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Analysis of the state and prospects of milk production and dairy products in Ukraine in the post-war period

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Abstract. The indicators of recent years demonstrate stability and high results in milk production at agricultural enterprises. The relevance is confirmed by the fact that milk production and its optimization are key aspects of the economic development of the agricultural sector of Ukraine in the post-war period, because dairy farming is a system-forming branch of agriculture that opens up new opportunities for the formation of promising business development vectors. The purpose of the article is to analyse the problems and prospects of economic aspects of the efficiency of resource use and optimization of milk production in agricultural enterprises of Ukraine in the post-war period. The research used the following methods: induction and deduction, synthesis, theoretical generalization, statistical analysis, comparative analysis, modelling. The links of

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inconsistency between resources, production of dairy products and the capabilities of enterprises, state policy, the level, and norms of consumption of milk and dairy products by the population in the post-war period are studied. Accordingly, the dynamics of production, export, sales, stages of production, peculiarities of cooperation and import of basic dairy products were considered. A direct connection between the production and consumption of milk, the dependence of the demand and consumption of milk and dairy products on the level of total income of households has been established. Based on this, the work presents a full description of the dairy industry in Ukraine, the volume of milk production in the pre-war period and prospects for development in the post-war period. A systematic study of the market properties of various types of dairy products of Ukraine using SWOT and PEST analysis is given in general. In order to improve the state of the market of milk and dairy products of Ukraine, appropriate proposals have been formulated. The practical value of the work lies in the fact that its results can be used as a basis for the development of technologies for the use of milk production resources in the post-war period, as well as in the work of specialists in the agro-industrial and economic sectors

Keywords: economic development; perspectives and innovations; competitiveness; investment

Introduction

Milk production is a powerful business direction in Ukraine. It is important to investigate the conditions for the production of products in accordance with the state food safety standards. Milk is a necessary component of a healthy human diet and belongs to the basic food products.

Many researchers paid attention to the economic problems and prospects of the efficiency of resource use and optimization of milk production in agricultural enterprises of Ukraine in the post-war period in their studies. M. Rakhman & D. Hryzo (2021) speak of the dairy industry as one of the most powerful. The authors analysed the state of the dairy market from 2017 to 2020, and noted that in January-April 2021, 2,519.3 thousand tons of milk were produced in Ukraine. In addition to it, agricultural enterprises produced 901.9 thousand tons of milk, and households – almost twice as much (1617.4 thousand tons). An analysis of threats and opportunities for dairy enterprises was carried out, which include: changes in legislation that open up favourable opportunities in the supply and demand market, economic instability, development, and improvement of

technologies at the enterprise, demographic changes, and the state of the environment.

N.M. Prysiashnyuk *et al.* (2023) focused on the evaluation of innovative approaches to milk production in Ukraine in the context of food security of the country's population. Milk production in agricultural enterprises of Ukraine is considered as a type of business that involves increasing economic potential and meets high requirements for production technologies and quality. Yu. Kindzerskyi (2022) outlines the post-war arrangement of Ukraine's industry, namely the development of economic and other industries, which before the war were the causes of the country's economic, technological and military backwardness. T. Pouch & A. Trouve (2018) analysed the consequences of the milk market crisis in Europe, their features. A.M. Moskalenko & V.P. Kolosha (2020) investigated the economic efficiency of dairy production that meets the necessary product requirements in world markets. M. Gladiy & O. Prosovyh (2022) indicate further prospects in the development and improvement of the dairy industry and highlight the main factors affecting them. The main ones are the state of

the production base, the solvency of consumers, market infrastructure, etc.

T. Gutsul (2022) examined the determinants of trends in the development of the milk market in wartime conditions and gave an assessment of further development in the postwar period. Promising directions are the functioning of the milk market, problems of agricultural development, solving the problems of providing dairy farms with fodder and exporting milk to world food markets. Z. Dvulit & Z. Komarenska (2022) characterized the peculiarities of exporting high-quality dairy products to foreign countries in conditions of full-scale war. The main problems that arose in the conditions of the war regarding the sale of dairy products were identified: the destruction of infrastructure, the reduction of livestock, the destruction of documentation, the impossibility of using pastures, the reduction of qualified personnel and many others.

