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Ukraine in the markets of organic agri-food products of the European Union: Analytics, trends, and prospects

Liudmyla Smolii*
PhD in Economic Sciences, Associate Professor
Uman National University of Horticulture
20300, 1 Instytutska Str., Uman, Ukraine
https://orcid.org/0000-0002-7426-0468

Mykola Mostoviak
Postgraduate Student
Uman National University of Horticulture
20300, 1 Instytutska Str., Uman, Ukraine
https://orcid.org/0009-0001-9230-820X

▶ **Abstract.** The study of the role of the Ukrainian agricultural sector in meeting the demand for organic products in the European Union is vital for understanding and maximising the benefits for Ukraine. This is crucial in the context of the development of the organic market and expanding cooperation with Europe, which indicates the relevance of the problem discussed in the present study. The purpose of this study was to identify the current position, dominant trends, and prospects for increasing Ukrainian organic imports to the European Union. The methodological framework of this study included the general and special methods of scientific cognition: monographic, dialectical, tabular, graphical, abstract and logical, and comparative analysis. The study analysed the vectors and dynamics of development of organic agriculture in the European Union, specifically, identified the growth of domestic and import demand for organic products, expansion of the list of commodity items, the existence of a gap between supply and demand, and high concentration of the commodity structure of imports. The study found the principal factors that ensure Ukraine's leading position among the key importers of organic food: geographical location, increase in domestic production of organic products, improvement of the system of its certification, and establishment of partnerships with the European Union. Ukraine's position in most commodity groups of import demand for organic products has been strengthened: specifically, Ukraine's share of imports has increased, and its structural characteristics have improved in terms of increasing the share of high value-added products. The study highlighted the barriers faced by Ukrainian exporters when entering the European market and acting as a deterrent to expanding the volume and range of exported organic products. The areas for increasing the potential of Ukraine in meeting the demand for organic products in the European Union were outlined. The findings of this study provide valuable information for producers, entrepreneurs, and stakeholders involved in the development of the organic market in Europe and sustainable agriculture. The outlined priorities for the development of organic production in Ukraine can underlie the development of a national programme aimed at increasing the competitiveness of the Ukrainian organic industry in the markets of the European Union

▶ **Keywords:** organic production sector; agricultural sector; exports; import demand; European Union

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*Corresponding author

Introduction

The growing environmental awareness of consumers in the European Union (EU) is leading to an increase in their interest in healthy eating and sustainable development. This encourages them to prefer organic products, which are considered safer and more environmentally friendly. Growing demand encourages producers to support and develop the organic industry, expand their product range to meet the needs of domestic consumers and reduce dependence on imports. The organic market is showing steady growth and is promising not only for European producers, but also for companies from other countries that adhere to high quality standards and sustainable production principles.

Considering this, the growth of the organic market is recognised as one of the key vectors of the European Green Deal (EGD). The European Commission's Farm to Fork strategy, implemented under the EGD, states that "the organic food market will continue to grow, and organic agriculture needs to be further promoted" (A Farm to Fork Strategy..., 2020). The European Commission's Organic Action Plan for 2021-2027 aims to increase both the demand and supply of organic products.

The active coverage of the problem of developing organic production in scientific sources, as well as its role in ensuring food security and achieving sustainable development goals demonstrates the considerable interest in this issue. The EU is the largest market for organic products, with annual growth. Since the 1990s, the development of organic agriculture has received considerable attention, which has contributed to an increase in the share of organic area in the EU by almost 8.5% compared to the global average of about 1.5% (Willer *et al.*, 2021). Foreign scholars who have investigated this issue argue that the organic sector in the EU has prospects for considerable growth (Rees *et al.*, 2023). Despite the expansion of organic agriculture and the increase in the number of organic producers, according to the results of studies by S. Pedersen *et al.* (2018) and A. Blaće *et al.* (2020), the demand for organic products is growing much faster than domestic production and supply.

At the same time, European scientists are discussing the feasibility of intensifying the expansion of organic areas in the EU member states. While research confirms that consumers are willing to pay a higher price for organic food due to health and environmental benefits, the environmental benefits are increasingly disputed because the lower productivity of organic farming systems may lead to intensification of agriculture on other farmland. This, according to M. Lambotte *et al.* (2023) and M. De Bauw (2022), calls into question the environmental efficiency of organic farming. Considering this, it can be predicted that the share of organic products imported to the EU will only grow.

Ukrainian scientists also pay attention to these trends, as Ukraine holds a key position in the import of organic products to the EU. Thus, V. Butenko *et al.* (2020) discuss the specific features of the development of this market in the European Union. O. Malokhlib (2021) explores the possibilities of Ukrainian producers' participation in the EU markets, considering the requirements of European environmental legislation. The studies of O. Senyshyn (2021) and T. Grabovska (2019) are based on the investigation of Ukraine's export potential in terms of supplying organic products to the EU. Considering the above, the issues raised are of significant scientific interest and determine the purpose of the present study. The purpose of this study was to investigate the opinions and outline the prospects of the Ukrainian organic industry in meeting the demand for organic agri-food products in the European Union.

