Eurointegration 1.0

Synthesis report on poultry meat production in Ukraine

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INTRODUCTION

Poultry meat production in Ukraine is one of the most dynamic sectors of the agro-industrial complex, demonstrating steady growth and a significant impact on the country's economy. The industry serves not only as an important source of protein for the population but also as a vital factor in economic stability and food security. The past two decades have been a period of transformation, during which poultry meat production increased sevenfold, and its share in total meat production grew to 56.8%.

Ukraine has established itself as a strong player in the international poultry meat market, particularly due to competitive prices, technological modernization, and the expansion of export opportunities. At the same time, the industry faces numerous challenges, including uneven regional distribution of production, high concentration in large enterprises, adaptation to international standards, and the impact of war.

This report aims to provide a comprehensive overview of the current state of the poultry meat production industry in Ukraine. It examines key trends, the economic role of the industry, regional production specifics, the profile of major producers, cost dynamics, prices, export potential, and the impact of the war. Special attention is given to Ukraine’s prospects for integration into the European Union market, which represents a strategic direction for the industry.

The analysis helps to identify key opportunities for further development of the sector, particularly through investment, innovation, and support. Poultry meat production has the potential not only to strengthen the national economy but also to ensure Ukraine’s sustainable integration into global food systems.

MAIN MESSAGE

1. **Rapid growth in the share of chicken meat.** Over the past 20 years, the share of poultry meat in Ukraine's total meat production has increased from nearly 12% to over 56%, indicating an active shift by both consumers and producers toward chicken as the most affordable and competitive meat option.
2. **High production concentration in specific regions.** Over 70% of poultry meat is produced in the Vinnytsia, Cherkasy, and Dnipropetrovsk regions, driven by well-developed infrastructure.
3. **Dominance of large enterprises.** Although only 12.5% of agricultural enterprises have flocks exceeding 500,000 birds, they account for 85% of all poultry.
4. **Gradual decline in the role of household farms.** The poultry population in personal peasant farms declined from 98 million (in 2000) to 78 million (in 2022), while large agricultural holdings expanded production, indicating a shift toward industrial methods.
5. **Material-intensive cost structure and rising production costs.** Feed, energy, veterinary medicines, and services account for about 85–90% of total costs. From 2012 to 2023, total expenses increased nearly tenfold (from UAH 8.38 billion to UAH 84.95 billion), making it more difficult to maintain high profitability.
6. **Minor regional differences in consumer prices.** The price difference for chicken meat between regions does not exceed 10–15%, indicating relatively uniform logistics and distribution networks nationwide.
7. **Export reorientation toward EU and Middle East markets.** Since 2016 (after the introduction of the Free Trade Agreement with the EU), the share of exports to EU countries and the UK has sharply increased and now exceeds 70% of total export volume, while the CIS market has significantly narrowed.
8. **Significant export growth. I**n monetary terms, poultry meat exports increased from a modest $153,000 (in 2004) to $424 million (in 2023), confirming the competitive advantages of Ukrainian producers in the global market.
9. **Popularity of chicken in consumption.** As of 2023, the average Ukrainian consumes about 22 kg of chicken per year – over 40% of all meat consumed. In EU countries, this figure is around 30%, and in the USA – approximately 50%.

1. TRENDS IN POULTRY MEAT PRODUCTION

Over the past decade, poultry meat production in Ukraine has demonstrated steady growth, particularly in the chicken segment. The share of poultry meat in the total volume of livestock production increased from 17% in 2011 to 28% in 2021 (Fig. 1.a., Fig. 1.b.).[1] Particularly notable growth was observed during the period from 2014 to 2021, when the share of poultry increased from 20% to 28%. This growth occurred not only in relative indicators (percentages) but is also confirmed by absolute production figures: in 2014, poultry meat production amounted to €1.86 billion, rising to €2.15 billion in 2021. This trend indicates the gradual strengthening of the poultry industry's position in Ukraine's agricultural sector, primarily driven by increasing demand for chicken as an affordable source of protein in the domestic market; export potential and access to international markets; the introduction of technological innovations; and cost optimization in large enterprises.[2]

Fig. 1.a. Dynamics of Poultry Production Output

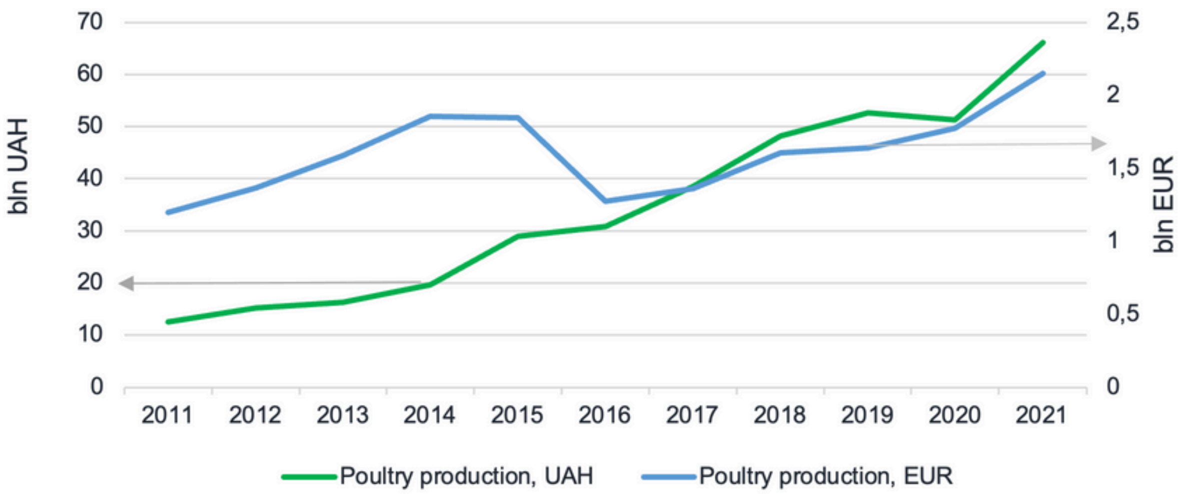
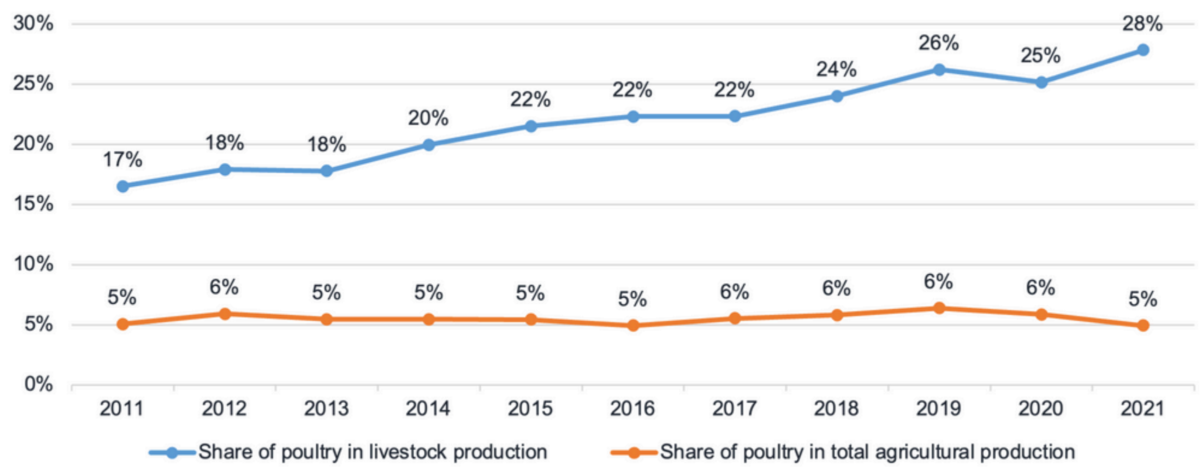


Fig. 1.b. Share of Poultry Production in Total Livestock Output and Overall Agricultural Production



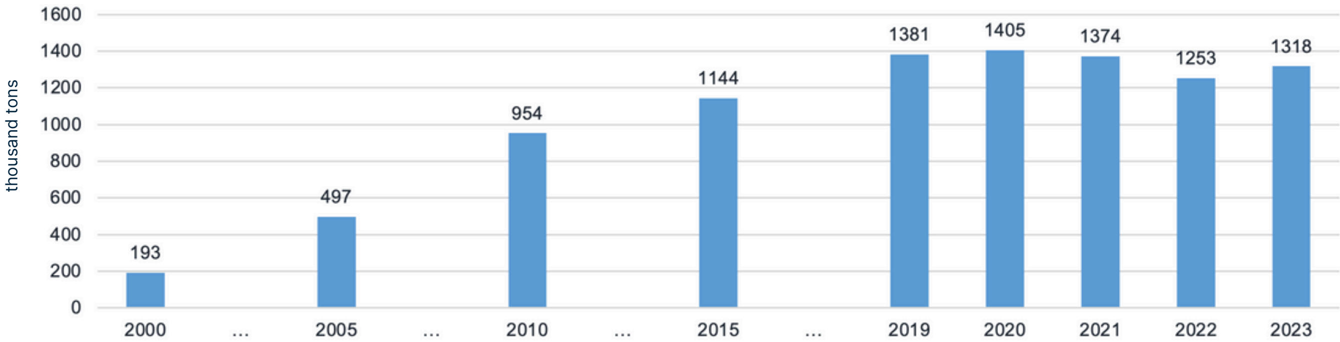
1 *SSSU. (2022). Статистичний збірник "Сільське господарство України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ*

2 *Kopytets, N., & Voloshyn, V. (2020). Current state and development trends of the meat market. Ekonomika APK, 27(6), 59-67. https://doi.org/10.32317/2221-1055.202006059*

In the overall structure of agricultural production, the share of poultry meat has fluctuated within the range of 5–6% over the past two decades. Despite the modest growth of this indicator, the role of poultry in livestock production has become increasingly important.

Between 2000 and 2023, poultry meat production in Ukraine experienced significant growth, reflecting a transformation of the meat market and the strengthening of the poultry industry. According to statistical data[3](Fig. 2), poultry meat production increased from 193 thousand tons in 2000 to 1,253 thousand tons in 2022, indicating a sevenfold rise over this period. The dynamics of poultry meat production in Ukraine (2000–2024) show steady growth with several key stages. During 2000–2010, the sector underwent gradual recovery due to privatization, modernization, and rising domestic demand for chicken as an affordable type of meat.[4] Between 2010 and 2015, the industry began to grow rapidly, driven by increased investment, the development of large poultry farms, and growing export potential.[5] The period from 2015 to 2020 marked a stable phase of development: entry into international markets, the implementation of international quality standards, and technological intensification significantly enhanced the sector's competitiveness.[6] In 2022, the war caused a decline in production due to infrastructure destruction and rising costs. However, in 2023–2024, gradual stabilization has been observed, thanks to producers' adaptation and continued domestic demand.[7]

Fig. 2. Dynamics of Poultry Meat Production in Ukraine



The significant increase in poultry meat production (Fig. 3.a) has had a major impact on the overall structure of meat production in Ukraine (Fig. 3.b). In 2000, poultry meat accounted for only 11.6% of total meat production, but this figure rose to 46.3% in 2010 and reached 56.8% in 2022. This change occurred not only due to the substantial increase in poultry meat production (from 193.2 thousand[4] tons in 2000 to 1,252.9 thousand tons in 2022), but also due to the decline in beef production, the share of which decreased from 45.5% in 2000 to 12.2% in 2022. Pork production also declined slightly—from 40.6% in 2000 to 29.8% in 2022. These structural

3 *SSSU. (2024a). Виробництво продукції тваринництва у 2023 році (2020, 2015, 2010, 2005). Держаналітінформ.* *https://www.ukrstat.gov.ua/operativ/operativ2022/sg/vpt/vpt2023.xls*

4 *Sendetska, S. (2019). Research on production and distribution of poultry meat in Ukraine. Scientific Messenger of LNU of Veterinary Medicine and Biotechnologies. Series Economical Sciences, 21(93), 8-12.*

5 *Makarynska, A., & Vorona, N. (2024). Analysis of the state of the poultry industry and hidden opportunities. Grain Products and Mixed Fodder's, 24(2), 33-38.*

6 *Kuriata, N. V., Chechet, O. M., Horbatyuk, O. I., Pishchanskyi, O. V., Musiiets, I. O., Balanchuk, L. V., & Zhovnir, O. M. (2024). Comparative analysis of different approaches for determining microbiological criteria in feed samples for animals and poultry. Animal Biology, 26(2), 37.*

7 *Cherevko, H. (2024). AGRICULTURE OF UKRAINE DURING THE WAR: CHALLENGES AND CHANGES. Annals of the Polish Association of Agricultural and Agribusiness Economists, XXVI(4), 32–43.* *https://doi.org/10.5604/01.3001.0054.8604*

shifts reflect two key trends: the rapid growth of the poultry sector, which has become the most dynamic sub-sector of livestock farming, and the diminishing role of pork and beef production.

