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Leadership of Countries, Regions, and Integration Groupings in Agricultural Trade

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ABSTRACT. The purpose of the study is to identify and analytically substantiate the key trends in the formation of global agricultural leadership, assess the role of countries, regions, and integration groupings in the structure of world agri-food trade, and determine the factors driving the redistribution of competitive positions in the global market. The study emphasizes that in the current context of global food instability, climate change, and intensifying geo-economic competition, agri-food trade plays a strategic role in shaping global economic security. The global agricultural market is becoming increasingly polycentric, with several groups of countries and integration blocs forming «nodes of concentration» in agricultural production, processing, and export. Under these conditions, the dynamics of leadership in global agricultural trade acquire special significance, as they are directly linked to the distribution of food resources, the competitiveness of nations, and the resilience of international supply chains. The study found that over the past decades, the global agricultural market has shown a clear trend towards intensified regionalization and a shift in the roles of traditional and emerging exporters. While in the past, external trade was dominated by North America and Western Europe, key competitive positions are now shifting toward Latin America, Southeast Asia, and select African countries. In parallel, integration groupings (EU, USMCA, MERCOSUR, and ASEAN) are increasingly shaping the regulatory, technological, and logistical foundations of global food flows. The study emphasizes that all these processes underscore the need for a comprehensive analysis of transformations at the national, regional, and integration-bloc levels. The shifting balance of power in the global agri-food market determines not only the scale and direction of exports but also approaches to food policy formation, investment priorities, and long-term development strategies of the agricultural sector. Therefore, a deep analysis of the dynamics of global agricultural leadership and the economic, institutional, and technological factors driving changes in the roles of leading market players is essential. The study concludes that global agri-food trade is evolving into a polycentric system shaped by the interaction of leading countries, regional clusters, and integration groupings. The strengthening position of the Global South is combined with the stable leadership of the USA, the EU, and Canada, which determine the technological and institutional parameters of the global market. Regional analysis confirmed the high concentration of exports in Europe and the Americas, while integration blocs strengthen the role of common standards and cooperative models. Lo-

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gistics and climate factors continue to transform global food flows, creating new centres of supply and demand. The study demonstrates that Ukraine maintains strategic positions in grain and oilseed exports, serving as a crucial element of global food security. The author proves that the identified trends reflect the transition to a multidimensional model of agricultural leadership that will define global market trajectories in the near future.
KEY WORDS: global agri-food trade; world agricultural market; leading countries; regional export structure; integration groupings; competitive advantages; food clusters; agricultural exports; leadership transformation; international trade; regional agricultural clusters; Ukraine; the US; the EU; Asia; Africa; countries of the Global South.

Introduction

The global food system has been undergoing a profound structural transformation driven by a combination of climate change, geopolitical tensions, logistical disruptions, and increasing competition among key players in the agricultural market. At the same time, global trade in agri-food products is increasingly becoming polycentric, as evidenced by the emergence of new export hubs, shifts in trade flows, and the growing role of integration blocs. These processes are shaping a new architecture of the international agricultural market, which requires in-depth analysis to understand the directions of global leadership.

Research into the dynamics of agri-food exports is highly relevant, as it allows for the identification of factors of the countries' competitiveness within the global food system, as well as the mechanisms shaping international food flows under current conditions. Of particular importance is the assessment of the growing role of Global South countries and integration blocs, which actively influence the structure, logic, and regulatory parameters of global trade in agricultural products.

Despite the active development of global agri-food trade, scientific research still lacks a comprehensive understanding of how the positions of leaders in the global market are formed and change. Analysis often focuses on individual countries, while the influence of regional clusters and integration groups remains insufficiently explored. The role of Global South countries, whose rapid growth is significantly altering the structure of global food flows, has also been insufficiently studied. This creates a need for a comprehensive study of current trends in the shift of agricultural leadership at the global level.

