



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 8-18

Article's History: Received: 13.02.2024 Revised: 10.05.2024 Accepted: 28.06.2024

DOI: 10.69587/sdc/2.2024.08

UDC 94:[655.4:355.48](470:477)

Book publishing in Ukraine in the context of the Russian-Ukrainian war (2014-2024): Main development trends

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Abstract. Since 2014, Russia has been conducting a hybrid war against Ukraine, aiming to keep it within its sphere of influence. This aggression encompasses not only military, economic, and diplomatic aspects but also an informational dimension, particularly in the regulation of the book market. Following the full-scale invasion, the protection of the Ukrainian language has become a factor in national security. Beyond market pressure, Russia has waged war on Ukrainian books at a much deeper level: assassinating authors, deliberately destroying libraries, and eradicating Ukrainian literature from occupied territories. Therefore, the development and analysis of the publishing industry are of utmost importance and require in-depth study. This article aimed to investigate the key trends influencing the development of Ukraine's publishing industry between 2014 and 2024. The methodology of the study is based on historical, retrospective, logical, chronological, and analytical research methods. It has been established that a significant achievement in the publishing sector is the shift in readers' preferences towards Ukrainian-language books. As a result, the number of new publications has grown, with trends such as children's educational literature, motivational or business books, and foreign bestsellers emerging. It was found that during the war with Russia and the economic decline in 2014-2015, the book market experienced a downturn. Between 2016 and 2019, some recovery was observed, with a broader genre range and an increased share of Ukrainian-language literature in the market. In 2020, due to the economic crisis caused by the pandemic, the publishing industry faced reductions. By 2021, the decline slowed, and the number of titles increased. After 24 February 2022, publishers and printing houses ceased operations. However, within a few months, most publishers managed to resume work, establish new logistics routes, and secure funding. The findings of this study can be used for further exploration of the scientific issues outlined in the article, as well as serve as a foundation for the development and teaching of relevant courses in higher education institutions

Keywords: publishing activity; publishing sector; book trade; literature; language

Suggested Citation:

Molotkina, V., & Molotkina, Yu. (2024). Book publishing in Ukraine in the context of the Russian-Ukrainian war (2014-2024): Main development trends. *Society. Document. Communication*, 9(2), 8-18. doi: 10.69587/sdc/2.2024.08.



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Introduction

The analysis of publishing is essential for understanding its current state, examining the evolution of global book market trends, and studying their development in line with a country's socio-economic conditions. Based on the results of an empirical study conducted with eleven German commercial and professional publishers from January to May 2019 using a theoretically developed system of organisational flexibility factors, Z. Velagić (2022) identified areas in which publishers must adapt to a dynamic environment and thus benefit from developing organisational flexibility.

C. Guren *et al.* (2021) investigating the impact of COVID-19 on the publishing sector, concluded that its effects were both subtle and profound. According to the authors' empirical data, most professional publishers achieved significant revenue in 2020, yet sales by category were highly uneven, reflecting short-term societal realities rather than structural changes in the industry. Publishers in the higher education sector, which had faced a prolonged period of decline, experienced a favourable year due to high demand for digital educational content catering to students of various age groups. Academic publishers, whose budgets are adjusted annually rather than monthly, weathered 2020 with minimal impact but expressed concerns about the budgets of their clients for the following year.

Various factors, beyond the perception of cultural and economic value, that influence the selection of books for translation and publication in English were studied by V.M.C. De Capua & P. Henningsgaard (2021). Using a combination of literature review, data collection on the publication of translated books for young readers, and interviews with industry professionals, the authors identified three main factors influencing the selection of books for translation and publication: global language hierarchy, narrative structures, and networks. A. Gudina & V. Grigas (2022) analysed legal and illegal access to e-books in Lithuanian, a smaller language market, to better understand the digital transformation of books in Lithuania. The researchers found that only 10-25% of legal e-books are available illegally, with the remainder consisting of "self-published" content created by users of illegal websites, primarily through scanning and recognising printed books. They identified four main channels for accessing legal e-books: online bookstores, libraries, subscription platforms, and academic online bookstores. It was determined that the choice of legal e-books available for reading in Lithuanian is limited, while illegal channels offer a wide variety of e-books.

Z. Velagić (2022) focused on the relationships between modern society and publishers, which shape the foundation for the potential of publishing mediation of book content. The study examined the positive and negative implications of IT companies' involvement in book production and distribution, as well as the role of the publisher, who remains the key guarantor of published

content quality. L. Price (2022) explored the theme of the fan writer as a self-publisher, examining changing concepts of authorship, book formats, and literary practices, which are significant for both fan studies and library and information science. Therefore, the issues of developing the publishing industry, examining its current state, identifying the causes of its unsatisfactory condition, and ensuring state support are pressing and require the close attention of researchers.

According to contemporary scholars and bibliologists, the primary challenges of the Ukrainian book market include: difficulties in establishing publishing as a full-fledged business; the need to organise an effective book distribution system; the lack of reliable statistical and analytical data on the market's condition; the necessity to fill all market niches with domestic book products; and ensuring the competitiveness of Ukrainian books and their entry into the global market. Additionally, promoting reading in Ukraine demands particular attention from researchers and professionals. An area ripe for theoretical exploration is the activation of publishers' communication strategies to promote book products among potential readers (Horbenko, 2019). The authors of this article aimed to outline the specific features of Ukrainian publishing under the conditions of the Russian Federation's military aggression and identify the key trends influencing the development of publishing in Ukraine during the period from 2014 to 2024. To achieve this goal, the following objectives were set: to provide a systematic overview of Ukrainian publishing; to illustrate the formation of an independent and viable Ukrainian book market; and to identify the communication challenges faced by Ukrainian publishers at this stage of publishing development.