In the world, milk production has its own standards of quality and volume of processing. Because of this, the international market will demand high-quality dairy products. Only countries with a high level of milk self-sufficiency can become suppliers of such products. Taste, purity, health benefits, awareness of the production process, convenience in using new trends in the demand for vegetable milk (soy, rice, coconut, etc.) and lactose-free products have a significant influence on the buyer's choice (Kozak, 2020).

The development of the domestic milk market directly depends on the strengthening of food security and the development of one's own agro-industrial production. For Ukraine, the basis of dairy provision should be its own agricultural and processing production with a raw material base, the food market, and reserve funds. In general, the situation in the world is of direct importance for the state of milk production in Ukraine, and production volumes in the EU show constant growth. The largest producers of milk in the EU are Germany,

France, Great Britain, the Netherlands, Poland, and Italy (Borawski *et al.*, 2020).

To study the development of the dairy industry in the pre-war (2017-2021) and war (2022-2023) periods, current problems and ways to solve them, scientific research methods were used: theoretical generalization for studying scientific works and research, forming conclusions; statistical analysis to study the impact of military actions on the territory of Ukraine, respectively, the dynamics of the number of cattle and dairy production; comparative analysis to determine the trends of the main changes in indicators of the development of milk production at agricultural enterprises; method of SWOT and PEST analysis; modelling to interpret the results of investment of this production in the post-war period.

The purpose of the article is to study the indicators and prospects of milk production in Ukraine according to the efficiency of resource use and milk production in agricultural enterprises. To achieve the definition of the goal and in accordance with the content of the scientific research, the following tasks were set:

- analysing the indicators of dairy production in the pre-war and post-war periods;
- describing the real state of milk production enterprises;
- identifying the characteristic features of production improvement and determining the ways of selling products in the EU after the war.

The informational and theoretical base of research is made up of the works of modern Ukrainian researchers (Gladiy & Prosovych, 2022; Komlichenko & Rotan, 2023; Sobkevich *et al.*, 2023), analytical reviews of foreign experts (Borawski *et al.*, 2019; Borawski *et al.*, 2020; Rakhman & Hryzo, 2021), as well as statistical information on the dynamics of crucial indicators of the dairy market in Ukraine (Union of dairy enterprises of Ukraine, 2021; Association of milk producers, 2021; Ministry of Agrarian Policy and Food of Ukraine, n. d.).

In the post-war period, the agricultural sector, which includes milk production, will

receive significant, highly effective resources to achieve its competitiveness and compliance with quality requirements and standards. The development of dairy production, including the use of resources and optimization of production, with a focus on export in the post-war period, will become one of the promising directions for the Ukrainian economy, as it is in demand in the world.

Dynamics of dairy production in the periods of pre-war and wartime transformations

Milk production is one of the constituent elements of the agro-industrial complex. It includes a number of groups of industrial and agricultural enterprises focused on the production, processing, and sale of milk. The dairy industry is socially oriented and should provide nutritious and high-quality food products to Ukrainian consumers. The complex of milk production at agricultural enterprises is the basis of food security (Korman *et al.*, 2022).

In recent years, Ukraine's economy has suffered the devastating impact of the Covid-19 pandemic and the military-political threats that harm it. In particular, the development and functioning of enterprises producing milk and milk products in Ukraine is changing, which is an extremely negative factor. Milk is a necessary food product in the diet of adults and children. In addition, the dairy industry stimulates the development of the Ukrainian countryside. The indicators of milk production from 2017 to 2021 changed significantly, showing its reduction from 20.7% of the total volume to 15.1% (Gutsul, 2022).

The production of milk and dairy products constitutes a whole system of state commodity-monetary relations between subjects and objects of management: producers of raw materials, processing enterprises and consumers of final products. In general, there is a process of reproduction, which consists of the following processes: production, distribution, exchange,

consumption, and receipt of expected income by all market operators. But the main task is to solve the food problem, which is one of the main conditions of the socio-political activity of the state (Rossokha & Petrychenko, 2018).

Speaking about the dynamics of production in dairy cattle breeding of Ukraine over the past 33 years, a sharp reduction is observed here. The reason for this is a reduction in the production of raw milk and a decrease in the number of cows – from 8.53 million heads in 1990 to 1.79 million heads at the beginning of 2020. And over the past three years, production has changed radically and is undergoing certain transformations in connection with political events (Dovhal, 2020). In such conditions, milk production enterprises cannot work in the usual mode, atypical signs appear in their activity: unstable conditions of supply and demand on the market, economic fluctuations, changes in the operation of the enterprise and in the main priorities. Of course, such factors ultimately affect the efficiency, optimization, and development of enterprises in modern conditions and complicate the process of planning and forecasting. In addition, these difficulties lead to a struggle for consumers, the process of setting up the product sales system is complicated (Korman *et al.*, 2022).