The issue of global agri-food trade development is extensively covered in the studies of such international organisations as FAO[2], OECD[3], WTO[4], and the World

[2] The State of Agricultural Commodity Markets 2024: Agricultural Trade, Climate Change, and Food Security. Rome: Food and Agriculture Organization of the United Nations, 2024. URL: https://www.fao.org/documents/card/en/c/cc9390en

[3] OECD-FAO Agricultural Outlook 2023–2032. Paris: OECD Publishing, 2023. URL: https://www.oecd.org/en/publications/oecd-fao-agricultural-outlook-2023-2032_08801ab7-en.html

[4] World Trade Report 2023: Re-globalization for a Secure, Inclusive and Sustainable Future. Geneva: World Trade Organization, 2023. URL: https://www.wto.org/english/res_e/publications_e/wtr23_e.htm

Bank[5], which analyse structural shifts, changes in competitive positions, and the role of integration blocs in shaping global food flows. Significant attention is paid to the growing impact of Global South countries, as reflected in the works of D. Laborde, W. Martin, and J. Swinnen[6], which reveal trends toward the strengthening of export-oriented models of agricultural economies in Latin America and Southeast Asia. In the works of European researchers (A. Matthews, K. Anderson[7]), the emphasis is placed on the transformation of EU agricultural policy, its impact on export dynamics, and the formation of shared value chains. In scientific publications from the U.S. and Canada (R. Orden, S. Zahniser[8]), increasing attention is being paid to the role of innovation, precision agriculture, and integration agreements such as the USMCA in strengthening North America's position. Ukrainian scholars, including T. Orekhova, Y. Ishchuk[9], O. Ryabchyn[10], N. Patyka[11], and M. Hrebenyuk[12], have been studying the structure of global agricultural markets, the specialization of leading exporters, and food security challenges amid turbulence. Individual researchers have demonstrated that the key determinants of leadership among countries, regions, and integration groups in agricultural trade are technological modernization [13], [14] (precision farming, AgTech, satellite monitoring), institutional support[15] (agribonds, war risk insurance, international guarantees), and logistical adaptation (expansion of the Danube Corridor)[16], [17]. Economic diplomacy of countries[18] and the influence of

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the transit economy[19] play an important role in the context of the issues under study. O. Dlugopolsky, O. Lesyk, M. Farion, O. Buchko, M. Tepliuk, and B. Fomenko examine the global dimension of business relocation in the context of resilience, digital transformation, and sustainable development. The authors emphasize that relocation is not merely a forced response to external challenges, but primarily a strategic mechanism for strengthening corporate resilience and requires adaptive strategies, including the use of digital technologies, optimization of business models, and integration of sustainable development principles[20], [21]. A number of researchers emphasize the significance of Ukraine, which maintains strategic positions in the grain and oilseed segment, serving as a key actor of global food security provision[22], [23]. However, despite a substantial body of analytical work, the interrelationship between national, regional, and integration levels in the formation of agricultural leadership has not been sufficiently comprehensively presented. The systematic interaction of Global South countries with traditional export hubs in the context of changes in the structure of global agri-food trade also remains unexplored.

Despite existing research on global agri-food trade, there remain gaps in our understanding of the multilevel interactions among countries, regions, and integration blocs. There has been insufficient research into how the combination of geo-economic, logistical, and technological factors shapes the modern polycentric structure of the global market. Analysis of the role of Global South countries in the redistribution of global leadership, as well as the internal asymmetry of integration groups—particularly the EU—is also limited. The mechanism for the formation of new regional agricultural clusters, which determine changes in global food flows, also requires clarification. It is precisely the need to synthesize current trends, combine spatial-economic and institutional analysis, and explain the mechanisms of change in global agricultural leadership that determines the relevance of this study.

The aim of this study is to identify and analytically substantiate the key trends in the

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formation of global agricultural leadership, assess the role of countries, regions, and integration groups in the structure of global agri-food trade, and determine the factors driving the redistribution of competitive positions in the global agri-food market.

Leading countries in global exports of agri-food and factors of change in leadership

The global agri-food market is increasingly taking on polycentric characteristics, with several groups of countries and integration associations forming «hubs of concentration» for agricultural production, processing, and export. In this context, the issue of leadership dynamics in global trade in agricultural goods takes on particular relevance, as it is directly linked to the distribution of food resources, the competitiveness of states, and the resilience of international supply chains.

