

Ilona Didenko
Dmytro Motornyi Tavria State
Agrotechnological University
Scientific and language adviser:
Senior Lecturer Kryvonos I.A.

TOMATO SAUCE PRODUCTION IN UKRAINE: CHALLENGES OF WAR AND DEVELOPMENT PROSPECTS

The tomato sauces production in Ukraine has always been an important segment of the agro-processing industry. Until 2022 Ukraine was among the top 10 global producers of tomato paste, and leading companies such as Chumak and Inagro held stable positions in the domestic and foreign markets. However, after the outbreak of a full-scale war, the industry suffered significant losses due to the destruction of production facilities, the occupation of part of the territory, and logistical difficulties. Nevertheless, Ukrainian producers are adapting to the new real situation by implementing anti-crisis measures and expanding export opportunities.

Before the war, Ukraine annually processed about 850-900 thousand tons of tomatoes, of which more than 60% were used to produce tomato paste and sauces. The main tomato growing regions were the south of the country - Kherson, Odesa and Mykolaiv regions, which had favourable climatic conditions.

The export component was also significant: in 2021, about 70% of products were shipped abroad, with the main consumers being the EU, the Middle East, and Africa.

Since the beginning of the full-scale invasion in February 2022, Ukraine's production capacity has decreased by at least 40% [Лебідь, 2023]. Companies in the southern region have suffered the most, including Chumak, whose main plant was located in Kakhovka, a city under occupation [Бесніна, 2023].

Due to the fighting and landmines, tomato acreage decreased by 35%, leading to a shortage of raw materials. Accordingly, in 2022, the production of sauces fell by 60%,

and imported products began to displace Ukrainian brands from the domestic market [Лебідь, 2023].

Despite the difficulties, Ukrainian producers did not stop production. Here are some key strategies that have allowed the industry to gradually recover:

Relocation of enterprises - Chumak moved part of its production to the western regions of Ukraine, and some companies established cooperation with agricultural firms in the central part of the country [Весніна, 2023].

Expansion of processing capacities in safe regions - new plants are opened in Vinnytsia and Khmelnytsky regions. Changes in export routes - companies that used to use Black Sea ports are now shipping products through the western borders to the EU. Investments in technology - there is a gradual transition to energy-efficient equipment and more flexible production systems [EastFruit, 2023].

Dynamics of tomato sauces production (2021-2024) are shown in Fig. 1.