The Law of Ukraine “On Milk and Dairy Products” contains contradictory and conflicting norms, which leads to the emergence of additional barriers for business entities, restrains the development of cooperation in the countryside and causes the unprofitability of agricultural enterprises, deprives the business of dairy production of sufficient support (Gruzinska *et al.*, 2018). After all, the issue of ways to optimize costs for the sale of dairy products should also be resolved at the state level. Therefore, in order to improve the dairy market, its resources and their functioning, it is necessary not only to increase the production of dairy products, but also to optimize the costs of establishing a clear marketing system (Melnyk & Stetsenko, 2018).

As of March 2023, according to the Ministry of Agrarian Policy and Food of Ukraine, the number of cows was about 1,400,000, which is 13% less than last year (Ministry of Agrarian Policy and Food of Ukraine, n.d.). Agricultural enterprises have 389,900 heads, which is 7.9% less. In all regions of Ukraine, there is a decrease in livestock. Only in the Khmelnytskyi region, the number of cattle increased by 1.9% during the year. Experts in the agricultural industry indicate that the number of livestock in Ukraine will continue to decrease due to problems with fodder, the destruction of farms in the context of continued hostilities (Barylovich, 2023).

Milk production in 2022 amounted to 7.7 million tons, which is 12.1% less than in 2021. In regions where hostilities are not taking place, the situation with milk production is better: 7.3 million tons, compared to 0.4 million tons in the affected regions. The production of dairy products decreased by 15% (Barylovich, 2023). Despite the difficulties and military operations, milk production at agricultural enterprises of Ukraine continues. There is a certain reduction in the range of milk, however, despite the losses of factories by

producers, most enterprises successfully overcome difficulties and ensure the supply of the product to the market (Svynous *et al.*, 2022). The current state of the domestic market of milk and dairy products is characterized by a moderate level of consolidation. Almost 80% of the market is controlled by 50 enterprises, a large part of which is part of large holdings (Association of milk producers, 2021).

The formation of a chain link between the producer of milk and the consumer of this product is important in the activity of agricultural enterprises. It is necessary to form a sales market in adjacent and related spheres and sectors with the help of the institute of state order and public procurement. Simplified procedures and high export prices for Ukrainian dairy products support sales on foreign markets. In 2022, milk exports reached 344 million US dollars, which is 39% more than in 2021. The results of the research are shown in Figure 1.

The study of the properties of the objects of the market of milk and dairy products of Ukraine and the connections between them is presented with the help of SWOT analysis. His results are shown in Table 1.

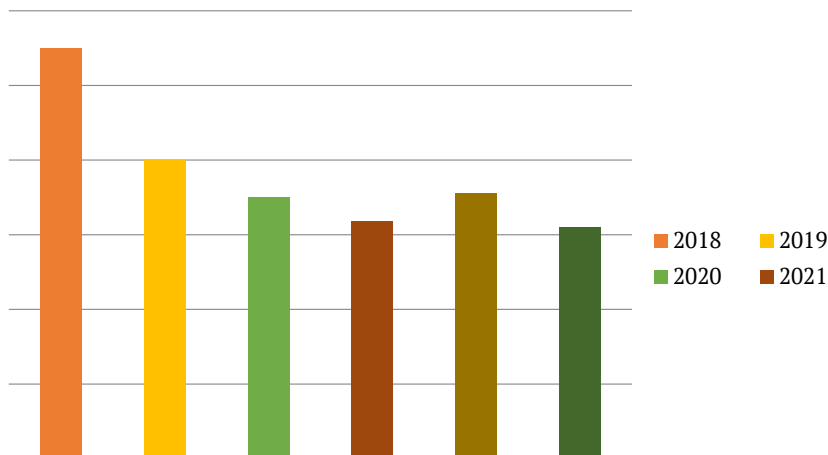


Figure 1. Dynamics of the export of dairy products in terms of milk 2018-2023, thousand tons
Source: Milk export is a powerful support for the dairy industry (2023)