Over the past decades, the global agricultural market has shown a trend toward intensive regionalization and a shift in the roles of traditional and new exporters. While North American and Western European countries previously dominated foreign trade, key competitive positions are now actively shifting toward Latin America, Southeast Asia, and certain African countries. In parallel, integration blocs (the EU, USMCA, MERCOSUR, ASEAN) are playing an increasingly significant role in shaping the regulatory, technological, and logistical foundations of global food flows.

All these processes underscore the need for a comprehensive analysis of the transformations taking place at the level of countries, regions, and integration groups. The shifting balance of power in the global agri-food market determines not only the scale and direction of exports but also approaches to shaping food policy, investment priorities, and long-term development strategies for the agricultural sector. This is precisely why there is a need for a continuous monitoring of the dynamics of global agricultural leadership and the economic, institutional, and technological factors that determine the changing roles of leading players in the global market.

Global trade in agri-food commodities is shaped by a group of countries that possess significant natural resources, technological advantages, and a developed logistics infrastructure. Amid high volatility in global markets, rising climate risks, and increasingly complex international economic relations, the agricultural sector demonstrates one of the most structured models of global integration. Over the past decade, the leadership structure in global agricultural exports has undergone significant transformations linked to changes in technological approaches to production, the redistribution of resources, increased competition, and the growing influence of Global South countries. These changes have led to the emergence of new centers of agricultural growth, which are increasingly shaping the parameters of the global market and influencing strategic decisions within global food supply chains[24], [25].

[24] The State of Agricultural Commodity Markets 2024: Agricultural Trade, Climate Change and Food Security. Rome: Food and Agriculture Organization of the United Nations, 2024. URL: https://www.fao.org/documents/card/en/c/cc9390en

One of the key trends is the strengthening of the positions of Brazil, Argentina, Indonesia, Vietnam, and India, which are demonstrating accelerated export growth thanks to specialization in high-demand products, modernization of production technologies, active foreign investment, and support from government agricultural development programs. These countries are transitioning from a model of raw material exports to more complex production and processing chains oriented toward foreign markets. Their competitiveness is being strengthened by large-scale infrastructure projects, the development of port logistics, and the introduction of modern technologies in crop and livestock farming. This is precisely why, in recent years, the Global South has been transforming into a powerful center of agricultural growth, capable of influencing the balance of power in the markets for grains, oilseeds, meat, and tropical products.

Alongside these new centers of development, the United States, Canada, Australia, and European Union member states maintain stable positions, traditionally supplying significant volumes of global grain, oilseed, meat, and dairy products. Their leadership is based on a high level of technological advancement, the industrialization of the agricultural sector, the use of digital platforms in production, a developed system of agricultural education and science, institutional stability, and a unified system of standards. Developed countries form the core of global agricultural innovation, setting the pace for technological change in global food production and processing.

The United States, the EU, Brazil, and Canada dominate the structure of global exports. The United States remains the leading exporter of corn, soybeans, and meat products, driven by high mechanization, precision farming, the use of genetically improved varieties and breeds, the operation of powerful farming cooperatives, and effective government support. Canada is one of the largest suppliers of wheat, rapeseed, and beef, forming a stable segment of the global market thanks to high-quality products and compliance with environmental standards. Brazil is demonstrating the highest growth rates in agricultural exports worldwide, strengthening its position as a supplier of soybeans, corn, beef, and cane sugar. Argentina, despite internal economic imbalances, retains a significant share of the global market for soybean meal and corn.

Ukraine, despite external challenges, consistently maintains its position as one of the world's key exporters of agri-food products. By the end of 2024, the country will be among the top 10 global exporters of grains and oilseeds, accounting for 8–10 per cent of global agricultural exports in its main commodity groups. Ukraine ranks first in the world in sunflower oil exports (over 50 per cent of the global market), fourth in corn exports, and sixth or seventh in wheat exports, confirming its pivotal role in shaping global food balances[26] ,[27] . The high competitiveness of Ukraine's agricul-

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[26] International Grains Council. Grain Market Report 2024. London: IGC, 2024. URL: https://www.igc.int/en/gmr_summary.aspx

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tural sector is driven by its natural resource potential, advanced specialization in oilseeds, large-scale grain production, and the efficiency of its production and logistics chains, which continue to function even amid heightened geopolitical instability[28] .

