up export costs. Other challenges include reduced investment attractiveness, limited access to credit, fuel supply issues, and high cargo insurance risks during transportation.

Despite these challenges, new opportunities are emerging. International partners, such as the EU and the UN, are actively supporting the creation of alternative logistics corridors, including the "Danube Corridor" and the "Solidarity Lanes." The development of rail and river transport, the expansion of Danube port capacities, and improvements in cross-border infrastructure offer opportunities to adapt Ukrainian exports to new conditions. In addition, there is growing support for exporting value-added products, which may boost agricultural sector revenues.

Keywords: agricultural export, war in Ukraine, logistical challenges, alternative routes, international trade, food security, grain corridor, agricultural sector.

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INTRODUCTION

The domestic agri-industrial sector has traditionally been a pillar of global food security. Until the full-scale armed invasion, Ukraine maintained its position as a key supplier of cereals, sunflower oil and other agricultural products to world markets. However, the hostilities have radically altered operating conditions in the sector, creating unprecedented challenges for both agribusiness operators and the public administration system as a whole. Given that the lion's share of produce was intended for shipment via deep-water Black Sea ports, the sudden blockade and hostilities in the Black Sea forced Ukrainian exporters to develop new logistics chains urgently. Damage to critical infrastructure, a sharp rise in transport costs, limited financial instruments, and difficulties with cargo insurance have led to a decline in export figures and significant losses for the country's macroeconomic stability. At the same time, the current crisis has stimulated diversification of export routes, restructuring of sales markets, and strengthening of international partnerships.

The relevance of this research stems from the urgent need for an in-depth study of the destructive factors destabilizing Ukrainian agricultural exports during the war, a comprehensive assessment of their impact on the national economy, and the development of effective mechanisms to safeguard and further realize the country's export potential.

PURPOSE OF THE ARTICLE

It involves studying changes in Ukrainian agricultural exports resulting from martial law, identifying the key disruptive factors and challenges arising from hostilities, and formulating strategic decisions to mitigate these impacts.

MATERIALS AND METHODS

The study's methodological framework is based on a comprehensive approach that integrates quantitative and qualitative methods. The primary tool was the analysis of statistical datasets on foreign trade in agricultural products during the pre-war and wartime periods, which enabled detailed tracking of changes in supply volumes and the configuration of logistics flows. The use of comparative analysis enabled comparison of current macroeconomic and logistical parameters with retrospective peacetime indicators and an objective assessment of the scale of the impact of military operations on the sector.

Statement of the problem. Ukraine's agro-industrial sector has traditionally been one of the main guarantors of global food security, as before the full-scale invasion the country consistently maintained its position as a key supplier of cereals, sunflower oil, and other agricultural products to world markets. Agricultural exports accounted for over 40 percent of the state budget's foreign exchange earnings, thereby supporting macroeconomic stability. However, the hostilities have radically altered the sector's operating conditions, creating unprecedented challenges.

The main problem is that the lion's share of Ukrainian agricultural produce (up to 90 percent) has traditionally been shipped via deep-water Black Sea ports, which have been under blockade since the start of the war. This has forced producers to urgently seek alternative logistics chains, amid a sharp rise in transport costs, limited financial resources, and difficulties with cargo insurance. Furthermore, the widespread destruction of critical infrastructure — grain silos, warehouses, railway junctions, and production facilities — has significantly limited the capacity to store and market produce. Taken together, these factors are causing significant losses to the national economy and pose a real threat of famine in countries across Africa, Asia and the Middle East, where Ukrainian grain is a critically important resource.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

A significant number of academic papers have examined the transformation of the agricultural sector in the context of armed conflict. Ukraine's role as one of the leading food suppliers, and the risks to global markets posed by the Russian Federation's aggression, are covered in detail in FAO reports. S. Bondarenko, O. Nikishina, O. Zerkina, and V. Shaposhnikov have investigated structural changes in exports and the development of adaptive mechanisms to mitigate the consequences of military aggression [4].

An analysis of the specific features of foreign trade operations under martial law was conducted by A. Nechyporuk, M. Kotova, and D. Kochubey [5]. The theoretical and practical aspects of developing the economic potential of enterprises in crisis conditions were studied by K.V. Pavlov, O.M. Pavlova, V.R. Kupchak, L.V. Shostak and D.A. Romanyuk [6, 7, 8].