Table 1. SWOT analysis of milk production in agricultural enterprises of Ukraine for 2021

Internal environment		Environment	
Strengths		Opportunities	
➤ Application of innovative technologies. ➤ Effective organization of structure and management style. ➤ Activities in accordance with international quality standards. ➤ A diverse selection of products and its constant updating. ➤ Information resources are developed at a sufficient level (websites, social networks).		➤ Due to the difficult situation of companies and enterprises in the dairy market, increasing competitiveness. ➤ Increasing the volumes and markets of export products. ➤ In connection with continuous changes and innovations in the technical process, the emergence of new and modern markets and their segments.	
Weaknesses		Threats	
➤ Consumption is affected by seasonality. ➤ Not all representatives of milk production enterprises have active advertising on television and in social networks. ➤ Insufficiently formalized comprehensive sales strategy.		➤ Gradual decrease in the number of cows and, accordingly, milk production, and increase in prices for dairy products. ➤ Increase in prices for keeping cattle. ➤ Emergence and growth of new requirements of suppliers and buyers. ➤ The variability of customer tastes (constant updating of the product line by competitors).	

Source: Compiled by the author based on Union data of dairy enterprises of Ukraine (2021) Association of milk producers (2021)

The analysis of the economic, political, technological and social aspects of the external environment, which significantly affect the production

and market of dairy products of Ukraine in general and its subjects, is illustrated with the help of a PEST analysis. These results are shown in Table 2.

Table 2. PEST analysis of Ukrainian dairy enterprises for 2021

Political Aspects (P)		Economic aspects (E)	
➤ State regulation of competition dairy industry. ➤ Political reformation. ➤ Active changes in tax legislation in favour of milk producers. ➤ Update of legislation on dairy industry.		➤ Economic situation in Ukraine. ➤ Inflation rate. ➤ Changes in the exchange rate of the national currency. ➤ Dynamics of tax policy. ➤ The impact of changes in utility tariffs (transportation, water supply) on the costs of an agricultural enterprise. ➤ Changes in the income of the population.	
Social Aspects (S)		Technological aspects (T)	
➤ Basic social values are undergoing noticeable changes. ➤ Attitude of the population of life and change of style. ➤ Situation and environmental changes in the country. ➤ Spreading the trend of consumption of vegetable milk ➤ Demographic changes (structure and rates of population growth or decline).		➤ New technologies are emerging. ➤ Transformations in the mechanization of milk production. ➤ Adaptations and speed of changes of the latest technologies in production. ➤ Production of dairy products based on innovations	

Source: Compiled by the author based on Union data of dairy enterprises of Ukraine (2021); Association of milk producers (2021)

The development of the dairy industry of Ukraine in the post-war period remains an important issue. Ukraine may face a number of problems after the war, which will need to be solved immediately, to find ways to avoid an acute crisis in the dairy industry. These include: lack of funds for payments; most of the enterprises are in a ruined state; low investment attractiveness due to the long investment payback period; the spread of various diseases between animals and people; an increase in the cost of products and, accordingly, a decrease in purchases, etc. Ukrainian specialists should already think about the post-war period, look for ways to preserve the production and sale of milk. As a result of the fruitful work of all parties, it should become a reliable, global and competitive partner that meets the needs of the world market, can offer a wide range of high-quality products of the processing and food industry at an appropriate price, as well as interesting authentic taste properties.

Cooperation and innovation strategies in the dairy industry: A review of foreign and domestic experience

It is useful to pay attention to the experience of foreign countries in which the main producers and sellers of dairy products in the world are cooperatives represented by medium and small producers. This enables the representatives, by uniting, to enter the international market, sell their products and work on favourable terms. Thanks to this, they achieve significant success and are designed for a larger number of participants. S. Shupyk (2020) highlights the experience of foreign dairy producing countries and indicates that the leading suppliers to the world market of milk and dairy products are the USA, which ranks first in milk production. 91.3 million tons. The largest commodity producers of milk in the world are also India – 60.6 million tons, China – 35.7, Brazil – 34.3, Germany – 31.1, France – 21.7, New Zealand – 18.9, Turkey – 16.7, Great Britain – 13.9 million tons.