Among EU countries, the largest exporters are the Netherlands, France, Spain, and Germany, each of which has its own national specialization, which structurally influences the geography of global food flows.

General characteristics of the world's leading exporters of agri-food products, their specializations, and export volumes are presented in Table 1.

Table 1

LEADING GLOBAL EXPORTERS OF AGRI-FOOD PRODUCTS IN 2024 AND THEIR MAIN AREAS OF SPECIALIZATION*

Country	Main export item	Export volume, billion USD	Characteristics of competitive advantages
United States	Corn, soybeans, meat	176	High-tech agriculture, genetically improved varieties, precision farming
Brazil	Soybeans, corn, beef	164.4	Highest growth rates, vast land resources
European Union	Processed food products, dairy and meat products	235.4	Largest exporter of processed products; implementation of the CAP (Common Agricultural Policy)
Canada	Wheat, canola, beef	65	Consistent quality, exports of premium-grade grains
Argentina	Soybean meal, corn	45	A powerful oil and protein complex
Ukraine	Sunflower oil, wheat, corn	25	Global leader in the sunflower oil market
India	Basmati rice, spices, tea	45	Leader in global trade in rice and spices
Indonesia	Palm oil	25	The world's largest exporter of palm products
Thailand	Rice, seafood, tropical fruits	30	Well-developed aquaculture and fruit industry
New Zealand	Dairy products	28	One of the top exporters of dairy products

*Compiled based on sources: [29], [30], [31].

[28] Kudlaenko S., Yatsenko O., Lunova T., Iatsenko O., Sharuk T., Dendeberia D. (2025). Strategic management and improvement of national export support and promotion systems to ensure sustainable development. Financial and Credit Activity Problems of Theory and Practice, 4(63), 280–295. https://doi.org/10.55643/fcaptp.4.63.2025.4811

An analysis of the aggregated data presented in Table 1 reveals significant differentiation in the scale and structure of agri-food exports among the world's leading countries. The European Union's absolute leadership in terms of the volume of shipments in 2024 confirms the region's dominance in high-margin segments of processed products. The United States and Brazil constitute the second and third largest centers of global exports, demonstrating high growth rates in the grain, oilseed, and livestock sectors. Ukraine, Canada, Argentina, and Asian countries occupy strategic niches in the global market, particularly in the vegetable oil, grain, rice, and palm oil segments.

To clearly demonstrate the scale of disparities between countries and the concentration of global agricultural flows, Figure 1 presents a comparative analysis of the dynamics of agri-food export volumes for leading exporters in 2024.

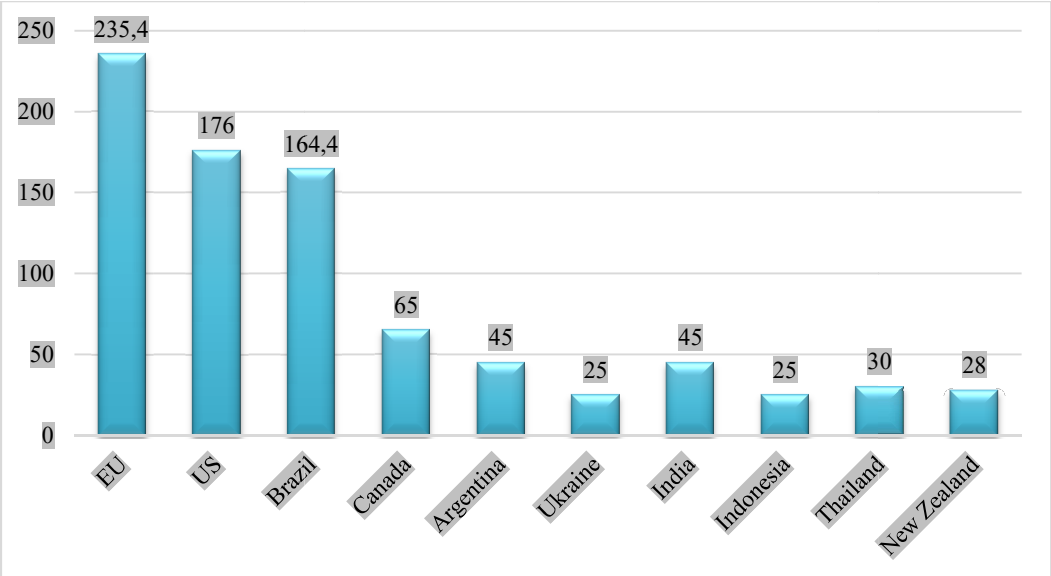

Fig. 1. Export volumes of leading agri-food exporting countries in 2024, in billions of U.S. dollars

This visualization allows us to clearly identify global leaders, assess each country's relative share in global supplies, and determine the degree of competitive advantage of individual countries within the structure of international agricultural trade.