Materials and Methods

The study was based on the use of general scientific and special methods of scientific cognition. Based on scientific sources selected on the principle of the highest reliability, objectivity, and relevance, information and provisions were selected that enabled a comprehensive investigation of the issue. The scientific findings and opinions of scientists from the European Union and Ukraine on the main trends in the development of organic exports of agri-food products were investigated using the monographic method. The comparative analysis was used to empirically study the structural and dynamic characteristics of Ukrainian organic exports to the EU; the dialectical method was used to clarify the cause-and-effect relationships between the analysed phenomena. The use of tabular and graphical methods in the study made it possible to demonstrate in a systematic way the dynamics and interrelationships between economic processes and indicators characterising export-import operations, and to identify the existence of functional dependencies between them. By applying these methods, the study clarified Ukraine's position in the import of organic agri-food products to the EU and its changes over time, and improved the ability to visualise and present analytical information. The conclusions were formulated using the abstract and logical method by identifying the essence of the main concepts in the context of the subject under study, identifying logical patterns of development of the organic agri-food market and drawing generalisations and new judgements on this basis.

The analytical calculations were based on the Trade Control and Expert System (TRACES), the European Commission's online platform for certification required for the import of animals, animal products, food, non-animal feed, and plant products into the European Union, as well as for trade within the EU and exports from the EU (TRACES NT – European Commission, n.d.). To complete the objectives of this study, data on the total volume of imports of organic products to the EU-27 countries in terms of commodity items and value indicators, including from Ukraine, were used. This made it possible to track the dynamics of import demand for organic products in the EU-27, determine the commodity structure of imports, the share of Ukrainian agri-food products in them, and establish trends in the growth (decline) of such imports in terms of the largest commodity items.

Furthermore, the study used data obtained from the official web portal Diia.Business (Overview of the organic market..., 2021). Specifically, information on the volume of exports of certified organic products by Ukraine by commodity groups, importing countries, destination countries, and types of transport for 2021-2023 was obtained using the interactive dashboard "Export of Ukrainian organic products" developed by the Business and Export Development Office in partnership with Organic Standard LLC and with the support of Switzerland within the framework of the Swiss-Ukrainian programme "Development of Higher Value Added Trade in the Organic and Dairy Sectors of Ukraine" (Dashboard on export of..., n.d.). The information obtained made it possible to assess Ukraine's ranking among suppliers of organic agri-food products to the EU in terms of imports, and to identify trends in the reorientation of logistics routes for Ukrainian exports from sea routes to alternative modes of transport: road, rail, and river.

Results and Discussion

The EU-27 market ranks second in the world in terms of consumption of organic products, having increased 5 times over the past 20 years and covering 43% of the market globally in 2022 (Overview of the organic market..., 2021). For a range of organic food products, market demand is growing faster than supply. This is conditioned by the fact that the growth rate of organic land in the EU lags behind the growth rate of organic sales (Fig. 1). The share of organic areas in the total volume of agricultural land in the European Union averages 8.1% (the leaders are Austria (26%), Estonia (22%), and Sweden (20%)) (Overview of the organic market..., 2021).

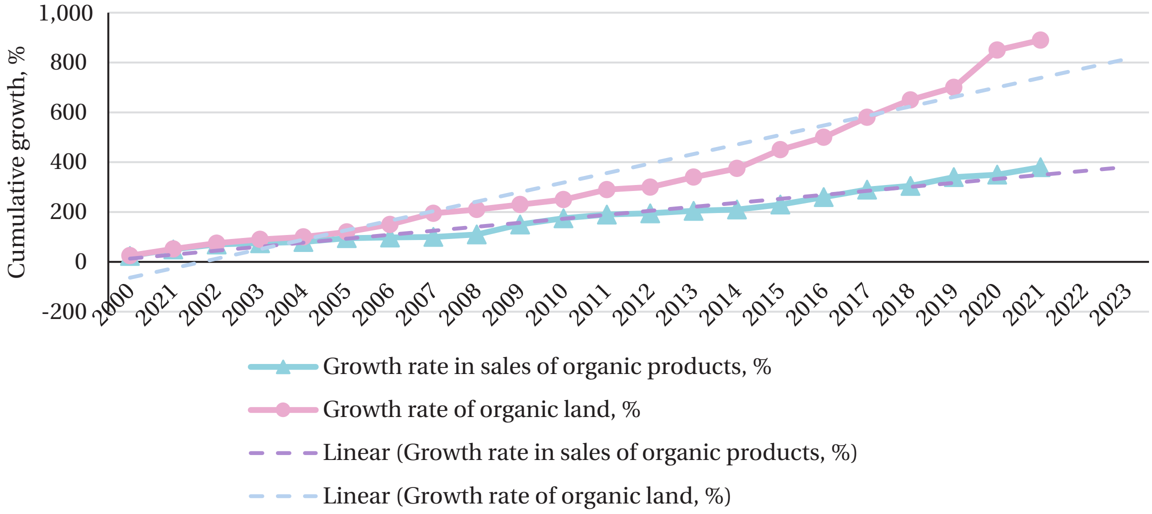

Figure 1 Growth rate of sales of organic products and organic land in the EU, %
Source: compiled by the authors of this study based on H. Willer (2021)

The gap between supply and demand is partially compensated for by imports of organic agri-food products. In 2022, the EU-27 imported 2.73 million tonnes of organic agri-food products (down 5.1% from 2.87 million tonnes in 2021, but up 0.6% from 2018). The growth of the organic market, which began during the coronavirus pandemic, was restrained by the spread of inflationary processes in 2022, triggered by the full-scale military invasion of Ukraine by Russia. Lower incomes and rising consumer prices led to a reduction in spending on organic products, resulting in a slight decline in imports. Overall, import demand was relatively stable in 2018-2022, with annual growth of no more than 5% (Fig. 2).

