# Outlook for Ukrainian agricultural market

**2025**

Ministry of
Agrarian Policy and
Food of Ukraine

Dear readers,

We have systematised information that will help our international and European partners better understand the structure and volume of Ukrainian agriculture.

This report demonstrates the actual production volumes of the Ukrainian agricultural sector and debunks the myths that Ukraine can "overfill" international markets, including the EU.

Predictability, clarity and openness in relations with our international partners, including the European Union, are the keys to our shared prosperity. I believe that this report will become a helpful tool for increasing transparency and improving understanding of the state of Ukraine's agricultural sector during the war.

Thank you to everyone who contributed to the creation of this important document. Together, we are forming a solid foundation for further developing our agricultural sector and Ukraine's integration into world markets.

In these difficult times for the world, Ukraine continues to demonstrate that its agricultural sector remains a reliable food supplier and an essential element of global food security.

Sincerely,
Vitaly Koval
Minister of Agrarian Policy and Food of Ukraine

Report completed in January 2025 by UCAB based on the data provided by the Ministry of Agrarian Policy and Food of Ukraine.



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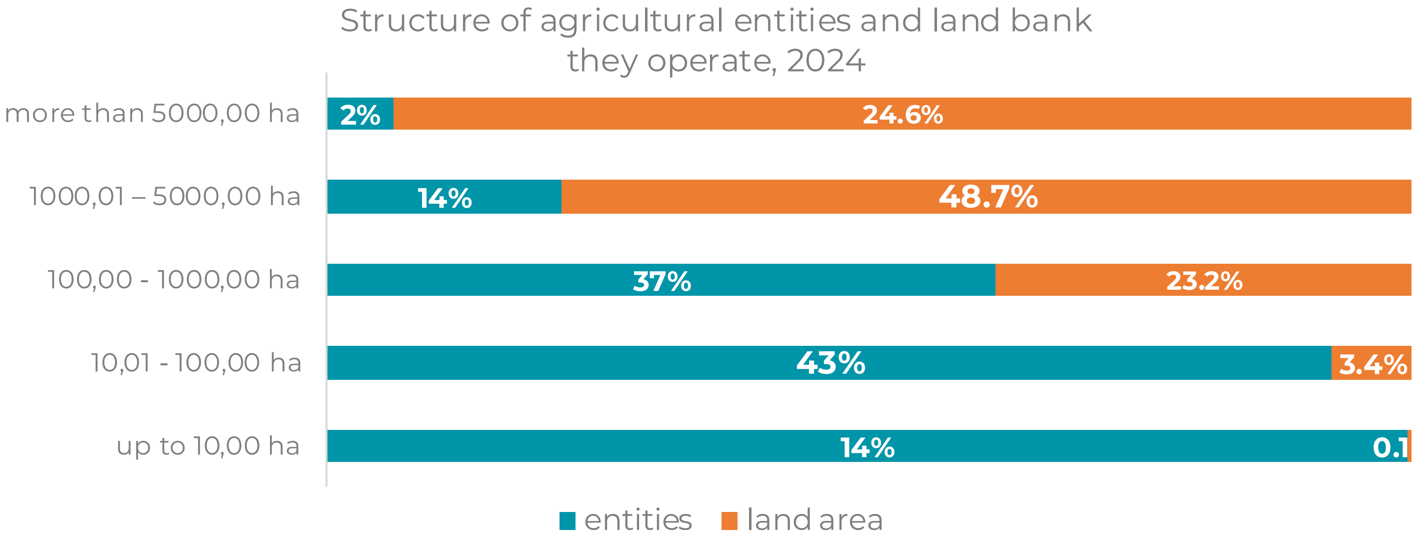
# CONTENT

# HIGHLIGHTS

- In 2024, the agricultural sector generated 59,3% ($24,7 bln) of foreign exchange earnings from the export of goods from Ukraine. In 2021, this indicator was 40.7% ($27.7 bln);
- The EU's share of agri-food exports from Ukraine remains critical for the Ukrainian agricultural sector — 52%. Since the beginning of Russia's full-scale war against Ukraine, the EU's share of agri-food exports has not been lower than 50% due to challenges in sea logistics hampering access to traditional third-country markets;
- The current structure of the Ukrainian agricultural sector has been significantly shaped by the legacy of the Soviet mode of agricultural production, as well as its later adaptation to the challenges and opportunities of cultivating such large areas of arable land;
- Today's Ukrainian agricultural sector represents a community of agricultural producers of different sizes, ranging from farmers that operate several ha to companies with a land bank of thousands of ha under cultivation;
- In 2024, Ukrainian agricultural producers sowed 23,2 mln ha, out of which agricultural enterprises sowed 17 mln ha;




