



Ветеринарне благополуччя та якість продукції тваринництва

Veterinary welfare and quality of livestock products

DOI 10.32900/2312-8402-2025-135-225-235

UDC 636.09:338.43(477)

KEY ISSUES IN THE RECOVERY OF THE VETERINARY SECTOR IN THE POST-WAR PERIOD: SWOT ANALYSIS AND MEASURES TO OVERCOME THEM

Svitlana BENDASYUK, Ph.D. in Economics

<https://orsid.org/0009-0008-3287-5203>

Olena MARTSENYUK, Ph.D. in Agricultural Sciences,

<https://orsid.org/0009-0000-1468-6224>

**Institute of Veterinary Medicine, National Academy of Agrarian Sciences, Kyiv,
Ukraine**

The article discusses key issues, trends and prospects for the development of the veterinary sector of Ukraine's economy in the context of contemporary challenges and post-war reconstruction tasks. It highlights the importance of the veterinary industry as a key component of agricultural production, food security and public health. The consequences of military actions that led to the destruction of production capacities, a decrease in the efficiency of state and private veterinary services, the loss of labour resources, and disruptions in the logistics of supplying veterinary drugs and animal protection products are analysed.

Based on a SWOT analysis, the strengths of the industry (availability of professional staff, scientific schools, a developed network of institutions) its weaknesses (insufficient funding, outdated material and technical base, ineffective management), as well as external opportunities (European integration processes, international technical assistance, growing demand for quality products) and threats (epizootic risks, climate change, global competition). On this basis, strategic directions for the restoration and development of the veterinary sector have been formulated.

The need to update legislation, bring regulatory acts into line with EU requirements, and strengthen state control in the field of food safety and animal welfare has been substantiated. A set of institutional, organisational and personnel measures has been proposed: the creation of a unified digital animal accounting system, the introduction of modern information and analytical technologies, the expansion of the functions of regional veterinary services, and the promotion of public-private partnerships.

The importance of developing veterinary science and education as a key factor in modernising the industry is emphasised, as is the need to support research in biosafety,



epizootology, pharmacology and biotechnology. It was stressed that overcoming the crisis in the veterinary sector requires a systematic, phased approach, taking into account short-term, medium-term and long-term goals. The implementation of the proposed measures will contribute to the formation of an effective, sustainable and innovation-oriented veterinary system capable of ensuring food security, animal and public health, and increasing Ukraine's competitiveness at the international level.

Keywords: veterinary sector, infrastructure, post-war recovery, SWOT analysis, problems, consequences, short-, medium- and long-term measures.

КЛЮЧОВІ ПРОБЛЕМИ ВІДНОВЛЕННЯ ВЕТЕРИНАРНОЇ ГАЛУЗІ В ПОВОЄННИЙ ПЕРІОД: SWOT-АНАЛІЗ ТА ЗАХОДИ ПОДОЛАННЯ

Світлана БЕНДАСЮК, к. е. н.,
<https://orcid.org/0009-0008-3287-5203>

Олена МАРЦЕНЮК, к. с.-г. н.,
<https://orcid.org/0009-0000-1468-6224>

Інститут ветеринарної медицини НААН, Київ, Україна

У статті розглянуто ключові проблеми, тенденції та перспективи розвитку ветеринарного сектору економіки України в контексті сучасних викликів і завдань післявоєнного відновлення. Висвітлено значення ветеринарної галузі як важливої складової аграрного виробництва, продовольчої безпеки та системи охорони здоров'я населення. Проаналізовано наслідки воєнних дій, які призвели до руйнування виробничих потужностей, зниження ефективності роботи державних і приватних ветеринарних служб, втрати трудових ресурсів, порушення логістики постачання ветеринарних препаратів і засобів захисту тварин.