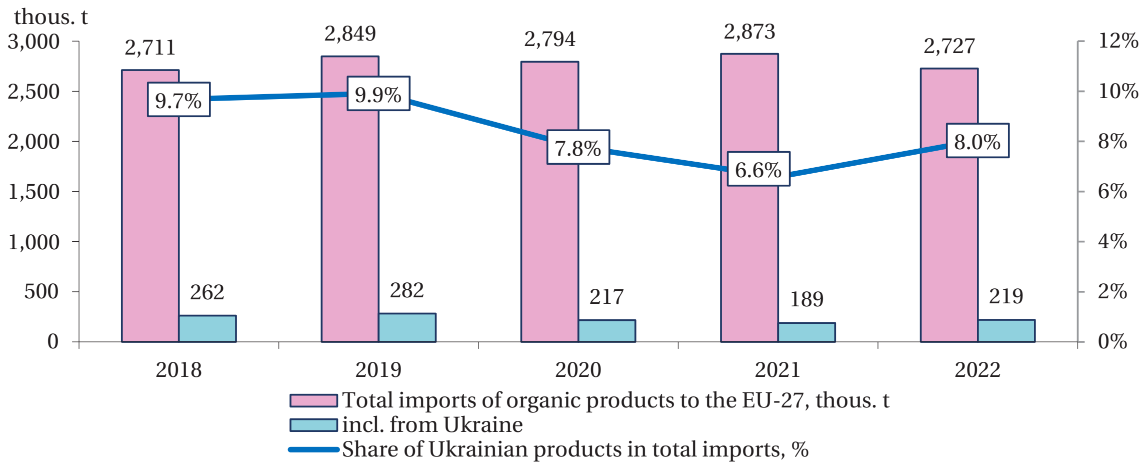

Figure 2. Supply of imported organic products to the EU-27 in 2018-2022, thous. t
Source: calculated and constructed by the authors according to TRACES NT – Europese Commissie (n.d.)

The volumes of Ukrainian organic products supplied varied substantially, ranging from 189 to 282 thous. t, primarily due to considerable fluctuations in the supply of wheat and other grains. Grain crops, vegetable oils and oilseeds, sugar, milk powder and butter, unroasted coffee and cocoa, which are classified as commodities, accounted for 46% of imports in 2022. Meat products, fruits, vegetables, dairy yoghurt, and honey accounted for 43% of imports (Fig. 3).

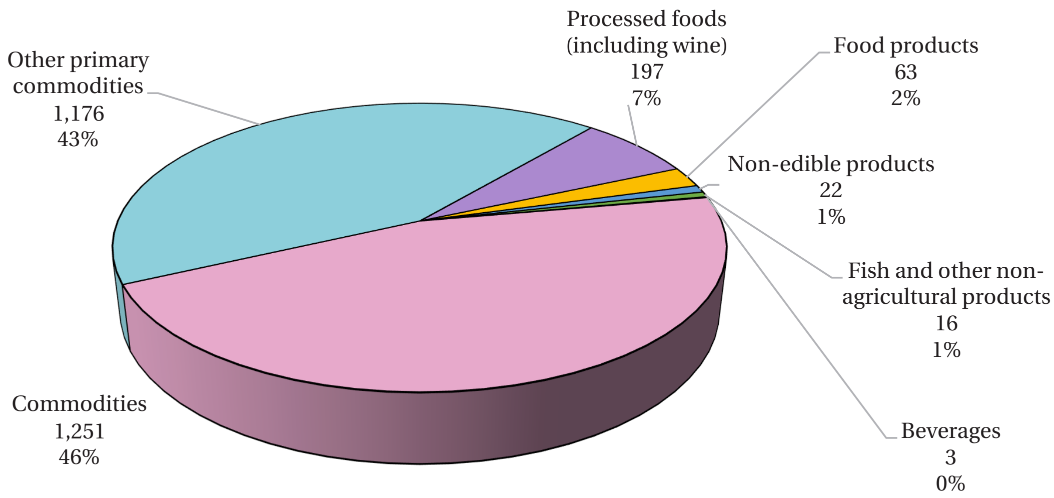

Figure 3. Commodity structure of organic imports to the EU-27 in 2022, thous. t (%)
Source: calculated and constructed by the authors according to TRACES NT – Europese Commissie (n.d.)