Also of significant importance are publications on the EU's 'Solidarity Lanes' initiative and the development of the Danube Logistics Corridor, which are analyzed as key instruments for supporting Ukrainian exports under conditions of a naval blockade. Summarising the work of domestic and foreign researchers, it can be stated that a robust theoretical and methodological foundation has now been established to understand the destructive impact of the war on the agricultural sector, a key element of the national economy. However, despite the significant number of publications devoted to crisis management and the development of alternative routes, such as the 'Solidarity Routes' or the Danube Corridor, the academic debate still needs to be deepened to ensure the long-term sustainability of exports. In particular, there remains a pressing need to justify a strategic shift from a raw-materials-based model to supplying high-value-added products, which will not only offset high logistics costs but also strengthen Ukraine's role as a guarantor of global food security in the new geopolitical realities.

Despite extensive research, there remains a need for a more in-depth analysis of the long-term effectiveness of alternative routes. In particular, there are significant technical and administrative barriers, such as the railway gauge not complying with European standards, a shortage of wagons and limited capacity at border crossings, which create 'bottlenecks' in logistics.

New disruptive factors that emerged in 2023–2024 – namely, protests by Polish farmers and border blockades – require a separate study. These actions led to the deliberate damage of cargo, delays in deliveries, and an erosion of trust in international logistics partnerships. Furthermore, strategies to encourage the export of value-added products rather than the raw-materials model remain

underdeveloped, a critical need for restoring agribusiness profit margins amid high logistics costs. Further detail is also required on the digitalization of customs procedures and the establishment of agricultural cooperatives and clusters as tools to enhance the resilience of small and medium-sized farmers during the war.

In summary, although the issue of diversifying logistics routes is actively discussed in academic discourse, a comprehensive mechanism to ensure their long-term stability remains underdeveloped. Researchers often overlook aspects of rapid adaptation to political and administrative barriers, such as the artificial blocking of borders and the tampering with cargo, which critically undermine the concept of 'Solidarity Routes'. Furthermore, the transition from the urgent search for any channel to sell raw materials to the strategic promotion of exports of high-value-added products requires further justification; this is the only way to maintain business margins amid extremely high logistics and insurance costs. The lack of a unified approach to the digitalization of customs procedures and the development of border logistics hubs creates additional 'bottlenecks' that require immediate academic analysis and practical implementation to strengthen Ukraine's position in the global food market.

PRESENTATION OF THE MAIN MATERIAL

Armed conflicts significantly alter the economic activity and development conditions of the countries involved, disrupting production chains, trade, and access to essential resources and markets. From a theoretical perspective, war constitutes a shock to a state, leading to losses in the manufacturing sector, disruptions to logistical links, and a decline in foreign trade volumes. Export-oriented sectors, particularly the agricultural sector, are especially vulnerable to such changes. Military action can not only restrict access to traditional markets but also render key infrastructure unusable, which significantly weakens a country's position within the international economic system.

Before the outbreak of full-scale war, Ukraine had consistently maintained its status as one of the world's leading suppliers of agricultural produce, meeting the food needs of dozens of countries. Agricultural exports generated over 40 percent of foreign exchange earnings for the budget, and their produce was supplied to more than 120 countries worldwide, thereby significantly impacting macroeconomic stability. Exports were primarily raw materials, in particular maize, wheat, barley, sunflower oil, rapeseed, and soya. A diagram showing the relative production of these crops compared with other countries is presented in Table 1.

However, the volume of processed food products was limited, leaving the Ukrainian agricultural sector dependent on fluctuations in global prices for agricultural raw materials.

Table 1

Share of selected crops in global production [1, 2]

Agricultural crop	2021/2022 (Before full-scale war)	2022/2023	2023/2024	2024/2025
<i>Corn</i>	24.7	25.2	26.3	22.2
<i>Wheat</i>	20.0	11.2	16.1	15.5
<i>Barley</i>	5.8	2.1	2.5	2.2
<i>Rapeseed</i>	2.7	3.1	3.6	3.8
<i>Soybeans</i>	1.5	2.0	3.5	3.0
<i>Sunflower oil</i>	5.0	4.5	5.6	5.2

From a logistical perspective, the seaports of the Black Sea basin – Odesa, Pivdennyi, Chornomorsk, and Mykolaiv – played a critical role in facilitating agricultural exports. Up to 90% of the volume of agricultural products entering foreign markets was transported through them. This distribution is explained by the high efficiency of maritime transport for bulk cargo – it enabled a significant reduction in logistics costs. It ensured the rapid delivery of large batches to distant regions, particularly North Africa, the Middle East, and South Asia.