На основі проведеного SWOT-аналізу ідентифіковано сильні сторони галузі (наявність професійних кадрів, наукових шкіл, розвинену мережу установ), її слабкі місця (недостатнє фінансування, застаріла матеріально-технічна база, неефективне управління), а також зовнішні можливості (євроінтеграційні процеси, міжнародна технічна допомога, зростання попиту на якісну продукцію) та загрози (епізоотичні ризики, зміни клімату, глобальна конкуренція). На цій основі сформульовано стратегічні напрями відновлення та розвитку ветеринарного сектору.

Обґрунтовано необхідність оновлення законодавства, приведення нормативно-правових актів у відповідність до вимог ЄС, посилення державного контролю у сфері безпечності харчових продуктів і добробуту тварин. Запропоновано комплекс заходів інституційного, організаційного та кадрового характеру: створення єдиної цифрової системи обліку тварин, впровадження сучасних інформаційно-аналітичних технологій, розширення функцій регіональних ветеринарних служб, стимулювання державно-приватного партнерства.

Підкреслено значення розвитку ветеринарної науки й освіти як ключового чинника модернізації галузі, необхідність підтримки досліджень з біобезпеки, епізоотології, фармакології та біотехнологій. Наголошено, що подолання кризових явищ у ветеринарній сфері потребує системного, поетапного підходу з урахуванням першочергових, середньострокових і довгострокових цілей. Реалізація



запропонованих напрямів сприятиме формуванню ефективної, стійкої та інноваційно орієнтованої ветеринарної системи, здатної забезпечити продовольчу безпеку, охорону здоров'я тварин і населення, а також підвищення конкурентоспроможності України на міжнародному рівні.

Ключові слова: ветеринарна галузь, інфраструктура, повоєнне відновлення, SWOT-аналіз, проблеми, наслідки, коротко-, середньо і довгострокові заходи.

As a result of military operations on the territory of Ukraine, the veterinary system has suffered significant infrastructure damage and changes in its institutional structure, which has had a negative impact on: the production and economic activities of the industry; the loss of production resources, human and scientific potential; the decline of rural areas; the destruction of veterinary infrastructure (laboratories, diagnostic centres and veterinary stations); the loss of livestock; increased biological risks, the system for ensuring epizootic safety and preventing zoonotic infections; insufficient veterinary services and state control over the prevention of animal diseases (Balyuk K., 2025; Sobkevich O. V. et al., 2024).

Key measures and directions of the country's government, business structures, public organisations and research institutions in overcoming the consequences of the war and ensuring the effective functioning of the veterinary sector of the economy should be considered in the context of solving national problems with a focus on: infrastructure restoration; overcoming the shortage of specialists; overcoming chronic underfunding of the state veterinary sector; ensuring access for agricultural enterprises and farmers to loans, subsidies, insurance and markets; returning the population to rural areas, creating jobs, etc.; restoring the early warning and monitoring system; technological modernisation and introduction of modern innovative technologies; close cooperation with international financial institutions (Shvedun V. O., 2019; Rykovska O. et al., 2024).

The aim of the study is to identify the key problems in the veterinary sector caused by military actions on the territory of Ukraine, to conduct a SWOT analysis (Traub-Werner M., et al., 2025; Kobylukh, O., 2023), and identifying a number of urgent measures aimed at ensuring the sustainable post-war recovery of the veterinary sector of the economy (Yunger V. I., 2024).

Materials and methods. Analytical, descriptive, generalisation and information search methods were used in the research process. An analysis of scientific publications, articles, monographs and other sources related to the sustainable development of the veterinary sector was carried out (Ainuddin, R.A. et al., 2007; Chetty, P., 2019). The use of SWOT analysis made it possible to identify the key problems of the country's veterinary sector in the post-war period and to develop measures aimed at restoring and ensuring the effective functioning of the industry (Kopchak, Yu., et al., 2024; Altomonte, L., 2024).

