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Eurointegration 1.0

Production of eggs and egg-derived products in Ukraine

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ЗМІСТ

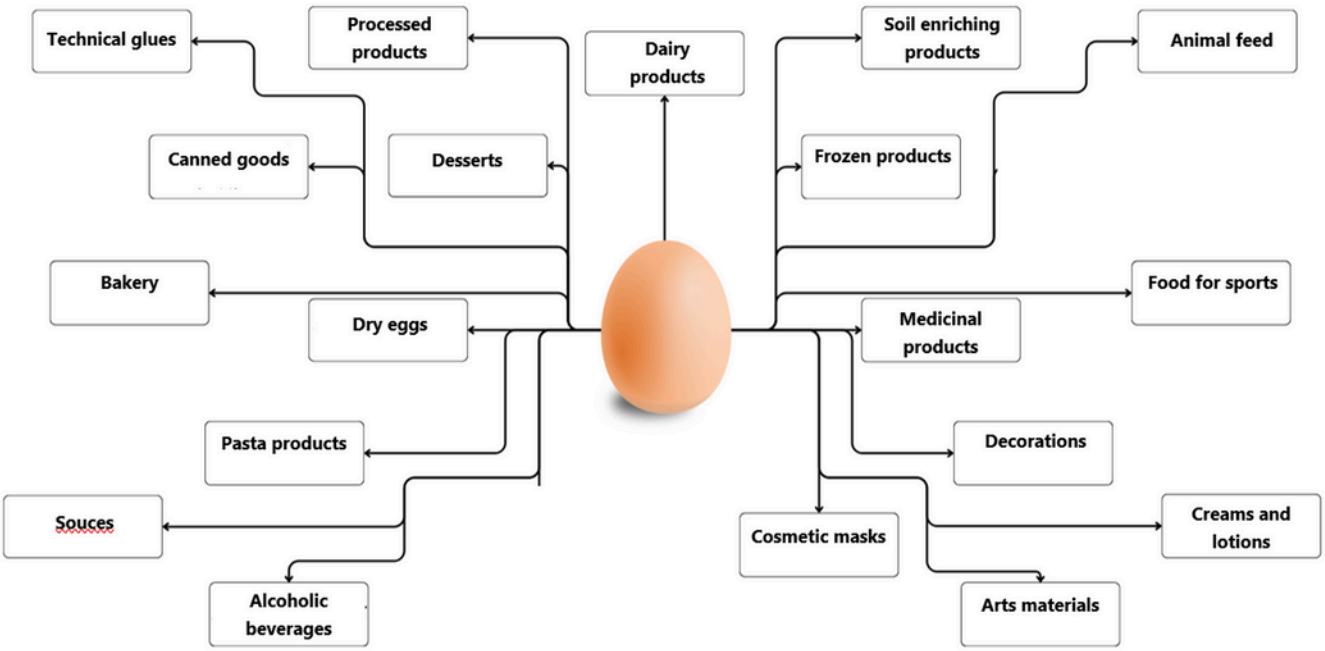
SUMMARY

1. **The importance of the egg sector in Ukraine's food security.** Eggs are one of the staple food products, a rich source of protein and essential amino acids. Pre-war production levels (up to 19.6 billion units per year) underscored the sector's significant role in the national food balance.
2. **Significant decline in production due to military conflict.** After 2014, there was a sharp drop in egg output in eastern and southern regions due to occupation and destruction of facilities. In 2023, production fell to 11.4 billion units – the lowest in the past two decades.
3. **Redistribution of regional production centers.** Due to the loss of eastern and southern regions, the role of "production leaders" shifted to central and western regions (Vinnytsia, Khmelnytskyi, Kyiv, and Lviv oblasts).
4. **Dominance of agricultural enterprises (AEs).** Although a significant number of eggs come from rural households (RHs), AEs provide the bulk of commercial supply for both domestic and foreign markets. Small producers are more stable in the long term, but their impact is limited due to small volumes.
5. **High dependence on feed costs.** Up to 80% of production costs are feed-related. The rise in energy, feed, and logistics prices since 2022 led to a sharp increase in costs and, consequently, consumer prices.
6. **Significant export potential.** By 2019, Ukraine reached record export volumes (over 143 thousand tons). Although exports in 2022–2023 dropped by around 60% from peak values, reorientation to European markets helps partially offset the losses in Asian directions.
7. **Vertical integration and market leaders.** Companies like Yasensvit, AVANGARDCO IPL, and Ternopil Poultry Farm maintain leading positions due to their own feed bases and large production volumes. Some of them have entered the top 30 largest egg producers in Europe.

INTRODUCTION

The production of chicken eggs is a key segment of Ukraine's agricultural sector, supporting both domestic demand and export opportunities. Eggs are a basic food item and significantly impact national food security. An average egg contains 6 grams of protein and a set of essential amino acids, making it a unique nutritional source. With a modest caloric value of 71.9 kcal, an egg provides high nutritional density and regular consumption meets part of the daily nutrient needs. Eggs are a multifunctional product used not only as standalone food but also as a crucial ingredient in various industries. (Fig. 1).

Fig. 1. Egg-derived poducts



Source: Own research

Despite the challenging circumstances caused by the war — including rising costs of feed and energy, disruptions in logistics chains, and the destruction of production facilities in conflict zones — Ukraine continues to remain one of the leading egg producers in Europe. This analytical document provides an overview of the state of chicken egg production in Ukraine, examining the structure of producers, production volumes, costs, pricing, and consumption. The study also addresses the challenges faced by the sector, such as veterinary restrictions, EU product standard requirements, and the impact of the war on exports and investment attractiveness.

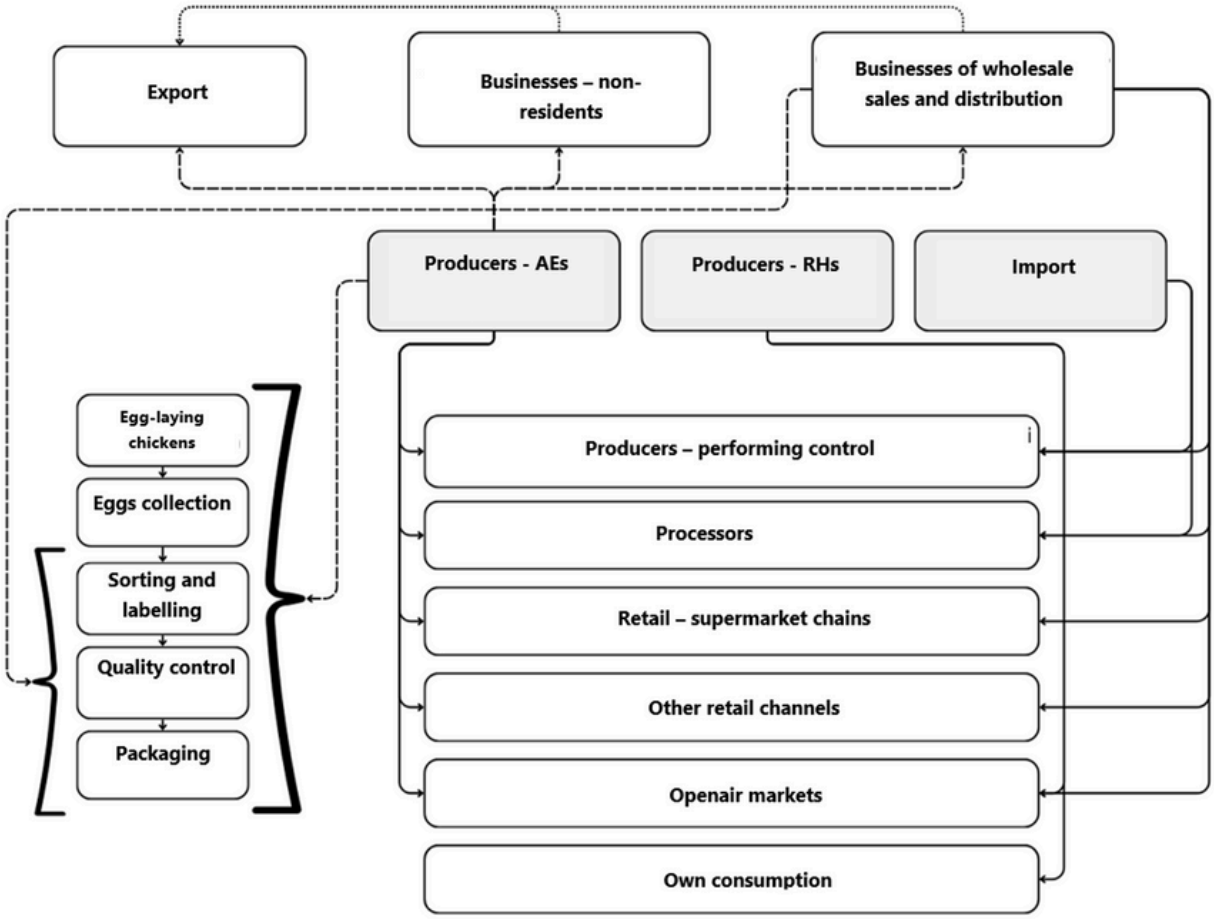
1 *Kerver, J. M., Park, Y., & Song, W. O. (n.d.). The Role of Eggs in American Diets: Health Implications and Benefits. In Eggs and Health Promotion (pp. 9–18). Iowa State Press. https://doi.org/10.1002/9780470376973.ch2*

1. SUPPLY CHAIN OF CHICKEN EGGS TO CONSUMERS

Egg market producers fall into two groups: agricultural enterprises (AEs) and rural households (RHs). Although both produce the same product—eggs—their sales channels differ fundamentally. Households may sell products at agricultural markets or use them for personal consumption. In contrast, AEs have wider sales options, including wholesale markets, processing and retail chains, and direct export, either independently or via trade intermediaries.

