ANALYSIS OF THE EXPORT POTENTIAL OF UKRAINIAN BEVERAGE PRODUCERS ON THE EU MARKET

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Amidst large-scale geopolitical and macroeconomic challenges, integrating Ukraine's agri-food sector into the EU internal market is a strategic priority for stabilizing the national economy. The beverage production sector – particularly fruit and vegetable juices – demonstrates significant adaptability and transformational potential; shifting from a predominantly raw-material export model to the supply of high-value-added products serves as a key driver for enhancing the competitiveness of Ukraine's agro-industrial complex within the European market. It should be noted that the EU remains Ukraine's primary trading partner, accounting for over 55–59% of total domestic goods exports. The food industry and processed food products (UKTZED groups 16–24) consistently maintain a significant share of bilateral trade (approximately 8.5% of total exports to the EU) [1].

An analysis of trade relations between Ukraine and the EU in the juice and beverage sector for the period 2016–2025 reveals profound structural transformations driven by both regulatory changes and force majeure factors of a global and national nature; these transformations can be broadly categorized into several key stages (Fig. 1).

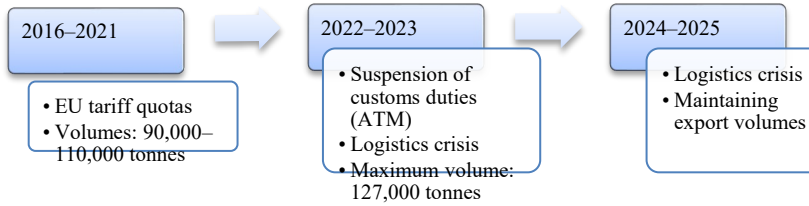


Figure 1. Periodization of Ukrainian juice and beverage exports to the EU, 2016–2025 [1-4]

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The initial stage of the period under analysis coincides with the full implementation of the Free Trade Area (FTA) between Ukraine and the EU, which began in 2016. Between 2016 and 2019, Ukrainian juice exports showed moderate growth, fluctuating between 90,000 and 110,000 tonnes annually. A major limiting factor was the strict tariff quotas, which Ukraine typically exhausted within the first quarter of each year. Exports exceeding these quotas were subject to high tariffs (up to 30%), thereby constraining exports by domestic producers. While the COVID-19 pandemic temporarily disrupted supply chains, it also triggered a surge in demand within the European market for products with high Vitamin C content [4-6].

The onset of the full-scale invasion in 2022 posed a challenge for the industry due to the destruction of production facilities, the occupation of orchards in southern and eastern Ukraine, and the blockade of deep-water Black Sea ports. However, a pivotal development was the EU's introduction of Autonomous Trade Measures (ATMs), which eliminated import duties and quotas for Ukrainian exports – exports that demonstrated remarkable resilience. In 2023, Ukraine exported approximately 127.0 thousand tonnes of juice, with the European market accounting for over 95% of the total. Under export agreements, the European market received between 60,000 and 100,000 tonnes of Ukrainian apple concentrate annually, serving as raw material for the processing industries in Poland, Germany, and Austria [4; 7-8].

A graph (Fig. 2) has been created to visualize the dynamics and volumes of Ukrainian exports of juices and beverages to EU countries for the period 2016–2025.

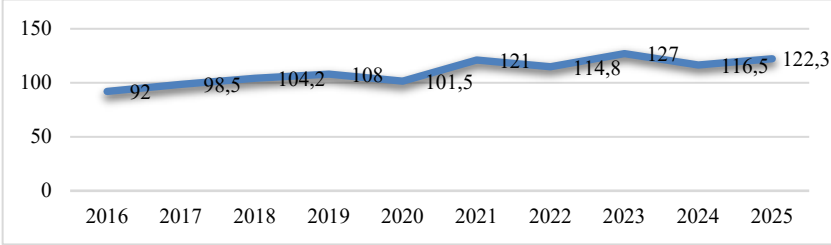


Figure 2. Dynamics and volumes of Ukrainian exports of juices and beverages to EU countries, 2016–2025 (thousand tonnes) [7]

Based on the data in Figure 2, it can be concluded that following the signing of the Association Agreement between Ukraine and the EU, supply volumes grew steadily from 92.0 thousand tonnes in 2016 to 108.0 thousand tonnes in 2019. In 2020, a temporary decline to 101.5 thousand tonnes occurred due to

logistics-related lockdowns. However, in 2021, a surge in demand for apple concentrate from the European B2B sector drove exports up to 121.0 thousand tonnes. Despite the loss of some orchards and port blockades in 2022, exports remained at 114.8 thousand tonnes, supported by the EU's implementation of Autonomous Trade Measures (the lifting of tariffs and quotas). In 2023, the industry reached a historic high, with exports to the EU totaling 127.0 thousand tonnes. In 2024, the blockade of western borders and domestic electricity shortages caused a temporary adjustment in export volumes to 116.5 thousand tonnes. Nevertheless, the implementation of alternative logistics routes and business adaptation enabled a renewed increase in export supplies to the EU market in 2025, reaching 122.3 thousand tonnes.

The product composition of Ukrainian juice exports to the EU underwent qualitative changes between 2016 and 2025, shifting from raw materials to finished products. Notably, apple juice concentrate (AJC) dominates the export mix, accounting for over 90–95% of the total. However, since 2018, there has been an increase in exports of ready-to-drink, direct-pressed juices – a trend driven by the growing preference for healthy lifestyles and the consumption of natural products free from added sugars and preservatives. Ukraine also ranks among the top five suppliers of organic agricultural products to the EU. Within the juice category, there has been a marked rise in the share of berry concentrates (raspberry, blueberry, bog blueberry, and blackberry) certified under the Euroleaf standard; these are exported as premium raw materials for the European baby food and dairy industries [4; 6; 8].

Among Ukrainian producers exporting juice and juice concentrates to the EU, T.B. Fruit stands out as a leading company; it is one of Europe’s largest fruit and berry processors and is deeply integrated into the European market, supplying a significant share of the demand for apple juice concentrate. The company operates its own plants in both Ukraine and the EU (Poland), thereby minimizing logistical risks. The Galicia brand is successfully implementing a diversification strategy by promoting direct-pressed juices; its products compete in the mid-range and premium segments, driven by a «Clean Label» concept (free from added sugar, water, and preservatives). Significant growth is being demonstrated by exporters holding Euroleaf certification that supply organic raw materials to the European baby food industry [9].

The further development of the export potential of domestic enterprises is constrained by the high cost of multimodal logistics, strict EU requirements regarding supply chain traceability, and the necessity of mandatory certification. A promising avenue lies in the digitalization of trade processes through state support tools—such as the Nazovni platform – and the utilization of financial guarantees from the Export Credit Agency (ECA).

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