In addition, it was established that the main factor that increases the profitability of dairy production in developed countries is the improvement of the quality and differentiation of the assortment. The main factors contributing to the successful development of dairy farming include increased state support and economical use of resources. They also use a set of financial incentives, including reducing the tax burden (Shupyk, 2020).

The production of dairy products in foreign countries is characterized by the special efficiency of the product market, which ensures the high development of innovative equipment and facilities. This, in turn, promotes cooperation and integration, the introduction of innovations in the processing sphere and trade infrastructure. Speaking about the borrowing of experience by Ukraine in the post-war period, this is possible only if certain circumstances are taken into account. In particular, local natural and economic factors. In addition, the state should take into account the use in domestic conditions of achievements in the field of production, storage, processing, formation of the infrastructure of the researched market, as well as the system of state regulation tools, improvement of the sales system based on the development of cooperatives.

For many years, Germany was the largest importer and exporter of milk in the EU domestic market. This country is also the largest producer of milk in the EU, despite the fact that in 2017 it had a deficit in the trade of milk and dairy products. Belgium, Italy, the Netherlands, France, etc. have a significant influence on trade. Analysing the export and import of milk products within the EU, it is worth noting that Germany also dominates with 4826.10 thousand tons in 2017, France is the second country – 2262.76 thousand tons. In Belgium, the level was 1827.64 thousand tons, which was equal to about 38% of the level of the largest exporter (Borawski *et al.*, 2019).

It is worth considering steps to improve the state of the milk market on the basis of forecasts

and assessment of the real state of dairy production by researchers M. Rakhman & D. Hryzo (2021). These include: compliance with international food safety standards and successful international agricultural practices; changing marketing strategies and correct positioning of one's product in foreign markets; stimulation of cooperation between enterprises; support for the export of dairy products; strengthening the competitiveness of enterprises through product improvement and diversification; financial assistance to agricultural enterprises that lost their business due to military actions; modernization of production technology at enterprises; professional development of personnel; investing in product line development; creation of the Fund for Support and Preservation of Animal Husbandry; introduction of state subsidies to encourage export of products; exemption from paying value added tax (VAT) on imported equipment for the processing industry and dairy farming.

O.O. Komlichenko, & N.V. Rotan (2023) note that the financial and economic development of the region is a complex concept and includes the totality of general production opportunities and the financial side. Taking into account the introduction of hostilities on the territories of Ukraine, the economic sector of the region can be restored and modernized only under the condition of the cessation of hostilities, the deoccupation of the captured territories on the basis of the growth of its investment potential, which is the combined possibility of own and attracted financial resources that are able to provide investment activities with the aim of obtaining profit, in the goals and scope determined by the economic policy of the region. Investment policy is one of the most important steps in the economic development of the region. It should be carried out by coordinated efforts of national, regional and local authorities. The key task of this policy is to increase the investment attractiveness of the region, the formation of attractive investment

products and effective promotion of investment markets.

A.M. Moskalenko, & V.P. Kolosha (2020) argue that the post-war concentration of milk production should be based on a real economic mechanism, which allows the size of enterprises to have a higher level of competitiveness. This means that in reality this group of enterprises may have advantages in terms of the level of production organization, its technical positioning on the market, product quality, and only then will it be able to increase milk production in the post-war period. In particular, Yu. Kindzerskyi (2022) indicates that the successful experience of the post-war recovery of the dairy industry should take place on the basis of a mobilization model of development with an increase in the coordinating and entrepreneurial role and share of the state in economic processes, clear and comprehensive planning and design of balanced economic, social and spatial development, and not further deregulation in the conditions of destroyed markets, which in Ukraine even before the war led to weakness and backwardness in economic and military terms.

O.V. Sobkevich *et al.* (2023) propose steps to preserve the chain "production – processing – storage – supply of food products to the population": rehabilitation of the agricultural economy in the territories affected by hostilities; strengthening the decentralization of the agrarian economy; strengthening of communities' own food system; restoring the integrity of the agro-industrial complex and strengthening the national food system; improvement of state support for the dairy industry; repositioning of Ukraine in the global food system; use of bio-energy potential, which will make it possible to partially replace traditional types of energy with alternative ones both at the national and local levels of consumption, to strengthen the country's energy sustainability.