- The evolution of the Ukrainian agricultural sector spurred sectoral specialisation among operators depending on the land area under cultivation: large enterprises make up only 2% of the agricultural sector, while they are responsible for 15% of the total volume of agricultural products and about 50% of food industry products. Small and medium-sized agricultural enterprises produce the rest;
- As the leasing of private-owned individual land plots by agricultural companies is the most widespread form of economic relationship in Ukraine's agricultural sector, agricultural enterprises provide financial support to hundreds of thousands of landowners, who, in the vast majority, live in rural areas;
- According to KSE, as of February 2024, the full-scale invasion caused the Ukrainian agri sector more than $80 bln in direct damages and losses: the total value of destroyed assets is $10.3 bln; lost income for agricultural producers, and increased production costs amounted to $69.8 bln.

# AGRICULTURE IN UKRAINE

## ROLE IN UKRAINIAN ECONOMY

Agricultural exports in 2024 reached

**59.3% OR $24.7 BLN**

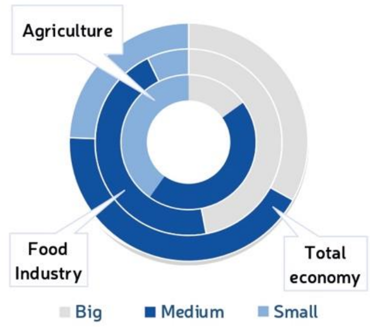
compared to **40.7%** or **$27.7 BLN** in 2021