Literature Review

The publishing activities in Ukraine have been the subject of research by numerous scholars and practitioners in the fields of publishing and library science. The monograph edited by H.V. Horbenko (2019) was devoted to the publishing industry in Ukraine, focusing on relevant and potential innovative development paths for publishing companies, insights from the startup industry, innovations in book design and artistic decoration, the introduction of new publishing trends (e.g., inclusive literature), and the growth of consistently demanded and profitable sectors such as children's books and educational literature. Contemporary trends in Ukrainian publishing, including its general characteristics, quantitative and qualitative indicators, output volumes, linguistic and territorial characteristics, were examined in the works of S. Buryak (2021), M. Senchenko & S. Buryak (2021), and A. Vorontsova & H. Cherniak (2022). External factors influencing the state of Ukrainian publishing and quantitative modelling of publishing characteristics in Ukraine from 1991 to 2017 have been studied in depth

(Horobets, 2018), along with the dynamics of Ukrainian publishing between 2015 and 2018 (Skrypchuk, 2019). T. Yezhyzhanska (2023), who traced the dynamics of the Ukrainian book market under systemic crisis conditions, concluded that the crisis caused by the pandemic, lockdowns, and large-scale war affected both major and small-scale producers in the industry. The study of Ukrainian publishers during crises sheds light on the communication challenges they face and highlights the anti-crisis communication strategies that can be employed to overcome the crisis and ensure effective operations.

S. Hirik (2022), in their research, examined the overall situation in Ukrainian publishing since the country's independence. Researchers agree that new offerings from publishers and the patriotic upsurge amidst the hybrid war have revitalised the Ukrainian book market. The thematic and genre diversity of domestic books has expanded, the share of Ukrainian-language literature on the market has increased, and the number of translated books has grown. However, given the low purchasing power of the population, expecting a breakthrough remains unrealistic. O. Sukhorukova (2016), investigating the issue of the competitiveness of the publishing sector in the global market and identifying negative trends in the development of Ukrainian publishing, concluded that the main vectors of publishing development in developed countries are as follows: slowing growth rates in the volume of printed products; the creation of a multi-tier competitive structure within the industry; the expansion of international media associations; and the introduction of comprehensive organisational, technological, and product innovations.

In Ukraine, publishing associations are absent, and the publishing sector consists solely of medium and small business entities. Ukrainian publishing companies are actively working in specific thematic segments of the book publishing market and implementing projects related to the use of informational resources. Several works by domestic scholars are devoted to the economic challenges of the publishing industry in Ukraine. For instance, Ya. Kotliarevskiy *et al.* (2017) systematised and analysed information regarding state support for the publishing industry in Ukraine and the EU, highlighting issues associated with the introduction of a new mechanism for oversight and control over state subsidies for economic entities that arose from changes in national legislation. However, the issue of the current state of publishing and its development trends amidst the Russian-Ukrainian war has not yet received adequate attention in modern scientific discourse.

Materials and Methods

Statistical data on the production of printed materials were sourced from the scientific-practical journal *Bulletin of the Book Chamber* (Onyshchuk & Tatarinova, 2021; Vorontsova & Cherniak, 2022), which is published systematically to inform the public about aspects of the

development of the domestic publishing industry. Analytics on global and Ukrainian publishing, book market reviews, and international practices in this field are presented on the website of the cultural and publishing project *Chytomo* (Zahorui & Khmelovska, 2022). The research employed general scientific, interdisciplinary, general historical, and specialised methods. Specifically, historical and logical methods facilitated the identification of development processes in Ukrainian publishing, the interrelation of socio-political events, and the necessity of their study in specific historical contexts. Comparative-historical and chronological methods were used to reconstruct the history of publishing development, the establishment and evolution of the legal framework, among others. Additionally, the comparative-historical method was utilised to identify similarities and differences among publishers with various ownership forms. This method enables the determination of the main directions, forms, and methods of publishers' activities at different stages of their development. Analytical methods allowed for the identification of certain patterns in publishers' operations. The critical-constructive method was applied to analyse modern interpretations of the interaction between publishing and political realities.

Using causal analysis methods, the study identified the dependence of the state of domestic publishing on the influence of internal and external factors, societal democratisation, and global processes. The descriptive method was applied to define the specific features of publishing processes. The statistical method was employed to account for quantitative indicators of publishing production and product sales in both quantitative and qualitative dimensions, as well as in thematic and linguistic aspects. The study of book repertoires was also supported by typological and thematic-problem methods. The problem-chronological method not only determined the technological aspects of the research but also shaped its structure, enabling the delineation of components, each examined in chronological order and its inherent dynamics. This method revealed the key patterns of publishing network development across various periods, considering content changes and thematic issues in their dialectical interconnection. Theoretical generalisation of the interaction between the whole and its parts, such as organisational and structural aspects of publishing, was also undertaken.

The historical and retrospective methods played a significant role, allowing a gradual transition from the present to the past to identify the most characteristic features, trends, and patterns in the publishing sector's development. The study also applied methods of source and quantitative analysis (to examine quantitative indicators of various types and significance), which enabled a comprehensive elucidation of the research problem to achieve the set objectives. The integration of these research methods helped avoid subjective perspectives, ensured scientific reliability in the findings, and facilitated

a logical and consistent presentation of the material, leading to a more profound reconstruction of the essence of historical processes.