Research results. Military actions on the territory of Ukraine have caused significant damage to the veterinary sector, accompanied by: destruction of veterinary infrastructure and logistics; reduction of state funding; disruption of the veterinary service, control and epizootic surveillance system; increased risk of zoonotic diseases; migration of highly qualified personnel, etc.

Overcoming the challenges facing the veterinary sector requires coordinated action by the government, civil society organisations, business representatives, and international financial institutions/organisations to build a sustainable and effective system. The development and implementation of priority post-war recovery measures is only possible if there is extensive technical and technological modernisation of



production, infrastructure development, cooperation between education, science and business, digitalisation and international partnerships, etc. (MacLachlan, MJ, 2024).

The problems and risks of the veterinary industry require the identification of key issues, analysis of the strengths and weaknesses of the industry, identification of opportunities and threats (SWOT analysis), as well as the development of strategic measures for its recovery aimed at achieving short-, medium- and long-term goals.

Solving the problems facing the veterinary system is becoming particularly urgent and requires an interdisciplinary approach. It should be noted that a number of Ukrainian scientists have addressed the problems of the development of the veterinary sector in Ukraine, mechanisms of state support and private investment, and the development of a system for the control and prevention of epizootics, namely Poperechny S. I., Babych L. V., 2019; Kruchynenko O. V., 2017; Gadzalo, Ya. M. 2023; Sobkevich O. V., et al., 2024.

At the same time, less attention has been paid to measures aimed at solving the problems of restoring the veterinary sector, especially in the post-war period. All this requires scientific support for studying threats to the sustainable development of the veterinary sector and identifying the main measures for the post-war recovery of the industry aimed at the socio-economic, epidemiological and environmental stabilisation of Ukraine's agro-industrial complex.

Improving the efficiency of the veterinary sector of Ukraine's economy in the post-war period is a complex task that requires the coordinated work of state and local authorities, international financial partners, representatives of business and public organisations, science and education.

The post-war restoration of veterinary infrastructure requires updating the institutional system, with an emphasis on strengthening state control, innovative and technological re-equipment of Veterinary laboratories, expanding the functions of local self-government bodies, creating a special fund to support veterinary medicine in emergency situations and regional veterinary control centers. The priority steps of the post-war reconstruction include: bringing domestic legislation in line with EU standards and developing special regulations for actions in crisis situations; strengthening responsibility for violation of the rules of keeping, transporting animals and handling Veterinary Medicines; introduction of mandatory electronic registration of livestock, etc. (Berezovska, I., 2019; Rykovskaya O. et al. 2024; Regulation (Eu), 2019).

In this context, the government, business and civil society are faced with an urgent issue: first, identifying the key problems that hinder the further development and post-war recovery of the country's veterinary market. Secondly, the development of priority measures to solve them.

The study of the main characteristics of the functioning of the domestic veterinary system in war conditions allowed us to identify a number of key problems and their consequences for this industry (table.1):

Statistics show that only in 2022-2024, the total losses amount to 12% of the dairy herd of cattle, the decline in production in pig production reaches 13-15%, where the total in the sectors of cattle, pig and poultry reach 785.6 - 800.9 million. Euro. At the same time, the total losses of the agricultural sector amount to more than 10 billion rubles. US dollars. According to the State Food and Consumer Service, almost 40% of veterinary facilities are destroyed or remain inaccessible, so as of 2024, out of 27 regional veterinary medicine laboratories, 17 are unable to perform the full range of functions, and more than 200 district veterinary clinics have stopped working.