Agricultural production in 2023 amounted to

**17.8% OR ₴1,681.9 BLN**

in total production value

Share of SME in 2023 reached




**66.4% OR ₴1,112.0 BLN**

in total production value

Source: SSSU, MAPF

## ROLE IN WORLD AGRICULTURE IN 2024

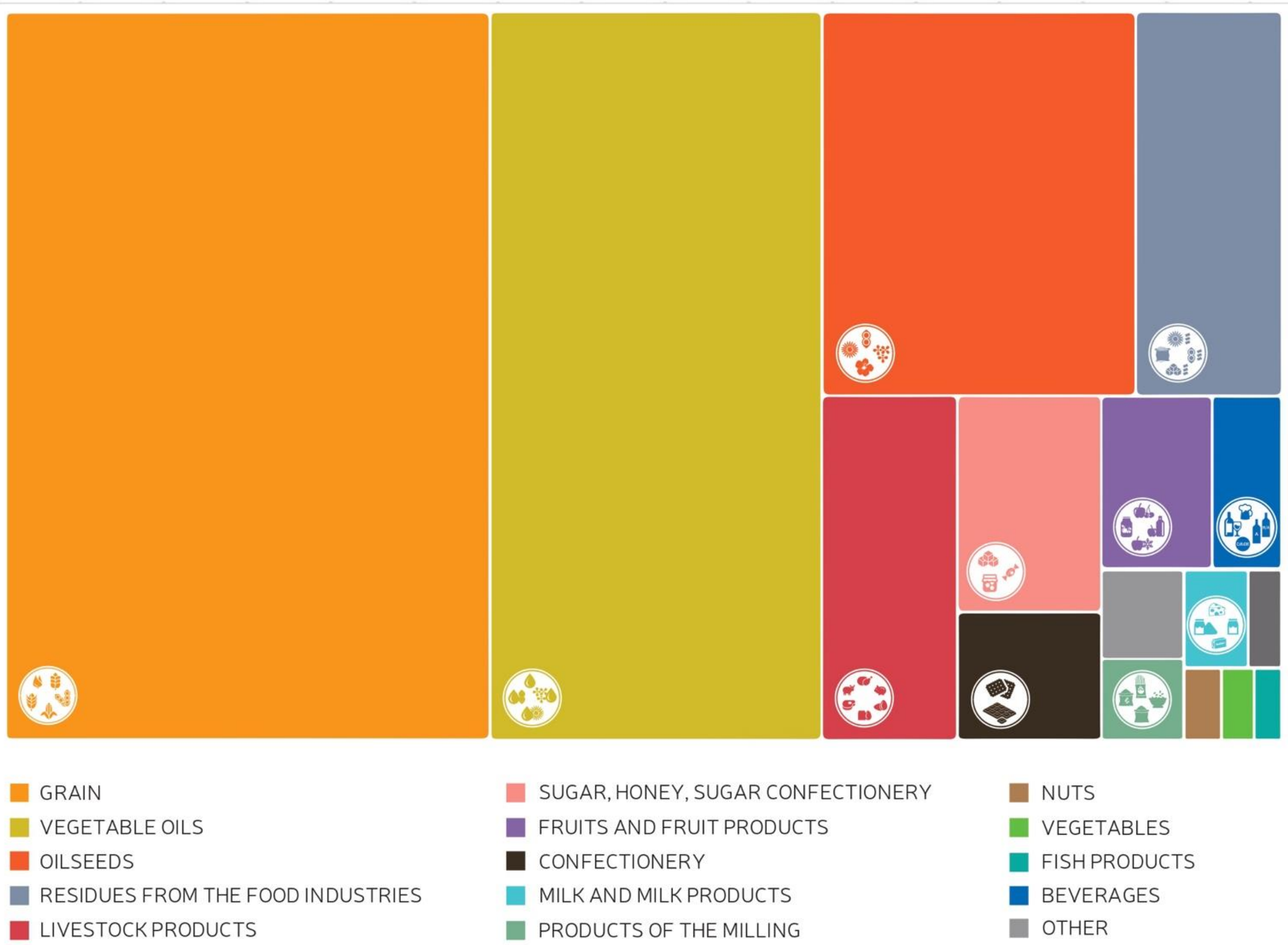
EXPORT EARNINGS

| | Export, mln $ | Production | Export |
|---|---|---|---|
| sunflower oil | 5,117 | #2 | #1 |
| corn | 5,071 | #7 | #4 |
| wheat | 3,735 | #9 | #6 |
| rapeseed | 1,850 | #7 | #3 |
| soybeans | 1,340 | #9 | #6 |
| sunflower meal | 1,029 | #2 | #1 |
| poultry | 960 | #19 | #6 |
| barley | 557 | #7 | #5 |
| white sugar | 420 | #18 | #11 |
| soybean oil | 316 | #19 | #8 |
| soybean meal | 304 | #19 | #11 |
| rapeseed oil | 239 | #15 | #7 |
| wallnuts | 185 | #5 | #4 |
| powdered milk, cream | 74 | #13 | #10 |
| beef | 73 | #20 | #18 |
| cheese | 54 | #12 | #9 |
| butter | 49 | #13 | #7 |
| apples | 21 | #9 | #14 |