It should be noted that the Black Sea ports played a key role in national cargo transportation. High throughput capacity, developed infrastructure, the availability of modern transshipment terminals, and the ability to service large maritime vessels ensured uninterrupted product exports. Due to the destruction of Ukrainian lands and occupation, the country lost access to a significant part of its logistics hubs; this caused significant consequences for all agricultural exports, resulting in a substantial drop in volumes, disruption of supply chains, and so on.

Grain and oilseed group products, as well as food industry goods, formed the basis of the foreign trade balance. Along with this, food security became an instrument of geopolitical influence: access to

Ukrainian exports was of great importance for regions with food shortages. The reports of international organizations, in particular the FAO, emphasize that the Russian Federation's aggression against Ukraine has become a factor of global food instability that threatens millions of consumers in the least developed countries.

Another important theoretical aspect of agricultural exports is their role in shaping global food security. In the modern world, food products serve not only as commodities but also as geopolitical tools. Control over the sources and channels of food supply is becoming a strategic resource that countries use to influence partners and adversaries. Ukraine, as one of the key suppliers of grain to countries across Africa, Asia, and the Middle East, plays a crucial role in stabilizing the international food market. Interruptions in Ukrainian exports caused by the war can provoke famine in vulnerable regions, creating the threat of escalating conflicts and migration waves. That is why ensuring the stable functioning of Ukraine's agricultural exports is not only an internal economic task but also a contribution to global security.

Due to blocked sea routes, Ukraine was forced to reroute agricultural flows to alternative logistics routes. Railway and road transport to the western borders – Poland, Slovakia, Romania, and Hungary – became increasingly important, with cargo further directed to European ports. At the same time, the active development of the Danube region's infrastructure began – with the ports of Izmail, Reni, and Ust-Dunaisk gradually taking over part of the load. However, compared to deep-water seaports, these routes are slower, less efficient, and have significantly lower throughput capacity.

The new routes proved to be limited both technically and organizationally. The mismatch between the railway gauge and the European one, the shortage of railcars, queues at customs, and overloaded border checkpoints – all of this created delays and limited export volumes. Road transport also has limited capacity for mass loading and depends on road conditions and driver availability. The river ports on the Danube were quickly modernized, but their capacities still cannot fully compensate for the loss of maritime infrastructure. This created "bottlenecks" in the export process that remain critical.

The transition to more expensive, complex logistics routes automatically increased transportation costs. Product storage costs have increased because, amid logistical delays, grain and other agricultural products often wait in line for shipment. A separate problem was the supply of fuel, especially in the initial stages of the war, when a shortage paralyzed internal logistics. In addition, cargo insurance risks increased significantly, especially for international companies that feared operating in areas of military danger. This limited private players' participation and complicated the conclusion of export contracts.

One of the key problems for Ukraine is the extensive destruction of infrastructure, including elevators, logistics hubs, storage facilities, railway junctions, and seaports. The problem of the inaccessibility of Black Sea ports, through which the bulk of exports was carried out before the war, became particularly acute. The destruction of transport infrastructure in frontline and occupied regions significantly constrained the geography of product cultivation and export, resulting in additional costs and delays. No less threatening is the problem of labor outflow, especially in rural regions. Part of the population was evacuated or mobilized, while another part changed their occupation, seeking more stable and safer sources of income. This led to a shortage of qualified workers across farms, logistics companies, and processing enterprises. At the same time, training new personnel is complicated, given the country's general socio-economic conditions.

Financial pressure on the agricultural sector has also intensified significantly. The unavailability of lending has become one of the main obstacles to the stable operation of enterprises. Banks and financial institutions are not ready to take on the risks of investing in a highly dangerous environment, especially in regions subjected to regular shelling. Because of this, farmers are forced to limit sown areas, reduce production volumes, and seek financing through international programs or donor assistance, which is limited. The war has also significantly increased the risks for agricultural activities. Transporting products carries the risk of loss due to shelling, border delays, and route instability. Moreover, the profit margins of Ukrainian exports have significantly decreased due to rising costs for logistics, fuel, insurance, and product certification. The deterioration in the terms of trade and the decline in price competitiveness place an additional burden on farmers, especially small and medium-sized ones.