Another distinguishing feature of the egg market is the quality and safety control system present at the AE level. This includes poultry management, egg collection, sorting, labeling, quality control, and packaging. Only after these steps does the product reach the market, ensuring compliance with quality standards for both domestic and foreign markets. Households lack such comprehensive control systems, limiting their access to organized markets. This results in a market division: large producers ensure quality standards for mass distribution, while smaller producers mainly serve agricultural marke ts and home consumption[1] (Fig. 2)[2].

Fig. 2. Flowchart of chicken eggs distribution to the end consumer



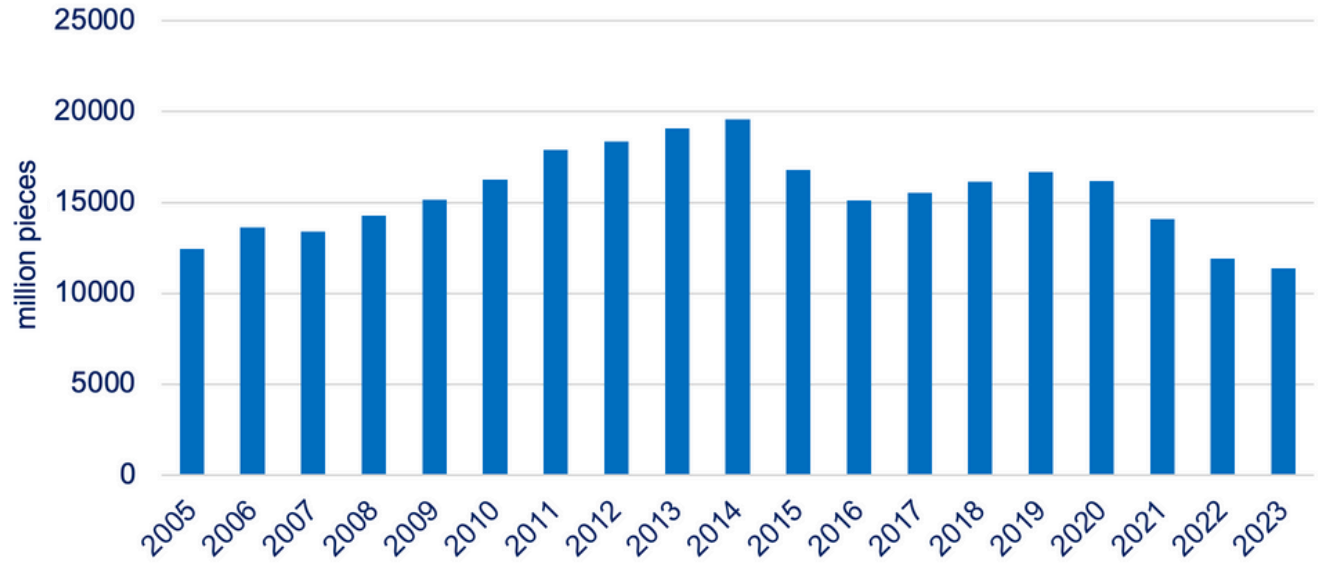
Source: Own elaboration based on [11]

1 *Sendetska, S. (2017). Дослідження українського ринку яєць та яйцепродуктів. Scientific Messenger of LNU of Veterinary Medicine and Biotechnologies, 19(81), 102–106. https://doi.org/10.15421/nvlvet8118*
2 *KSE. (2023). Measurement of Resilience of the Agricultural Producers and Food Consumers to War-Induced Shocks in Ukraine. https://kse.ua/wp-content/uploads/2024/03/D_III_WUR_Schemes_v2.pdf*

2.PRODUCTION

Over the past two decades, Ukraine's egg production has undergone several key phases with noticeable growth and decline trends. From 2005, production steadily increased, peaking in 2014 at 19.6 billion units[3].

Fig. 3. Dynamics of the number of eggs obtained from domestic poultry



Post-2014, egg production experienced a sharp decline due to the military conflict in the east and the annexation of Crimea. These events led to significant losses in production capacity, particularly in areas previously housing large poultry farms. Donetsk and Luhansk oblasts, once major production centers, saw severe infrastructure damage. Additionally, Crimea's annexation cut off access to a market that contributed to domestic consumption, leading to market oversaturation. As a result, total production dropped from 19.6 to 16.8 billion units in 2015—a sharp decline from 2014's peak.

From 2019 onward, a new production decline began, intensified by economic crisis and the COVID-19 pandemic, which limited logistics and increased costs of feed, energy, and labor. By 2023, production dropped to 11.4 billion units—the lowest level in the observed period.

The general trend points to a significant decline in production due to a combination of factors: war, economic instability, rising production costs, and export restrictions. Stabilizing the sector requires new producer support strategies, infrastructure investments, and export facilitation.

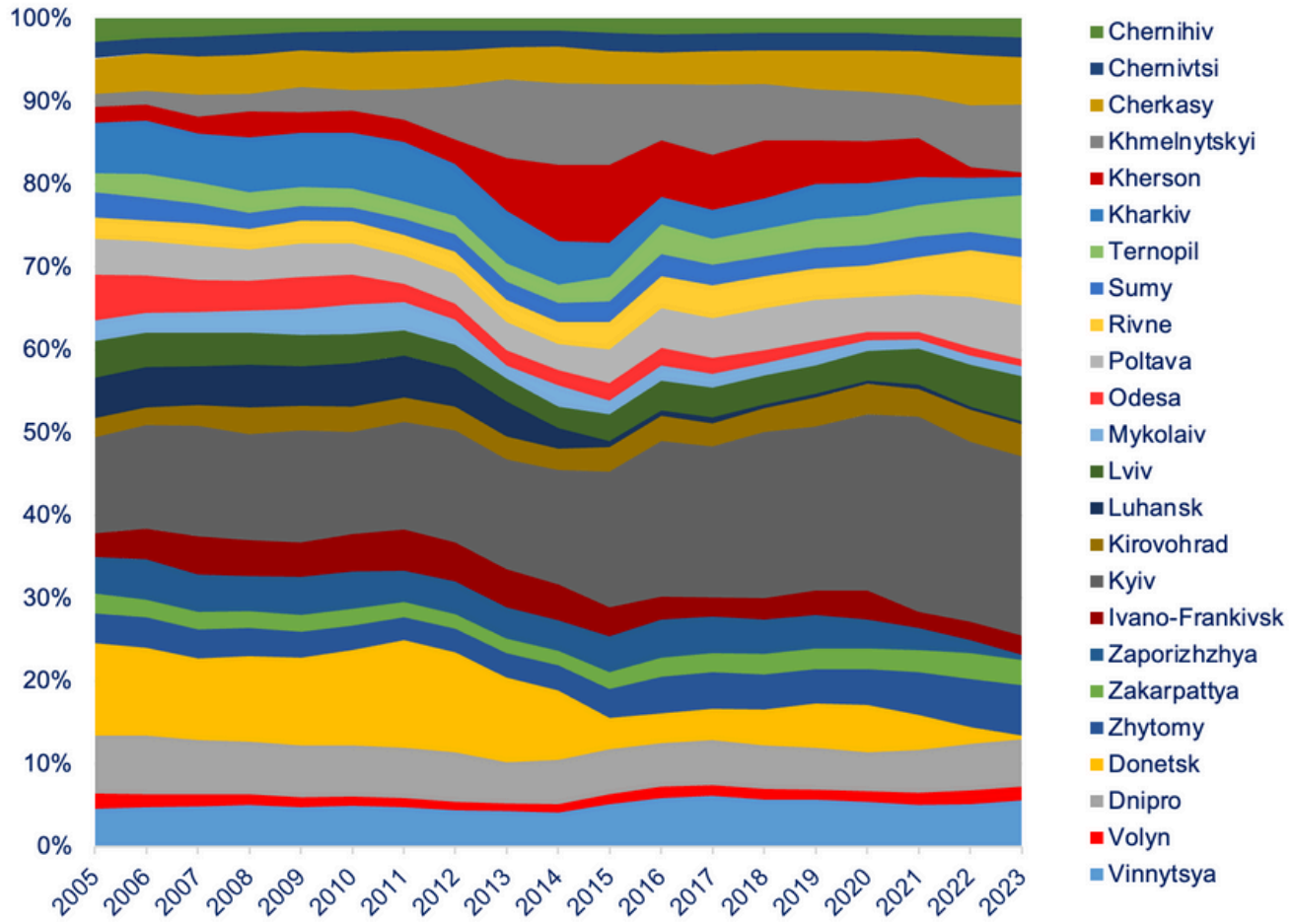
3 *SSSU. (2024). Виробництво продукції тваринництва у 2023 році (2020, 2015, 2010, 2005). Держаналітінформ.*

3. PRODUCTION REGIONALIZATION

Until 2014, egg production in Ukraine was relatively evenly distributed across regions, with a focus on the eastern and southern areas, where major poultry farms and large agro-industrial complexes were concentrated. Due to favorable conditions, including well-developed infrastructure and stable sales markets, these regions held leading positions in the overall structure of egg production in the country.

After 2014, egg production in Ukraine underwent a significant redistribution caused by the military conflict in the eastern part of the country. Donetsk, Luhansk, and other eastern regions, which had previously been among the main producers, significantly reduced their production volumes due to the loss of facilities and disruption of logistics chains. This process intensified further after 2022, when large-scale hostilities spread to new territories, including the south and partly the center of the country. As a result, the center of gravity of production shifted to the western and central regions, such as Vinnytsia, Khmelnytskyi, Kyiv, and Lviv, which were able to partially take on the role of main suppliers of eggs to the domestic market. This redistribution led to new challenges for the western and central regions, which faced increased pressure on infrastructure and the need for investments to ensure stable production and meet domestic demand (Figure 4)[4].