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[29] WTO. World Trade Statistical Review 2024. Geneva: World Trade Organization, 2024. URL: https://www.wto.org

[30] FAO. FAOSTAT Statistical Database. Rome: Food and Agriculture Organization of the United Nations, 2024. URL: https://www.fao.org/faostat

[31] International Grains Council. Grain Market Report 2024. London: IGC, 2024. URL: https://www.igc.int

Regional architecture of global agri-food trade

For a comprehensive understanding of global patterns, it is important to move from analyzing national agricultural systems to assessing the regional architecture of global trade, as leading countries set the trajectories for the development not only of their own markets but also of regional clusters that shape the structural contours of international food flows.

The analysis shows that global trade in agri-food products is structured around clear regional specialization, determined by natural resource potential, technological modernization, logistics hubs, and the degree of integration into global markets. These regions form the core of the global food network and ensure the resilience of the world food system.

North America is one of the most powerful and technologically advanced centers of agricultural production, forming the core of global exports of high-tech products. Latin America plays a leading role in the supply of raw agricultural products, combining natural advantages with rapid modernization of the sector. Europe sets global standards for agricultural processing. Asia supplies the world with tropical products, seafood, and rice. Oceania is represented by highly efficient dairy and meat production systems. Africa, in turn, demonstrates a mixed model of participation and simultaneously serves as a promising future center of growth in food demand.

In light of this, it is important to quantitatively assess the distribution of global agricultural exports among the major macro-regions; to this end, Table 2 summarizes their share in global agri-food exports, allowing us to identify the scale and proportions of regional dominance in the global food system.

Table 2

REGIONAL SHARE OF GLOBAL AGRI-FOOD EXPORTS, per cent, 2024*

Region	Share in global exports of agri-food products, %
North America	16.5
Latin America and the Caribbean	17.5
Europe	39.5
Asia	14.0
Africa	3.5
Oceania	4.0
Rest of the world	5.0
Total	100

* Compiled based on sources: [32], [33], [34].

[32]WTO. World Trade Statistical Review 2024. Geneva: World Trade Organization, 2024. https://www.wto.org

Having analysing these indicators, it is advisable to examine the spatial structure of exports, as regional distribution is shaped by natural resource potential, technological specialization, and integration processes. The data in table 2 show that in 2024, global exports of agri-food products exhibit a clearly defined regional concentration. Europe holds the largest share (39.5 per cent), acting as a key exporter of processed products and high-value-added goods. Latin America and the Caribbean rank second (17.5 per cent), supplying the global market primarily with raw agricultural products—soybeans, corn, coffee, and meat. North America (16.5 per cent) and Asia (14 per cent) demonstrate a balanced export structure, combining both high-tech segments and primary production goods. Africa and Oceania, despite their smaller shares—3.5 per cent and 4 per cent, respectively—remain significant in specialized niches (cocoa, tea, dairy products, meat).

The visualization of the regional structure (Fig. 2) highlights the dominance of Europe and the Americas, while also demonstrating Asia's growing role as a production and logistics hub that is simultaneously a major food importer.