Difficulties with logistics partners should be noted separately. Due to military risks, many international and even national logistics companies are unwilling to cooperate with Ukrainian exporters or to offer services at inflated prices. The number of insurance companies covering risks during the transportation of Ukrainian cargo has also decreased. Together, these factors create extremely difficult conditions for maintaining and developing the agricultural sector's export potential in wartime. Overcoming these challenges requires a comprehensive approach that combines state support, the

attraction of international assistance, and innovative solutions from agricultural market participants themselves.

One of the most significant external solutions was the European Union's 2022 "Solidarity Lanes" initiative. Its goal is to provide alternative routes for exporting Ukrainian agricultural products across western borders by rail and road, as well as through Danube ports. Thanks to this initiative, it was possible to export millions of tons of grain and significantly expand cross-border logistics capabilities. The Danube logistics corridor plays a special role, having become a real "window to the world" for Ukrainian farmers. Thanks to the development of port infrastructure on the Danube, particularly in Izmail, Reni, and Kiliia, alternative water export routes were secured. However, the effectiveness of such solutions largely depends on long-term investments in logistics – modernizing railway transport, building granaries near borders, and creating logistics hubs are strategic tasks.

However, to make more effective use of these routes, investments are needed to modernize railway and port infrastructure, increase the number of border crossing points, improve coordination between customs and logistics services, and digitalize customs exchanges.

Under conditions of instability, the digitalization of agribusiness becomes increasingly important—including the use of digital platforms for monitoring, planning, and managing logistics processes, electronic certification, and remote trading. Also important is the creation of agricultural cooperatives and clusters, which enable farmers to jointly address issues related to storage, transportation, processing, and product marketing. Cooperation creates the prerequisites for increasing efficiency with limited resources and provides an opportunity to access international grant programs. Agricultural clusters can serve as innovative centers that combine production, processing, education, and research.

The prospects for post-war agricultural export development are tied to Ukraine's integration into global supply chains. After hostilities end, international investment is expected to intensify, particularly in agricultural logistics, processing, and green development. Ukraine has the opportunity to become a key food supplier to the EU and developing countries, provided reforms are implemented to promote transparency, effective management, and innovation. Restoring destroyed capacities, modernizing ports and railway connections, supporting small businesses, and adapting to the requirements of global markets can lay the foundation for sustainable growth in the agricultural sector's export potential. The agricultural industry itself has all the prerequisites to become the locomotive of Ukraine's post-war economic revival.

In the period from 2023 to 2024, the situation with Ukrainian agricultural exports, particularly grain, became significantly more complicated due to actions by Polish farmers who organized blockades at border checkpoints. The main reason for their protests was competition from Ukrainian agricultural products, which, according to them, dump their products on the European market at below-market prices. Polish farmers accused the EU of excessively facilitating Ukrainian exports after the start of the full-scale war, believing that Ukrainian grain was intended only for transit. Instead, it remains on the Polish market, harming their own production. However, during the protests, the situation went beyond peaceful expression of dissatisfaction. Instances of intentional damage to Ukrainian cargo were recorded: Polish protesters opened train cars with grain, spilling it right onto the ground, delayed or blocked the movement of trucks with Ukrainian products, and sometimes even physically obstructed drivers. Such actions led not only to economic losses for Ukrainian producers but also to threats to the food security of countries that depend on Ukrainian exports.

These incidents caused outrage in Ukrainian society and political leadership, as in wartime conditions, Ukraine relied on overland export routes through Poland due to the blockade of Black Sea ports. Constant restrictions, blockades, and cargo spoilage undermined trust in the partnership between the two states. At the same time, the Ukrainian side repeatedly called on its Polish colleagues to engage in dialogue and mutual understanding, emphasizing that, in wartime conditions, the country cannot fully control logistics and is seeking any means to maintain exports to support the economy and ensure foreign exchange earnings.

CONCLUSIONS

Ukraine's agri-industrial sector has demonstrated remarkable resilience in the face of full-scale war, becoming one of the key pillars of the national economy and, despite numerous challenges, maintaining its export potential. The war has caused widespread disruption to logistics: seaports have been blocked, transport infrastructure has been destroyed, and access to fuel, insurance and credit has been hampered. The loss of access to traditional export routes has forced Ukraine to redirect its logistics via rail, road and river ports. This process has proved technically complex and economically costly.