■ Results and Discussion

Reconsideration of humanitarian policy principles in publishing

Since 2014, Ukraine has been revising its humanitarian policy foundations, particularly intensifying efforts to regulate the book market. Prior to 2013, the Ukrainian book market was predominantly oriented toward selling products imported from Russia. According to the Ukrainian Publishers and Booksellers Association, Russian books constituted 73-75% of the market, whereas Ukrainian publications accounted for only 20-23% at that time (De-occupation of the Book Market..., 2023). Data from the Ukrainian Book Chamber reveals that books vital to Ukraine's cultural and informational space were mostly printed in micro-runs, rarely exceeding 1,000 copies, typically ranging between 300-500. As a result, they wielded minimal influence on public opinion and functioned weakly as a social institution, exacerbated by the lack of proper promotion (Kuzmuk, 2016). This situation affected both Ukrainian publishers and readers, who had to settle for a limited selection of Ukrainian-language books, posing a threat to Ukraine's national interests (Skrypchuk, 2019).

During 2014-2015, negative trends in Ukraine's book market persisted and even worsened due to the war with Russia. The number of published books nearly halved, and the number of retail outlets also declined. Key factors deteriorating the market included inflation and a 25.4% drop in Ukrainians' purchasing power (Sukhorukova, 2016). Publishing volumes fell to 2009-2010 levels, with 21,796 titles totalling 55 million copies in 2014, and 19,958 titles totalling 36 million copies in 2015 – this being the lowest overall print volume since 2000 (Hirik, 2022). Simultaneously, societal processes during 2014-2015 fostered Ukrainian self-identity, state-building, and the need to protect both territory and informational products (Yezhyzhanska, 2023). The patriotic sentiment boosted demand for Ukrainian-language books, a segment that has since shown stable growth. Ukrainian publishers strengthened their market position through active promotion of new publications, primarily via bookstore networks and book fairs. This led to an increase in the proportion of books purchased in organised retail channels, with a corresponding decline in those bought at markets or informal stalls. This trend was partly due to reduced imports of Russian books. In 2015, the value of Russian book imports was nearly \$3.7 million, compared to \$23 million in 2013. However, these official figures exclude the shadow market, which remained significant (Skrypchuk, 2019). The content of Russian books infiltrating the Ukrainian market raised significant concerns for humanitarian security. Among them were examples of anti-Ukrainian propaganda that

distorted history, called for the destruction of Ukrainian statehood, and portrayed resistance against Ukraine in a positive light. This necessitated the urgent implementation of legal and other mechanisms to prevent the dissemination of such books in Ukraine (Horbenko, 2019). This restriction did not apply to Russian-language books published in Ukraine. Consequently, the ban failed to achieve the desired results, although it did complicate logistics and supply chains for Russian publishers (De-occupation of the Book Market..., 2023). Legislation led to Russian books entering the Ukrainian market primarily through smuggling (Horbenko, 2019).

By 2016, Ukraine's book market began showing signs of revival, with an expanding range of Ukrainian-language printed products. In 2016, the volume of book production reached 21,330 titles with a total circulation of 49 million copies (Hirik, 2022), equating to slightly more than one book per capita. By contrast, EU countries publish 6-8 books per capita annually. Approximately 70% of all books published in Ukraine were in Ukrainian, while Russian-language publications decreased by 54%. These trends have continued. Entire segments that previously did not exist in Ukrainian publishing – such as business, motivational, popular science, science fiction, fantasy, comics, and graphic novels – emerged (Horobets, 2018). Ukrainian publishers refined their marketing strategies, driving qualitative changes in the book market structure. One key development was the rise of Ukrainian non-fiction, including popular science literature addressing contemporary issues. Another significant shift was the growth of translated literature, which nearly doubled between 2015 and 2017 in both titles and print runs. This "boom" in translated literature and non-fiction was primarily attributed to the reduction of Russian imports and changing reader preferences, with an increased interest in Western and global cultural contexts and technologies. Publishers responded to these shifts (Skrypchuk, 2019).

Popular non-fiction works by foreign authors, business literature, and translations of global bestsellers gained the most traction in Ukraine. In 2017, for instance, Nash Format published 22,500 copies of Ayn Rand's "Atlas Shrugged" trilogy. E.L. James's "Fifty Shades of Grey" trilogy also achieved immense popularity, although print figures remain unknown. These trends were influenced not only by authorship but also by reading formats – traditional, electronic, and audio (Horobets, 2018). In addition to producing new books – including works by emerging Ukrainian authors and translations of modern literary bestsellers – publishers began reprinting classic literature (Orlova, 2019). Some publishers sought to define distinct niches. For example, Balance Business Books specialises in quality business literature, *Nash Format* combines business and fiction, Fontan Kazok focuses on children's books, while ArtHuss and Rodovid produce popular art publications. However, most Ukrainian publishers remain generalists.

Notably, Ukraine lacks publishers exclusively dedicated to niches like gastronomic literature. Efforts are also underway to fill gaps in young adult literature, predominantly by translating global bestsellers. Overall, the Ukrainian book market remains insufficiently structured by themes (Horbenko, 2019).

The issue of regulating the illicit distribution of printed materials in Ukraine from Russia continues to be a pertinent concern. Since March 2018, a practice has been implemented in Ukraine involving the confiscation of unauthorised publications and the imposition of fines on book smugglers and distributors. In 2018, 27 violation reports were issued for breaches of the rules on distributing publishing products, resulting in fines totalling UAH 1,005.210. However, it must be acknowledged that efforts to formalise the book market were largely ineffective. These measures were primarily relevant in regions of Ukraine with higher proportions of Russian-speaking populations and a correspondingly higher demand for Russian-language books – namely, in the eastern and southern parts of the country (Skrypchuk, 2019). On the other hand, Russian publishers adapted to the new circumstances by actively establishing subsidiary companies in Ukraine. Prepress work was carried out in Russia, while the Ukrainian subsidiaries acquired the printing rights and effectively operated as printing facilities, publishing books through specially registered local branches. This arrangement allowed Russia to remain the primary beneficiary of profits while incurring lower costs for its part of the process. Through this mechanism, Russian entities continued their ideological expansion and maintained a strong presence in Ukraine's book market. Subsidiaries of major Russian publishing houses, such as *Eksmo*, *Azbuka-Attikus*, and *Alpina Publisher*, operated successfully in Ukraine for an extended period (De-occupation of the book market..., 2023).