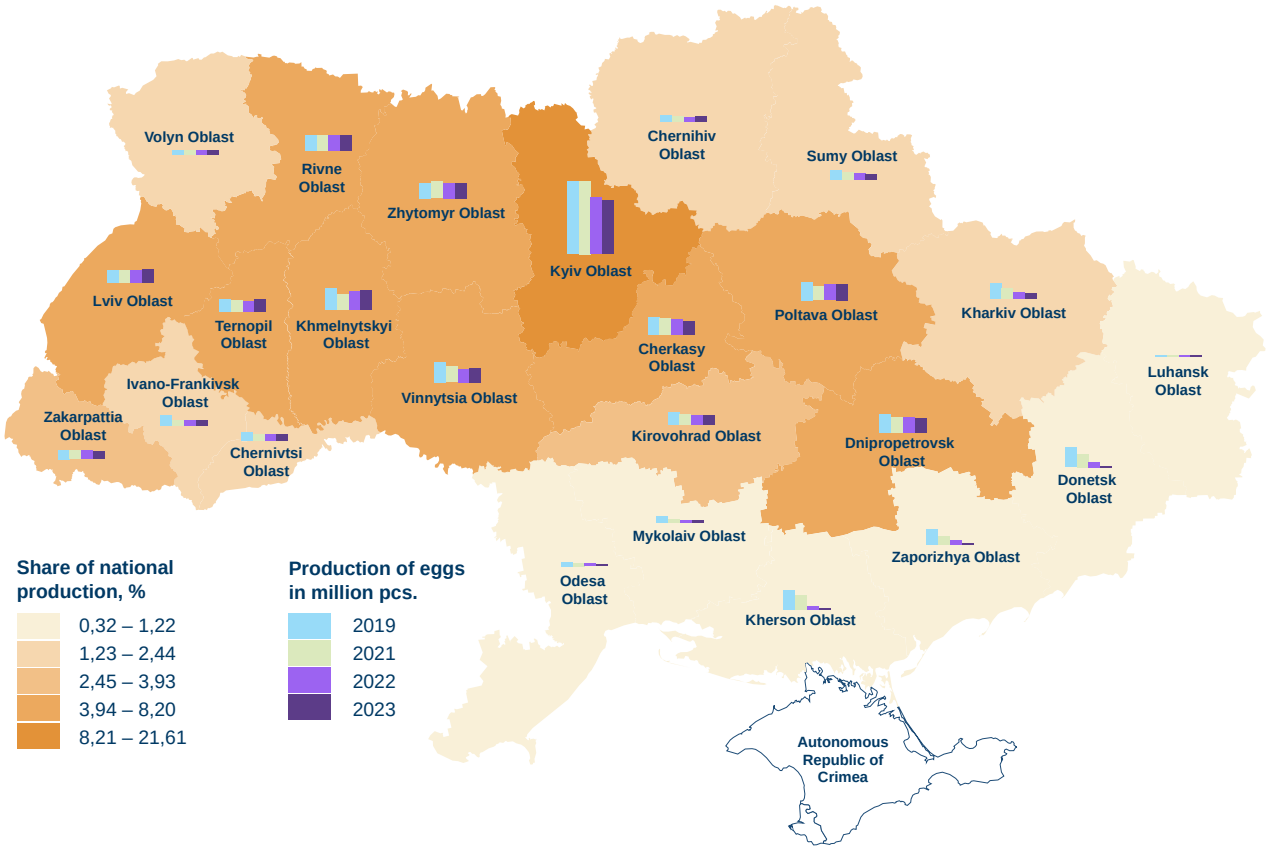
Fig. 4. Regional distribution of egg production



4 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*

After 2022, the central and western regions of Ukraine played a critical role in maintaining the stability of the egg production sector, taking on the main burden amid active hostilities in the eastern and southern parts of the country[5]. Thanks to the preservation of production capacities and existing infrastructure, regions such as Vinnytsia, Khmelnytskyi, Kyiv, and Lviv were able to partially compensate for the losses of the eastern regions, ensuring uninterrupted supply of products to the domestic market (Fig. 5).

Fig. 5. Egg production by region in Ukraine



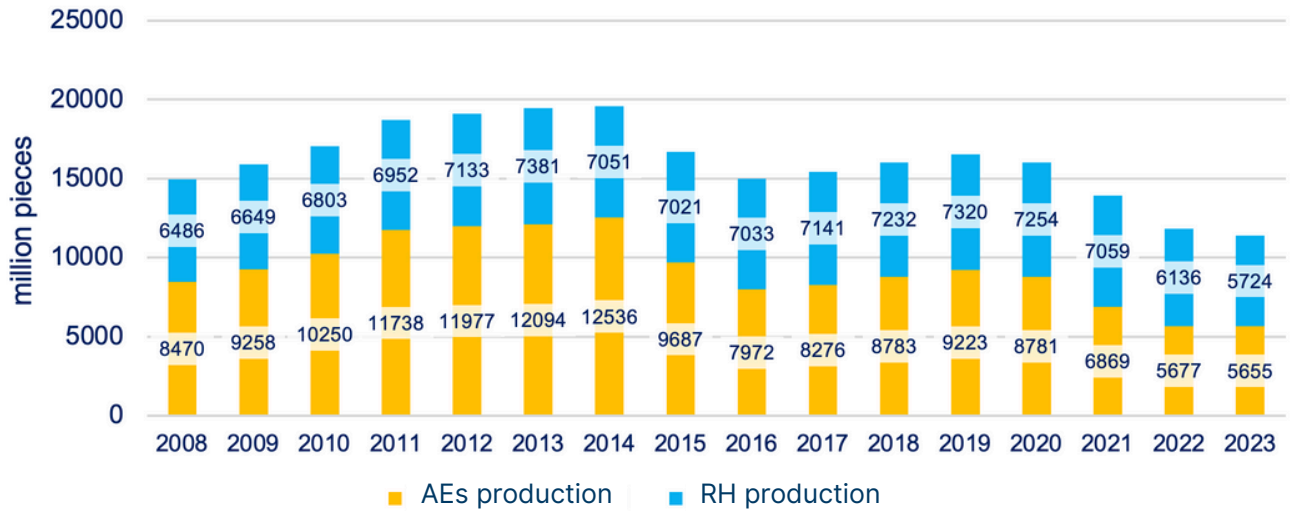
The regional differentiation in production levels presents new challenges for the sector. Western regions are facing increased demand for infrastructure and logistical resources, as they now play a leading role in supplying the domestic market. Thus, the regionalization of egg production in Ukraine has become one of the key factors influencing the stability and development of the industry, requiring producers to adapt to new conditions and increased state support to ensure an even distribution of resources across regions.

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

4.TYPES OF PRODUCERS

The egg market in Ukraine is clearly divided between two types of producers that define its structure: rural households (RHs) and agricultural enterprises (AEs) (Fig. 6). These groups of producers differ significantly in scale and market role. AEs are large enterprises capable of producing substantial quantities of eggs, making them the main suppliers to the commercial market. They are the primary hubs of egg production and account for the majority of the product entering the market (Fig. 6)[6]. RHs, on the other hand, are rural households and microfarms often resembling "backyard farms." Although the number of RHs is considerable, each typically keeps a relatively small number of laying hens, which limits their impact on total production volumes.

Fig. 6. Distribution of egg production by type of producers



RHs showed more stable production volumes during the pre-war period, with changes being less abrupt than those observed in agricultural enterprises (AEs). Throughout the analyzed period, production in RHs remained relatively steady, with a slight increase until 2019. With the onset of the war in 2022, RHs production volumes declined significantly but to a lesser extent than in AEs, reaching 5,724.1 million eggs in 2023. Thus, AEs play a leading role in supplying the commercial market with eggs, while RHs, due to their stability, ensure domestic consumption, particularly during times of crisis.

The Antimonopoly Committee of Ukraine has classified the egg market as moderately concentrated or unconcentrated in different years (2017, 2018, 2020 – moderately concentrated; 2016, 2020 – unconcentrated). This indicates that egg production is not dependent on a single large player, and the market is not monopolized. Such a market structure contributes to its resilience, as the presence of numerous RHs helps offset production losses in AEs during economic or political crises[7].

6 *SSSU. (2024). Виробництво продукції тваринництва у 2023 році (2020, 2015, 2010, 2005). Держаналітінформ.*
7 *Sendetska, S. (2017). Дослідження українського ринку яєць та яйцепродуктів. Scientific Messenger of LNU of Veterinary Medicine and Biotechnologies, 19(81), 102–106. https://doi.org/10.15421/nvlvet8118*

5.THE LARGEST PRODUCERS

The Ukrainian egg market is represented by several leading producers that ensure a stable supply of products to both domestic and international markets. These include companies such as Yasensvit (TM "Yasensvit"), AVANGARDCO IPL (TM "Кучка"), Ternopil Poultry Farm (TM "Dobre Yaitse"), SAMMIT EGGS, and INTER-EDINSTVO HOLDING. Thanks to their large production volumes and innovative approaches, these enterprises hold leading positions in the market (Fig. 7Each of these companies has its own distinct features. For example, Yasensvit and AVANGARDCO IPL actively invest in modern poultry housing technologies and process automation, which enhances production efficiency and helps maintain high quality standards[8]. Ternopil Poultry Farm and SAMMIT EGGS place great emphasis on quality control to meet the requirements of both domestic and export markets[9]. In turn, INTER-EDINSTVO HOLDING and Phoenix stand out for their flexibility in adapting to market conditions and developing their own brands, which helps them gain consumer trust and expand their presence in the domestic market[10].

Many of these companies are part of agricultural holdings, which gives them the advantages of vertical integration. For example, AVANGARDCO IPL, which is part of the UkrLandFarming agroholding, has access to internal resources such as feed, helping to control costs and maintain stability amid fluctuations in demand. Similarly, Yasensvit, as part of a large agroholding, has the capacity to invest in production modernization.