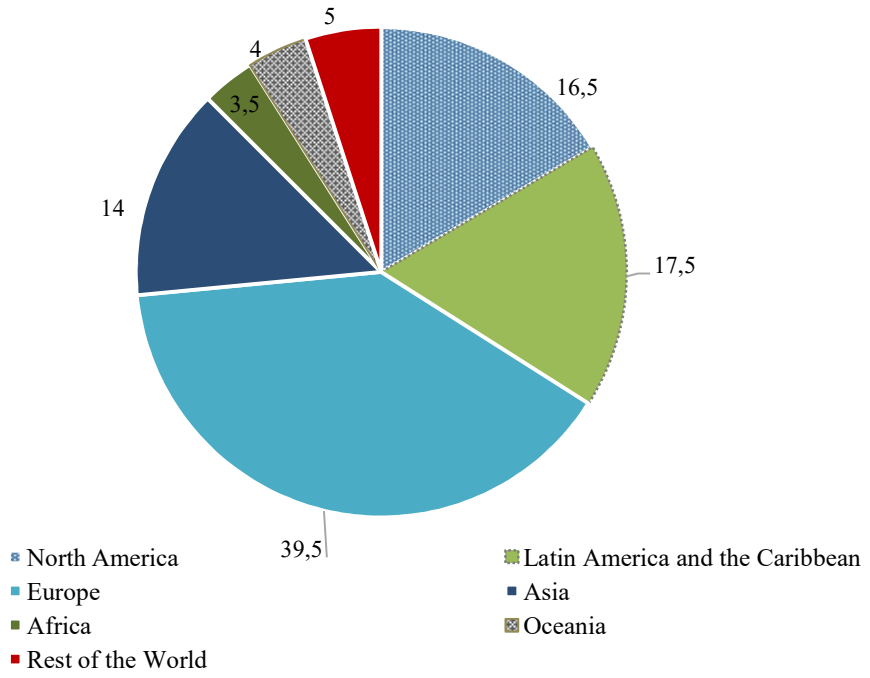

Fig. 2. Share of regions in global agri-food exports, 2024, per cent

[33]FAO. FAOSTAT Statistical Database. Rome: Food and Agriculture Organization of the United Nations, 2024. https://www.fao.org/faostat

[34]International Grains Council. Grain Market Report 2024. London: IGC, 2024. https://www.igc.int

This distribution indicates the formation of a polycentric agri-food trade system, where several regional clusters ensure the stability and diversification of global food flows.

Positioning of the regional economic integration groups in agri-food trade

Regional analysis simultaneously leads to a third, even deeper level of institutional generalization of economic integration blocs, which are becoming a key system-forming factor in modern agricultural trade. Unlike individual countries or groups of regions, integration blocs are not merely territorial but regulatory and institutional constructs that define the rules of the game for hundreds of millions of producers and consumers. It is these blocs that set regulatory and legal standards, harmonize agricultural policy, ensure a single market, and create opportunities to enhance competitiveness.

Therefore, moving on to an analysis of integration blocs is a logical final stage in a systematic examination of global agri-food trade, as it allows us to explore not only the geographical and structural configuration of production but also the institutional mechanisms, regulatory regimes, and economic logic behind the formation of transnational food flows. The EU, USMCA, MERCOSUR, ASEAN, and the African Union set the parameters of international agricultural policy, standardize trade, harmonize technical regulations, and ensure the functioning of integrated production and logistics systems. Their role increasingly shapes the architecture of the global market, as stable value chains, models of interstate cooperation, and mechanisms for certification and quality assurance are formed within these integration blocs—elements that cannot be replicated solely at the level of individual national economies.

Given the European Union's leading role in the global food system, it is important to examine the internal distribution of its agricultural exports. The data in Table 3 allow us to assess which EU countries form the core of the bloc's export potential and how specialization is distributed within the single market.

As shown in Table 3, EU agri-food exports are highly concentrated: over 60 per cent of the total volume is accounted for by six key economies, dominated by the Netherlands and France. This internal asymmetry confirms that integration associations not only form a single market but also reflect the specialization of individual member states, which determines the development trajectories of the entire bloc. The spatial differentiation of export volumes is clearly illustrated in Fig. 3, which shows the regional structure of EU agri-food exports in 2024. Thus, global trade in agri-food products takes shape as a multi-level system where countries with different models of agricultural production, regions with specialized food

flows, and integration blocs that set the rules of the global market interact[35]. Their mutual influence forms a complex, polycentric structure that is constantly changing under the influence of economic, technological, climatic, and geopolitical factors. It is precisely this multi-layered architecture that defines the current dynamics of global agricultural leadership and creates the foundation for further research on global food security.