Table 1

Key challenges facing the veterinary industry

Problem	Consequences
General socio-economic and environmental crisis of the agricultural sector	Falling agricultural production in general and demand for veterinary products in particular, the deterioration of the environmental situation.
Infrastructure losses, logistics problems and reduced production capacity of Veterinary enterprises	<p>Destruction or damage of public and private veterinary clinics, laboratories, Disease Control and diagnostic points.</p> <p>Reduction of domestic production due to the suspension or forced movement of production and economic activities of Veterinary enterprises and activities in the field of providing veterinary services.</p> <p>Interruptions in the delivery of raw materials and components for manufacturers of veterinary drugs, suppliers and enterprises in the field of providing veterinary services, which led to a shortage of medicines, vaccines and consumables;</p> <p>Loss of access to test systems;</p> <p>Significant financial losses and higher prices for veterinary drugs and services;</p> <p>Complications of delivery of imported medicines, vaccines, and various feed additives.</p> <p>Problems with registration and difficulties in entering the market for new products and innovative solutions</p>
Lack of highly qualified personnel in the field of Veterinary Medicine	<p>Migration of the population and departure of a significant part of highly qualified personnel abroad or to safe regions.</p> <p>Reduced quality of education due to military operations.</p> <p>Mobilization of Veterinary Specialists in the ranks of the Armed Forces of Ukraine.</p> <p>A significant part of specialists were forced to change their field of activity</p>
Regulatory challenges and lack of coordination	<p>Lack of a joint action plan between government agencies to support enterprises providing veterinary services.</p> <p>Insufficient level of regulation and incentives for producers in the veterinary industry.</p> <p>Insufficient level of digitalization of the industry.</p> <p>Lack of an electronic register of animals and diseases.</p> <p>Slow implementation of modern information technologies.</p> <p>Lack of a strategic vision and a unified post-war strategy for restoring the industry</p>
Loss/decline in confidence in domestic manufacturers of veterinary drugs and vaccines	<p>Non-compliance with the delivery schedule of veterinary drugs and vaccines and questions about their quality.</p> <p>Increased demand for products of foreign manufacturers and increased cost in the treatment and Prevention of diseases</p>



Problems with the quality and safety control system for veterinary medicines	Lack of full-fledged epizootic supervision, prevention and state control due to the conduct of military operations, which increases the threat of the emergence and spread of infectious diseases. The presence of a shadow market with a significant share of counterfeit drugs and their non-compliance with the standards of dissolution and uniformity. The growth of online trading volumes significantly complicates product quality and safety control.
Financial difficulties of manufacturers and consumers of veterinary drugs	Limited government funding. The low purchasing power of veterinary drug manufacturers is caused by rising energy prices, rising prices for raw materials for their production, and the lack of support programs for veterinarians

As for staffing, the average age of a veterinarian is 51 years, which indicates an aging staff, where more than 3,500 specialists have left the country, some of whom have emigrated. Not the best situation has developed in the field of training specialists, so over the past 5 years, the number of graduates of Veterinary Universities has decreased by 25%, and according to the Ministry of education and science, 45% of students study abroad or do not plan to work in Ukraine after completing their studies. It should be noted that there are also questions about state funding of scientific institutions, so in the period from 2021 to 2024. there was a significant reduction in budget expenditures by 60%.

It should be noted that as part of the adaptation to European legislation, from September 2025, Ukraine begins implementing EU regulatory directives in the field of animal health. This will create favorable conditions for entry and expansion of the domestic market for producers of veterinary products and services from EU countries.

It is an indisputable fact that the rapid restoration of the sustainable functioning of the veterinary market requires, first of all, solving infrastructure problems, carrying out measures aimed at increasing production capacity and state financial support for enterprises, effective investment and innovation policies for their attraction and implementation, which will certainly ensure socio-economic, food and biological safety and will have a positive impact on the environment.

Solving urgent problems of the veterinary market requires a systematic and integrated approach, joint actions of the state, entrepreneurs, international organizations and society. The very implementation of SWOT analysis (Table 2) provides an opportunity to identify the strengths and weaknesses and potential opportunities for sustainable development of the veterinary sector.

The SWOT analysis shows that the post-war recovery of the veterinary industry, the market for veterinary drugs and vaccines in particular, requires a comprehensive solution based on the weaknesses/threats and opportunities noted above.