The commodity structure of exports shows that it is highly concentrated – the 8 largest commodity items (with imports of more than 100 thous. t/year) account for almost 72% of the volume, namely: tropical fruits, nuts, and spices (872 thous. t), oilcake (223 thous. t), soya beans (192 thous. t), beet and cane sugar (146 thous. t), unroasted coffee, loose tea, and mate (145 thous. t), cereals, except wheat and rice (121 thous. t), fruits, except citrus and tropical fruits (119 thous. t) and fresh, chilled and dried vegetables (109 thous. t) (Fig. 4).

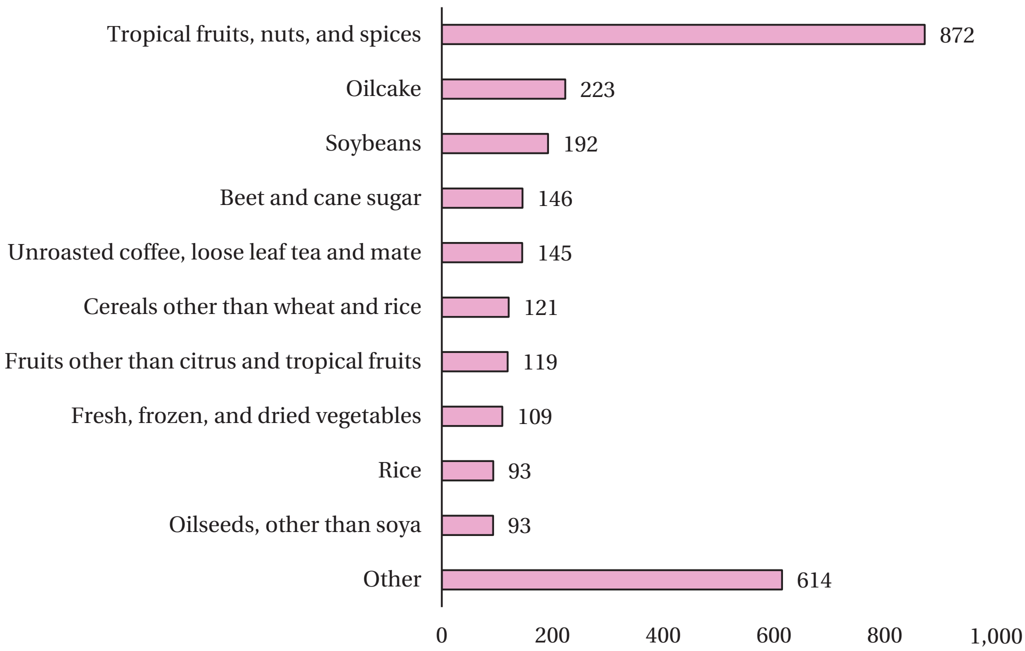

Figure 4. Supply of imported organic products to the EU-27 in 2022 by major commodity items, thous. t
Source: calculated and constructed by the authors according to TRACES NT – Europese Commissie (n.d.)

In 2018-2022, the increase in imports of organic products in the EU27 was driven by the growth in supplies of tropical fruits, nuts and spices (+211 thous. t) and soybeans (+87 thous. t). The largest decline in imports was mainly in commodities represented in Ukrainian exports, namely wheat (-157 thous. t), cereals other than wheat and rice (-104 thous. t), oilseeds other than soybeans (-96 thous. t), and oilcake (-34 thous. t) (Fig. 5).

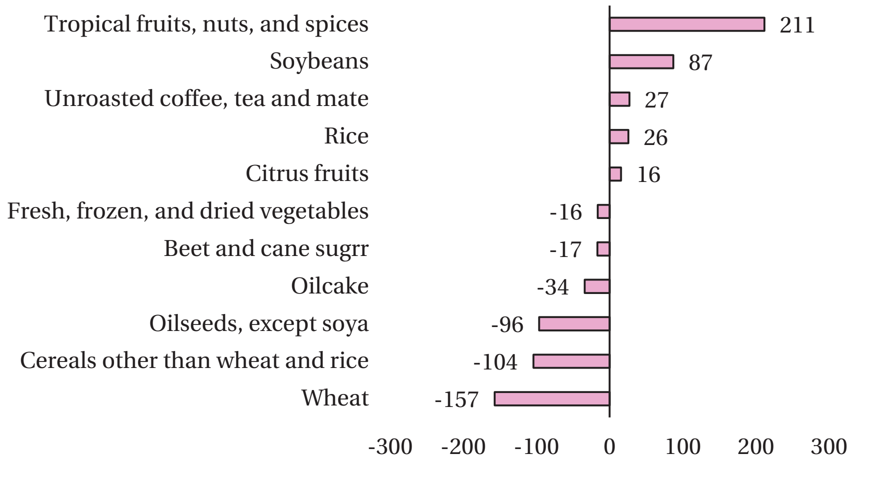

Figure 5. Increase (decrease) in the supply of imported organic products to the EU-27 countries in 2018-2022 by major commodity items, thous. t

Source: calculated and constructed by the authors according to TRACES NT – Europese Commissie (n.d.)