Despite this, thanks to the support of international partners, notably the EU, several initiatives were launched, such as 'Solidarity Routes' and the Danube Corridor, which partially compensated for the lost opportunities. However, the effectiveness of these alternative routes is significantly limited by technical, administrative and political barriers. One of the most contentious issues in the current climate has been the disruption of Ukrainian grain exports amid protests by Polish farmers. Blocking borders and creating artificial obstacles at railway crossings and logistics hubs in Poland not only violate the terms of the 'Solidarity Routes' initiative but also directly threaten the stability of Ukraine's agricultural exports and weaken its position in international markets. These actions are causing concern in both political and economic terms, as restricting Ukrainian grain's access to Europe not only undermines confidence in allied support but also creates a surplus of produce within the country, thereby reducing farmers' incomes and diminishing foreign exchange earnings.

Overcoming the current challenges requires a strategic approach: investment in modernizing border and transport infrastructure, active diplomatic dialogue with neighboring countries, diversification of export markets, and the promotion of value-added exports. The development of agricultural clusters, the digitalization of logistics, and the expansion of cooperation in international projects will contribute to the sector's stable development. In the context of post-war recovery, the agricultural sector stands to become the cornerstone of Ukraine's economic resurgence, its integration into global supply chains, and the strengthening of its role as a leading global food supplier.

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ВПЛИВ ВІЙНИ НА ЗОВНІШНЬОЕКОНОМІЧНУ ДІЯЛЬНІСТЬ АГРОПІДПРИЄМСТВА: ПРОБЛЕМИ ТА МОЖЛИВІ РІШЕННЯ

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Агропромисловий комплекс України традиційно відіграє важливу роль у світовому продовольчому забезпеченні. До початку повномасштабного вторгнення Україна була одним із провідних експортерів зернових, соняшникової олії та інших сільськогосподарських

товарів. Однак війна суттєво вплинула на цю сферу, створивши нові виклики для аграрного бізнесу та держави загалом. Значна частина продукції експортувалася через чорноморські порти, але їхня тимчасова блокада та військові дії на морських торговельних шляхах змусили українських виробників шукати нові логістичні рішення. Руїнування інфраструктури, зростання собівартості перевезень, проблеми з фінансуванням та страхуванням вантажів призвели до зменшення обсягів експорту і, відповідно, до втрат для економіки країни. Водночас криза створила передумови для розвитку альтернативних маршрутів експорту, переорієнтації ринків збуту та посилення міжнародної співпраці.

Актуальність дослідження полягає в необхідності детального аналізу проблем, з якими стикається український аграрний експорт у період війни, оцінки їхнього впливу на економіку країни та розробки можливих рішень для збереження й розширення експортного потенціалу.

Війна суттєво вплинула на експорт української агропродукції, спричинивши зниження його обсягів через блокаду портів, руїнування інфраструктури та зростання логістичних витрат. Втрата доступу до морських шляхів змусила переорієнтувати експорт на залізничні та автомобільні маршрути через західний кордон, що значно вплинуло на швидкість і собівартість постачання. Також виникла потреба у пошуку нових ринків збуту замість традиційних напрямків.

Серед основних проблем аграрного сектору в умовах війни слід відзначити руїнування інфраструктури, зокрема зернохосвищ, транспортних вузлів і виробничих потужностей, що ускладнює ефективний збут продукції. Логістичні труднощі, пов'язані зі змінами маршрутів та обмеженими пропускними можливостями залізниці й автомобільних переходів, спричинили зростання вартості експорту. Додатковими викликами стали зниження інвестиційної привабливості галузі, зменшення доступу до кредитних ресурсів, проблеми із забезпеченням паливом та високі ризики страхування агропродукції під час транспортування.

Попри всі труднощі, що переживає Україна, у нинішніх умовах відкриваються і нові можливості. Зокрема, міжнародні партнери, такі як ЄС та ООН, активно підтримують створення альтернативних логістичних коридорів, зокрема "Дунайського коридору" та "Солідарних шляхів". Розвиток залізничних і річкових перевезень, розширення потужностей портів Дунаю та покращення транскордонної інфраструктури відкривають перспективи для подальшої адаптації українського експорту. Крім того, спостерігається активне стимулювання експорту продукції з доданою вартістю, що може сприяти зростанню доходів аграрного сектору.

Ключові слова: аграрний експорт, війна в Україні, логістичні проблеми, альтернативні маршрути, міжнародна торгівля, продовольча безпека, зерновий коридор, аграрний сектор.