Access to products from Ukrainian publishers in the regions remains problematic. The only comprehensive bookstore chain, *Knyharnya Ye*, operated exclusively in cities such as Kyiv, Kharkiv, Lviv, Ivano-Frankivsk, Vinnytsia, Lutsk, Volodymyr-Volynskyy, Ternopil, Dnipro, Rivne, Khmelnytskyi, and Sumy. This meant that not all regional centres were covered by this network, let alone smaller towns or villages, where access to books was available primarily through online platforms and postal services. These distribution channels not only made books more accessible but also helped save costs for buyers due to lower prices (Horbenko, 2019). In Ukraine's book industry, online platforms have emerged as a response to the digital economy. Major platforms such as Yakaboo, Bookzone, Kniging, and Buklya provide better accessibility to printed books for Ukrainian consumers. Through flexible pricing policies, dynamic updates to catalogues, easy product searches, and efficient delivery systems, this segment of book sales continues to grow. For instance, Ukraine's largest online bookstore, Yakaboo.ua, guarantees free delivery of selected books to

any branch of the Ukrposhta postal network chosen by the customer (Horobets, 2018).

Researchers recognise book fairs as the primary promotional tool for books in Ukraine. These events combine vibrant marketing efforts with moderate pricing strategies. The largest fairs, such as the Book Arsenal in Kyiv (held in spring) and the Publishers' Forum in Lviv (held in September), are the most significant cultural events in the country, showcasing almost the entire range of books published in Ukraine. Smaller sales exhibitions in Dnipro, Zaporizhzhia, and Cherkasy also play their part. If in 2017 the volume of publishing output reached 22,047 titles with a total circulation of 45 million copies, in 2018 it increased to 22,612 titles with a circulation of 47 million copies, and by 2019, it rose to 24,416 titles with a circulation of 61 million – figures comparable to the record levels of 2012 (Hirik, 2022). Ukrainian publishing is becoming increasingly visible globally. In 2019, a Ukrainian book was recognised as one of the best inclusive children's books in the world, while the *Mystetskyi Arsenal* received the International Excellence Award in the Literary Festival category at the 48th London Book Fair (Orlova, 2019). Overall, the years 2016–2019, spanning the period after the first active phase of the Russian-Ukrainian war and before the COVID-19 pandemic, can be considered the most successful for domestic publishing (Onyshchuk & Tatarinova, 2021). However, the economic crisis caused by the pandemic and quarantine restrictions negatively impacted the development of Ukraine's book market.

Challenges for book publishing during the COVID-19 pandemic

The pandemic led to the closure of bookstores, halts in the operations of publishing houses, and interruptions in printing services. In 2020, 343 publishing houses and 48 bookstores in Ukraine were forced to cease operations (Konstantinova, 2021). The crisis resulted in a decline in book production to 18,967 titles with a total circulation of 42 million copies. This figure represents the lowest number of titles since 2008, though the decline in circulation did not reach the critical levels observed in 2015. According to the Ukrainian Association of Publishers and Booksellers, compared to 2019, the volume of production by title decreased by 23%, and total circulation dropped by 34% (De-occupation of the book market..., 2023). Despite the reduced output of books during quarantine, an increasing number of consumers began purchasing and reading books. While in 2014, the share of book buyers was 31%, it doubled to 62% in the first months of 2020. The proportion of consumers purchasing printed books rose from 30% in 2014 to 59% in 2020, while the share of electronic book buyers increased from 3% to 51% (Yezhyzhanska, 2023).

In 2020, priority was given to educational, scientific, and literary works. Among thematic categories, socially significant publications dominated the total output of

printed editions. Educational and methodological literature led in both the number of titles and circulation, accounting for 3,843 printed items with a circulation of 12,267.3 thousand copies, representing 27.7% of all titles and 60.7% of the total circulation. Compared to 2019, the number of educational publications decreased by 2,560 titles (40%), and the circulation declined by 17,877.4 thousand copies (59.3%) (Buryak, 2021; Senchenko & Buryak, 2021).

Books and brochures in Ukrainian totalled 10,604 titles with a circulation of 16,671.5 thousand copies, which constituted 76.5% of all titles and 82.5% of the total circulation. Compared to the previous year, the number of Ukrainian-language titles fell by 4,199 (28.4%), and circulation decreased by 26,120.5 thousand copies (61%). Russian-language publications amounted to 1,724 titles with a circulation of 1,814.1 thousand copies, representing 12.4% of titles and 9.0% of total circulation. Compared to 2019, Russian-language titles decreased by 1,126 (39.5%), and circulation dropped by 2,646.8 thousand copies (59.3%) (Buryak, 2021). In 2021, the rate of decline slowed, and the industry began to recover: "The market revived, the assortment expanded, and the number of titles increased" (Yezhyzhanska, 2023). Educational, scientific, and literary works remained predominant in the book stream. Among thematic categories, socially significant publications continued to lead. Educational and methodological literature accounted for 6,573 printed items with a circulation of 31,639.6 thousand copies, representing 31.2% of all titles and 71.4% of the total circulation. Compared to 2020, the number of titles grew by 520 (8.6%), and circulation increased by 3,137.9 thousand copies (11%).