In 2022, the ten largest exporting countries to the EU accounted for 65% of organic imports. An analysis by buyer country showed that the Netherlands is the leader among suppliers and importers of organic products, accounting for 36% of imports. Germany, France, and Belgium account for 16%, 10%, and 10% of organic products imported to the EU, respectively. Considerable trading partners in this area are Ecuador, which accounts for 13% of total imports, and the Dominican Republic, which accounts for 9% of imports. China and Ukraine are in roughly the same position, with a share of 8%. Data from the Government Portal (Dashboard on export of..., n.d.) show that Ukraine has become one of the key suppliers of organic agri-food products to the EU, ranking 5th out of 126 countries and 1st among non-tropical countries in terms of supply in 2021. Export trends in 2022 showed a 13% increase in imports of organic products from Ukraine to the European Union and Switzerland compared to 2021, despite the full-scale military invasion of Ukraine by Russia. This was mainly due to an increase in the supply of organic soybeans, wheat, and maize. Generally, Ukraine's role in supplying organic products to the EU markets is vital for both Ukrainian producers and European consumers who appreciate the benefits of such products.

Ukraine's position in imports to the EU of agri-food products produced in compliance with organic legislation is ensured by a combination of factors. The geographical location of Ukraine and its proximity to the European Union allow for fast and efficient transportation of organic products to this market. Ukrainian producers are actively expanding domestic production and developing their sales markets in the EU, looking for new opportunities and customers to meet growing demand. The product range covers a variety of types, including cereals, meat, milk, fruit, and vegetables. This contributes to the diversification and sustainability of export operations. Furthermore, Ukraine has partnerships with many EU countries, which facilitates cooperation and the development of trade in organic products. Major steps have been taken to improve the certification system for organic products, which helps ensure high quality and compliance with EU standards and is essential for maintaining consumer confidence and increasing competitiveness in the European market. Grains and oilseeds dominate the structure of supplies from Ukraine to the EU market, accounting for 75% of imports in 2022 (Fig. 6).

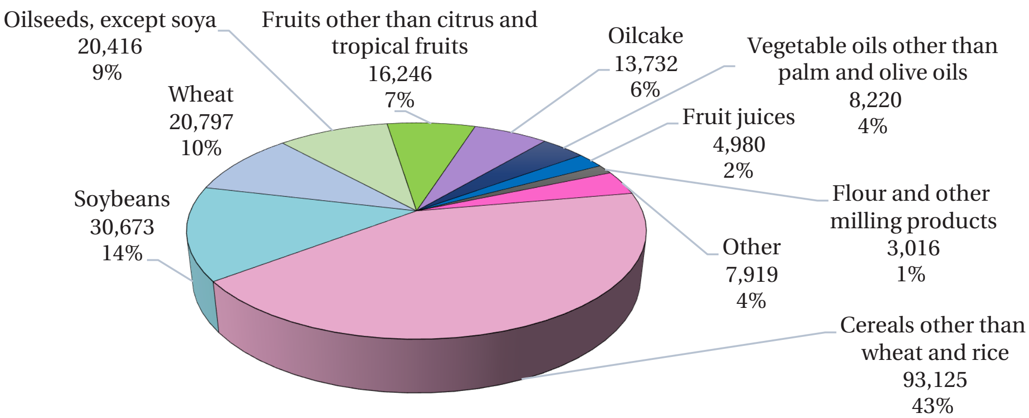

Figure 6. Commodity structure of imported organic products from Ukraine to the EU-27 in 2022, thous. t (%)

Source: calculated and constructed by the authors according to TRACES NT – Europese Commissie (n.d.)

Among commodity items, the highest export growth rates were observed for such products as oilcake (4.3 times in 2018-2022), vegetable oils (2.3 times), nuts (2 times), soybeans (1.3 times), and eggs and honey (1.1 times). In 2018-2022, Ukraine's position in most product groups of the EU's import demand strengthened (Table 1). Specifically, the most noticeable increase in the share of imports occurred in the segment of cereals other than wheat and rice (+28.0 percentage points to 77.1% in 2022), wheat (+25.4 percentage points to 65.3%), vegetable oils (23.3 percentage points to 49.4%), and oilseeds other than soybeans (+6.8 percentage points to 22.0%).

Table 1. Import demand for organic products in the EU-27 in 2018-2022 by main product groups, thous. t

Product group	Imports to the EU-27		incl. from Ukraine			Ukraine's share, %		
	2018	2022	2018	2022	Increment, %	2018	2022	Change, p.p.
Cereals other than wheat and rice	224,792	120,743	110,360	93,125	-16	49.1	77.1	28.0
Soybeans	104,794	191,898	13,269	30,673	131	12.7	16.0	3.3
Wheat	188,847	31,838	75,355	20,797	-72	39.9	65.3	25.4
Oilseeds, except soya	189,053	92,700	28,773	20,416	-29	15.2	22.0	6.8
Fruits other than citrus and tropical fruits	132,493	118,967	12,955	16,246	25	9.8	13.7	3.9
Oilcake	257,056	223,028	2,564	13,732	436	1.0	6.2	5.2
Vegetable oils other than palm and olive oils	9,708	16,648	2,532	8,220	225	26.1	49.4	23.3
Fruit juices	88,206	80,284	5,947	4,980	-16	6.7	6.2	-0.5
Flour and other milling products	19,406	15,227	3,922	3,016	-23	20.2	19.8	-0.4
Tropical fruits, nuts, and spices	660,778	872,234	973	2,914	200	0.1	0.3	0.2
Fresh, frozen, and dried vegetables	125,592	109,298	3,552	2,739	-23	2.8	2.5	-0.3
Other feed and feed ingredients	2,277	1,878	1,094	739	-32	48.0	39.4	-8.7
Eggs and honey	15,825	17,656	320	680	112	2.0	3.8	1.8
Water and soft drinks	1,574	2,081	330	352	7	21.0	16.9	-4.0
Other	690,227	832,724	290	495	71	0.0	0.1	0.0
TOTAL	**2,710.628**	**2,727.206**	**262,237**	**219,125**	**-16**	**9.7**	**8.0**	**-1.7**

Source: calculated by the authors of this study based on TRACES NT – Europese Commissie (n.d.)