In the post-war period, state policy should form positive trends, promote the development

of investment attractiveness programs for the sector, create support vectors for Ukrainian dairy products business in accordance with high-tech production and standards on a cooperative basis. A successful solution to the task of effective use of resources, optimization of milk production and provision of milk and dairy products to the population of the country is possible only in the case of close cooperation of all branches and sub-branches of the industry of the state and enterprises where direct production, transportation, storage, processing, and sale of milk is carried out. All these links should form a single, balanced system. In the post-war period, this will raise the level of industry specialization and determine the effectiveness of all participants in the dairy chain.

Conclusions

The production of milk is an important aspect of the economic development of the agricultural sector of Ukraine in the post-war period. It is necessary to develop anti-crisis measures to preserve the functioning of dairy farms, develop dairy farming, stop the decrease in the number of cows at enterprises and improve the quality of dairy products. Analyzing the indicators of dairy production in the pre-war and post-war periods, significant changes are observed. The indicators of milk production and export for 2017-2021 showed its reduction from 20.7% of the total volume to 15.1%. Such changes are also observed during the war period (2022-2023 years). Since the beginning of the full-scale war, numerous dairy farms and processing enterprises have suffered or found themselves in temporarily occupied territory. Statistical data, in general, for 2022, milk production in Ukraine decreased by 12.1%, which amounted to 7.6 million tons.

The real state of milk production enterprises reflects the decline in resource efficiency and the optimization of milk production. And thanks to the effective activity of dairy farms in safe regions and individual regions, high-quality production and sales of products are carried

out in compliance with all requirements, as well as the relocation of livestock from affected areas. This makes it possible to minimize the losses of dairy enterprises. Problems in the Ukrainian legislation are highlighted, which hold back projects to support the successful development of the dairy industry. To change this situation at the legislative level, it is necessary to make appropriate changes and develop a policy aimed at overcoming crisis phenomena. On the basis of their own research and the opinions of other scientists, the ways of successful activity and production of milk products in the post-war period have been determined, namely, the effective use of resources and their optimization of opportunities, full support of the dairy business, improvement of innovative activities, the use of achievements of scientific and technical progress and the experience of foreign countries. the use of various forms of management, the contribution of investments to the development of the industry.

Further scientific research should consider the issue of the development of the application of the proposed prospects for the production of milk and milk products in Ukraine in the post-war period, in particular, the analysis of their impact on the state and development of the country's economy.

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Conflict of Interest

None.

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Аналіз стану та перспектив виробництва молока і молокопродукції в Україні в повоєнний період

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Анотація. Показники останніх років демонструють стійкість і високі результати щодо виробництва молока в сільськогосподарських підприємствах. Актуальність підтверджена тим, що виробництво молока і його оптимізація є ключовими аспектами економічного розвитку сільськогосподарського сектора України в повоєнний період, адже молочне тваринництво є системоутворюючою галуззю сільського господарства, яка відкриває нові можливості для становлення перспективних векторів розвитку бізнесу. Метою статті є аналіз проблем та перспектив економічних аспектів ефективності використання ресурсів та оптимізації виробництва молока в сільськогосподарських підприємствах України в повоєнний період. У дослідженні було використано наступні методи: індукція та дедукція, синтез, теоретичне узагальнення, статистичний аналіз, порівняльний аналіз, моделювання. Досліджено зв'язки невідповідності між ресурсами, виробництвом молочної продукції і можливостями підприємств, політикою держави, рівнем і нормами споживання молока й молочних продуктів населення в повоєнний період. Відповідно до цього, розглянуто динаміку виробництва, експорту, збуту, етапів виробництва, особливості кооперації та імпорту основних молочних продуктів. Встановлено безпосередній зв'язок між виробництвом і споживанням молока, залежність попиту і споживання молока й молочних продуктів від рівня сукупних доходів домогосподарств. На основі цього в роботі подано повну характеристику молочної галузі в Україні, обсяг виробництва молока в довоєнний період і перспективи розвитку в повоєнний час. Наведені в систематизованому вигляді дослідження властивостей ринку різних типів молочної продукції України за допомогою SWOT- та PEST-аналізу загалом. Для покращення стану ринку молока та молочної продукції України сформульовано відповідні пропозиції. Практична цінність роботи полягає в тому, що її результати можуть бути використані як підстава для розробки технологій використання ресурсів виробництва молока в повоєнний період, а також у роботі спеціалістів агропромислового й економічного секторів

Ключові слова: економічний розвиток; перспективи та інновації; конкурентоспроможність; інвестиції