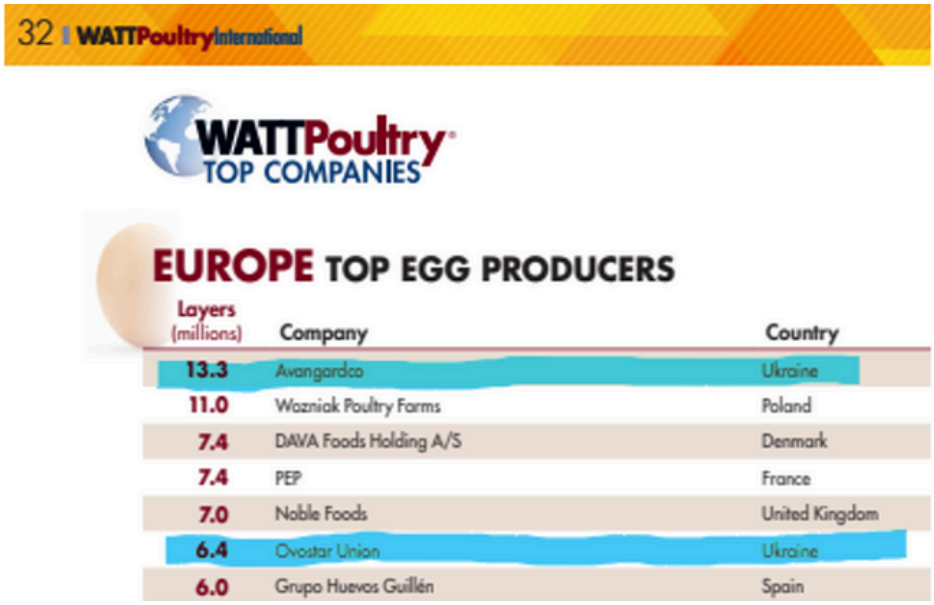


Fig. 7. Largest egg producers in Europe in 2024

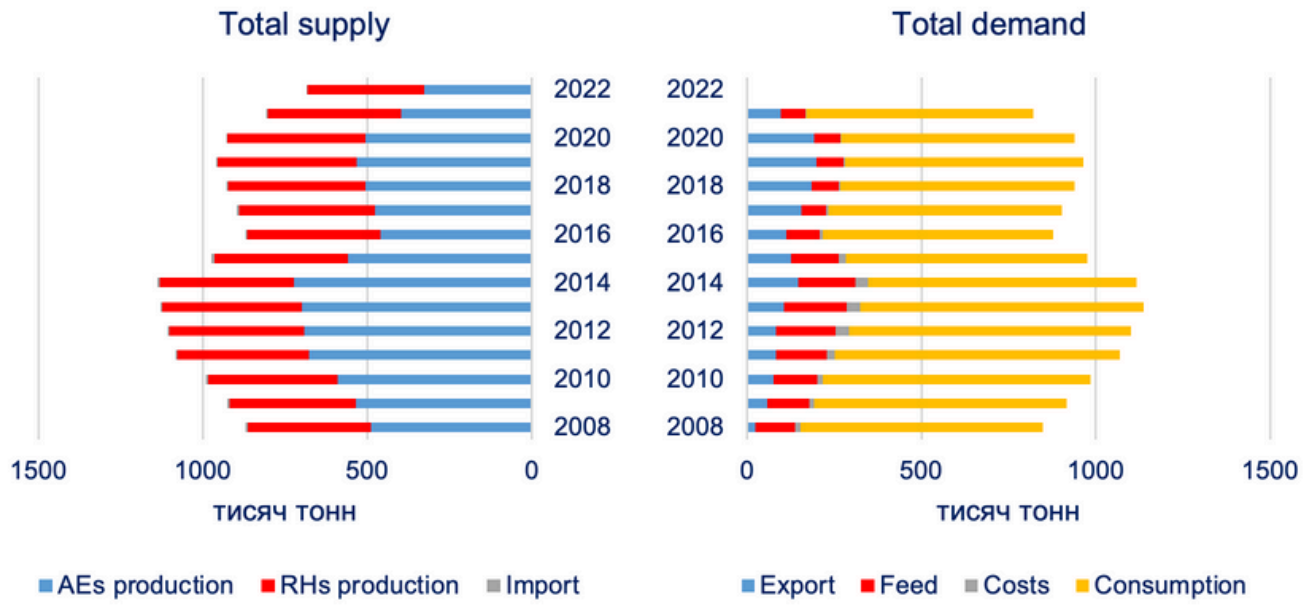
Two Ukrainian companies are among the top 30 largest egg producers in Europe, highlighting their influence on the international market[11].

8 *Agroholding Avangard - Агрохолдинг Авангард. (2024). Agroholding Avangard. https://avangardco.ua/*
9 *Птахофабрика Тернопільська. (2024). https://yadobre.com.ua/*
10 *Союз птахівників України - Склад асоціації. (2024). https://poultryukraine.com/ua/about-association/structure/*
11 *Українські компанії очолили рейтинги з виробництва птиці та яєць в Європі. (2024, October 18). Mind.ua. https://mind.ua/news/20280358-ukrayinski-kompaniyi-ocholili-rejtingi-z-virobnictva-ptici-ta-yaec-v-evropi*

6.COMMODITY BALANCES

The balance of supply and demand in Ukraine's egg market demonstrates a dynamic nature and dependence on various internal and external From 2008 to 2014, there was steady growth in supply, driven by increasing production volumes, particularly among AEs. However, since 2015, due to economic instability and military events, production volumes in AEs have significantly decreased, leading to a decline in overall market supply (Fig. 8)[12].

Рис. 8. Загальна пропозиція та попит на яйця в Україні, 2008-2021 роки



** estimated indicator with conversion from million eggs to thousand tonnes*

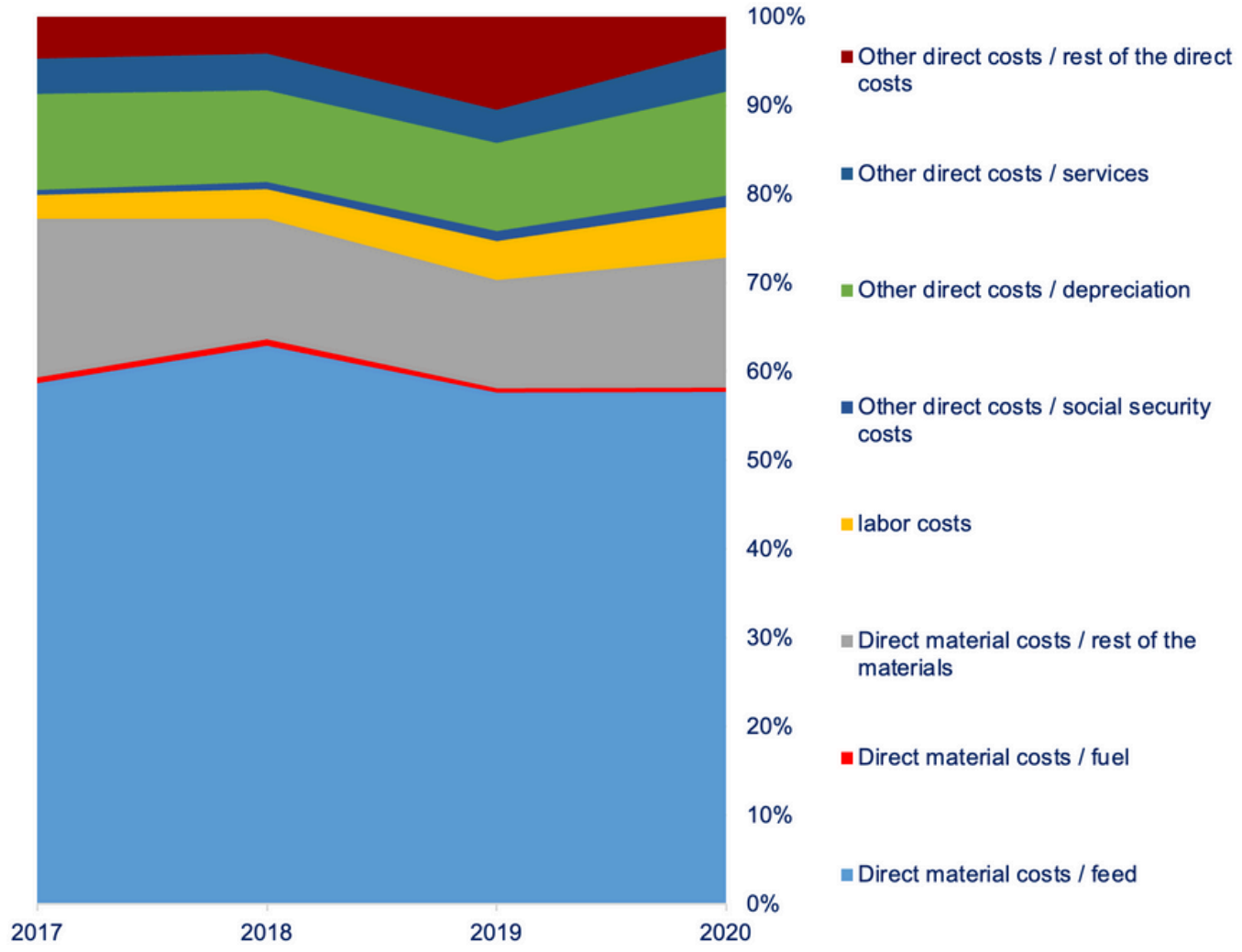
Egg imports remain an insignificant component of overall supply, with volumes fluctuating at the level of a few million eggs and having little impact on the market. However, in 2022, there was a notable spike in imports, reaching 808.29 million eggs. Total demand in the market consists of four main elements: consumption, export, use of eggs for feed, and losses. The majority of demand traditionally comes from domestic consumption, which grew during the 2008–2014 period, peaking in 2011 at 818.25 million eggs. After 2014, a decline in domestic consumption has been observed. Exports showed a growth trend up to 2019 but fell to 97 million eggs in 2021. The use of eggs for feed and losses has remained relatively stable, with minor fluctuations, reflecting producers' adaptation to market conditions.

12 *SSSU. (2022a). Баланси та споживання основних продуктів харчування населенням України (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*

7.PRODUCTION COSTS

When analyzing the cost structure of egg production in Ukraine, particular attention should be paid to the percentage breakdown of key cost categories within the total production cost. The largest and most consistent share is taken up by feed expenses, which accounted for approximately 76.6% of total direct material costs in 2020 (Fig. 9). This share has increased compared to previous years: in 2019, it was around 78.8%, and in 2017 – 73.7%, indicating a growing dependence of the industry on this cost category[13].

