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Ukraine's Antitrust Enforcement in Wartime: What AMCU's 2025 Results and 2026 Priorities Mean in Practice

On 22 January 2026, the Antimonopoly Committee of Ukraine (AMCU) simultaneously approved its Report on the implementation of the 2025 priorities and its enforcement and policy priorities for 2026. Taken together, these documents provide unusually concrete insight into how Ukraine's competition authority operates under wartime conditions — and where enforcement risk is crystallizing for businesses.

1. Enforcement in 2025: Sector-Specific and Case-Driven

The AMCU's 2025 enforcement activity demonstrates a deliberate shift away from abstract advocacy toward targeted, sector-specific intervention, including dominance cases, cartel enforcement, and corrective action in digital markets.

In the electricity sector, the AMCU adopted a decision finding abuse of a dominant position, imposing a fine of UAH 8.9 million and ordering the elimination of the infringement's effects. A second dominance investigation was launched in March 2025, accompanied by continued sectoral inquiries.

In port infrastructure markets, the AMCU fined an operator UAH 28.5 million for imposing economically unjustified tariffs. A separate operator was fined UAH 6.6 million. Additional proceedings were initiated concerning discriminatory pricing, tying of services, and the application of unequal conditions to equivalent transactions.

2. Digital Platforms: Enforcement Through Recommendations

Rather than relying exclusively on fines, the AMCU actively employed binding recommendations to correct distortions in platform-based markets.

Notably, the AMCU issued recommendations to the Main Service Centre of the Ministry of Internal Affairs to eliminate advantages granted to the state-owned enterprise INFOTECH in the market for preparation for theoretical driver examinations. These recommendations were implemented.

In the ride-sharing sector, the AMCU ensured that BlaBlaCar discontinued economically unjustified service fees and eliminated legal uncertainty regarding consumer refunds. Proceedings were also initiated concerning potential infringements linked to the Kyiv Digital municipal platform.

3. Pharmaceuticals as the Enforcement Epicentre

Pharmaceutical markets clearly represent the AMCU's primary enforcement focus.

In 2025, the AMCU imposed a landmark fine of UAH 4.8 billion on BaDM and Optima-Farm, Ltd for anticompetitive concerted practices consisting of parallel and economically wholesale distribution unjustified pricing of medicinal products between March 2020 and December 2023.

Beyond this case, the AMCU issued compliance recommendations to 160 manufacturers and importers and 13 distributor-importers. In October 2025, it also launched proceedings against five of the largest pharmacy chains for suspected coordinated conduct.

4. Public Procurement and Reconstruction-Driven Risk

Public procurement enforcement remained intense in 2025, particularly in areas critical to national security and reconstruction.

The AMCU adopted five cartel decisions in defence and security procurement (total fines of UAH 91.8 million), five cartel decisions in medical procurement (UAH 73.5 million), and nine cartel decisions in construction and reconstruction works (UAH 55 million).

5. State Aid: From Suspension to Structured Return

Although state aid control remains formally suspended under martial law, 2025 was substantively devoted to preparation for its restoration.

The AMCU developed compatibility criteria across nine sectors, supported draft legislation restoring state aid control with wartime adaptations, and

advanced Ukraine's alignment with EU and OECD competition frameworks, including completion of the OECD Competition Review.

6. 2026 Priorities: Precision Rather Than Expansion

The AMCU's 2026 priorities emphasise continuity and precision rather than expansion. They explicitly target fuel markets, port services, digital platforms, essential consumer goods, pharmaceuticals, utilities, and donor-funded or reconstruction-related procurement.

The 2026 agenda also includes adoption of an updated methodology for market definition and dominance assessment, second stage of the continued reform of competition legislation, and the gradual resumption of state aid monitoring in sectors such as decarbonisation, energy efficiency, innovation, maritime transport, housing utilities, and culture.

Conclusion

Ukraine can no longer be regarded as a low-enforcement or transitional competition jurisdiction. Despite wartime conditions, the AMCU is pursuing structurally significant cases, imposing substantial fines, and aligning its enforcement architecture with EU standards.

For international businesses and their advisers, competition compliance in Ukraine now requires the same level of attention as in established EU enforcement jurisdictions — particularly in pharmaceuticals, infrastructure, digital platforms, and reconstruction-related projects.

Oleksandr Aleksyeyenko

Partner

NOBLES

7/11 Khreschatyk str., 01001 Kyiv / Ukraine

M +380 67 5106611

o.aleksyeyenko@nobles-law.com

For further information, please refer to www.nobles-law.com.