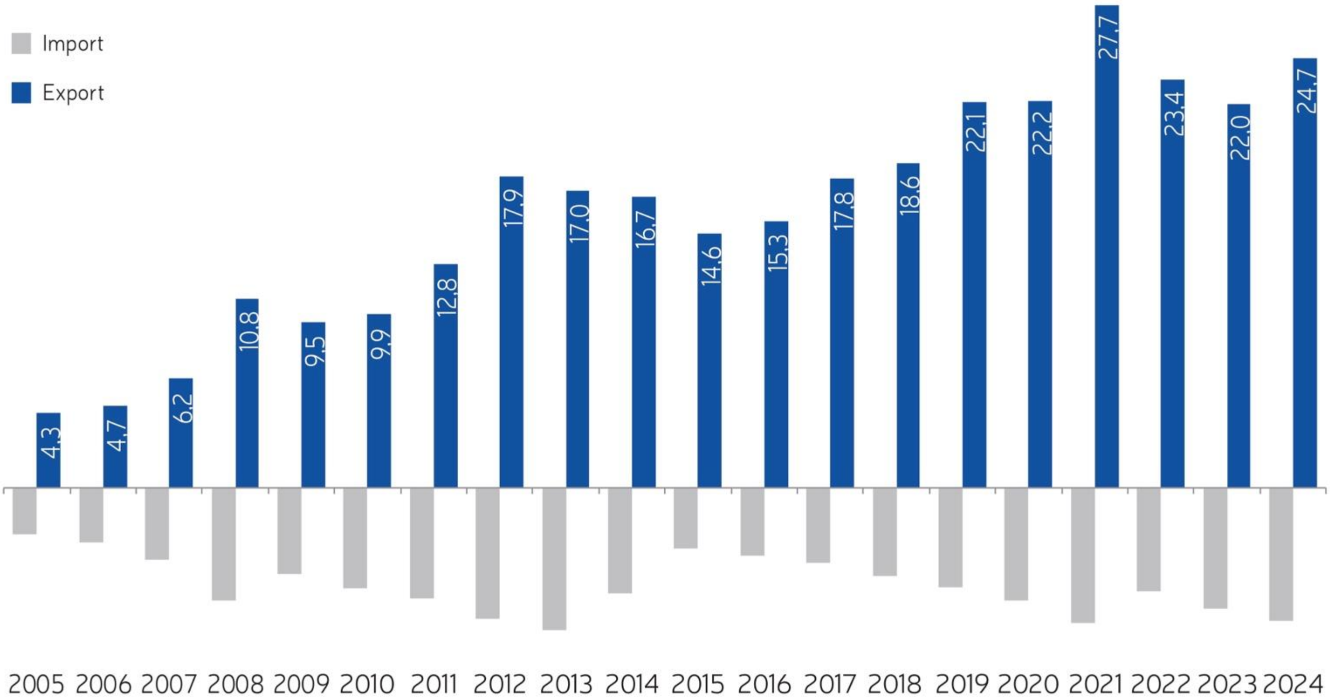
Source: USDA, rank by natural indicators