Fig. 9. Cost structure of agricultural enterprises producing eggs*



**Fresh shelled eggs from domestic poultry (excluding hatching eggs)*

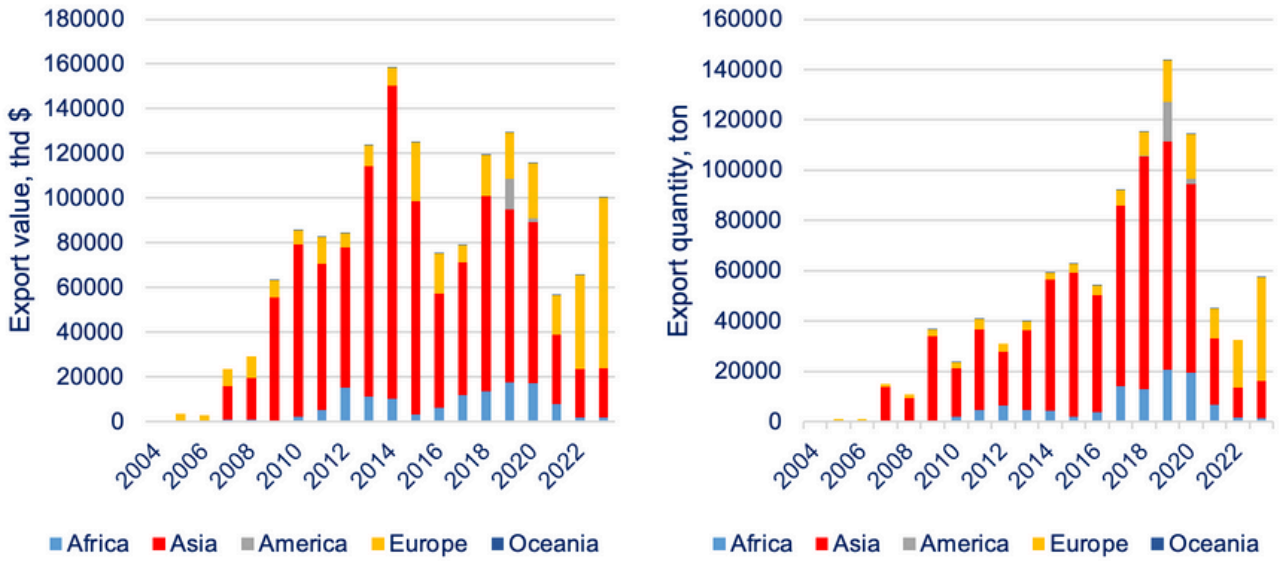
Labor costs in 2020 accounted for approximately 7.6% of total direct material expenses, showing an increase compared to 7.5% in 2019 and 4.6% in 2017. This trend may indicate rising wages or the hiring of additional workers. Depreciation of fixed assets in 2020 made up about 15.6% of total expenses, up from 12.6% in 2017[15]. This may indicate increased investment in the modernization and renewal of production facilities. Feed costs remain the dominant component in the cost structure.

13 *SSSU. (2021). Витрати підприємств на виробництво продукції сільського господарства (2020). Держстат.*

8.INTERNATIONAL TRADE

Export. The export of eggs and egg products from Ukraine has undergone significant changes over the past twenty years, showing dynamic growth from an initial low of 167 tonnes in 2004 to a historic peak of 143,606 tonnes in 2019—an 860-fold increase. This growth reflects the strong expansion of Ukraine's egg export sector. However, following the outbreak of war, the export situation deteriorated sharply due to logistical challenges and reduced production capacity. In 2022, export volumes dropped by 60% compared to the 2019 peak (Fig. 10)[14].

Fig. 10. Total export volumes of eggs and egg products by region



The geographical structure of exports has also changed. Prior to 2022, Asian countries were the primary export market, accounting for approximately 65% of total exports, while the Americas, Africa, and Europe collectively made up the remaining 35% (Fig. 11)[15]. However, in 2023, there was a dramatic shift toward European markets: Europe now accounts for 68% of exports, Asia for 29%, and Africa for just 3%.

In 2019, which marked the peak of Ukraine's egg exports, the United Arab Emirates accounted for 23% of total egg exports. Latvia was the second-largest importer, receiving around 8% of total exports. Other importers included African countries such as Liberia, Sierra Leone, and Gambia, as well as Moldova and Denmark.

In 2023, European countries became the main buyers of Ukrainian eggs, rapidly increasing their imports due to geographical proximity and the lifting of export restrictions on Ukrainian goods to the EU[16]. Latvia remained the leading European importer, accounting for 18% of total

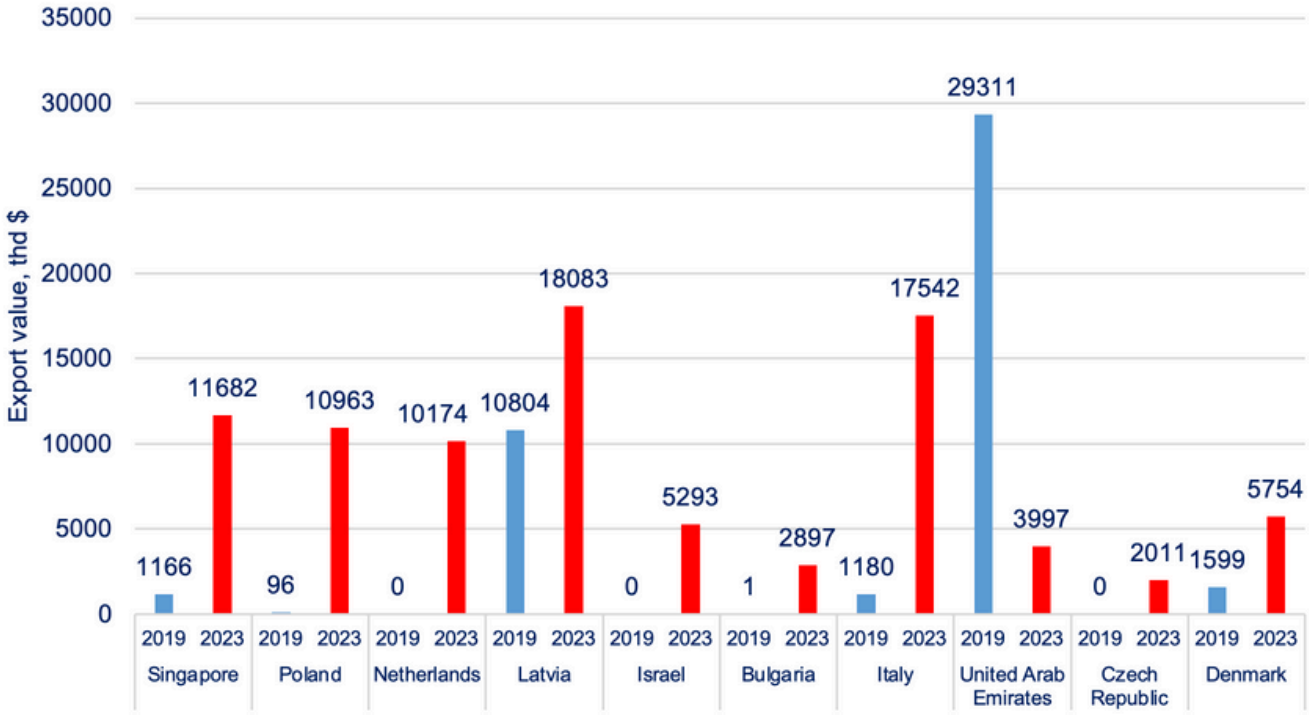
14 *0408 Birds' eggs, not in shell, and egg yolks, fresh, dried, cooked by steaming or by boiling in ... . Export/import. .https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1|||||0408|||4|1|1|1|2|1|2|1|1|1*

15 *0407 Birds' eggs, in shell, fresh, preserved or cooked. Export/import.https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1|||||0407|||4|1|1|1|2|1|2|1|1|1*

16 *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*

exports—matching the share of Italy. They were followed by Poland with 11%, the Netherlands with 10%, and Denmark with 6% of Ukraine's total egg exports.

Fig. 11. Dynamics of the geographical structure of egg and egg product exports (thousands of USD) by importing countries in 2019 and 2023



Source: [1]

Significant changes occurred in the Asian market. The United Arab Emirates, which had traditionally held a dominant position among Asian importers, reduced its share to just 4% in 2023. In contrast, Singapore rose to first place, now accounting for 12% of Ukraine's egg exports. Among new markets, Israel stood out, quickly reaching a 5% share of total exports. African countries such as Liberia, Gambia, and Sierra Leone, which had previously been active importers of Ukrainian eggs, reduced their combined share to less than 2%.