Some reduction in the presence of Ukrainian organic products on EU markets in 2022 is conditioned by the consequences of the military invasion of Ukraine by Russia, which caused considerable losses for the organic industry. The occupation of the territories, destruction of infrastructure, logistical problems, rising fuel and fertiliser prices, and the suspension of retail chains have halted the functioning and development of organic production in Ukraine and, consequently, led to a large-scale reduction in organic production. About 120,000 ha of certified organic land were lost due to occupation or hostilities. In March 2022, 30% of Ukrainian organic operators ceased operations, and 70%, according to a survey conducted by the Organic Ukraine NGO, required financial support (Statement on the situation..., 2022). Thanks to a range of measures taken by Ukrainian and foreign organisations to support organic businesses and meet the most urgent needs to maintain operations and strengthen their positions in the future, the crisis was partially overcome. As a result, 70% of operators have fully or partially continued production and processing of organic products (Situation in the Ukrainian organic sector..., 2022); the situation continues to adapt to a new reality. The development of alternative logistics routes and the lifting of many existing restrictions on organic exports to the European Union and other countries allow Ukraine's organic sector to continue to hold a significant position in meeting the demand for organic agri-food products on foreign markets. This creates opportunities for Ukrainian producers to find new markets.

At the same time, organic production is one of the key goals of Ukraine's agricultural policy. Within the implementation of the National Economic Strategy for the period up to 2030 (Resolution of the Cabinet of Ministers..., 2021), it is planned to achieve at least 3% of the total area of agricultural land (1.3 million ha) with organic status. However, in 2021, the area of agricultural land under organic production (including land in transition) was 422.3 thous. hectares (1%), and in 2022, due to the Russian military aggression, it was 263.6 thous. ha (0.6%) (Organic production of Ukraine..., n.d.). This means that to achieve the goals set out in the National Strategy, it is necessary to increase the area of organic land by 5 times in 8 years. Therewith, the Strategic Objective "Optimisation of the sales ecosystem in the domestic and foreign markets" aims to increase exports of organic products to USD 1 billion by 2030 (in 2022 – USD 219 million).

However, even assuming that such ambitious plans are implemented, the target set by the National Economic Strategy may not be sufficient to meet both domestic and external needs, considering the active measures taken by foreign countries to promote organic agriculture and the ever-growing demand for these products. By designating 3% of agricultural land for organic agriculture, Ukraine may face the challenge of producing the large volumes of these products required to meet demand, and thereby risk losing its leading position on the organic market in Europe and globally.

The EU's Farm to Fork strategy aims to increase the share of land designated for organic agriculture to 25% of the total agricultural land area (A Farm to Fork strategy..., 2020), which will require the involvement of about 45 million ha (more than the entire agricultural land area of Ukraine). Considering this, increasing the pace and volume of organic production in the country is a promising area of development.

Fulfilling this purpose requires overcoming a range of barriers faced by Ukrainian exporters when entering the EU market, which may open new opportunities. Ukraine is noted as a country that actively exports organic products, entering the European and American markets with a large volume of organic agri-food products. In this context, it is recognised as a substantial player, especially in the wholesale of organic products. However, the majority of food in the EU, including organic food, is sold through wholesale retailers and supermarkets. A certain share is sold through speciality shops and farmers' markets, i.e., local distribution channels (Milford *et al.*, 2021). Given the number of organic products available for sale at retail in the European, American and Ukrainian markets, the number of organic products is not that large. This situation can be a favourable prospect both in the domestic and global organic market.

Ukraine's leadership in exports of organic products to the EU in terms of volume is not identical to its position in terms of value. This is caused by the fact that the products are mainly raw materials and have low added value. However, there have been some positive developments in this area: in recent years, the share of processed organic products in the structure of exported products has been slowly increasing. The list of exported organic products with high added value increased by 100 items in 2021, including sunflower oil, frozen berries, apple juice, honey, amaranth, freeze-dried fruit, fruit pastille, instant meals, essential oils and nectarine juice, baking mixes, apple chips, and dried fruit bars (Halashevskyi *et al.*, 2020).

This can explain the slight increase in the value of exported organic products against the background of a decrease in their volume. According to Organic Standard LLC, in 2020, out of the total value of USD 204 million of exported organic products, USD 77.5 million (61.4 thous. t) was the value of products with higher added value (Analysis of the Ukrainian..., n.d.).