# DYNAMICS AND STRUCTURE OF AGRICULTURAL TRADE, BLN $

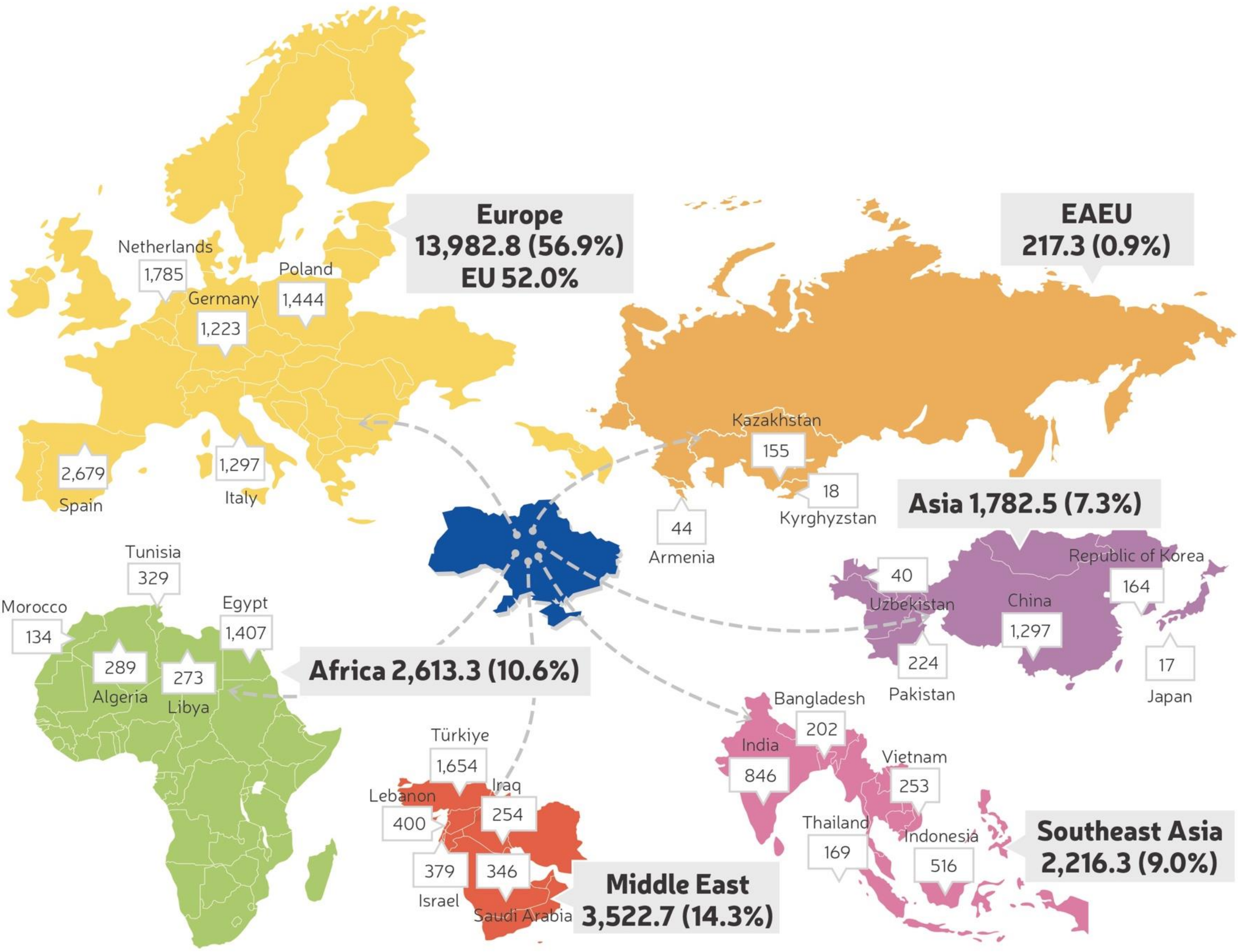
## STRUCTURE OF TRADE IN 2024



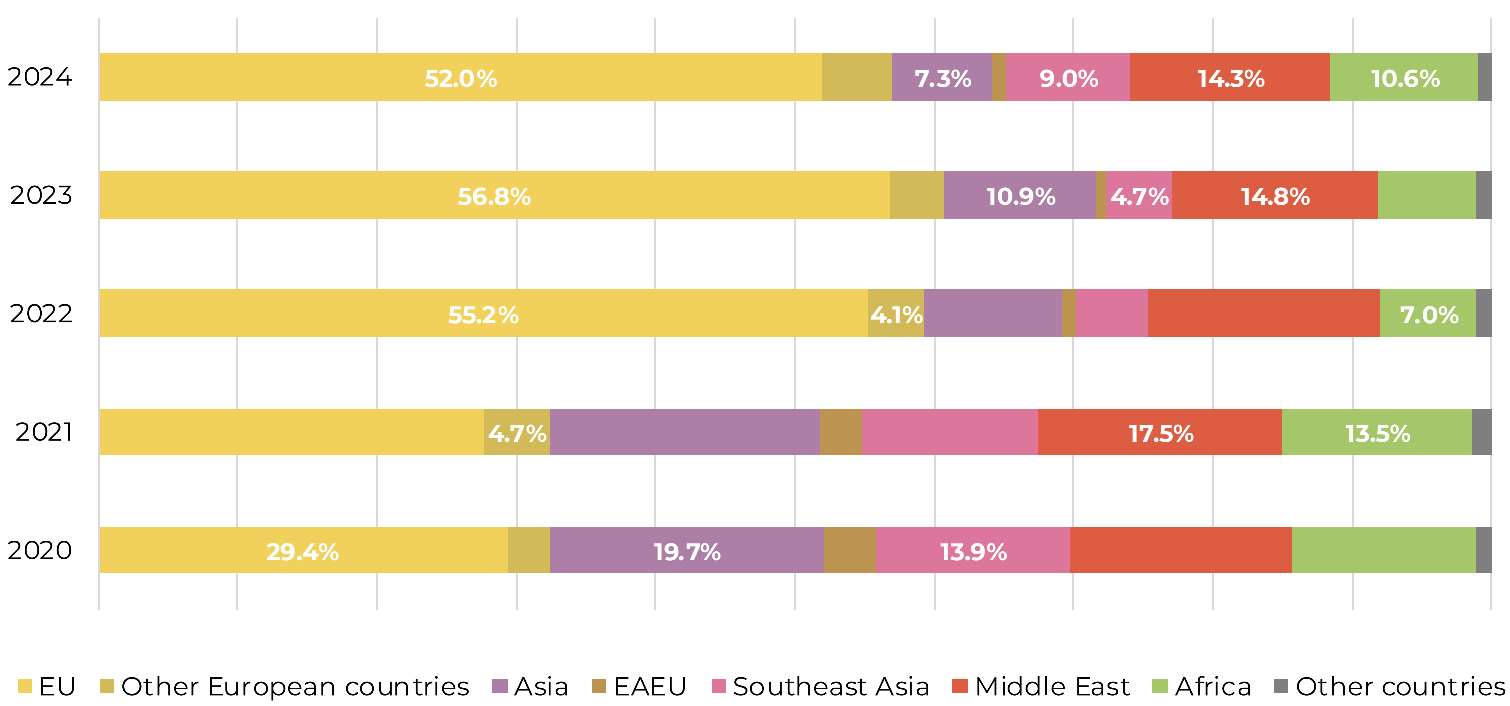

## DYNAMICS OF TRADE, BLN $



# MAJOR IMPORTERS OF UKRAINIAN PRODUCTS 2024, MLN $

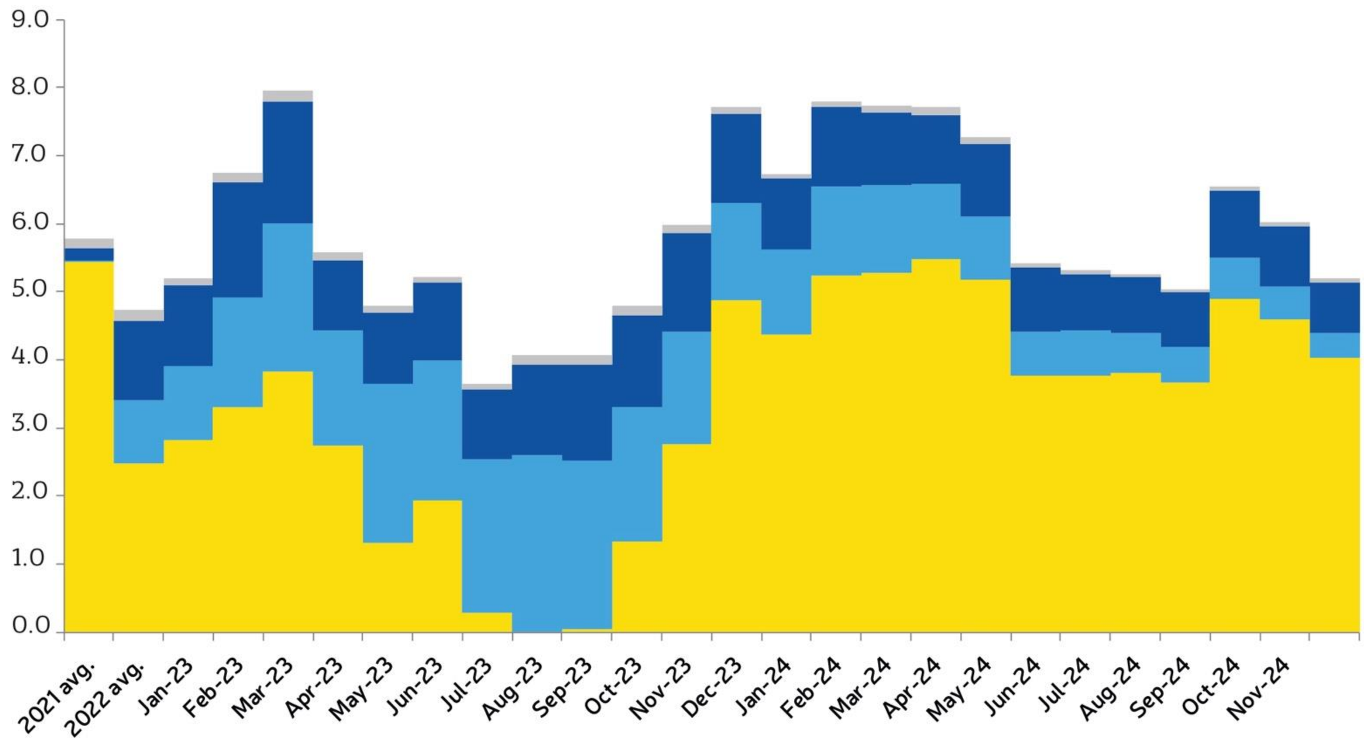



## EXPORT DESTINATIONS OVER THE YEARS

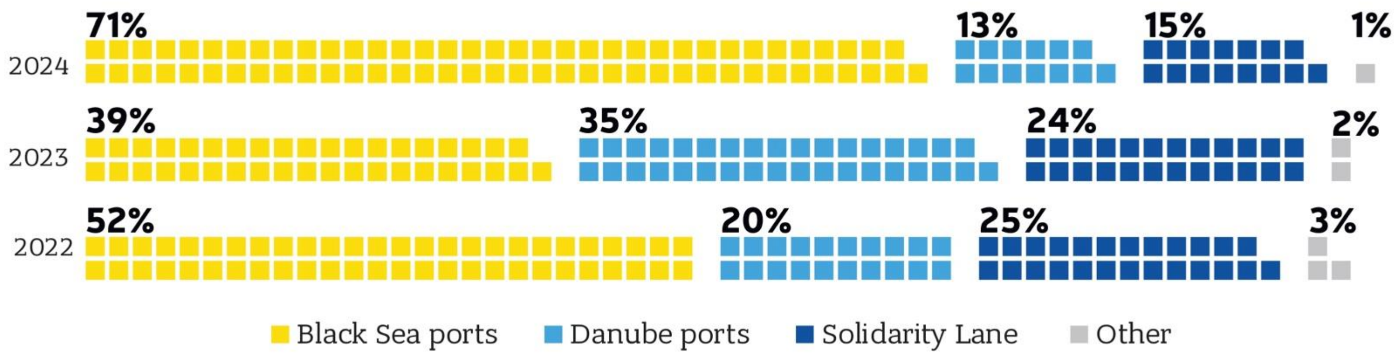


# EVOLUTION AND ROUTES OF AGRICULTURAL EXPORT LOGISTICS

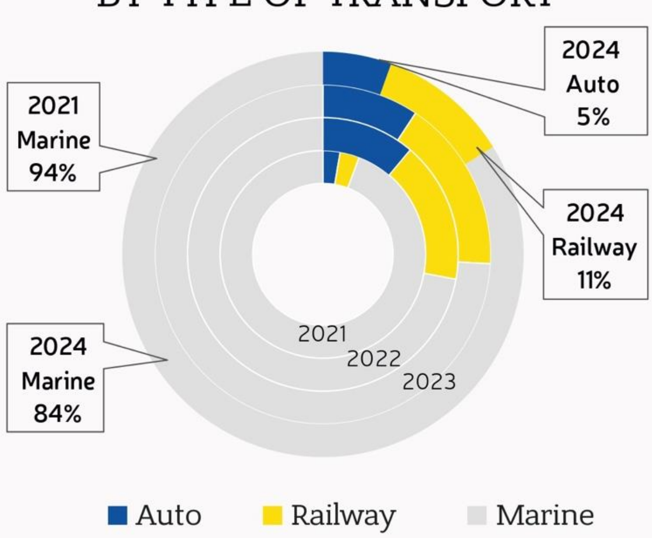
## DYNAMICS AND PATHWAYS OF EXPORT LOGISTICS, MLN T



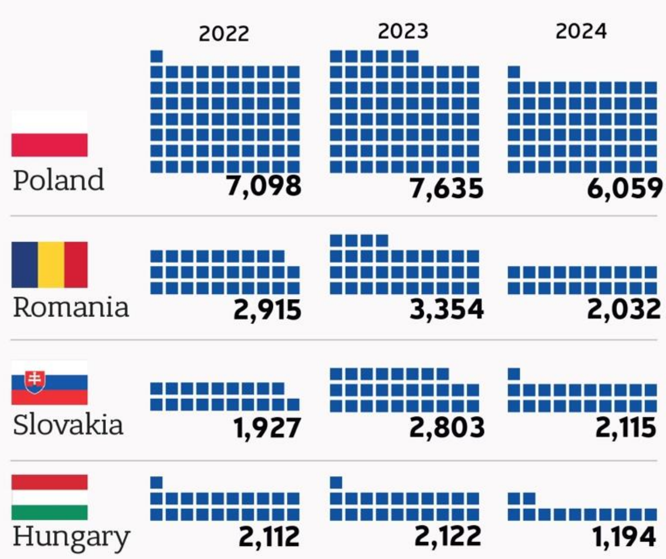