Fig. 3.a. Volumes of Poultry Meat Production in Ukraine, thousand tons

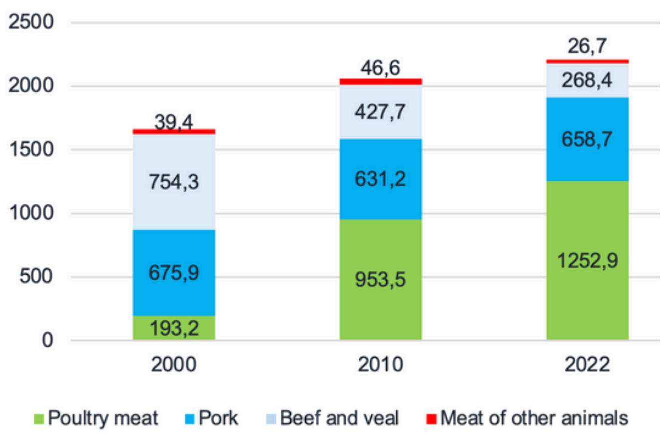
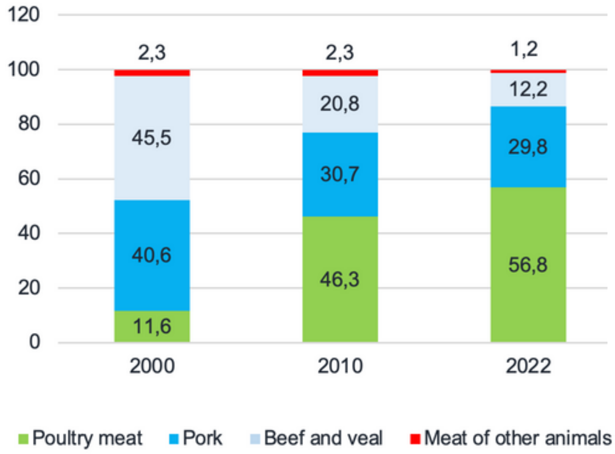
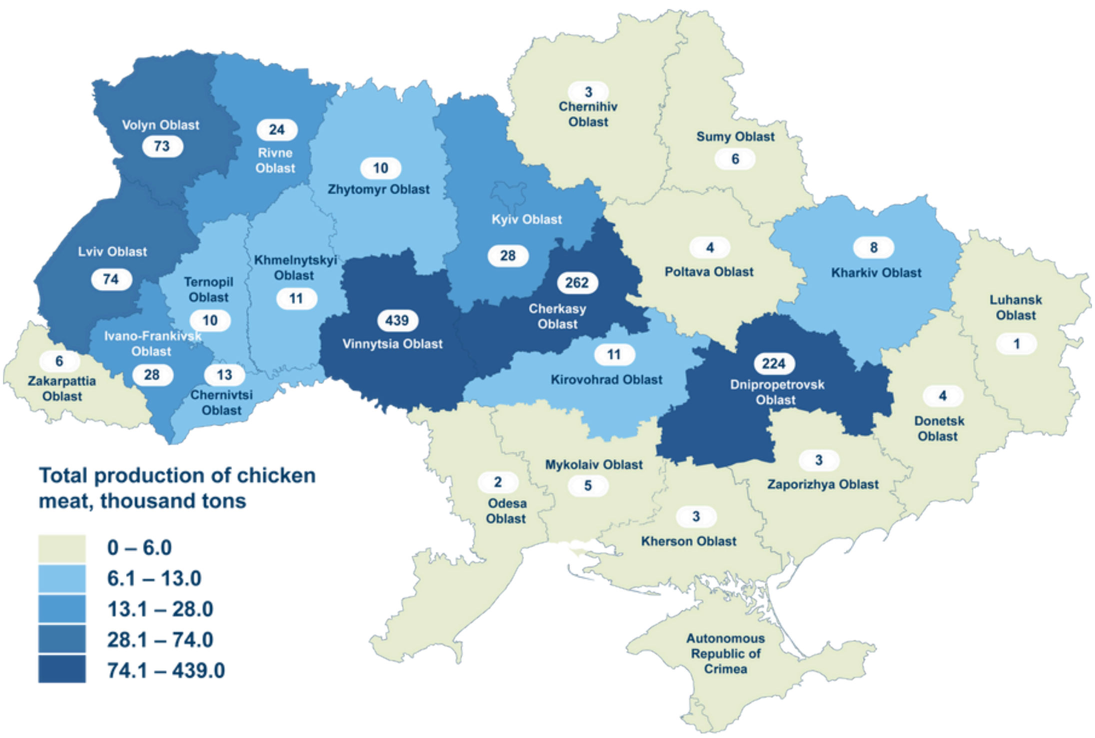


Fig. 3.b. Structure of Meat Production in Ukraine, %



According to data from UkrStat for 2022,[8] poultry meat production in Ukraine was unevenly distributed across the country's regions (Map 1). The leading producer was Vinnytsia region, which accounted for 35.1% of the national poultry meat output, with poultry representing 92% of the total meat production in the region. The second-largest producer was Cherkasy region, contributing 21.0% of Ukraine's total poultry meat output and 83.6% of the region's total meat production.

Map 1. Regional Distribution of Poultry Meat Production, 2022



8 SSSU. (2023). *Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ.* https://www.ukrstat.gov.ua/druk/publicat/kat_u/2023/zb/05/zb_tv_2022.pdf

Dnipropetrovsk region ranked third, providing 17.9% of the national poultry meat output and accounting for 85.1% of the total meat production in the region. These three regions—Vinnytsia, Cherkasy, and Dnipropetrovsk—are the main production hubs, collectively concentrating over 70% of Ukraine's poultry meat production. This indicates a high level of sectoral concentration in specific areas of the country. In contrast, production levels in other regions were significantly lower—for instance, Lviv region contributed 5.9% to national output, and Rivne region only 1.9%. Moreover, half of Ukraine's regions demonstrated very low poultry production volumes—less than 1% each. The uneven distribution of poultry meat production across Ukrainian regions is driven by several factors. The main reasons behind this phenomenon, supported by relevant scientific sources, are outlined below:

- **Economic conditions and investment.** Regions with higher levels of economic development and a favorable investment climate—such as Vinnytsia, Cherkasy, and Dnipropetrovsk—attract more investment into poultry farming, which supports the establishment of large poultry farms and increased production volumes.[9]
- **Infrastructure.** The presence of well-developed transportation and logistics infrastructure in the central regions of Ukraine facilitates the supply of feed, equipment, and the distribution of finished products, making these areas more attractive for the development of poultry farming.[10]
- **Natural and climatic conditions.** Regions with a moderate climate and access to water resources provide favorable conditions for poultry farming, which can influence the concentration of production in these areas[11].
- **Traditions and experience.** Some regions have long-standing traditions in poultry farming and accumulated experience, which contribute to the development of the industry and the concentration of production in those areas.[11]

9 *Родіна, О. (2022). Аналіз ринку м'яса птиці в Україні: сучасний вектор у контексті продовольчої безпеки. Підприємництво та інновації, (23), 91–96. https://doi.org/10.37320/2415-3583/23.16*

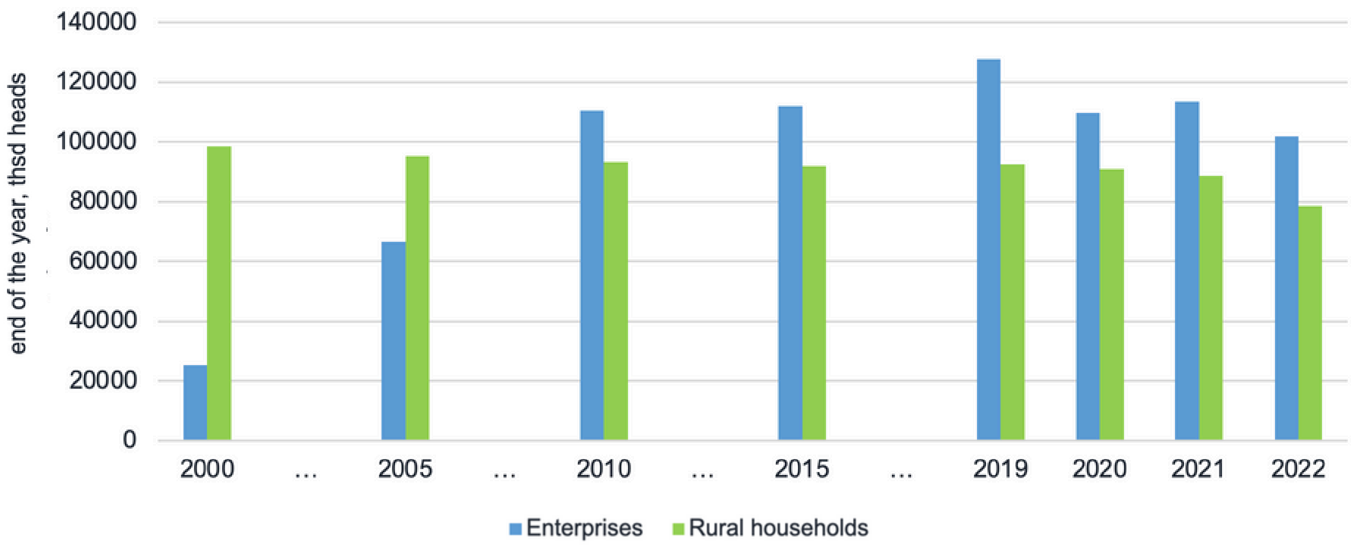
10 *Просторова організація бізнесу в регіонах України: форми та механізми регулювання: монографія у 2-х томах. Т.1 / НАН України. Державна установа «Інститут регіональних досліджень ім. М.І. Долішнього НАН України»; наук. ред. М.І. Мельник. Львів, 2019. 377 с*

11 *Полегенька, М. А. (2019). Аналіз сучасного стану виробництва продукції птахівництва в Україні. Економіка та держава, (3, березень), 136–143.*

2. PRODUCERS

Between 2000 and 2022, the number of domestic poultry in Ukraine showed varying trends depending on the type of farm. Analysis of UkrStat data[12] indicates an increase in poultry populations at enterprises and a decline in household farms. However, these changes should be considered within the broader context of macroeconomic and social developments (Fig. 4). The number of poultry at enterprises rose significantly—from 25.4 million in 2000 to a peak of 127.8 million in 2019. This growth can be attributed to large-scale modernization of production, the introduction of modern technologies, and a rise in production concentration and intensity within the agro-industrial sector.[13] At the same time, in 2022 the number of poultry at enterprises decreased to 101.8 million, which may be the result of rising feed and energy costs, as well as the ongoing war.[14] A 2023 survey of farming households confirms that the war has had a considerable impact on the agricultural sector, particularly by limiting market access, causing logistical disruptions, and damaging infrastructure.[15]

Fig. 4. Classification of Producer Types by Poultry Headcount



The dynamics of poultry populations in household farms show a steady downward trend—from 98.4 million in 2000 to 78.6 million in 2022. This decline can be divided into three main periods:

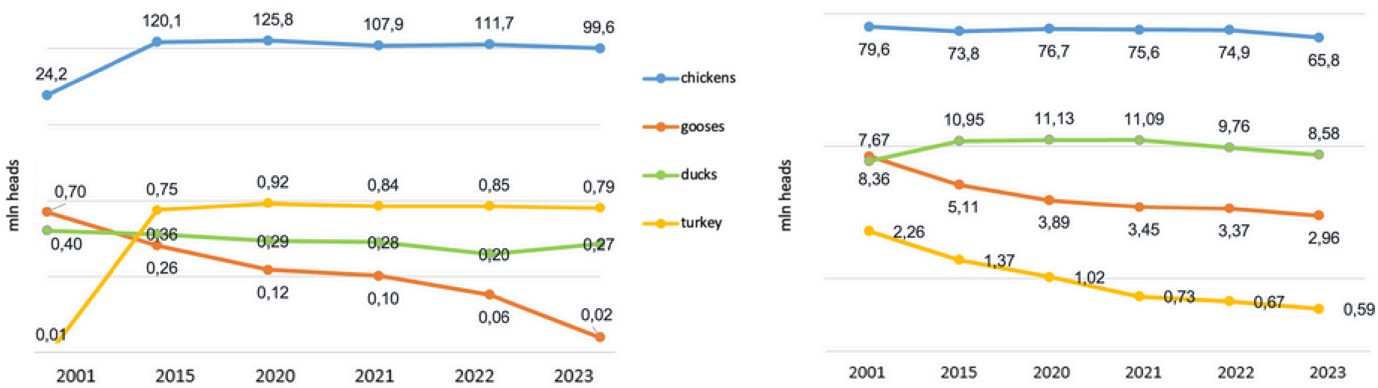
- **2001–2010** – a gradual decrease to 93.2 million birds, caused by transformations in the agricultural sector that led to rising costs for maintaining poultry.
- **2010–2021** – a period of relative stability. For example, in 2015, the poultry population was recorded at 91.9 million, and in 2019, it was 92.7 million.
- **2021–2023** – a sharp drop, with the number falling to 78.6 million in 2022.