Product Structure of Exports. In 2023, the product structure of Ukraine's egg and egg product exports included a wide range of items—from fresh eggs to processed egg products—highlighting both broad market reach and strong demand across different segments. The largest share of exports consisted of fresh shell eggs. Top importing countries for fresh eggs included:

- Singapore: USD 11,682 thousand
- Poland: USD 10,496 thousand
- Netherlands: USD 9,188 thousand
- Latvia: USD 6,332 thousand
- Israel: USD 5,247 thousand

The total export value of fresh eggs to other countries where volumes exceeded USD 3,000 thousand amounted to USD 17,019 thousand (Fig. 12). **Dried eggs and other egg products** also

represented a significant portion of exports. In particular, **dried, shell-less eggs (excluding yolks)** were in demand in Europe, with top markets including:

- Italy: USD 14,170 thousand
- Latvia: USD 6,062 thousand
- Denmark: USD 5,754 thousand

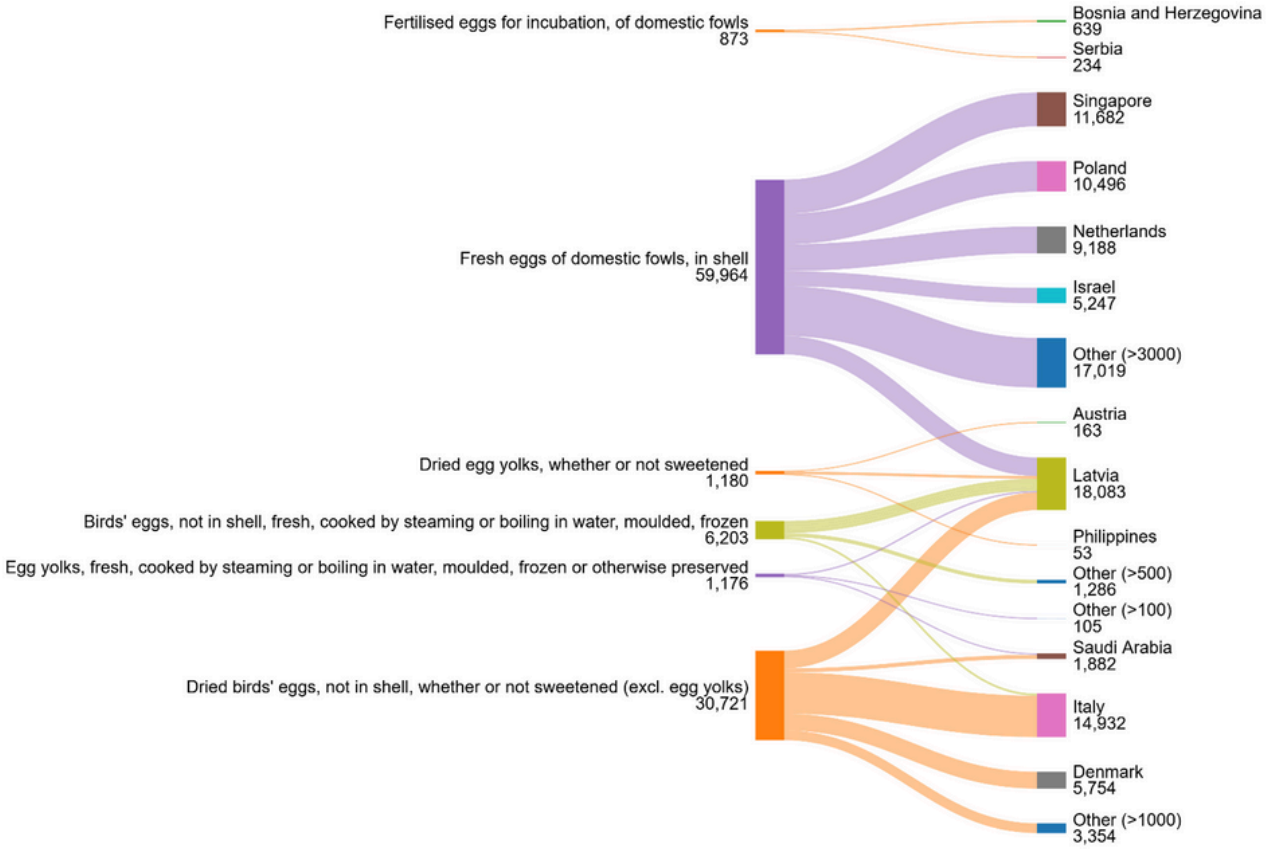
Saudi Arabia imported USD 1,381 thousand worth of these products, while exports to other countries with volumes over USD 1,000 thousand totaled USD 3,354 thousand.

Hatching eggs for poultry breeding found demand in:
- Bosnia and Herzegovina: USD 639 thousand
- Serbia: USD 234 thousand

For **dried yolks,** the main destinations were:
- Latvia: USD 964 thousand
- Austria: USD 163 thousand
- Philippines: USD 53 thousand

In the category of **fresh egg products (boiled or frozen)**, the primary importers were:
- Latvia: USD 4,155 thousand
- Italy: USD 762 thousand
- Other countries with over USD 500 thousand in import volume[17].

Fig. 12. Commodity and geographical structure of egg and egg product exports in 2023, thousand USD



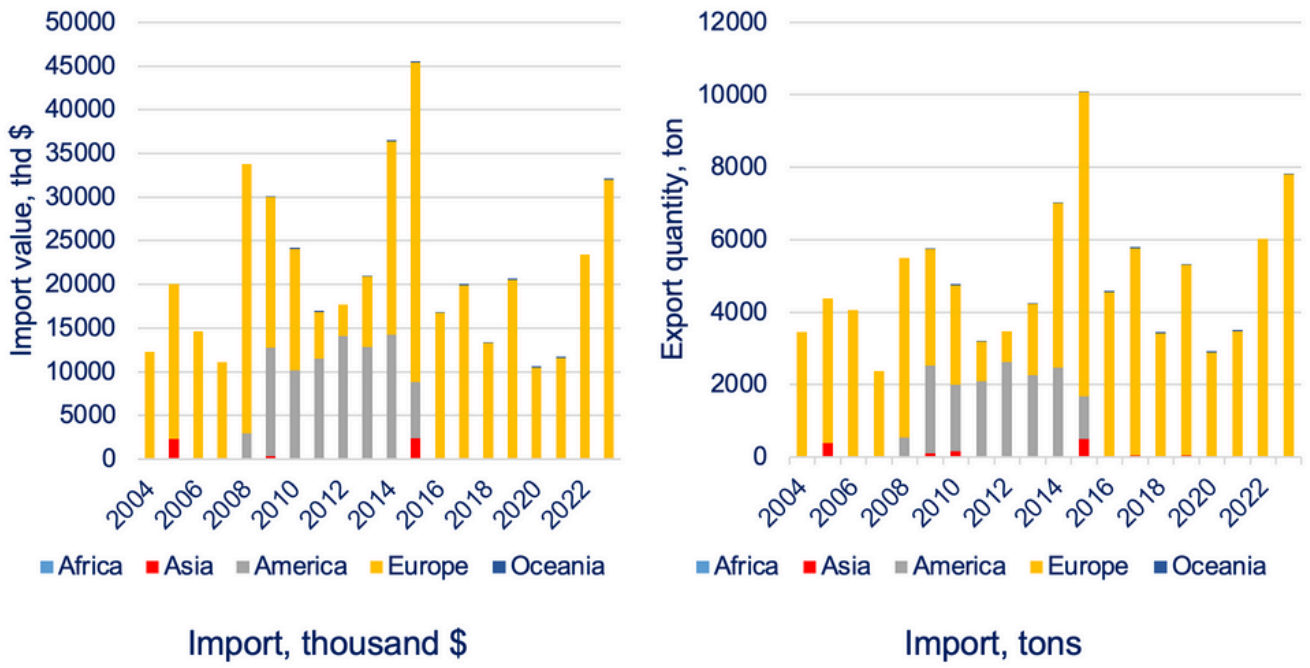
17 *0408 Birds' eggs, not in shell, and egg yolks, fresh, dried, cooked by steaming or by boiling in ... . Export/import. .https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1|||||0408|||4|1|1|1|2|1|2|1|1|1*

Import. Over the past twenty years, imports of eggs and egg products into Ukraine have fluctuated, reflecting changes in market conditions and domestic demand. However, compared to exports, imports play a minor role in Ukraine's egg market.

During wartime, Ukraine's egg exports exceed imports by more than seven times, while in the pre-war years, this gap was even larger—reaching 10 to 15 times. This indicates a high level of self-sufficiency in the domestic market and a strong reliance on domestic production (Fig. 13)[18]. At the beginning of the analyzed period, import volumes were minimal, but they gradually increased over time. In 2004, the total value of imports was USD 12,264 thousand, rising to USD 32,002 thousand by 2023—reflecting more than a twofold increase. The most significant surge in imports occurred in 2013 and 2014, when the value reached USD 36,399 thousand and USD 45,423 thousand respectively, with volumes totaling 7,007 and 10,071 tonnes[18].

Throughout the analyzed period, European countries remained the primary source of egg imports to Ukraine, supplying the majority of imported products. In 2023, imports from Europe accounted for nearly the entire import value—USD 32,001 thousand and 7,796 tonnes—highlighting Ukraine's strong dependence on European suppliers. Other regions, such as the Americas and Asia, occasionally supplied egg products, but their share remained minimal.

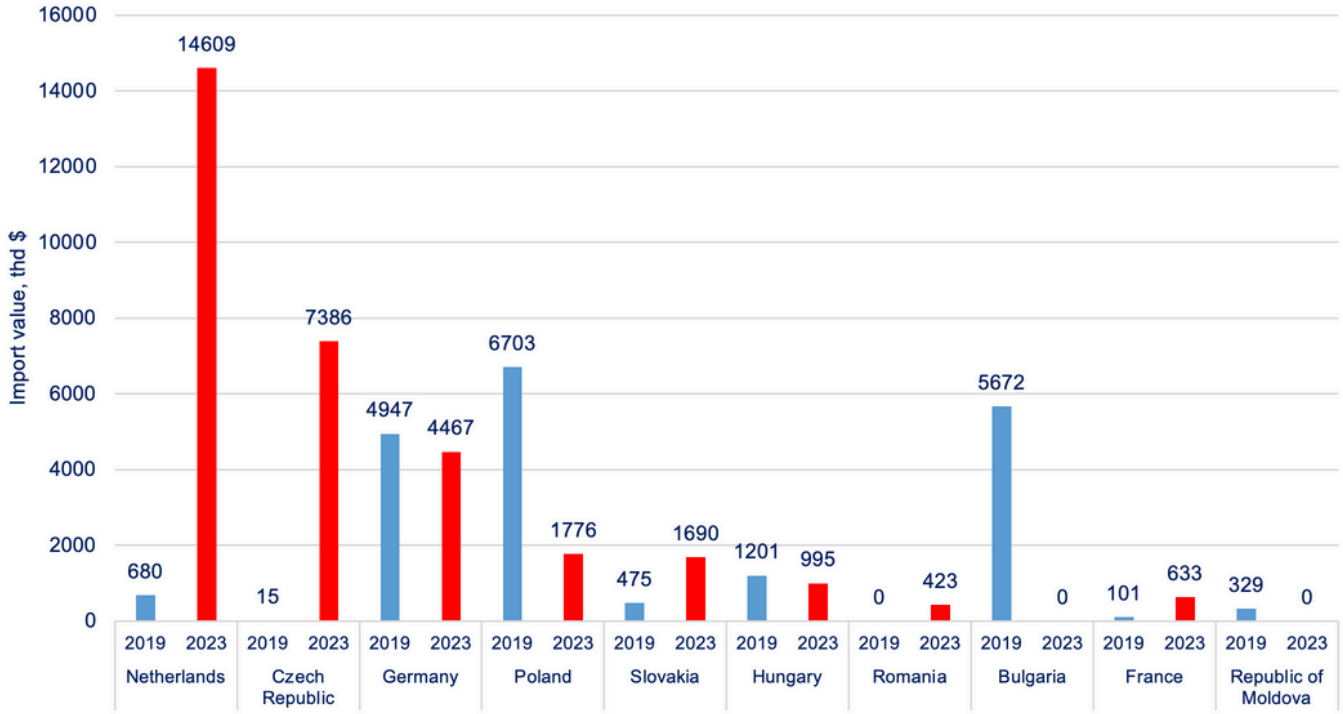
Fig. 13. Total egg import volumes by region