Table 3

STRUCTURE OF AGRI-FOOD EXPORTS OF LEADING EUROPEAN UNION COUNTRIES, 2024*

EU Country	Agri-food exports, billion euros	Share of EU agricultural exports, %	Main product specialization
Netherlands	45.9	20.1	Vegetables, greenhouse produce, flowers, re-export of cocoa, coffee, and tropical products
France	27.5	12.0	Grains, wines, dairy products, meat
Germany	26.3	11.5	Meat, processed food products, beverages
Spain	22.8	10.0	Fruits and vegetables, olive oil, wines, seafood
Italy	21.8	9.5	Wines, olive oil, processed foods, confectionery
Poland	17.5	7.6	Poultry, dairy products, confectionery, grains, vegetables/fruits
Other EU countries	66.8	29.3	Mixed export structure
Total	228.6	100	

* Compiled based on sources: [36], [37], [38].

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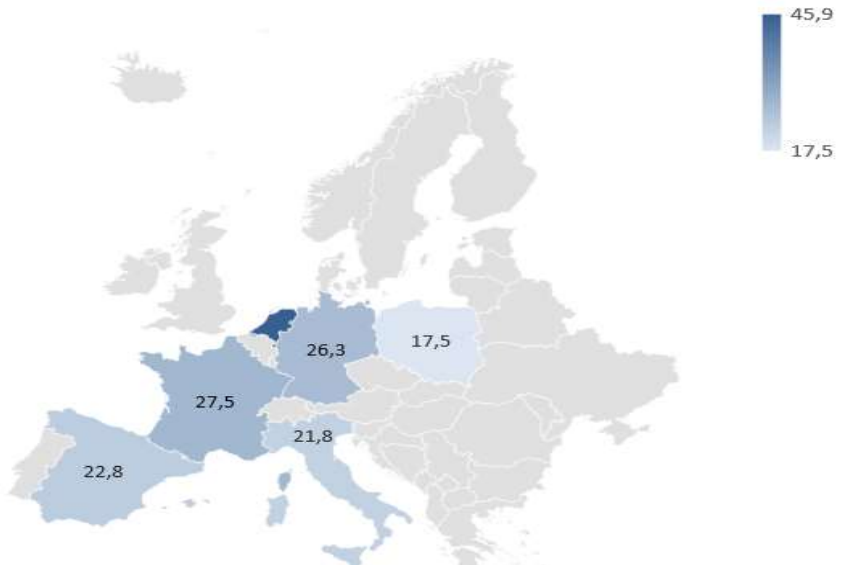

Fig. 3. Regional structure of EU agri-food exports, 2024 (bln EUR)

The transformation of global leadership in agri-food trade

To summarize the identified patterns of global agri-food trade, it is useful to visually represent the key trends shaping the transformation of global leadership. The current dynamics of international food flows are shaped by several systemic factors: the strengthening of the Global South's position, the growing importance of integration blocs, the restructuring of logistics routes, and the global market's transition to a model of regional agricultural clusters. The combination of these processes is illustrated in Figure 4, which summarizes the multilevel structure of global changes and demonstrates their interconnection.ï

The trends shown in Fig. 4 summarize the systemic shifts that define the current configuration of global agri-food trade. They demonstrate that global leadership increasingly depends not on the isolated advantages of individual states, but on the ability of regions and integration blocs to form sustainable cluster models, adapt to logistical and climatic risks, and develop high-tech production segments. Together, these factors are shaping a new architecture of the international agricultural market, within which countries of the Global South are increasing their influence, while traditional leaders are reorienting themselves toward innovative and processing-oriented development paths. It is precisely this transformation that determines the future dynamics of global food flows and outlines strategic challenges for global market participants.