12 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ. https://www.ukrstat.gov.ua/druk/publicat/kat_u/2023/zb/05/zb_tv_2022.pdf*
13 *Аналітичне дослідження ринку птахівництва в Україні - УкрАгроКонсалт. (2024). UkrAgroConsult - Агроконсалтинг світового рівня. https://ukragroconsult.com/research/ukrayina-rinok-ptahivnicztva/*
14 *Поголів'я птиці у 2022 році скоротилося на 10,7% - AgroTimes. (2023). AgroTimes. https://agrotimes.ua/tvarinnitstvo/pogolivya-ptyczi-u-2022-roczi-skorotylosya-na-107/*
15 *Вплив війни на стан аграрної галузі в Україні. (2023). Economics.org.ua. https://economics.org.ua/images/Analitika-agro-sector2023.pdf*

Overall, the trends in poultry headcount indicate structural changes in Ukraine's agricultural sector. Enterprises showed substantial growth in poultry numbers up to 2019, underscoring their leading role in poultry meat production. In contrast, household farms have been gradually losing significance due to economic and social challenges, including rising maintenance costs, the need to adapt to market conditions, and the consequences of war (e.g., labor shortages).[16]

Between 2001 and 2023, the structure of the domestic poultry population in Ukraine changed, reflecting transformations both at enterprises and in household farms (Fig. 5). The number of hens and roosters at enterprises increased from 24.2 million in 2001 to a peak of 125.8 million in 2020, after which it began to gradually decline, reaching 99.6 million in 2023. This decrease is likely related to economic difficulties and the impact of the war on the industry. Virtually all poultry kept at enterprises (99%) are hens and roosters, indicating that chicken meat production is the dominant segment of the poultry sector.[17]

Fig. 5. Number of Domestic Poultry by Species



Agricultural Enterprises *Rural Households*

Household farms also show a decline in the number of hens and roosters—from 79.6 million in 2001 to 65.8 million in 2023. Despite the overall decrease, the number of ducks in these farms peaked in 2020–2021, then declined but remained relatively high in 2023 (8.6 million). The populations of other poultry species, such as turkeys and geese, have steadily decreased in both enterprise and household categories, indicating waning interest in these species. Approximately 84% of all poultry kept in rural households are hens and roosters, while geese, ducks, and turkeys account for 4%, 11%, and 1%, respectively.

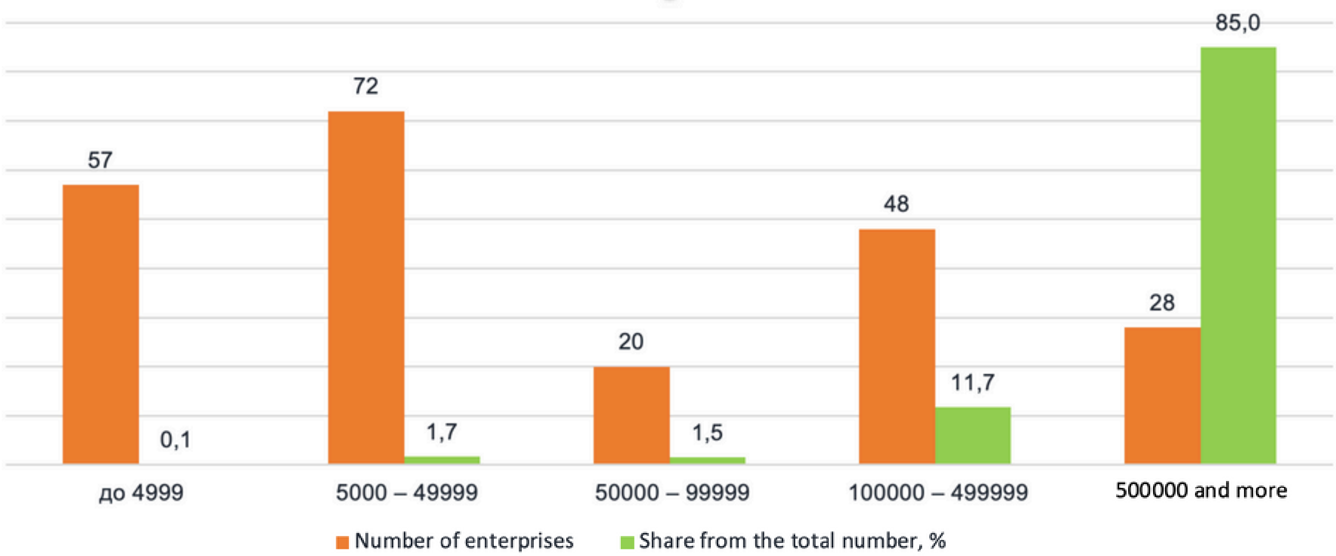
Based on the data presented in Figure 5, it is evident that the diversification of poultry species remains low in both enterprises and household farms. Enterprises focus almost exclusively on the production of hens and roosters, which made up over 99% of the total poultry population in 2023. Household farms also mainly raise hens and roosters (84% in 2023), although they maintain a slightly higher share of ducks (up to 11%). Geese and turkeys continue to show a steady downward trend in both categories of producers. Overall, the gradual dominance of

16 *Вплив війни на сільське господарство: ООН представила оцінку нагальних потреб агросектору та сільського населення. (2024). MilkUA.info. http://milkua.info/uk/post/vpliv-vijni-na-silske-gospodarstvo-oon-predstavila-ocinku-nagalnih-potreb-agrosektoru-ta-silskogo-naselenna*
17 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ. https://www.ukrstat.gov.ua/druk/publicat/kat_u/2023/zb/05/zb_tv_2022.pdf*

chicken as the primary product in the poultry sector aligns with current economic realities and consumption trends. [18] [19]

In 2022, poultry meat production in Ukraine was concentrated among a small number of large enterprises that each had more than 500,000 birds (Fig. 6). Out of a total of 225 enterprises, only 12.5% fell into the category with flocks exceeding 500,000. However, these enterprises held 85% of the total poultry population, indicating a high level of production concentration.[20]

Fig. 6. Classification of Enterprises by Number of Domestic Poultry, 2022



In contrast, 57 enterprises (25.3% of the total) had flocks of up to 4,999 birds and accounted for only 0.1% of the total poultry population in Ukraine. Other enterprises, falling into the categories with flock sizes between 5,000–49,999 and 50,000–99,999 birds, collectively held just 3.2% of the national poultry population. These figures highlight the low efficiency and competitiveness of small-scale producers compared to large-scale farms.

The main players in Ukraine's chicken meat production market remain a few large enterprises that hold dominant positions. The leader is Myronivsky Hliboproduct (MHP), known for brands such as "Nasha Ryaba", "Legko!", "Bashchynsky", among others. MHP operates a full production cycle—from feed cultivation to the export of finished products—and has a strong presence in international markets. Other key players include: Agro-Oven, Agromars Complex (brand: Havrylivski Kurchata), Vinnytsia Poultry Farm, Volynholding (brand: Chebaturochka). In 2018, these top five companies collectively controlled 74.79% of primary chicken meat sales, with MHP holding the largest share—45.16%.[21]

18 *Tridge. (2023, November 21). FAO: Trends in world poultry meat production in 2023. Tridge News. Retrieved March 22, 2025, from https://www.tridge.com/news/fao-trends-in-world-poultry-meat-production-in-202*
19 *Yildiz, A. (2023). World poultry meat production and trends. DergiPark. Retrieved March 22, 2025, from https://dergipark.org.tr/en/download/article-file/3717980*
20 *SSU. (2023b). "Тваринництво України" (2022, 2020, 2017, 2015, 2010). (Статистичний збірник). Держаналітінформ. https://ukrstat.gov.ua/druk/publicat/Arhiv_u/07/Arch_tvar_zb.htm*
21 *АМК. (2019). Звіт про результати дослідження ЗАГАЛЬНОДЕРЖАВНОГО РИНКУ М'ЯСА КУРЯЧОГО (2016 – 2018 роки). Відділ ринків агропромислового комплексу. https://amcu.gov.ua/storage/app/sites/1/%20курятина.pdf*

Competition in the market is concentrated among large holdings that possess the resources to modernize production and expand capacity. As noted in the FAO report (2020), a high level of concentration contributes to efficiency; however, it also poses challenges for small and medium-sized producers, who struggle to meet strict quality standards and invest in capital-intensive technologies. [22]

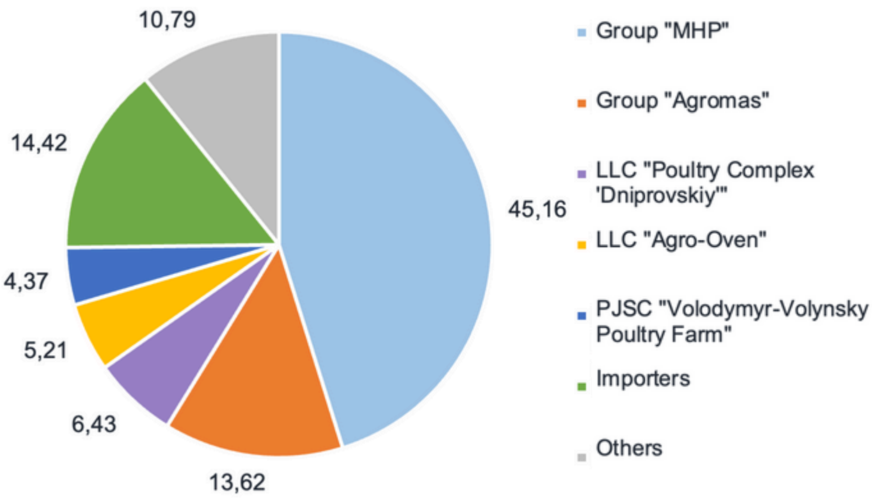


Fig. 7.a. Market Share of Major Players (Top 5) in Primary Chicken Meat Sales in 2018

The development prospects of the industry depend on the modernization of production, the implementation of environmentally safe technologies, and the further expansion of export opportunities, which will enable Ukrainian producers to strengthen their positions in the international market.[23] [24]