Egg imports from European countries play a dominant role, consistently accounting for a significant share of total import volumes. In 2023, imports from Europe made up nearly the entire total—USD 32,001 thousand and 7,796 tonnes. Among other regions, notable imports were observed from Asia and the Americas, although these volumes were considerably lower. For instance, Asia exported egg products to Ukraine only in selected years, with the highest value recorded in 2009 at USD 2,385 thousand (Fig. 14)[18].

18 *0408 Birds' eggs, not in shell, and egg yolks, fresh, dried, cooked by steaming or by boiling in ... . Export/import. .https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1|||||0408|||4|1|1|1|2|1|2|1|1|1*

Fig. 14. Comparison of egg and egg product imports (thousand USD) by exporting countries in 2019 and 2023



9.PRICES

Selling Price. Over the past decade, egg prices in Ukraine—both from agricultural enterprises and household farms—have experienced significant growth. This trend is driven by a range of factors, including rising production costs, increases in feed and energy prices, economic challenges, and seasonal fluctuations in demand. It is worth noting that eggs sold by household farms typically command higher prices than those sold by enterprises. This can be attributed to differences in production scale and cost structures. Additionally, winter months consistently show higher prices due to seasonal demand spikes.

Analyzing egg prices provides valuable insights into the market dynamics affecting Ukraine's egg sector and reveals key trends in price formation. Average nominal prices for products sold by household farms show a steady upward trend over the analyzed period. For example, in January, the nominal price increased from UAH 1,328.7 in 2013 to UAH 3,544.8 in 2022. The most notable price increases are observed in the winter months, such as December and November, highlighting the seasonal impact on pricing. In December 2021, prices peaked at UAH 3,868.7, reflecting the influence of broader economic conditions on the market (Table 1)[19].

19 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*

Table 1. Average nominal monthly prices for eggs sold by household farms, UAH per thousand pieces

Months	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
January	1328,7	1447,4	1857	2746,3	2801,3	3202,8	3229,9	2974,4	3544,8	3544,8
February	1221,3	1328,6	1709,4	2306	2461,9	3057,8	2984,4	2601,7	3654,1	3654,1
March	1093,7	1072	1652,5	1655,4	1872,5	3006,1	2604,9	2292,2	3515,4	3515,4
April	974,5	1060,9	1582,1	1486,9	1705,4	2651,7	2359,8	2153,9	3258,1	3258,1
May	844,7	926,4	1382,8	1378,1	1455,5	2000,1	2033,1	2030,2	2719,9	2719,9
June	787,9	945,3	1503,8	1389,6	1524,7	2018,6	1889,3	2053,4	2591,6	2591,6
July	821,1	983,1	1571,9	1450,8	1611,4	2082,2	1962,3	2103,8	2561,8	2561,8
August	894,2	1110,3	1618,8	1541,5	1710	2172,9	2248,2	2208,4	2891,9	2891,9
September	1062,9	1316,5	1824,6	1647,3	2208	2373,1	2489,9	2483,5	3138	3138
October	1254,3	1504,1	2069,6	2216,4	2460,8	2669,9	2613,2	2737,2	3475	3475
November	1389,3	1677,9	2379,9	2667	2831,1	2848,6	2895,4	2950,7	3590,4	3590,4
December	1476,7	1860,4	2649,4	2835,9	3198,5	3149,4	3093,5	3253,3	3868,7	N/A

**Green indicates the lowest price, red indicates the highest price*

Enterprises that sell egg products also show a clear upward trend in prices, although the rate of increase is somewhat lower compared to household farms. For instance, the average nominal price in January for enterprises rose from UAH 654.9 in 2013 to UAH 2,190.3 in 2022. Despite the slower pace of growth, enterprises display a consistent year-round price increase, which is also influenced by seasonal factors (Table 2)[20]. Overall, prices for both household farms and agricultural enterprises have shown continuous growth over time.

20 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*

Table 2. Average nominal monthly prices for eggs sold by agricultural enterprises, UAH per thousand pieces

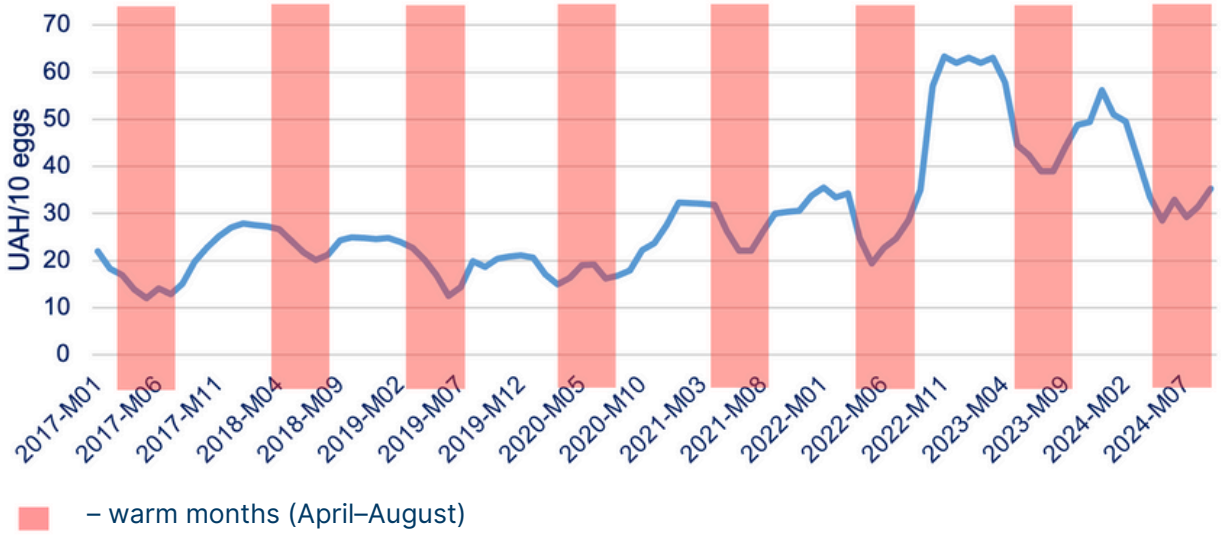
Months	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
January	654,9	594,6	1070,8	1388,8	1284,1	1736	1580,7	1176,6	2190,3	2190,3
February	669,7	642,5	1072,1	1080,3	1176,5	1667	1416,1	969,2	1891,4	1891,4
March	630,8	740,2	1103,8	920	927,3	1723,9	1414,5	910,5	2160,7	2160,7
April	509,5	667,8	1090,8	854,6	691,6	1553,8	1225,2	1238,2	1925,5	1925,5
May	463,3	760,9	1279	936,8	824,4	1409,8	964,1	1289,8	1351,9	1351,9
June	560,2	691,2	1446,8	903,1	890,7	1213	715,7	1184,4	1310,1	1310,1
July	614,4	784,5	1130,3	887,4	751,9	1235,6	999,7	995,7	1439,5	1439,5
August	608,8	775	1458	992	1040,1	1403,7	1079,4	1123,3	1863,8	1863,8
September	778,1	908,2	1479,6	1033,1	1251,8	1572,3	1109,2	1139,7	1942,5	1942,5
October	817,4	938,1	1381,7	1536,6	1571,2	1753	1328,8	1376,3	1867,2	1867,2
November	810,7	876,3	1551,2	1331,9	1720,6	1506,8	1258	1573,6	1974,4	1974,4
December	747,2	1027,3	1723,7	1577,5	1723,9	1879	1318,9	2236,9	2348,3	N/A

**Green indicates the lowest price, red indicates the highest price*

Consumer Prices. An analysis of consumer egg prices in Ukraine over the past few years reveals significant volatility, driven by seasonal factors, shifts in economic conditions, and rising production costs. Between 2017 and 2024, the price of a dozen eggs steadily increased, with seasonal fluctuations. In 2017, the average nominal price ranged between UAH 18–27 per dozen, while by 2024, it had risen to over UAH 56. The most noticeable fluctuations occurred during the autumn-winter period, when demand for eggs traditionally increases (Fig. 15). For example, in December 2023, the price reached UAH 56.18 per dozen, slightly decreasing to UAH 51.02 in January 2024—still high compared to earlier years. Egg prices are typically lowest during the summer months, such as July and August, due to a seasonal rise in supply.