Adaptation to the current reality is also taking place in the area of transporting organic products exported to the EU. The problem of seaports being blocked is gradually being addressed by using alternative logistics routes, specifically by increasing the use of rail or road transport. Due to this, as well as the reorientation to transportation through river ports instead of seaports, Ukrainian exporters managed to increase the volume of organic exports in 2022 compared to 2021 for all types of transportation (Fig. 7).

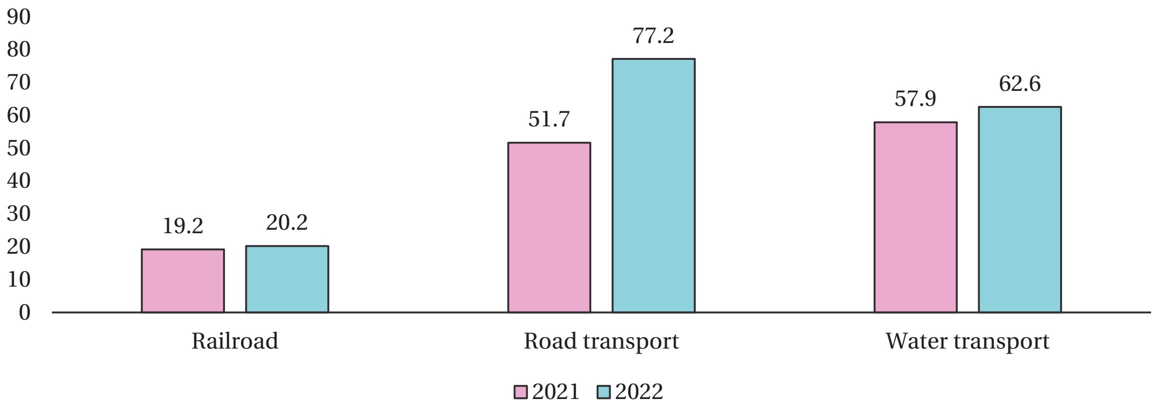

Figure 7. Exports of Ukrainian organic products to the EU and Switzerland in 2021 and 2022 (January to August), thous. t
Source: compiled by the authors of this study based on data from TRACES NT – Europese Commissie (n.d.)

The problem is still the rising cost of logistics, for all types of transport. To solve this problem, the possibility of creating and operating infrastructure in importing countries is being considered, which could partially help overcome this and other logistical problems.

Another challenge for Ukrainian organic exporters is the growing level of competition from European producers. There is a growing focus on local production, which is reducing demand for organic products from Ukraine. Organic products from Ukraine have a reputation of good quality, but once import duties and taxes are paid, the products may no longer be competitive in terms of price. Cost and delivery times can be a weakness for Ukrainian exporters compared to local suppliers.

A constraint to expanding the volume and range of exported organic products is the high cost of certification to ensure strict compliance with EU norms and standards. The majority of Ukrainian producers have been certified according to EU standards, as well as the US National Organic Programme (NOP), Canadian Organic Standard (COR), private organic standards of Bio Suisse (Switzerland), Naturland (Germany) and Bioland (Germany), JAS (Japan) and KRAV (Sweden) (Analysis of the Ukrainian..., n.d.), which involved considerable costs. The organic status of a product can only be established through a certification system controlled by the European Commission. In some EU member states, there has been noteworthy progress in covering organic production with certification. Specifically, in Switzerland, certified organic production covers 20.4% of agricultural land (Area under organic farming, n.d.). In comparison, in Ireland and France, such conditions are used on only 2.6% and 7.7% of agricultural land, respectively (Leduc *et al.*, 2023). Consumers in the EU have a prominent level of trust in certified organic products, but there are some differences by country. Thus, for instance, in Italy and Poland, preference is given to products certified by EU bodies; in Great Britain and Germany, national certification bodies enjoy a higher level of trust (Murphy *et al.*, 2022).

In Ukraine, the system of certification and standardisation of organic products is still in its infancy. The Law of Ukraine "On the Fundamental Principles and Requirements for Organic Production, Circulation and Labelling of Organic Products" (Law of Ukraine No. 2496-VIII..., 2018), which is based on the IFOAM International Standard (IFOAM Standard, n.d.), as well as the provisions of Council Regulation (EC) No. 834/2007 (Council of the European Union..., 2007), sets out the principles and requirements for legal support of organic production, circulation, and labelling of organic products. In 2022, the government revised the organic legislation in the context of adapting it to Regulation (EU) 2018/848 of the European Parliament and of the Council (Regulation (EU) 2018/848..., 2018) on organic production and labelling of organic products, which came into force on 1 January 2022. The Action Plan for the Harmonisation of the Legal Framework for the Functioning of the Agro-Industrial Complex of Ukraine and the EU (Order of the Ministry of Agrarian Policy..., 2018) prescribes measures to implement 44 acts of EU law (Ignatenko, 2021).