Books in Ukrainian comprised 2,288 titles with a circulation of 4,504.3 thousand copies, making up 81.3% of all titles and 86.4% of total circulation. Russian-language publications included 449 titles with a circulation of 564.6 thousand copies, constituting 16.0% of titles and 10.8% of total circulation (Vorontsova & Cherniak, 2022). The implementation of the "eSupport" state programme at the end of 2021 significantly boosted the book market dynamics, tripling activity compared to the same period the previous year, as consumers actively spent their so-called "COVID thousand" on books. Over two months, the programme generated UAH 1.2 billion in sales for Ukrainian bookstores and publishers (pre-pandemic, the entire market was valued at UAH 2.5 billion) (Melnyk, 2022). This provided substantial support to the publishing sector, which, after months of operating under quarantine restrictions, experienced a surge in customer activity (ICIP: Ukrainians spent a billion hryvnias..., n.d.). According to the director of the Ukrainian Book Institute, "Without this support, retail sales would have nearly halved" (Koval, 2023). The primary challenge for publishers was meeting the enormous demand from consumers: the "eSupport" programme increased sales three- to fivefold, creating an atypical situation where

books became scarce. Publishers were unprepared for the surge, struggling to handle the excessive volume of orders (Morozov, 2022). This programme provided a strong impetus for industry development and allowed many publishers to settle debts and plan for the future. However, the full-scale Russian invasion on 24 February 2022 shattered all plans, disrupting the industry's progress and undermining the recovery achieved during the previous year.

The functioning of the book publishing industry after a full-scale invasion

At the beginning of the full-scale invasion, the printing houses stopped working completely, and the production and shipment of finished products ceased. It was dangerous not only to produce books but also to transport them. At the beginning of the invasion, the Kharkiv publishing houses Vivat and Folio lost not only their offices and some of their employees, who were evacuated to other places, but also their printing houses (Lysenko, 2023). The question of the protection of Ukrainian book publishing has become more acute than ever. It has also become a national security factor. In addition to market pressure, the Russians began to wage a war against Ukrainian books on a completely different level: killing authors, deliberately destroying libraries, and eradicating Ukrainian literature from the occupied territories (De-occupation of the book market..., 2023). By mid-April, 22% of Ukrainian publishing houses (ASAA, BOOKSHA, Blym-Blym, Vihola, Vydavnytstvo Zhupanskoho, Zhorzh, 4mamas, Molfar, Parasolia, PEGAS, Ranok, Tezy, Folio, Chas Maistriv, Osnova Group, and others) had been damaged as a result of the hostilities. Most of the damaged buildings were located in Kharkiv. The Blim-Blim, KLO, and YIZHAK publishing houses were practically unable to operate due to the constant shelling. Abrykos, BOOKSHA, 4mamas, Oleksandr Savchuk Publisher, DIPA, Mamino, Smoloskyp, and the Osnova Group ceased operations (Survey: Offices and warehouses..., 2022). At the beginning of June 2022, only 39% of publishing houses were operating, and 22% had partially or completely destroyed warehouses and offices (Cherkasets, 2022).

However, most publishing houses were able to resume operations and secure their employees, solve problems with paper supplies, move warehouses away from the combat zone, establish other logistical routes, and find funding for these processes (Yezhyzhanska, 2023). In particular, large publishing houses such as Lviv's Vydavnytstvo Staroho Leva or Kharkiv's Folio and Vivat were able to resume operations in April 2022, a month and a half after the start of the invasion. Due to the shutdown of the Kharkiv (Unisoft and Globus) and Kyiv (Konvi) printing houses at the beginning of the full-scale invasion, Kyiv's Vydavnytstvo Laboratoria was only able to release its first books in August. Kharkiv's Unisoft printing house resumed full operations in June 2022. Smaller

publishers: Motorny Ravlyk and Parasolka also resumed operations in the summer of 2022 (Lysenko, 2023). Abuk, Bilka, Bukrek, Vydavnytstvo Anetty Antonenko, Vydavnytstvo Bukrain, Vydavnytstvo Staroho Leva, Kalamar, Knigolav, Kompas, Nash Format, Choven, Rodovid, and Yakaboo Publishing continue to operate fully (Survey: Offices and warehouses..., 2022). By mid-2022, both large and small publishers were printing books. But for a while, printing facilities from Kharkiv and Kyiv moved to the west. Publishers began to print books in printing houses in Drohobych (Kolo printing house) and Kamianets-Podilskyi (Ruta printing house) (Lysenko, 2023). By 14 June 2022, the number of books published in Ukraine had decreased by 52% compared to the same period of the previous year. However, the share of Ukrainian-language books and brochures increased by 15%. In 2021 the share of Ukrainian-language publications was 79%, and in 2022 it was 94% (Melnyk, 2022).

According to the Book Chamber, 9,691 titles of books and brochures were published in Ukraine in 2022, with a circulation of 11 million 704.2 copies, which is 2-4 times less than in previous years (Semeniuta, 2023). Of all books published in the country in 2022, 82% were in Ukrainian – 7,147 titles. This is 54% less than in 2021. The circulation of Ukrainian-language books decreased by 38%. In 2022, 714 books in Russian were published in Ukraine, 32% less than in 2021. In other languages, 855 books were published, almost half as many as in 2021, with circulation falling by 19% (Melnyk, 2023). As for retail book sales, in the first few months of the full-scale invasion, sales plummeted (almost to zero). In particular, Yakaboo, the largest book retailer, did not sell a single paper book in March, only e-books, as logistics were blocked and the warehouse was under fire since 24 February; by 15 April they sold 57,500 books, and in May – almost 84,000 books (Melnyk, 2022). Vydavnytstvo Zhupanskoho, Nora-Druk, Rodovid, Komora, and others have partially resumed sales, and publishers such as A-BA-BA-HA-LA-MA-GA, Vydavnytstvo Anetty Antonenkoe, Smoloskyp, Yakaboo Publishing, and others have even increased sales (Zahorui & Khmelovska, 2022; Yezhyzhanska, 2023). The price of a book has roughly doubled due to the increase in the price and shortage of paper, complicated logistics, and the rising cost of printing services (Kruhlov, 2022).