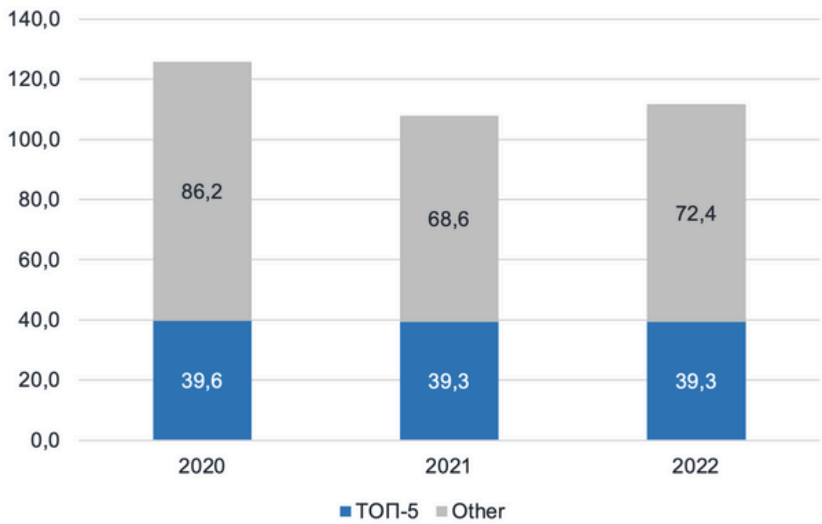


Fig. 7.b. Number of Poultry (Broilers and Meat/Meat-Egg Layer Hens) at Year-End, million birds

22 *Perekhozhuk, O., & Polonska, O. (2020). Market structures in the Ukrainian poultry sector. Home | IAMO. https://www.iamo.de/fileadmin/user_upload/iamo2020_en_c6.pdf*
23 *FAO. (2013). Poultry Development Review. Food and Agriculture Organization of the United Nations. https://www.fao.org/3/i3531e/i3531e.pdf*
24 *FAO. (2007). Poultry in the 21st Century: avian influenza and beyond.Proceedings of the International Poultry Conference, held 5–7 November 2007, Bangkok, Thailand.Edited by O. Thieme and D. Pilling. FAO Animal Production and Health Proceedings (9). https://openknowledge.fao.org/items/25faff0f-e7db-4ae1-b2d4-1cc751822b6b*

In 2020–2022, the Top 5 enterprises — **MHP Group, Agromars Group, Dniprovskiy Poultry Complex LLC, Agro-Oven LLC, and Volodymyr-Volynsky Poultry Farm PJSC** — maintained a stable share of the poultry population, amounting to approximately **39.3–39.6 million birds.** In contrast, the poultry population held by **other producers** ranged between **68.58 and 86.21 million birds** during the same period (Fig. 7.b).[25] This stability indicates the continued high concentration of production, while small and medium-sized farms remain important for supplying regional markets.

3. ENTERPRISE COSTS OF CHICKEN MEAT PRODUCTION

Over the period from 2012 to 2023, total nominal costs for chicken meat production in Ukraine increased steadily. In 2012, production costs amounted to UAH 8.38 billion, while in 2023 they reached UAH 84.95 billion, indicating a nearly tenfold increase.[26] The main portion of these costs falls under material expenses and service-related costs, which in 2023 accounted for 89.5% of total expenditures—remaining relatively stable throughout the analyzed period.

Table 1. Nominal Costs of Poultry Meat Production

Years	Total Expenditures	Breakdown of Expenditures									
		Material Costs		Depreciation		Labor Costs		Social Security Contributions		Other Costs	
		million UAH	% of total	million UAH	% of total	million UAH	% of total	million UAH	% of total	million UAH	% of total
2012	**8382**	7493	89,4	168	2,0	523	6,2	184	2,2	14	0,2
2013	**11329**	10190	89,9	189	1,7	687	6,1	243	2,1	20	0,2
2014	**10025**	8925	89,0	221	2,2	574	5,7	201	2,0	103	1,1
2015	**14015**	12955	92,4	214	1,5	617	4,4	207	1,5	22	0,2
2016	**13899**	12796	92,1	237	1,7	683	4,9	153	1,1	30	0,2
2017	**31283**	28557	91,3	448	1,4	1828	5,9	386	1,2	64	0,2
2018	**33579**	29891	89,0	700	2,1	2432	7,2	520	1,6	37	0,1
2019	**37114**	31962	86,1	1259	3,4	3160	8,5	673	1,8	61	0,2
2020	**41219**	35447	86,0	1560	3,8	3425	8,3	728	1,8	59	0,1
2021	**50761**	44368	87,4	1715	3,4	3771	7,4	811	1,6	97	0,2
2022	**61351**	54428	88,7	1705	2,8	4206	6,8	910	1,5	102	0,2
2023	**84946**	76064	89,5	2247	2,6	5398	6,4	1149	1,4	89	0,1

25 *Трипільє (2024). Платна інформаційна база даних. https://tripoli.land/ua/farmers/zhivotnovodcheskiye-fermy/ptitsefabriki*
26 *SSU. (2024b). Витрати на виробництво продукції (товарів, послуг) підприємств за видами економічної діяльності (2012–2023). https://www.ukrstat.gov.ua/operativ/operativ2021/fin/pdp/pdp_ue/vvp_ek_2012_2020_ue.xlsx (Код за КВЕД 10.12)*

Between 2012 and 2023, the cost structure of poultry meat production in Ukraine remained relatively stable. The largest share consistently belonged to material costs — ranging from 86% to 92% of total expenditures (with the highest level in 2015 and the lowest in 2020). Labor costs increased in nominal terms from UAH 523 million in 2012 to UAH 5,398 million in 2023. However, their share in the total cost structure remained moderate — between 6% and 8%. Depreciation never exceeded 4%, social security contributions stayed below 2%, and other costs did not exceed 0.2%. This structure indicates a high material intensity of production and an industrial character of the sector, where key roles are played by feed, energy, and veterinary supplies.

Another source for analyzing the cost structure of poultry meat production in Ukraine for 2023 and 2024 is research from the Ministry of Agrarian Policy and Food of Urkraine (MIN AGRO),[27] which confirms the stability of expenditure distribution.[28] The main cost components remain feed, the price of day-old chicks, veterinary drugs, labor, and energy (Table 2). The largest share of poultry meat production costs is attributed to feed, which maintains a stable level of $0.39–0.41 per kg, accounting for 54.2%–54.9% of total costs. The cost of day-old chicks (Cobb 500) is gradually decreasing from $0.16/kg in 2023 to a projected $0.14/kg in 2024 (from 21.3% to 19.7% of the cost structure). Other cost items — such as veterinary drugs, electricity, labor, taxes, depreciation, and repairs — remain stable at $0.01–0.04/kg for each category. In the cost structure, these components account for 1.3%–5.6%, depending on the category. Meanwhile, the live weight selling price of broilers shows moderate fluctuations — from $1.08/kg in 2023 to a projected $1.07/kg in 2024. This, together with the stable cost levels, enables producers to maintain profitability in the range of $0.33–$0.41 per kg.

Table 2. Cost Structure of Broiler Meat Production

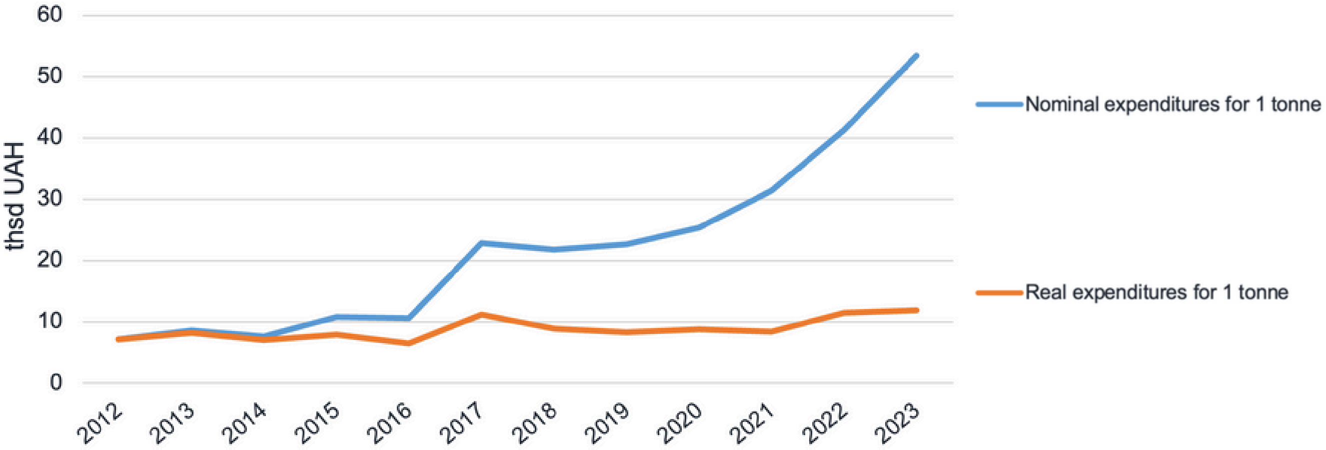
Total Costs,	2023		Jan.24		Aprl.24		2024 (f)*	
	$/кг	%	$/кг	%	$/кг	%	$/кг	%
Cost of Day-Old Chicks (Cobb 500)	**0,75**	**100**	**0,72**	**100**	**0,71**	**100**	**0,71**	**100**
Feed	0,16	21,3	0,15	20,8	0,15	21,1	0,14	19,7
Veterinary Drugs	0,41	54,7	0,39	54,2	0,39	54,9	0,39	54,9
Electricity	0,04	5,3	0,04	5,6	0,04	5,6	0,04	5,6
Heating Costs	0,01	1,3	0,01	1,4	0,01	1,4	0,01	1,4
Labor Costs	0,02	2,7	0,02	2,8	0,02	2,8	0,02	2,8
Taxes and Social Contributions on Labor	0,04	5,3	0,04	5,6	0,04	5,6	0,04	5,6
Depreciation of Buildings and Equipment	0,02	2,7	0,02	2,8	0,02	2,8	0,02	2,8
Repair of Buildings and Equipment	0,02	2,7	0,02	2,8	0,02	2,8	0,02	2,8
Other General Production Costs	0,01	1,3	0,01	1,4	0,01	1,4	0,01	1,4
Administrative Expenses	0,01	1,3	0,01	1,4	0,01	1,4	0,01	1,4
Live Weight Selling Price, $/kg (excluding VAT)	0,01	1,3	0,01	1,4	0,01	1,4	0,01	1,4
Profit/Loss, $/kg	**1,08**	**x**	**1,1**	**x**	**1,11**	**x**	1,07	x
Total Costs,	**0,33**	**x**	**0,37**	**x**	**0,41**	**x**	0,36	x

**forecast*

27 *MIN AGRO. (2024). УКРАЇНА: Вплив війни на прибутковість сільськогосподарського виробництва.* *https://minagro.gov.ua/ (https://shorturl.at/iK2qp)*

The cost of producing 1 ton of chicken meat in Ukraine from 2012 to 2023 (Figure 8) shows a steady upward trend in both nominal and real terms. In 2012, real costs amounted to UAH 7.18 thousand, rising to UAH 11.92 thousand by 2023. The most notable increase occurred after 2021, when real costs were UAH 8.39 thousand — within just two years, they increased by approximately 42%.

Figure 8. Ratio of Nominal and Real (in 2010 prices) Costs of Poultry Meat Production [29]



The poultry sector in Ukraine shows a steady increase in cost per unit of output, driven by several factors outlined in Table 3. This growth results from a combination of global economic trends and unique circumstances related to the war in Ukraine:

1. **Natural gas prices for industrial consumers more than doubled** at the end of 2021 (exceeding 70 UAH/m³). This led to a significant increase in the share of energy costs in the total cost of production — rising from about 2.1 UAH to 6 UAH per 1 kg of meat. Although prices remained high in 2023, they were below the peak levels of the previous year. [30]
2. **Power outages during the winter of 2022/23 and the associated costs of using generators** caused a notable increase in the production cost of chicken meat for many producers. [31]
3. **The closure of ports and shift to land export routes** raised the share of logistics costs in the price structure from around 10% to 21–25% in 2022–2023. Transporting products overland to EU countries is 30–50% more expensive than pre-war maritime shipping, significantly impacting the final production cost of poultry. [32]
4. **Veterinary drugs, vaccines, and biosecurity measures** have also become more expensive, mainly due to inflation and higher prices for imported products. Additional expenses for avian flu prevention and enhanced biosecurity protocols have further contributed to rising total production costs. [33]

29 *SSU. (2024b). Витрати на виробництво продукції (товарів, послуг) підприємств за видами економічної діяльності (2012–2023). https://www.ukrstat.gov.ua/operativ/operativ2021/fin/pdp/pdp_ue/vvp_ek_2012_2020_ue.xlsx*
30 *Кабінет Міністрів України. (2021). Про заходи з регулювання тарифів на газ для промисловості. Офіційний вісник. ukurier.gov.ua (https://shorturl.at/OKl4T)*
31 *USDA. (2024). Poultry and products semi-annual: Ukraine (Report No. UP2024-0004). Foreign Agricultural Service. https://shorturl.at/xD8oX*
32 *Міністерство аграрної політики та продовольства України. (2023). Вплив війни на прибутковість сільськогосподарського виробництва: Випуск 4. https://minagro.gov.ua/storage/app/sites/1/uploaded-files/viini-na-pributkovist-silskogospodarskogo-virobnitstvavipusk-4.pdf*
33 *AgroTimes. (n.d.). Сучасна ветеринарія. Про роботу ветеринарних відділів птахогосподарств https://agrotimes.ua/interview/suchasna-veterynariya/*

4. PRICES

In Ukraine, the poultry meat production sector shows significant differences between **household farms (HF) and agricultural enterprises (AE)**, which is reflected in the variation in product selling prices. **Producer prices** are a key indicator reflecting production efficiency, cost levels, and market opportunities for each group of producers.