New challenges and unresolved issues facing exporters make it difficult to maintain Ukraine's current position in the markets for agricultural organic products and to strengthen it in the future. Considering the new reality and operating conditions of organic producers, the targets set out in the National Economic Strategy for the period up to 2030 in terms of production and export of safe and healthy agricultural and food products need to be reviewed and adjusted. The European Commission has adopted an Action Plan for the Development of Organic Production for 2021-2027 aimed at achieving the European Green Deal. This document envisages the implementation of the following areas: increased consumption, increased production, and further development of the sector's sustainability to ensure its balanced growth (Communication from the commission..., 2021). To create a roadmap for achieving the indicators set out in the National Economic Strategy for the development of the organic sector, it would be advisable to develop Ukraine's own national programme, which would focus, among other things, on strengthening the presence and competitiveness of Ukrainian organic products in the markets of the European Union.

Conclusions

A study of the current state of exports of Ukrainian organic agri-food products found that Ukraine is one of the key exporters of these products to the EU and is among the top five suppliers. Against the backdrop of the European organic market growth (annual growth of about 5% in 2018-2022), the supply of organic products is characterised by strengthening of Ukraine's position in most product groups of the EU import demand, providing a 13% increase in 2022 alone compared to the previous year. The high concentration of the commodity structure of organic products exported to the EU is typical for all exporting countries in general (the 8 largest commodity items account for 72% of the volume) and for Ukraine specifically (two commodity items cover 75% of the volume). This is facilitated by factors such as a good geographical location, a wide range of organic products, and the establishment of partnerships with many EU countries. The raw material nature of imports stays (46% of the volume of supplies in quantitative terms), but the share of products with higher added value is gradually increasing. The pace of growth of Ukrainian organic products in the EU markets slowed slightly due to the full-scale military invasion of Ukraine by Russia in 2022 (by 1.7 percentage points compared to 2018), but latest trends show a gradual recovery of the organic sector – 70% of operators have resumed production and processing. Increasing the use of road and rail logistics routes as an alternative for transporting organic products partly helps to solve the problem of blocking sea transport. This was facilitated by the considerable work done to support the development of organic production and export activities in this sector, which was implemented by both foreign and Ukrainian organisations and structures. At the same time, the new reality requires a review of previously approved priorities and target indicators considering the emergence of new and exacerbating problems in the export of organic products to the EU, in particular, the system of standardisation and certification needs to be improved. The development of a programme for the development of organic production and a clear action plan to improve the competitiveness of Ukraine's organic sector in foreign markets, specifically the European Union, based on the identified priority vectors, may be the subject of further research.

Acknowledgements

None.

Conflict of Interest

The authors of this study declare no conflict of interest.

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Україна на ринках органічної агропродовольчої продукції країн Європейського Союзу: аналітика, тренди та перспективи

Людмила Василівна Смолій
Кандидат економічних наук, доцент
Уманський національний університет садівництва
20300, вул. Інститутська, 1, м. Умань, Україна
https://orcid.org/0000-0002-7426-0468
Микола Іванович Мостов'як
Аспірант
Уманський національний університет садівництва
20300, вул. Інститутська, 1, м. Умань, Україна
https://orcid.org/0009-0001-9230-820X

▸ **Анотація.** Дослідження ролі українського агропромислового сектору в забезпеченні потреби в органічній продукції в країнах Європейського Союзу є значущим для розуміння та максимізації переваг для України. Це особливо важливо в контексті розвитку органічного ринку та поглиблення співпраці з Європою, що вказує на актуальність розглянутої у статті проблеми. Метою роботи було визначення існуючих позицій, домінуючих тенденцій та перспектив збільшення українського імпорту органіки до країн Європейського Союзу. Методологічною основою дослідження стало використання загальнонаукових та специфічних методів: монографічного, діалектичного, табличного, графічного, абстрактно-логічного та методу порівняльного аналізу. Проаналізовано вектори та динаміку розвитку органічного сільського господарства в Європейському Союзі, зокрема, виявлено зростання внутрішнього та імпортного попиту на органічні продукти, розширення переліку товарних позицій, наявність розриву між попитом та пропозицією, високу концентрацію товарної структури імпорту. Виділено основні чинники, що забезпечують провідне становище України серед ключових імпортерів органічного продовольства: географічне розташування, збільшення обсягів внутрішнього виробництва органічної продукції, вдосконалення системи її сертифікації, налагодження партнерських стосунків з країнами Європейського Союзу. Встановлено посилення позицій України по більшості товарних груп імпортного попиту на органічну продукцію: зокрема, зростання частки України в імпорті, а також поліпшення структурних характеристик в частині збільшення питомої ваги продукції з високою доданою вартістю. Виокремлено бар'єри, що постають перед українськими експортерами при виході на ринок Європи та виступають стримуючим фактором розширення обсягів та асортименту експортованої органічної продукції. Окреслено напрями підвищення потенціалу України в забезпеченні потреби в органічній продукції в Європейському Союзі. Результати дослідження надають важливі відомості для виробників, підприємців та стейкхолдерів, зацікавлених в розвитку ринку органічних продуктів в Європі та сталого сільського господарства. Окреслені пріоритети розвитку органічного виробництва в Україні можуть стати підґрунтям для формування національної програми, спрямованої на підвищення конкурентоспроможності української органічної галузі на ринках країн Європейського Союзу

▸ **Ключові слова:** сектор органічного виробництва; агропромисловий сектор; експорт; імпортний попит; Європейський Союз