By the end of 2022, most publishers observed a gradual increase in interest in reading (Yezhyzhanska, 2023). The domestic book market experienced a revival driven by readers' widespread rejection of Russian-language literature and a growing interest in works by Ukrainian authors. According to the State Committee for Television and Radio Broadcasting, 178 business entities and individual entrepreneurs expressed interest in engaging in publishing and book distribution in Ukraine in 2022 (The number of Russian-language books published in Ukraine decreased by almost 60%..., 2022). Furthermore, Ukrainian publishers expanded to international markets, active-

ly participating in global events, seeking new partners, selling rights, and presenting books in foreign bookstores (Zahorui & Khmelovska, 2022). Foreign partners have also supported Ukrainian publishers, purchasing rights and books, organising printing, and distributing products from Ukrainian publishers. In some instances, foreign partners raised funds and provided grants to assist publishers. For example, the Warsaw-based Universal Reading Foundation allocated \$150,000 among 51 publishing houses. Additionally, 20 publishers received €30,000 each from the German Publishers and Booksellers Association. These programmes were actively facilitated by the Ukrainian Publishers and Booksellers Association in collaboration with the Ukrainian Book Institute. However, the Ukrainian publishing industry still lacks a unified strategy for recovery (Cherkasets, 2022).

While publishers experienced a degree of recovery, printing houses continued to face the aftermath of destruction, staff evacuations, and winter power outages. Paper books were released with delays from their scheduled sale dates. The most severely affected were large printing facilities, predominantly located in the Kharkiv region. Publishers formed queues at printing houses to complete their planned releases (Lysenko, 2023). Sustaining the publishing industry during the war, as with the entertainment industry as a whole, has been challenging without state support. The development of the book market requires effective advertising, promotion of new releases, and public outreach. The mission of promoting reading within the country must be undertaken not only by publishers but also by state institutions and civil society organisations. Quota systems and temporary subsidies proved insufficient to protect Ukrainian publishers. More systematic and decisive measures were needed to limit the aggressor state's access to the Ukrainian market. Consequently, several legislative initiatives were introduced to stimulate the publishing industry and completely ban Russian imports (De-occupation of the book market..., 2023).

The Verkhovna Rada passed Law of Ukraine No. 2313-IX "On Amendments to Certain Laws of Ukraine Concerning the Stimulation of Domestic Publishing and Book Distribution Development" (2022). This law aimed to support book distributors by reimbursing the cost of real estate rental for premises used as specialised bookstores (The Book Chamber of Ukraine: in 2023, more than 90% of publications were printed in Ukrainian, 2023; Yarema, 2023). However, the law requiring the state to reimburse bookstore rental costs and provide annual book purchase certificates to Ukrainian citizens was signed by the President but was not funded and therefore remains non-operational (The UIK's position on the provision of certificates and subsidies has been clarified. Ukrainian Book Institute, 2023). Additionally, the Verkhovna Rada adopted another "book law", Law of Ukraine No. 2309-IX "On Amendments to Certain Laws of Ukraine on Establishing Restrictions on the

Import and Distribution of Publishing Products Relating to the Aggressor State, the Republic of Belarus and the Temporarily Occupied Territories of Ukraine" (2022). The goal of this legislation is to reduce the volume of Russian-language literature on the Ukrainian market and eliminate a powerful competitor to Ukrainian publishers. The Russian book market, traditionally supported by private funds and state budget allocations, has long been a tool for spreading Russian cultural influence (Zelenchuk, 2023).

The law awaited the President's signature for almost a year and, thanks to efforts by the publishing community and stakeholders, finally came into effect on 25 June 2023 (De-occupation of the book market. How Russian publishers are still making money in Ukraine, 2023). However, the 2023 state budget did not allocate funds for implementing plans to provide reading certificates or subsidies to bookstores (The UIK's position on the provision of certificates and subsidies has been clarified, 2023). On 11 January 2023, the Ukrainian Book Institute publicly announced its inability to implement programmes for bookstore subsidies and book vouchers due to a lack of funding. Nonetheless, on 3 March 2023, the Cabinet of Ministers of Ukraine approved the "Reading as a Life Strategy" strategy, set to run until 2032. This strategy optimistically aims to increase the number of books per capita, expand the network of bookstores, update library collections, and engage more children in reading. On 12 September 2023, the Ukrainian Book Institute published an appeal on its website requesting the Ukrainian government to ensure funding for the Institute's activities in 2024. The appeal emphasised that the Institute had not received financing for implementing the primary priorities outlined in the Reading Development Strategy for 2032 (Zelenchuk, 2023).