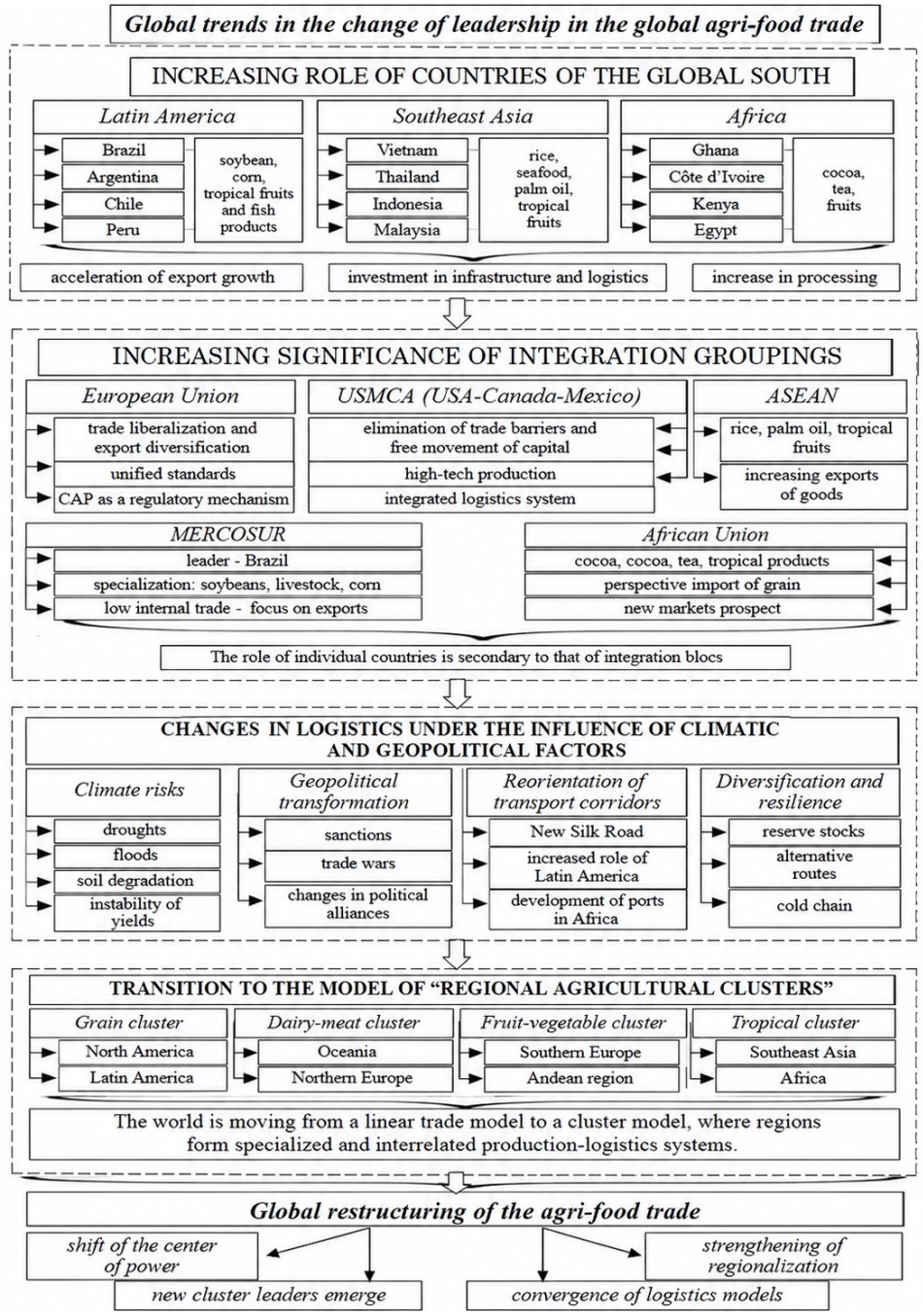

Fig. 4. Global trends in shifts in leadership in agricultural trade

Conclusions

Thus, global agri-food trade is becoming polycentric, shaped by the interaction of leading countries, regional clusters, and integration blocs. The strengthening of the Global South's position is accompanied by the stable leadership of the U.S., the EU, and Canada, which determine the technological and institutional parameters of the global market. Regional analysis confirmed a high concentration of exports in Europe and the American macro-region, while integration groups are strengthening the role of common standards and cooperative models. Logistical and climatic factors are driving the further transformation of global food flows, forming new centres of supply and demand. Ukraine maintains strategic positions in the grain and oilseed segment, serving as a key element of global food security. The combination of identified trends reflects a transition to a multidimensional model of agricultural leadership, which will determine the development trajectories of the global agri-food market in the near future.

* This article was translated from its original in Ukrainian.

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