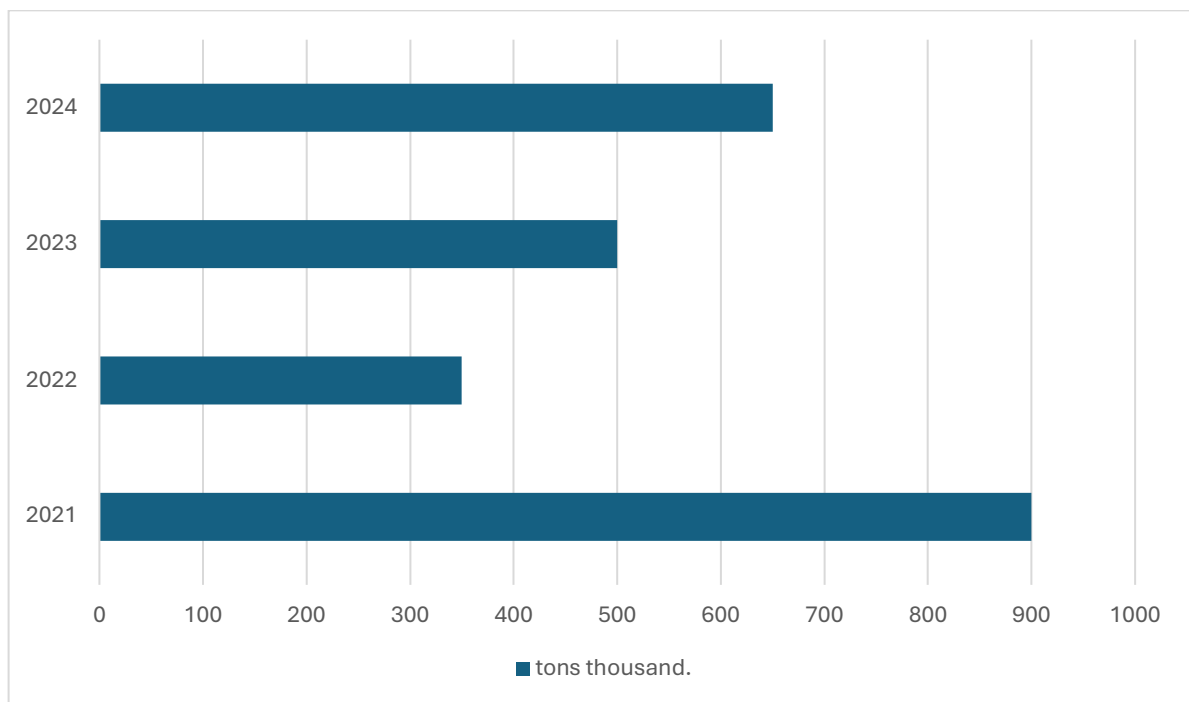


Figure 1. Reduction of production capacity due to the war

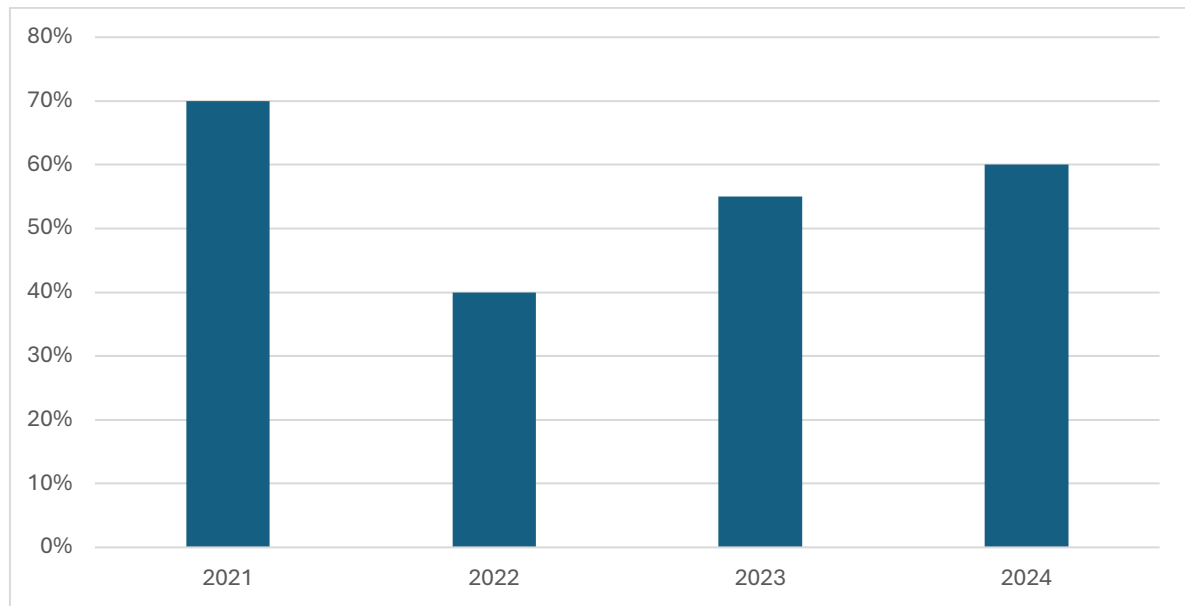


Figure 2. Share of exports in total production of tomato sauces
(in % of total production)

Despite the devastating effects of the war, the Ukrainian food industry, including tomato sauce producers, has demonstrated resilience and flexibility. Thanks to relocation, technological innovations, and changes in logistics, the industry is gradually recovering, although it is not expected to reach pre-war production volumes until 2026 [EastFruit, 2023].

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