The main efforts of the state and civil society should be aimed at carrying out activities, namely: creation of a state program for the restoration of the industry until 2030 (decree of the Cabinet of Ministers of Ukraine No. 1163-R of November 15, 2024); infrastructure restoration; development of national and regional programs for financial support and reconstruction of Veterinary enterprises; implementation and harmonization of domestic legislation in accordance with European directives; improvement of personnel policy, development of programs aimed at professional development/retraining of specialists; further digitalization and automation of the veterinary industry, construction of new laboratories with digital equipment, their integration into the Joint



Table 2

SWOT analysis of the current state of the veterinary industry in Ukraine

Strengths	(Weaknesses)
<p>Availability of experienced, highly qualified and competent specialists. Sufficiently high scientific base and educational potential of the veterinary industry Availability of significant production capacities of the veterinary market. Increased demand for safe drugs and vaccines. Availability of a system of state control, monitoring and veterinary supervision. Experience in rapid response to bioristics Approximation and implementation of national legislation to the requirements and standards of EU countries. Extensive experience in cooperation with international organizations and foundations.</p>	<p>Complications in the supply of veterinary drugs due to the destruction and damage of infrastructure facilities and logistics routes of industry enterprises Outdated material and technical base, rather low level of digitalization of the industry, monitoring and lack of statistical reporting. Distrust of domestic manufacturers of veterinary drugs. A fairly high level of bureaucracy in the industry Insufficient budget funding and lack of significant financial resources from enterprises for the purchase of necessary veterinary drugs. Low level of investment in the development of new drugs and technologies.</p>
Opportunities	Threats
<p>Post-war restoration of veterinary infrastructure according to new standards. Attracting investment resources and donor assistance in the development of new veterinary drugs and vaccines. Expanding the market of veterinary drugs and increasing demand for the products of Veterinary enterprises due to the full restoration of the agricultural sector. Certification and quality improvement of Veterinary Medicines. Development and support of public-private partnerships Continuation of cooperation with international organizations and participation in production modernization programs and their technical and technological support. Holding events aimed at further European integration and harmonization of national standards with those of EU countries. Further introduction of the latest digital technologies in veterinary medicine, development of mobile clinics.</p>	<p>The unstable military-political situation, bureaucratic obstacles, lack of effective quality control of veterinary medicines can negatively affect the stable functioning of the market for veterinary drugs and vaccines, as well as reduce the overall biosafety of the agro-industrial complex. Quite a significant share of imported and cheaper, in contrast to domestic, veterinary drugs. The emergence of environmental threats due to the destruction of veterinary infrastructure and migration of animals, which may be accompanied by the spread of epizootics, the emergence of epidemiological outbreaks (ASF, anthrax, avian influenza, etc.) and New, previously unknown, infectious diseases of animals. Further increases in the cost of energy and other resources will affect the cost and availability of medicines. Increased migration of veterinary specialists abroad.</p>



National epizootic surveillance system; development of digital platforms for monitoring the epizootic situation, as well as the creation of electronic animal accounting and databases for monitoring the provision of Veterinary Services; creation of a National Register of infectious diseases of animals; closer cooperation with potential donors, international organizations and structures in the process of restoring the industry (USAID, GIZ, EBRD).

Discussion. Approaches to solving key problems of the veterinary market in the post-war period require, as noted above, consistency and complexity in carrying out activities aimed at short-, medium- and long-term periods and aimed at strengthening the institutional, economic, organizational and financial-credit foundations. This, in turn, will: increase the efficiency of veterinary sector management; ensure timely response and identification of biological and environmental risks; to modernize the system of monitoring, diagnostics and certification of livestock products, their quality and safety; to strengthen the food and biological security of the country; faster integration of Ukraine into international systems of Veterinary Control and cooperation, etc. (Pavlovskaya N. V., 2024).