Nominal selling prices for household farms have tripled, primarily due to inflationary pressures and increased costs for feed, energy, and veterinary supplies. **For agricultural enterprises,** nominal prices also increased — by 2.9 times (Figure 9a).

Figure 9a. Nominal Prices

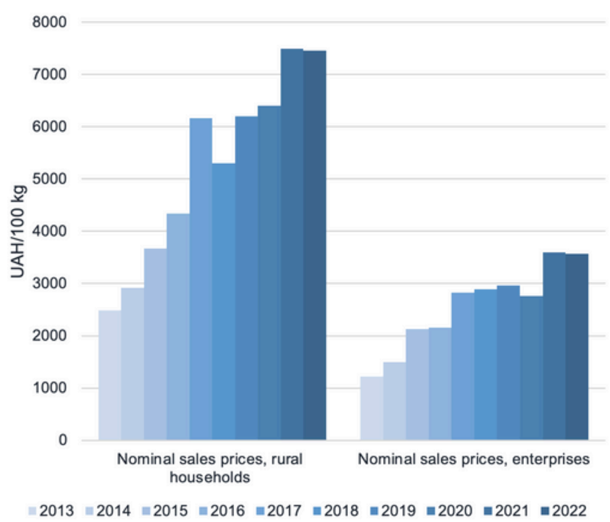
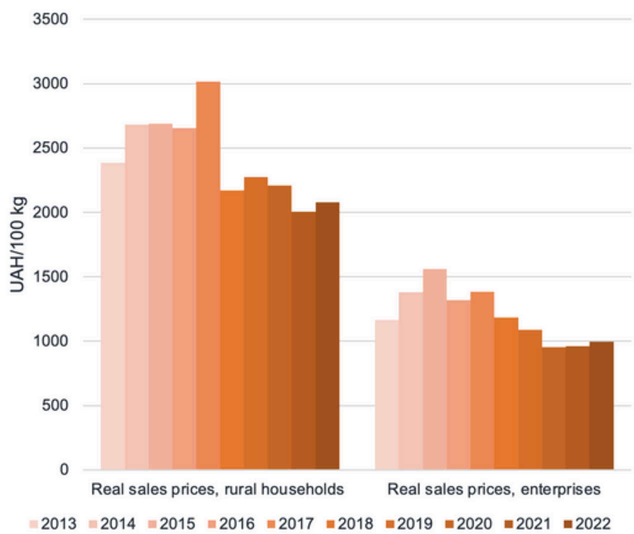


Figure 9b. Real Prices

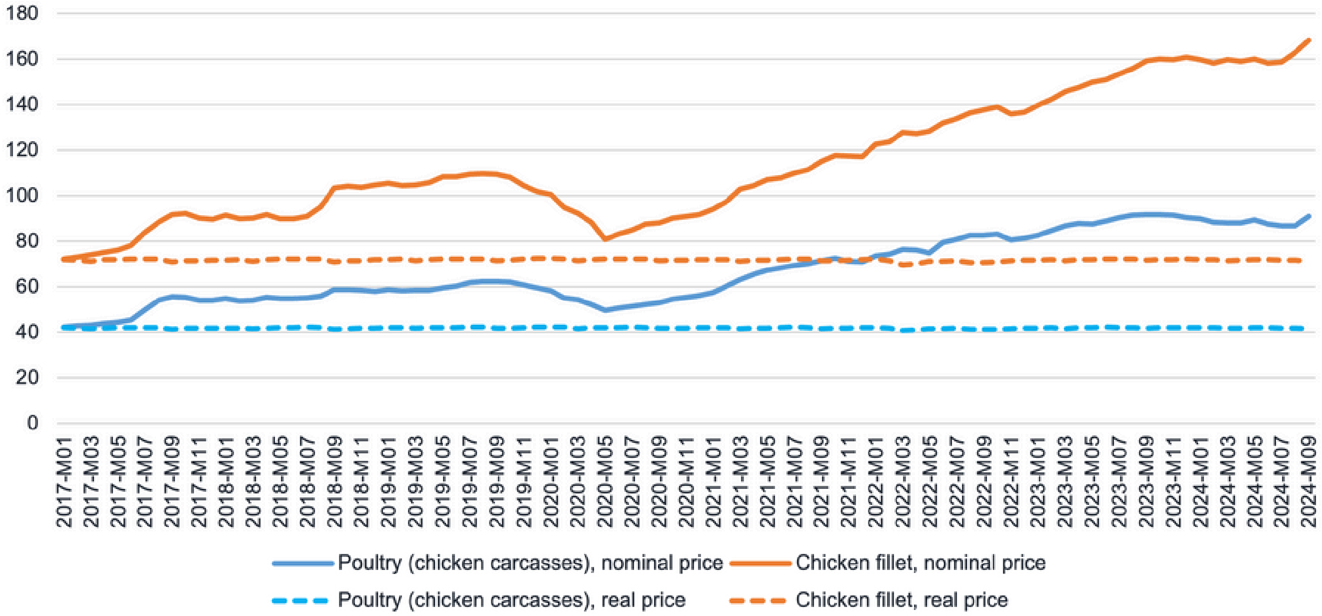


Real selling prices, however, show a downward trend. From 2013 to 2022, real poultry meat prices in Ukraine declined, particularly in the AE sector, where the price dropped from a peak of **1,560 UAH/ton in 2015 to 994 UAH/ton in 2022.** Meanwhile, household farms maintained more stable positions: the highest price was recorded in 2017 **(3,016 UAH/ton),** and in 2022 it was **2,077 UAH/ton.** Throughout the entire period, real prices in HFs were consistently higher than in AEs — sometimes by **as much as twofold** (Figure 9b).

From 2017 to 2024, nominal prices for chicken in Ukraine rose significantly: whole chickens increased from 42 to 91 UAH/kg, and fillets — from 72 to over 160 UAH/kg (Figure 10)[34]. However, real prices (adjusted for inflation) remained almost unchanged.[35] For whole chickens, real prices fluctuated between 41.5 and 42.2 UAH/kg, and for fillets — between 71.5 and 72.4 UAH/kg, with a slight decline observed in 2022–2023. This indicates that producers did not receive higher real revenues, despite rising nominal prices, as inflationary pressure and increased production costs absorbed potential profits. Such a situation reflects a decline in the real profitability of the sector.

34 *Мінфін. (2024). Ціни на продукти - М'ясні продукти: курятина. Ставки, індекси, тарифи. index.minfin.com.ua. https://index.minfin.com.ua/ua/markets/wares/prods/meat-food/meat/chicken/*
35 *SSSU. (2024a). Базовий індекс споживчих цін/До попереднього місяця. https://stat.gov.ua/uk/explorer*

Figure 10. Dynamics of Consumer Prices for Major Meat Products

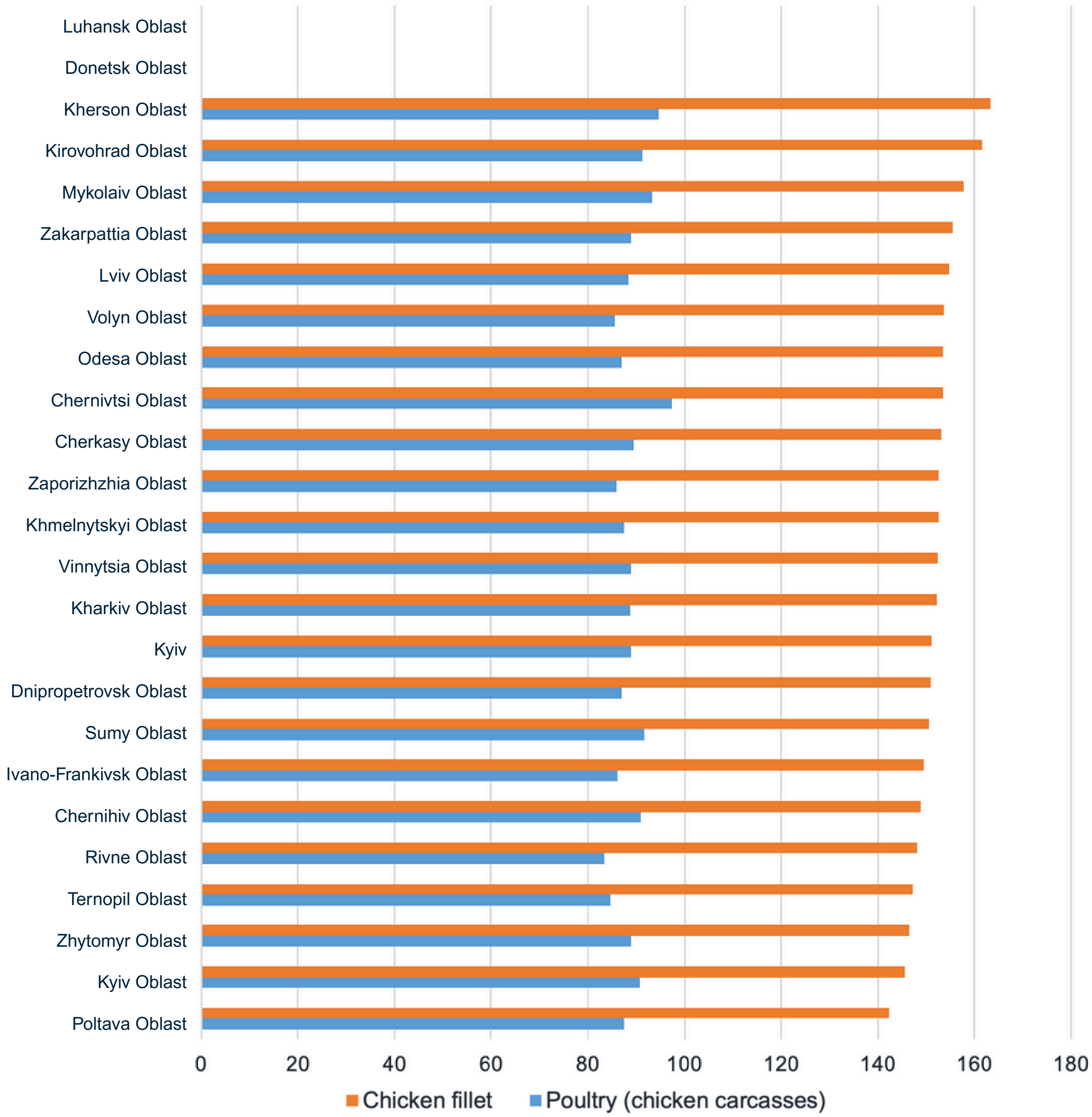


An analysis of consumer prices for chicken meat across different regions of Ukraine in 2023 shows minor fluctuations in the cost of both whole chickens and chicken fillets (Figure 11). Prices for whole chickens ranged from 83.4 UAH/kg in Rivne Oblast to 97.3 UAH/kg in Chernivtsi Oblast, indicating a difference of only about 14% between the lowest and highest prices. A similar trend is observed for chicken fillets: prices ranged from 142.40 UAH/kg in Poltava Oblast to 163.40 UAH/kg in Kherson Oblast, with a 13% difference.