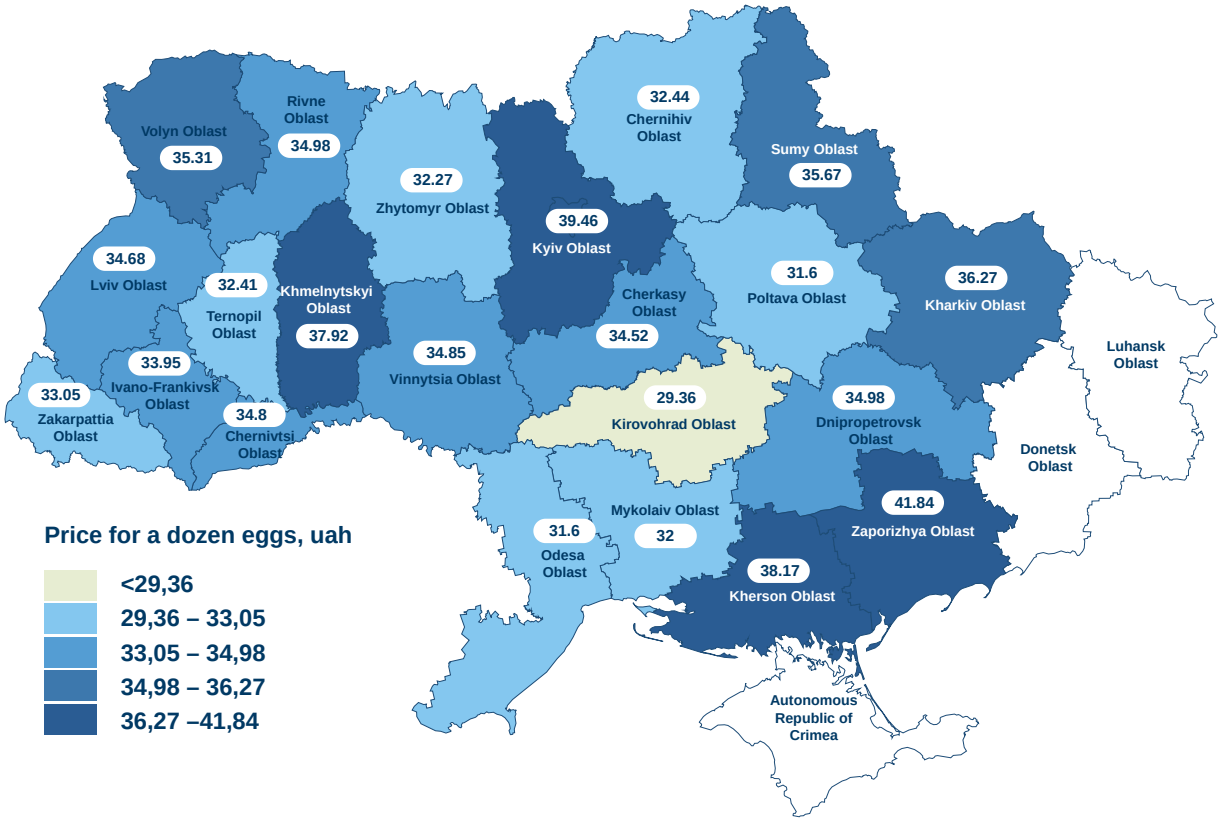
Overall, the price dynamics of eggs in Ukraine indicate that this product is highly sensitive to economic changes and seasonal demand, with sharp increases in the autumn-winter period and declines in the summer.

Fig. 15. Nominal consumer prices for a dozen eggs in Ukraine[21]



Regional egg prices in Ukraine can vary by approximately 25% and depend on a range of factors, including the development of the distribution network, logistical complexity, the presence of household producers (PHFs), and the overall supply and demand within a region. Another key factor influencing price formation is the proximity of a region to active combat zones. For instance, in Sumy region, the price is UAH 35.67; in Kharkiv region – UAH 36.27; in Zaporizhzhia region – UAH 41.84; and in Kherson region – UAH 38.17. These figures are on average 2–6 hryvnias higher than the national average (Fig. 16)[22].

Fig. 16. Regional nominal price for a dozen eggs as of September 2024



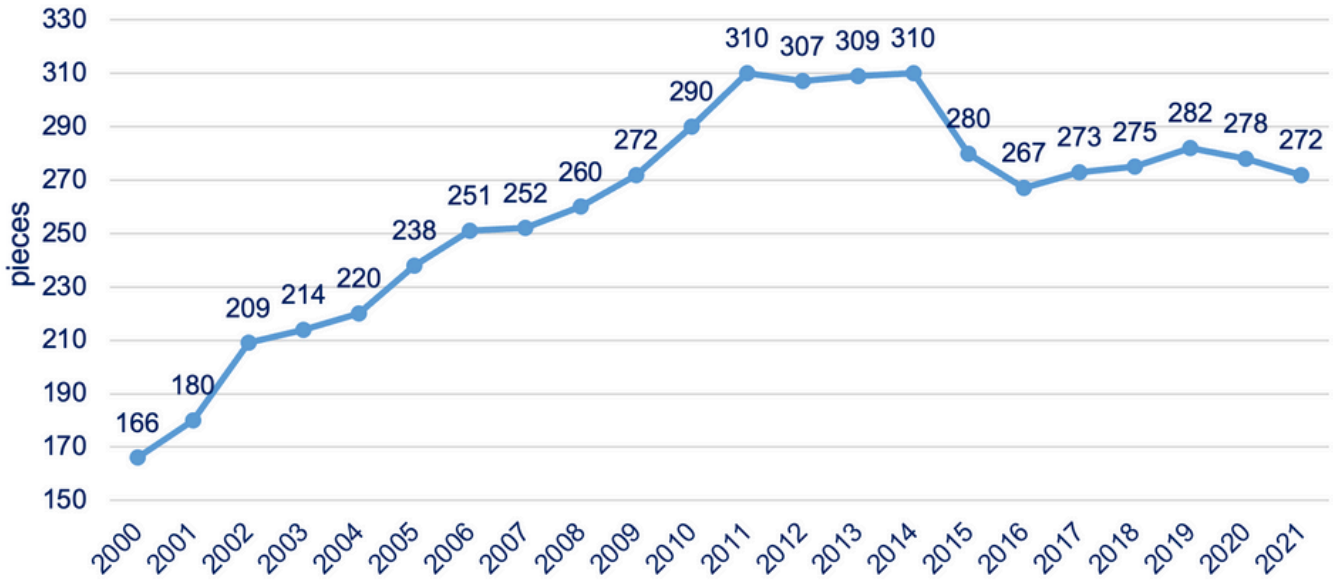
21 *Мінфін. (2024). Індекси цін на продукти. Ставки, індекси, тарифи.* https://index.minfin.com.ua/ua/markets/wares/index/eggs/eggs/chicken/

22 *SSSU. (2023). Статистичний збірник "Тваринництво України" (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*

10.CONSUMPTION

Per capita egg consumption in Ukraine showed a positive growth trend between 2000 and 2014. Production levels, product availability, and price stability contributed to increased consumption, particularly during the 2011–2014 period, when it exceeded 300 eggs per person annually. This figure surpassed the recommended consumption norm set by the FAO and WHO, which stands at 295 eggs per year (Fig. 17)[23]. However, the onset of hostilities in Ukraine in 2014 and the occupation of part of its territory, including the Autonomous Republic of Crimea, had a significant impact on egg production. This, in turn, led to a decline in consumption. Between 2014 and 2021, egg consumption decreased by 10%, reflecting reduced product availability and increased price volatility.

Fig. 17. Per capita egg consumption



During Russia's military invasion in 2022, per capita egg consumption in Ukraine was significantly affected due to the destruction of production capacities. The devastation of infrastructure, production facilities, and farms in regions impacted by hostilities led to a decline in domestic egg production, which in turn limited product availability on the market. The loss of part of the country's production capacity drove up egg prices and reduced supply volumes, directly impacting consumption levels[24].

An additional factor was the large-scale migration of the population, both within the country and abroad. The forced displacement of people from regions that were occupied or affected by active hostilities led to a shift in the structure of demand for eggs.

23 *SSSU. (2022a). Баланси та споживання основних продуктів харчування населенням України (2022, 2020, 2017, 2015, 2010). Держаналітінформ.*
24 *Ukrainian Agribusiness Club. (2023). Ukraine's agricultural sector during the conflict: Current status and future challenges. UCAB. https://ucab.ua*

CONCLUSIONS

Виробництво яєць в Україні, попри довготривалий період зростання, зазнало відчутного спаду після 2014 року: зі свого піку у 19,6 млрд штук (2014) воно скоротилося до 11,4 млрд у 2023-му. Ключові чинники – військові дії, нестабільна економічна ситуація, пандемія COVID-19 і зростання цін на корми й енергоносії. Внаслідок цього внутрішній ринок зіткнувся з обмеженою пропозицією та підвищенням роздрібних цін.

Через війну ключові виробничі потужності змістилися у центральні та західні регіони, такі як Вінницька, Київська та Хмельницька області. Це зумовило підвищене логістичне навантаження та потребу в модернізації місцевої інфраструктури для швидкого й ефективного збуту продукції. У виробничій структурі зберігається домінування великих сільськогосподарських підприємств (СГП), які забезпечують переважну частину реалізації яєць, зокрема й на експорт. Водночас особисті селянські господарства (ОСГ) орієнтовані в основному на власне споживання й локальні ринки.

Великі сільськогосподарські підприємства (СГП) утримують лідерські позиції на ринку та забезпечують експорт. Вони мають відпрацьовані канали збуту й інвестиційний потенціал для модернізації.

Після рекордних 143,6 тис. тонн експорту у 2019 році, у 2022-му показник скоротився майже на 60% через труднощі з логістикою та втрати виробничих потужностей. Проте у 2023 році триває переорієнтація на європейський ринок, зокрема Латвію та Польщу. Це сприяє диверсифікації збуту й частковому відновленню валютних надходжень.

Витрати на корми стабільно перевищують 70% собівартості виробництва, а зарплата та амортизація сукупно сягають близько 20%. Зростання цін на зернові та енергоресурси підвищує собівартість яєць, що відображається на кінцевій роздрібній ціні. Така тенденція негативно впливає на прибутковість виробників і купівельну спроможність населення.

Унаслідок бойових дій до 20% виробничих об’єктів зруйновано або виведено з експлуатації. Пошкоджена логістика і дефіцит персоналу ускладнюють підтримання стабільного виробничого циклу. Відновлення галузі вимагає інвестицій у відбудову потужностей, а також належного страхування ризиків та ефективних програм підтримки.

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