The development of priority measures for the post-war restoration of the veterinary industry in the short term will require, first of all, the stabilization of the country's veterinary system, focusing on providing basic services and creating a fund for the post-war restoration of the industry. The next steps should be aimed at: adoption of new and improvement of existing laws and bylaws; creation of a roadmap with the allocation of priority areas; analysis, assessment and audit of infrastructure losses and destroyed / damaged veterinary enterprises and formation of their register, both at the national and regional level; development of programs aimed at restoring basic necessities (electricity and water supply, diagnostic laboratories, etc.) and carrying out urgent measures to restore the supply of necessary veterinary drugs and vaccines to the regions where military operations were conducted; assessment of existing personnel and determination of the shortage of specialists in relevant specialties; development of Public-Private Partnership; improvement of the system of granting subsidies and grants to private veterinary enterprises; revision towards simplification of procedures for obtaining licenses and certification for manufacturers when registering Veterinary Medicines; revision of regulatory documents related to import and export policy; restoration of the system of monitoring and control over the quality and safety of products of Veterinary enterprises; strengthening international cooperation with international financial institutions and donors.

Medium-term measures should be aimed at: further development of logistics infrastructure, construction of modern laboratories, premises and complexes; restoration of the internal market of veterinary drugs and vaccines, equipment for veterinary medicine; development of programs and strategies to support manufacturers of veterinary drugs and service centers; adaptation of national legislation in the field of veterinary drugs turnover to international standards related to quality and safety control; further modernization of production facilities; creation of a favorable investment and innovation climate with the assistance of government agencies in obtaining and implementing the latest technologies; further digitalization of the industry, formation of an electronic database of veterinary drugs and vaccines, as well as databases of services, clinics, animal data, Veterinary Specialists; development of programs related to veterinary education and science, training, retraining and advanced training of Veterinary Specialists; conducting online courses, international trainings for manufacturers, developers of veterinary drugs and veterinarians on modern methods of prevention, diagnosis and treatment; creating



centers of cooperation with international organizations and centers of public-private support in the restoration of regional and local veterinary laboratories and clinics.

Long-term measures for post-war restoration of the country's veterinary system include: the development of a national strategy for post-war recovery until 2030, and the creation of a national biological protection system (monitoring, Forecasting, Prevention and crisis response to outbreaks of infectious diseases) and anti-crisis management; further legislative and institutional reform of management structures with the subsequent implementation and adaptation of national regulatory norms and rules to EU standards; development of the investment and innovation-technological market of veterinary drugs and services, manufacturers of veterinary equipment, attracting internal and external investments in support of the latest scientific developments in diagnostic and biosafety methods, as well as in the production of environmentally friendly technologies; ensuring conditions for fair, open competition, positioning in foreign markets (Kobzeva, T. A.; Hein, D. S., 2021).

Based on the above, we can conclude that the main goal of short – term measures is measures aimed at stabilizing the veterinary industry as a whole, which provides for: the development of a plan for the modernization of institutions; the implementation of audits of adopted legislative acts; programs to stabilize the market of veterinary drugs and services in particular. The complex of medium-term measures provides for: structural adjustment; updating of control mechanisms; infrastructure modernization; mechanisms for attracting investment in the industry; post-war restoration of the main functions of the market. Finally, the goal of long-term measures is aimed at: formation of a balanced, technologically innovative and competitive industry; stable financing of the veterinary sector; integration with international veterinary control systems. and so on.

Conclusion. The restoration of the veterinary industry requires comprehensive support in the main areas such as: strategic planning taking into account the risks and priorities of restoration; implementation of programs subsidizing the veterinary industry; development of new regulatory documents to stimulate the development of the industry; improving the quality of training; restoration of the system of control and monitoring of the turnover of veterinary drugs, the fight against the shadow market and falsification; restoration of veterinary infrastructure; international financial assistance and investment for infrastructure restoration and technical and technological re-equipment.

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