The minor variation in chicken meat prices across Ukraine — despite production being concentrated in the Cherkasy, Vinnytsia, and Dnipropetrovsk regions — indicates the presence of an efficient distribution network. A well-developed logistics infrastructure contributes to the even distribution of products, which helps minimize regional price disparities.[36] [37]

36 *Shcherbak, A. (2022). Retail networks in Ukraine: development trends and problems of dominance. Economics: time realities, 4(62), 52–59. https://doi.org/10.15276/etr.04.2022.6*
37 *Duangnate, K., & Mjelde, J. W. (2023). Changing Regional Price Relationships in Retail Fresh Broiler/Fryer Whole Chicken Prices. Journal of Agricultural and Applied Economics, 1–17. https://doi.org/10.1017/aae.2023.33*

Figure 11. Regional Variation in Consumer Prices in 2023

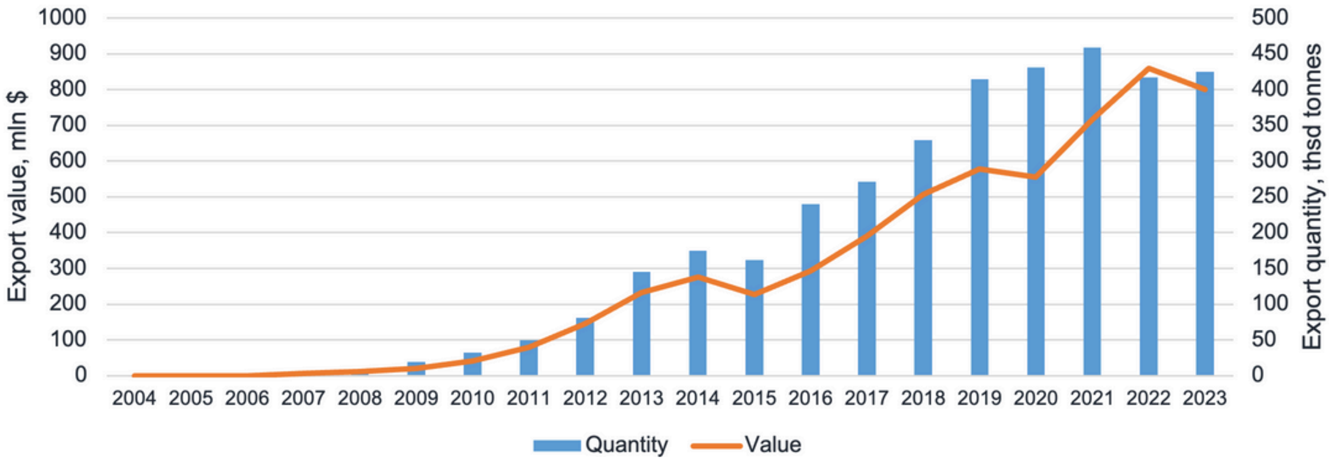


5. INTERNATIONAL TRADE

Over the past two decades, Ukraine has significantly increased its poultry meat exports, becoming a notable player in the global poultry market — accounting for 2.3% of global exports in 2023. The export value of poultry meat rose from $153,000 in 2004 to over $424 million in 2023 (Figure 12).[38] This rapid growth likely reflects both the expansion of the poultry industry and the increasing competitiveness of Ukrainian producers on the international stage.

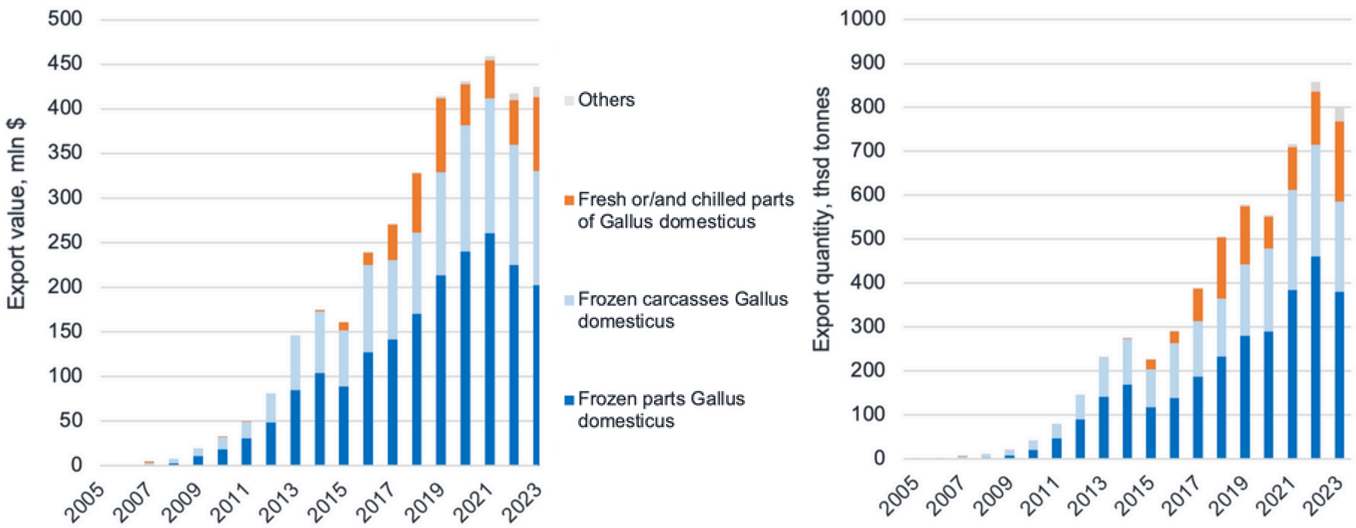
38 *Trade Map. (2024). 207 Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and. trademap.org. https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1|804||||0207|||6|1|1|2|2|1|1|2|1|1*

Figure 12. Dynamics of Ukraine's Poultry Meat Export Growth



The commodity structure of poultry meat exports from Ukraine has undergone significant changes over the past two decades (Figure 13). The share of frozen chicken parts and edible by-products increased from 36.6% in 2004 to 47.7% in 2023, which may reflect a growing demand for value-added processed products, as well as the adaptation of Ukrainian producers to international market requirements.[39] At the same time, the share of frozen whole chickens decreased from 51.6% to 30.2%, likely reflecting shifts in consumer preferences, especially in importing countries where buyers increasingly favor ready-to-cook products.[40]

Figure 13. Commodity Structure of Ukrainian Poultry Meat Exports



39 *Duangnate, K., & Mjelde, J. W. (2023). Changing Regional Price Relationships in Retail Fresh Broiler/Fryer Whole Chicken Prices. Journal of Agricultural and Applied Economics, 1–17. https://doi.org/10.1017/aae.2023.33*

40 *Temgire, S., Borah, D. A., Kumthekar, S., & Idate, A. (2021). Recent trends in ready to eat/cook food products: A review. The Pharma Innovation, 10(5), 211–217. https://doi.org/10.22271/tpi.2021.v10.i5c.6207.*

The share of chilled parts and by-products increased from 11.8% to 19.4%, which may be the result of improvements in logistics, storage infrastructure, and transportation technologies that help maintain product freshness even during long-distance exports. This shift toward value-added processed products not only reflects growing demand,[41] but also indicates that Ukrainian producers have learned to meet existing demand in international markets by employing modern production technologies and quality standards.[42]

In the analysis of poultry meat export trends, partner countries were grouped by region: Africa, the Americas, Asia, the EU + the United Kingdom, the Middle East, and the CIS. This classification is based on the geopolitical and economic significance of these regions. Global trade typically reflects a regional segmentation by market type (e.g., the CIS as a post-Soviet market, the EU as a market with strict quality standards). Such an approach allows for a more detailed understanding of export trends in each region.

Figure 14. Export Volume, thousand tons

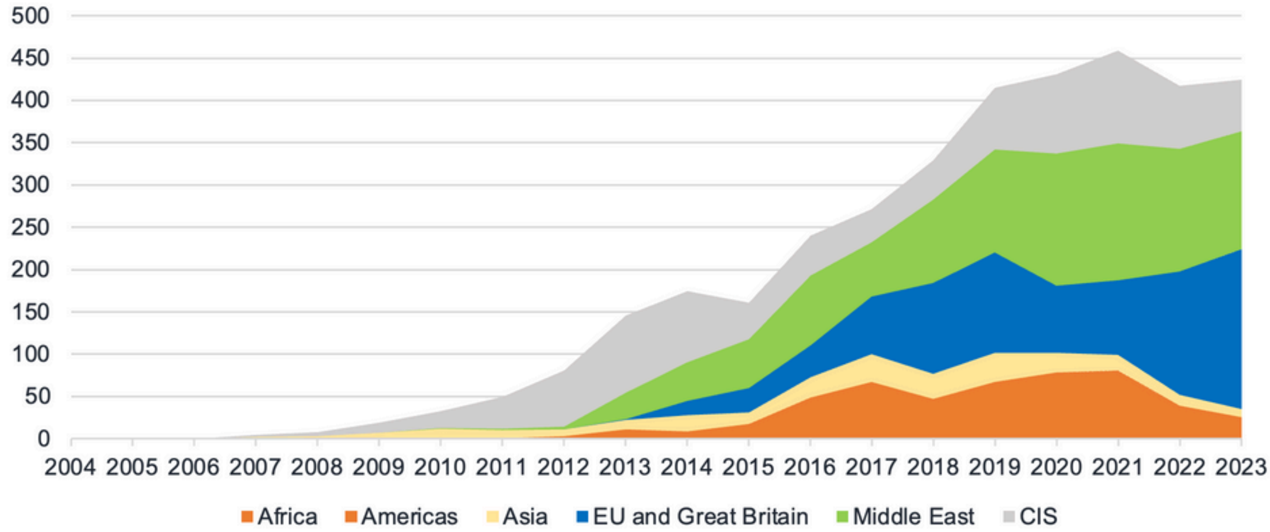
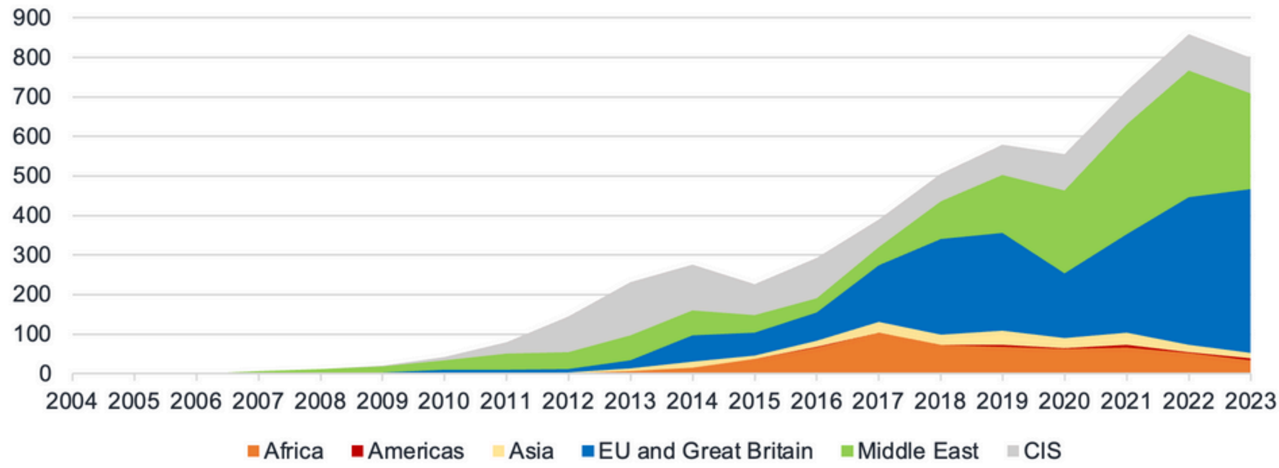