This is not the first attempt to declare state support for Ukraine's publishing sector; there have been others, but progress has rarely gone beyond strategy adoption, with laws providing only partial protection for the Ukrainian market. Understandably, during wartime, increasing publishing output and expanding reading opportunities for the population are not high funding priorities. However, this raises the question of whether it is appropriate for state authorities to regularly adopt regulatory acts that require significant public funds for implementation. Under such circumstances, publishers must rely on their own resources and skills to promote their books to readers and popularise reading in general (Yezhyzhanska, 2023). The Ukrainian Book Institute has also intensified its efforts, including initiatives to replace Soviet-era Russian-language library collections with new publications (Lysenko, 2023). Additionally, the surge in national consciousness driven by the large-scale Russian aggression has contributed to "cleansing" the publishing sector: libraries increasingly removed Russian books from their collections, bookstores withdrew them from their shelves, and municipal services

assisted readers in discarding such books from their home libraries. Demand for works by Ukrainian authors has risen, with many people choosing not to read in Russian or buy books published by the aggressor state as a matter of principle. Bookstore chains independently decided to stop selling Russian-made literature.

According to the State Committee for Television and Radio Broadcasting, the number of registered publishers has also increased. In 2023, 302 publishing entities were added to the State Register of Publishers, Producers, and Distributors of Publishing Products, including 270 new ones. Additionally, 32 players in the publishing market renewed their certificates. In contrast, 293 publishers were registered in 2021, and only 152 in 2022. In 2023, five certificates were revoked due to the termination of publishers' activities (Yarema, 2023). According to O. Koval (2023), there were 560 publishers in Ukraine in 2023, but only around 250 were active. Furthermore, there are approximately 130 bookstores in the country. Ukrainian publishers are actively adapting to changes, implementing modern technologies, experimenting with presentation methods, and exploring new ways to engage consumers. The number of new publishers is also growing, bringing freshness and innovation to the industry. These new players often specialise in niche topics, experimenting with formats and sales methods, helping to diversify the market and expand readers' options. According to the Book Chamber of Ukraine, more than 6.5 million copies of books and brochures were printed in 2023, most of which were in Ukrainian (The Book Chamber of Ukraine: in 2023, more than 90% of publications were printed in Ukrainian, 2023). Compared to the previous year, book publishing in Ukraine increased by 73% in the number of titles (printed units) and by 203% in circulation (Yarema, 2023).

Foreign literature remains the most popular, accounting for over 80% of sales, as noted by Oleksandr Krasovytsky, Director General of Folio Publishing House. However, works by Ukrainian authors are also gaining popularity. Besides classics, readers are increasingly interested in contemporary writers. According to the Ukrainian Book Institute, the most popular book in 2023 was "I See You're Interested in Darkness" by Ilarion Pavlyuk, translated from Russian by Viktoriya Stakh and published by Vydavnytstvo Staroho Leva. It attracted attention from both Kyiv bookstores and nationwide platforms. Other popular titles included "The Ladder" by Eugenia Kuznetsova (Vydavnytstvo Staroho Leva), "New Dark Ages: Colony" by Max Kidruk (Borodaty Tamarin), and "Dances with Bones" by Andriy Semianykov (Vikhola). According to the Ukrainian Book Institute, not only prose but also poetry, popular science publications, and journalism enjoyed considerable popularity (Book Publishing in Ukraine: Definition and Prospects, 2024). Consumers of books tend to rally around publishing brands and show support for their favourite authors and publishers (Yezhyzhanska, 2023).

The current state of Ukrainian publishing is dynamic and evolving. The publishing sector is undergoing a period of transformation and adaptation to new conditions, including digitalisation and changing reader preferences. As of February 2024, the Ukrainian Book Institute reported that the book market included approximately 300 publishers represented in book trade, around 600 retail sellers (bookstores and kiosks), approximately 50 online sellers, and an annual market volume of ~2-3 billion UAH.

This study addresses the issue of disseminating and accessing quality cultural content in Ukraine's market, the prospects for developing a publishing strategy based on works that meet the needs of a wide readership (thus ensuring publisher profitability without increasing printing costs), and the potential for providing a significant contribution to Ukraine's cultural and informational landscape. Further research is needed on the functioning of the publishing sector during crises, a topic explored by T. Yezhzhanska (2023), who examined the dynamics of the Ukrainian book market during challenging times and the communication difficulties publishers face during critical periods. The researcher argues that crises have become a common phenomenon in modern society, triggered by various destructive factors such as political and economic instability, the COVID-19 pandemic, and Russia's full-scale war against Ukraine. Over recent years, the country's publishing industry has faced multiple crises: economic challenges, a reading crisis, the pandemic, and war. For the domestic book market, these challenges have significant and systemic consequences, pushing publishers to the brink of survival.

The issue of counterfeit product distribution remains contentious. As O. Horobets (2018) aptly notes, book piracy – namely, the free downloading of unlicensed versions of printed materials – has become widespread due to the population's low purchasing power and the rapid development of electronic technologies. In a market economy, all work, including creative authorship, should be remunerated. However, amid unstable state policies on copyright and an uncontrolled internet environment, an increasing number of readers turn to such "libraries". This trend, in turn, reduces sales not only in traditional bookstores but also in online shops. In addition to piracy, the researcher highlights several factors that directly impact sales, both in Ukraine and globally, including: the economic situation at macro and micro levels, government policies, innovative technologies, consumer purchasing power, market trends, and alternative content sources.

H. Skrypchuk (2019), in analysing the development of publishing in Ukraine during the years of independence, also draws attention to the market for electronic books (including audiobooks), which is a particularly problematic segment of the Ukrainian book market. According to the researcher, the spread of internet piracy – where free content is readily available – dissuades Ukrainian publishers from offering electronic versions of books. While agreeing with the author's conclusions, it is worth

emphasising that piracy and the lack of a culture of paying for digital content have not only technological but also social roots. These include: the general economic crisis, which has led to a decline in the population's purchasing power; the extraordinarily high production costs for domestic publishing, rendering it uncompetitive and limiting print runs and the range of publications; the absence of a nationwide book distribution network; reductions in and insufficient funding for libraries; a decline in the number of bookstores across administrative and territorial units; high postal and transportation costs; unreasonably high utility and rental payments; minimal foreign investment in the publishing sector; the underdevelopment of the domestic internet market for selling publishing products; and the lack of comprehensive informational support for bringing Ukrainian books to the domestic market. These issues collectively hinder the growth and sustainability of Ukraine's publishing industry, exacerbating existing challenges in adapting to modern market demands.