Figure 15. Export Value, million USD



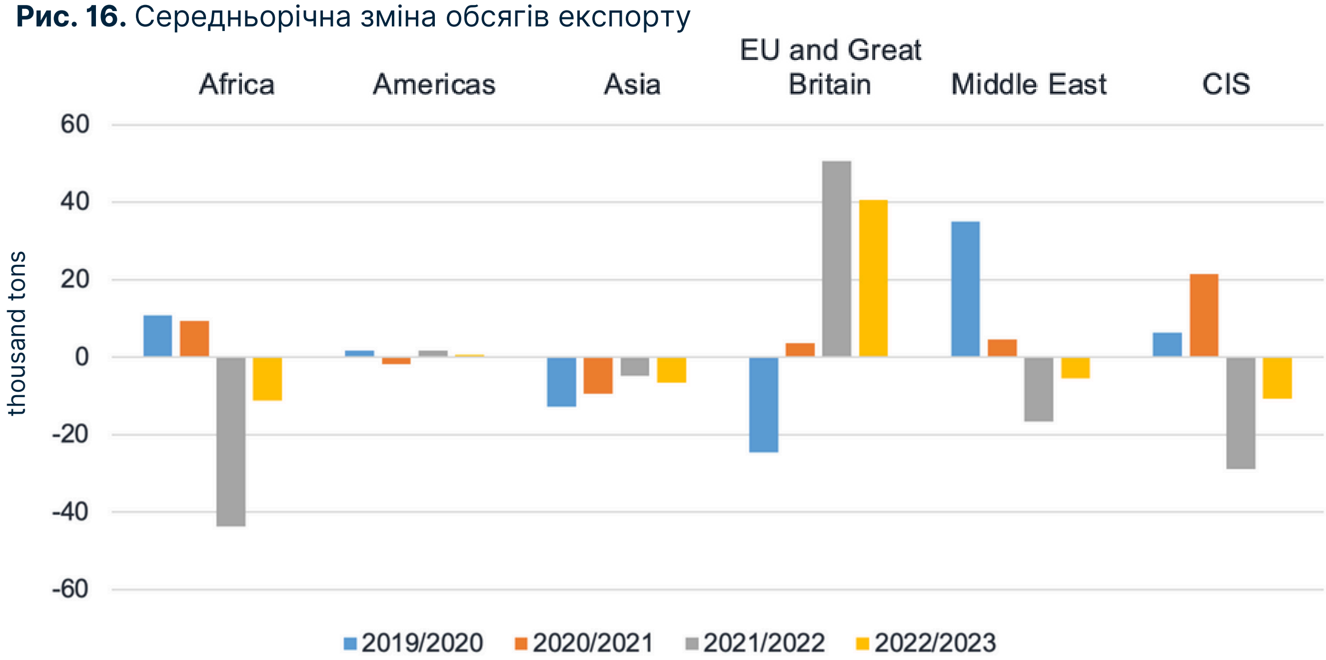
41 *OECD/FAO. (2023). Agricultural Outlook 2023-2032. OECD Publishing. https://chooser.crossref.org/?doi=10.1787/08801ab7-en.*
42 *MHP. (2024). Certification. MHP Global. https://mhpglobal.eu/sustainability/*

Between 2004 and 2023, poultry meat exports from Ukraine showed consistent growth both in physical volumes and in monetary terms (Figure 14).[43] Starting with 0.152 thousand tons to CIS countries in 2004, export volumes peaked in 2023, when the EU + United Kingdom became the main market, accounting for over 70% of total exports (189 thousand tons), while the Middle East reached 25%. In monetary terms (Figure 15), the EU + UK also dominated, generating about $415 million, or 60% of total exports, while the Middle East contributed approximately $240 million, or 35%. These trends likely reflect a reorientation of Ukrainian exports toward more profitable and stable markets. An important factor contributing to the growth in EU-bound exports was the removal of restrictions on Ukrainian goods entering the EU.[44]

The significant increase in the poultry export potential is associated with the Association Agreement between Ukraine and the EU, which included the establishment of a Deep and Comprehensive Free Trade Area (DCFTA) and came into force in 2016. This agreement opened access to the European market, known for its strict quality standards. As a result, exports to the EU + UK rose from zero in 2004 to over 189 thousand tons in 2023, generating more than 60% of Ukraine's foreign currency revenue from poultry meat exports. At the same time, there has been a decline in dependence on CIS markets due to geopolitical instability, which forced Ukrainian producers to reorient toward more stable and promising regions.

The analysis of the geographic structure of poultry exports from Ukraine during 2019–2023 (Figure 16) shows how domestic producers are gradually shifting away from CIS and Asian markets in favor of more stable and promising markets in the EU and the Middle East.

Рис. 16. Середньорічна зміна обсягів експорту



43 *Trade Map. (2024). 207 Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and. trademap.org. https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1|804||||0207|||6|1|1|2|2|1|1|2|1|1*

44 *European Union. (2022). Regulation (EU) 2022/870 of the European Parliament and of the Council of 30 May 2022 on temporary trade-liberalisation measures supplementing trade concessions applicable to Ukrainian products under the Association Agreement. Official Journal of the European Union, L 152. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2022:152:TOC*

Africa. During the 2019/2020 and 2020/2021 periods, there was positive growth (+10,738 and +9,386 respectively), likely due to favorable market conditions and strengthened trade and economic relations with several African countries. However, in 2021/2022 and 2022/2023, there was a sharp decline (−43,683 and −11,199).

Americas. The dynamics here were less volatile: +1,733 in 2019/2020, followed by a slight decrease in 2020/2021 (−1,785), then a rebound in 2021/2022 (+1,750) and continued growth in 2022/2023 (+621). This "wave-like" pattern suggests producers are exploring new niches and opportunities, although trade barriers or fluctuating demand in the Americas remain factors.

Asia. The overall trend in this region points to a consistent decline in exports: −12,727 in 2019/2020, −9,389 in 2020/2021, −4,862 in 2021/2022, and −6,591 in 2022/2023. This decrease may be due to intensified competition from Brazil and Thailand in Asian markets, as well as local restrictions and shifting consumer preferences.

EU + United Kingdom. The trend for this market is particularly telling. While there was negative growth in 2019/2020 (−24,591), the situation improved starting in 2020/2021 (+3,667), with a significant surge in 2021/2022 and 2022/2023 (+50,548 and +40,627 respectively). These figures align with the trend of Ukraine's export reorientation following the signing of the EU Association Agreement and the establishment of the Free Trade Area. This agreement enabled producers who adapted to European standards to successfully increase shipments to Europe and the UK.

Middle East. After positive growth in 2019/2020 (+35,042) and 2020/2021 (+4,633), there was a decline in 2021/2022 (−16,653) and 2022/2023 (−5,403). This trend may reflect political and economic instability in certain countries of the region. However, the Middle East remains a promising destination for poultry exports due to population growth and stable food demand.

CIS. The CIS market has shown notable volatility: after growth in 2019/2020 (+6,379) and a sharp spike in 2020/2021 (+21,470), there was a noticeable decline in 2021/2022 (−28,862) and 2022/2023 (−10,708). These changes were heavily influenced by geopolitical factors and trade restrictions on Russia following its military aggression in 2022, confirming the necessity for Ukrainian producers to shift toward more stable and solvent markets.

In conclusion, the changes in the structure of poultry meat exports from Ukraine have been shaped by both external constraints and internal adaptation processes. Trade barriers imposed by Russia since 2014 forced Ukrainian producers to reorient their export flows, facilitating deeper integration into European markets thanks to high-quality standards and the Free Trade Agreement with the EU, effective since 2016.[45] These processes demonstrate the adaptability of Ukrainian producers to external challenges and their readiness to enter new markets.[46]

According to statistical data from 2019–2023, Ukraine's poultry meat exports show a redistribution of trade flows. Compared to previous periods, the share of exports to CIS and

45 *Kryvenko, N. (2022). Foreign trade in poultry meat of Ukraine in the context of integration processes. ЕКОНОМІКА АПК. https://eapk.com.ua/web/uploads/pdf/Ekonomika%20APK_2022_Volume%2029,%20No.%206-57-67.pdf*

46 *Brenzovych, K., & Mashkara-Choknadiy, V. (2020). Dynamics of foreign trade development between ukraine and the eu in the framework of free trade area. Herald UNU. International Economic Relations and World Economy, (30). https://doi.org/10.32782/2413-9971/2020-30-2*

Asian countries (such as Azerbaijan, Iraq, Hong Kong, Armenia, Vietnam, etc.) has significantly declined, indicating reduced or unstable demand in these markets (Figure 17). Meanwhile, there has been active growth in exports to EU countries (especially the Netherlands, Slovakia, and the United Kingdom) and Middle Eastern states (Saudi Arabia, Turkey, Kuwait, Oman). This trend confirms earlier assessments that Ukrainian producers are increasingly redirecting their exports to markets characterized by higher purchasing power, more open trade regimes, and better logistical accessibility. In particular, cooperation with the EU is strengthening, supported by the simplification of customs and tariff barriers and the gradual alignment of production standards with European requirements.

An analysis of the dynamics of Ukraine's poultry meat export prices from 2004 to 2023 shows growing competitive advantages and a change in the global positioning of Ukrainian products. The low export price compared to the global average suggests that Ukrainian producers can offer products at more attractive prices, likely due to lower production costs, including cheaper feed and labor.

Figure 17. Major Partner Countries for Ukrainian Poultry Meat Exports

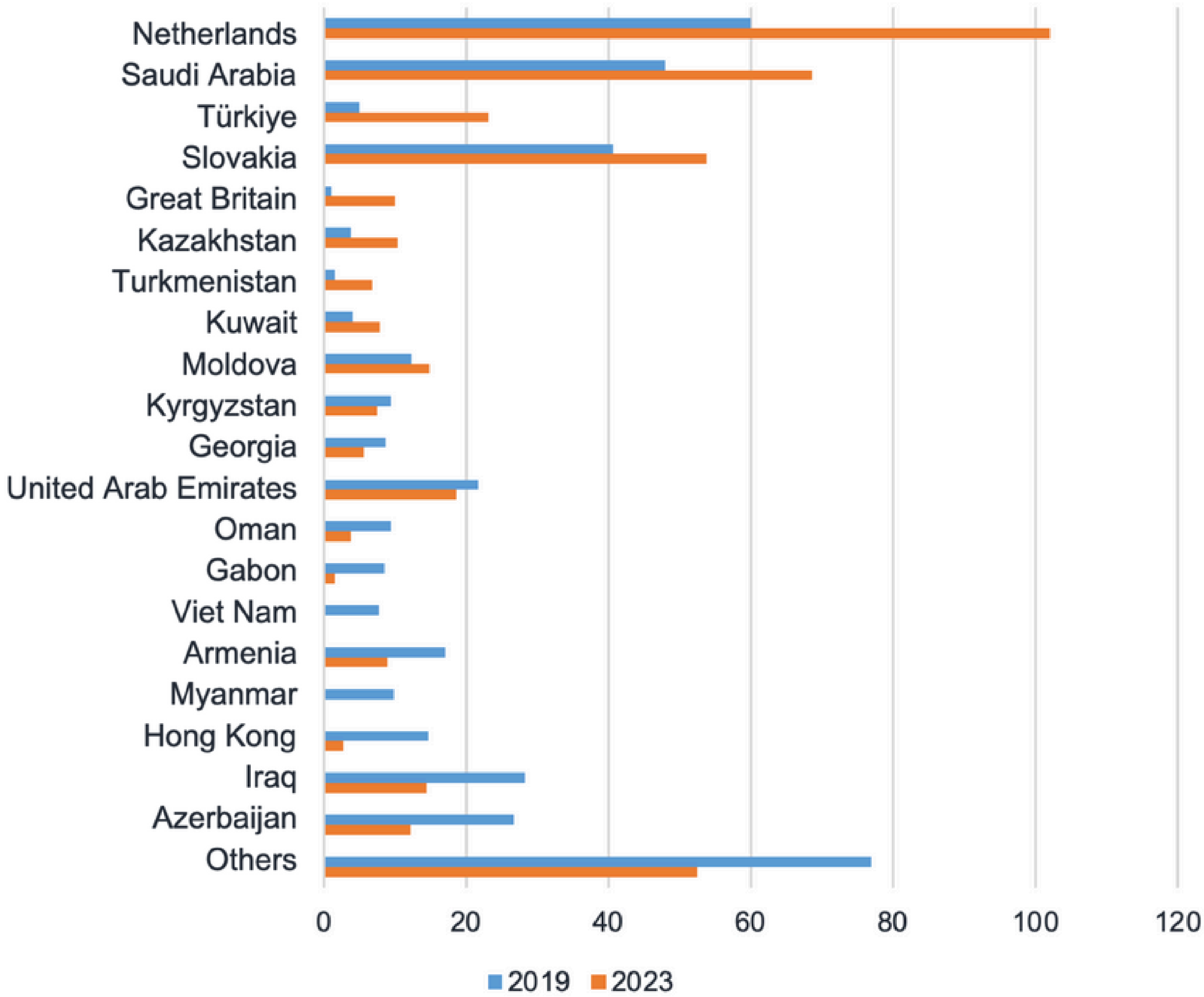
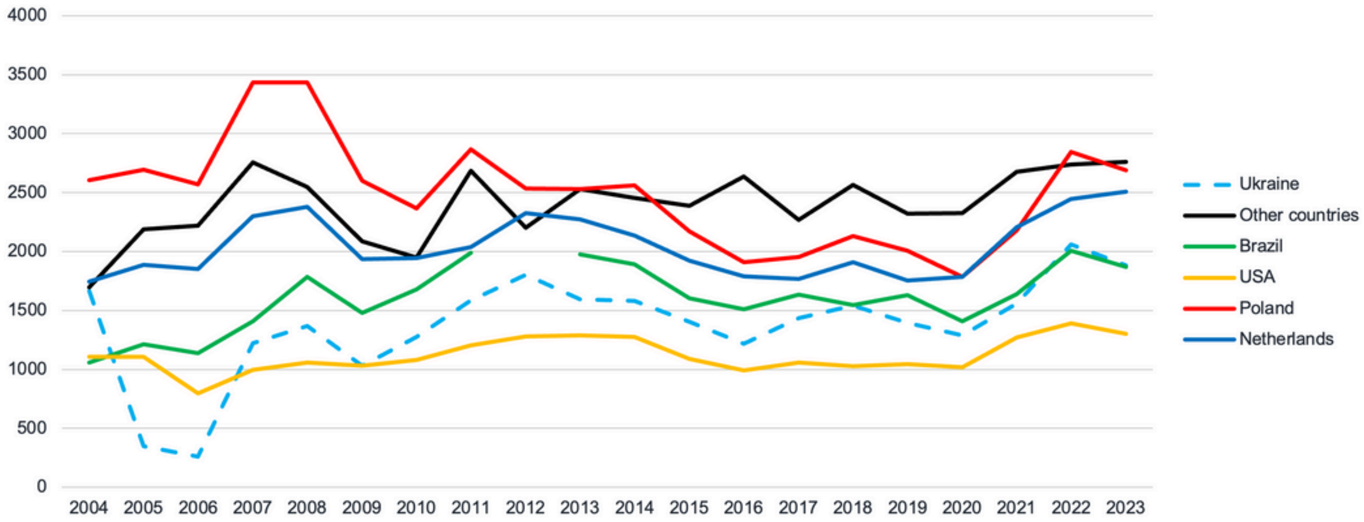


Figure 18. Dynamics of Ukrainian Export Prices on the Global Poultry Meat Market



Compared to major global players such as Brazil, the USA, Poland, and the Netherlands, Ukraine's export price remains competitive. Brazil, one of the world's largest poultry exporters, had an export price of $1,870/ton in 2023, which is close to Ukraine's $1,883/ton. The USA offered a lower price at $1,300/ton. Meanwhile, European countries like Poland and the Netherlands had higher prices — $2,691/ton and $2,506/ton, respectively. Therefore, Ukraine competes successfully in the global poultry meat market .[47]

6. POULTRY MEAT CONSUMPTION

Over the past two decades, poultry meat consumption per capita in Ukraine has increased significantly. In 2000, the figure was just 3.9 kg per person, whereas by 2019, it had peaked at 26 kg (Figures 19a, 19b). This growth reflects a shift in dietary preferences toward poultry meat, which is more affordable and considered a lean, healthy protein. However, since 2020, consumption has slightly declined, reaching 22 kg in 2023, likely due to economic hardships and external factors such as the COVID-19 pandemic and the ongoing war. Nevertheless, the share of poultry in total meat consumption in Ukraine remains one of the highest: over 40% of all meat consumed is chicken, compared to approximately 30% in the EU and about 50% in the United States%. [48] [49]

47 *USDA /. FAS. (2024). Poultry and Products Semi-annual (UP2024-0004). https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Poultry%20and%20Products%20Semi-annual_Kyiv_Ukraine_UP2024-0004*
48 *FAO. (2024a). Food Balance Sheets. http://www.fao.org/faostat/en/#data/FBS*
49 *USDA /. FAS. (2024a). Poultry and Products Semi-annual (UP2024-0004). https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Poultry%20and%20Products%20Semi-annual_Kyiv_Ukraine_UP2024-0004*

Figure 19a. Average Annual Consumption of Main Types of Meat in Ukraine, kg per person [50]

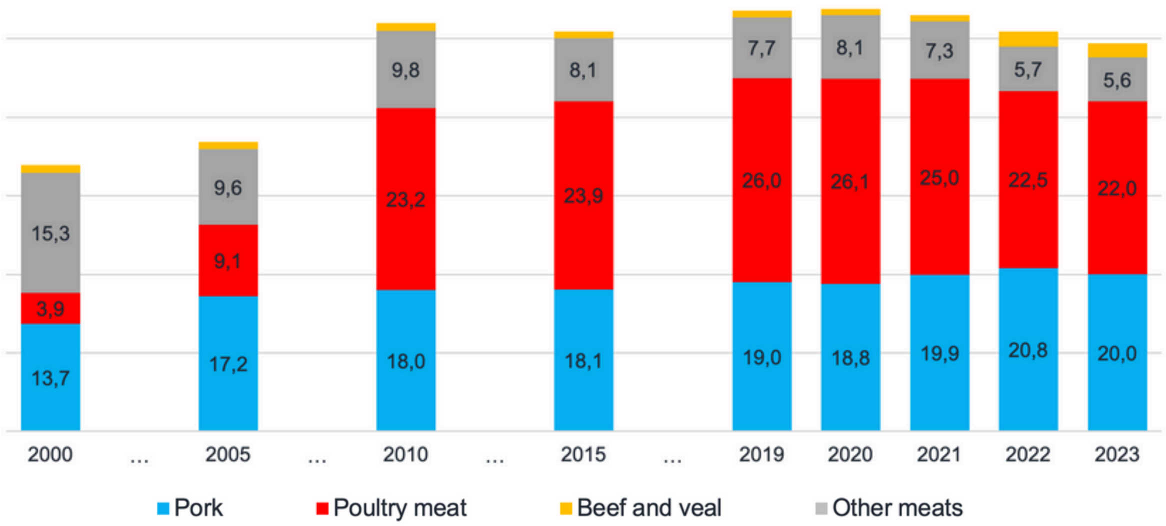
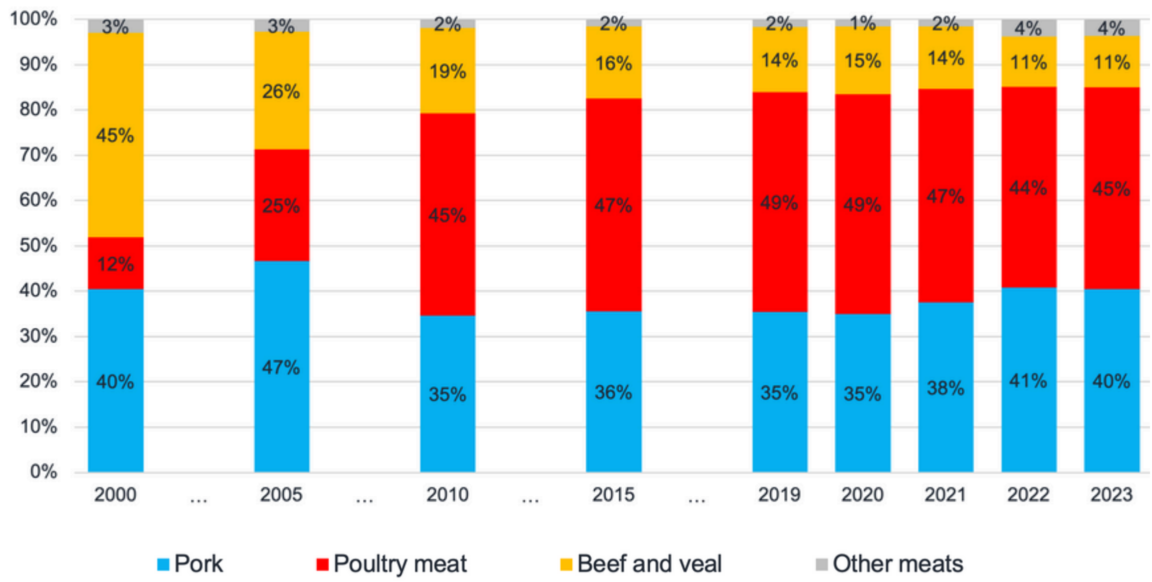


Figure 19b. Structure of Meat Consumption in Ukraine, % [51]



Compared to other countries, the overall per capita meat consumption in Ukraine is lower than in developed nations. According to OECD data from 2020, the average meat consumption per person was approximately 100 kg in the USA, 69 kg in the European Union, and 76 kg in Poland. In Ukraine, this figure was around 52 kg. [52]

The growing share of chicken in the Ukrainian diet, alongside the decline in consumption of other types of meat, highlights the importance of this sector for the national economy and food security. Chicken meat is becoming the primary source of animal protein for the population due to its affordable price, high nutritional value, and short production cycle.

50 *Helgilibrary. (2024). Poultry Meat Consumption Per Capita in Ukraine. Helgi Library. https://www.helgilibrary.com/indicators/poultry-meat-consumption-per-capita/ukraine/*
51 *SSSU. (2023a). Баланси та споживання основних продуктів харчування населенням України (2022, 2020, 2017, 2015, 2010). https://www.ukrstat.gov.ua/druk/publicat/kat_u/2022/zb/07/Zb_bsph2021.pdf*
52 *OECD-FAO. (2021). Meat. In Agricultural Outlook 2021-2030. OECD. https://doi.org/10.1787/d5918cca-en*

CONCLUSIONS

Poultry meat production in Ukraine is a vital sector of the agro-industrial complex, demonstrating steady growth and significant impact on the national economy. Over the past two decades, the industry has undergone substantial transformation, reflected in a **sevenfold increase in poultry meat production from 2000 to 2022** and a rise in its share of total meat production to 56.8%. These trends highlight poultry's growing role as a **key livestock product** and reflect producers' ability to **adapt to changing consumer preferences** both domestically and internationally.

Production concentration in three Ukrainian regions and the dominance of large enterprises underscore structural shifts in the industry. Large companies can invest in modern **technologies**, allowing them to reduce production costs and improve competitiveness. Meanwhile, **small farms are reducing output** due to high costs and competition from larger players. This indicates a **need for support of small and medium-sized enterprises to preserve their role in regional supply and rural community stability.**

The **growth of poultry meat exports from Ukraine,** which reached over **$424 million in 2023,** demonstrates successful integration into the global market and enhanced competitiveness. **Diversification of export products and a shift toward value-added goods** align with international market demands and strengthen Ukraine's position in **strategic markets in Asia, the EU, and the Middle East.** Competitive export prices and a gradual alignment with global leaders point to **rising quality in Ukrainian products** and the ability to compete not only on price but also on **quality.**

The war has created serious challenges for the industry, including reduced production volumes, logistical disruptions, rising production costs, and declining investment. However, the industry has shown resilience, quickly adapting to new conditions and restoring production, underlining its **potential for further development.**

As Ukraine moves toward **EU integration**, producers face **strict quality standards and technical barriers.** The implementation of international standards, investment in modernization, and focus on **eco-friendly production** open new opportunities for export expansion. **Lower production costs** and **rising demand for poultry in the EU** may become key factors for success.

In conclusion, poultry meat production in Ukraine holds **strong potential to strengthen its position on the international market.** Strategic priorities include **supporting both large and small producers, driving innovation, aligning with international standards, and overcoming the challenges posed by the war.** Ensuring the **resilience of the sector** will contribute to **food security, economic development,** and **an improved quality of life** for the population.