Conclusions

The war with Russia and the economic downturn in 2014-2015 led to a contraction of the book market in Ukraine. However, from 2016 to 2020, there was a notable revival. The share of literature published in Ukrainian increased, and the thematic and genre diversity of Ukrainian books expanded. Restrictions on imports significantly reduced the volume of Russian-language literature, and the Ukrainian book market ceased to operate as an extension of the Russian market. This shift was not only the result of sanctions imposed on certain Russian publications but also reflected a change in readers' perspectives. In response, many publishers began placing greater emphasis on print quality, translations, and collaboration with domestic authors. Consequently, the number of new publications in Ukraine increased, and translation projects emerged more rapidly. Ukrainian publishers began filling market niches with high-quality products offered at affordable prices. New trends emerged in the book market, including children's educational literature, non-fiction, motivational and business literature, and foreign bestsellers. Additionally, there was an increase in events and activities in the publishing sector, such as literary festivals, book exhibitions, fairs, book presentations, author meet-and-greets, and autograph sessions.

In response to the demands of discerning readers, publishers improved the quality of their books. They took more risks and paid greater attention to visual content, with a particular focus on creative design and illustrations in children's literature. The publishing market saw the emergence of new players who combined publishing with art, bringing fresh perspectives to the industry. For the first time since Ukraine's independence, Ukrainian publishers became market leaders. The volume of book publishing in 2019 was nearly a record high for the industry. However, the economic crisis caused by the

pandemic, quarantine restrictions, prolonged bookstore closures, and months of remote work negatively impacted the development of the Ukrainian book market, leading to a decline in publishing. In 2021, the rate of decline slowed, the range of available books expanded, and the number of titles increased. The challenges brought about by the full-scale war affected every publishing house. Printing operations ceased, production halted, and the distribution of finished products was disrupted. Nevertheless, most publishers managed to resume operations, ensure the safety of their employees, address paper shortages, relocate warehouses to safe locations, restore logistics, and secure funding for these processes. Moreover, new publishing houses emerged, new books were released, and various online and offline events, attracting thousands of participants, were organised. The widespread rejection of Russian-language books and the growing interest in works by Ukrainian authors contributed to the revitalisation of the domestic book market.

To ensure the growth of book publishing and distribution and to produce competitive products for

the market, as revealed by this study, it is essential to adjust state policy in this area. This includes updating the legal framework of the sector to address contemporary challenges, taking measures to combat online piracy that threatens the country's informational security, increasing funding for central book institutions, and creating and promoting programmes to popularise reading among the population. Further studies should analyse the impact of external factors on book publishing in Ukraine, examine the material and technical conditions of publishing houses, and assess the professional and staffing capacity of the industry. These aspects serve as a basis for continued investigation into the issue.

■ Acknowledgements

Sincere gratitude is extended to the Hryhorii Skovoroda University in Pereiaslav for providing access to the Scopus and Web of Science scientometric databases.

■ Conflict of Interest

None.

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Книговидання в Україні в умовах російсько-української війни (2014-2024 рр.): основні тенденції розвитку

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Анотація. Росія веде гібридну війну проти України з 2014 року з метою не допустити її виходу зі сфери свого впливу. Ця агресія має не лише військову, економічну та дипломатичну складову, а й інформаційну, зокрема в питанні регулювання книжкового ринку. Після повномасштабного вторгнення питання захисту українського слова стало одним із чинників національної безпеки. Адже, окрім ринкового тиску, нині РФ веде війну проти української книги на зовсім іншому рівні: вбиває авторів, цілеспрямовано знищує бібліотеки та викорінює українську літературу з окупованих територій. Тому питання розвитку книговидавничої справи, вивчення її стану є актуальними і потребують поглибленого вивчення. У цій статті автори мали на меті дослідити основні тенденції, що вплинули на розвиток книговидавничої справи в Україні в 2014-2024 рр. Методологія статті ґрунтується на використанні історичного, ретроспективного, логічного, хронологічного, аналітичного методів наукового дослідження. Встановлено, що важливим досягненням книговидавничої галузі стало зміщення читацьких інтересів у бік україномовної книги. Як наслідок, збільшилася кількість нових видань, з'являються такі книжкові тренди, як дитяча розвиваюча література, мотиваційна чи бізнес-література, іноземні бестселери. З'ясовано, що через війну з РФ та економічний спад в країні у 2014-2015 рр. книжковий ринок зазнав занепаду. У 2016-2019 рр. спостерігалось певне пожвавлення, розширився жанровий спектр книжок, збільшилася частка україномовної літератури на ринку. У 2020 р. через економічну кризу, спричинену пандемією, відбулося скорочення книговидання. У 2021 р. темпи падіння сповільнилися, кількість назв збільшилася. Після 24 лютого 2024 р. видавництва та друкарні припинили роботу. Проте за декілька місяців більшості видавництв вдалося відновити роботу, налагодити нові логістичні маршрути, знайти фінансування. Результати цієї розвідки можуть бути використані для подальшого розроблення наукової проблематики, окресленої в статті, а також слугувати основою для розробки та викладання відповідних курсів у закладах вищої освіти

Ключові слова: видавнича діяльність; книговидавничий сектор; книжкова торгівля; література; мова