## EXPORT LOGISTICS CHANNELS




## EXPORT LOGISTICS BY TYPE OF TRANSPORT

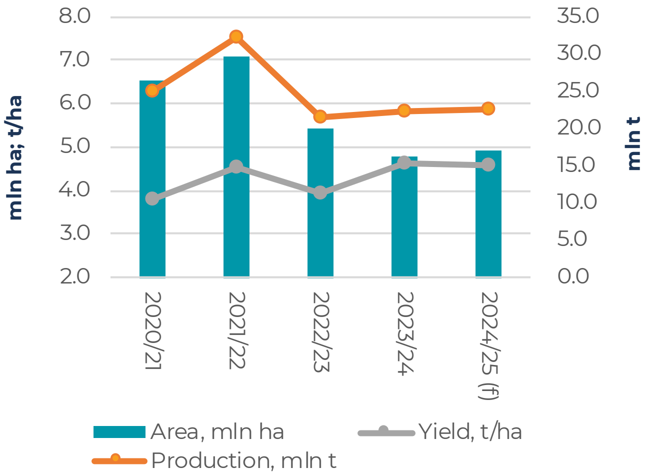



## EXPORT VIA SOLIDARITY LANE

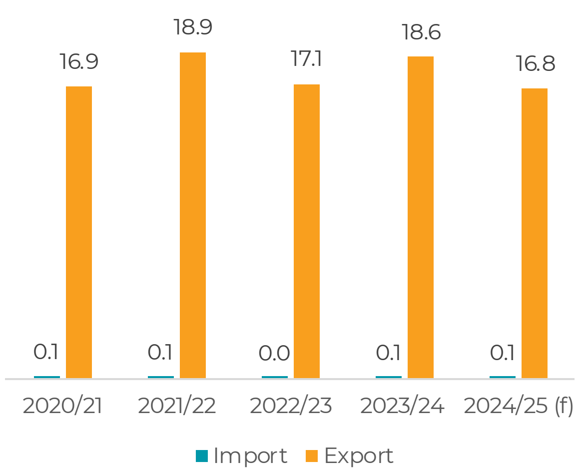


# Wheat

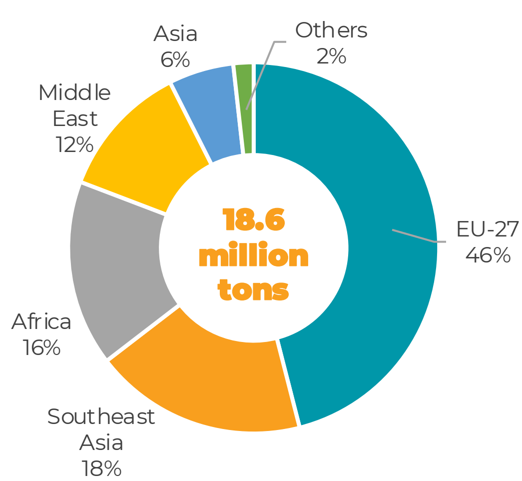
### Ukrainian area, production and yield of wheat




### Ukrainian wheat trade, million tons




### Export geography in 2023/24 MY




- **Wheat production**

In 2024/25 MY, the area under wheat in Ukraine was 4.9 mln ha (3.0% above the last marketing year and 19.6% below the 5-year average). The temporary occupation of a large part of Ukrainian territory by russian troops caused a significant decrease in the wheat areas in the longer term.

At the same time, the average yield in 2024/25 MY amounted to 4,6 tons per hectare (0.9% below the last marketing year and 9.2% above the 5-year average). Difficult weather conditions in 2024/25 MY had a more negative impact on spring crops, so the yield of winter crops was not so low (a larger share of wheat is winter wheat).

The increase in sown areas offset the decline in yields. Therefore, wheat production in 2024/25 MY is estimated at 22.7 mln tons (2.0% above the previous marketing year but 12.2% below the 5-year average).

- **Domestic consumption of wheat in Ukraine**

In 2024/25 MY, domestic wheat consumption is expected to reach 6.3 mln tons, including 3.8 mln tons for household consumption and 1.3 mln tons for feed. In recent years, the domestic consumption of wheat for both food and feed has been decreasing due to the temporary occupation of part of Ukraine by russian troops and forced migration of the population due to military actions.

- **Ukrainian wheat trade**

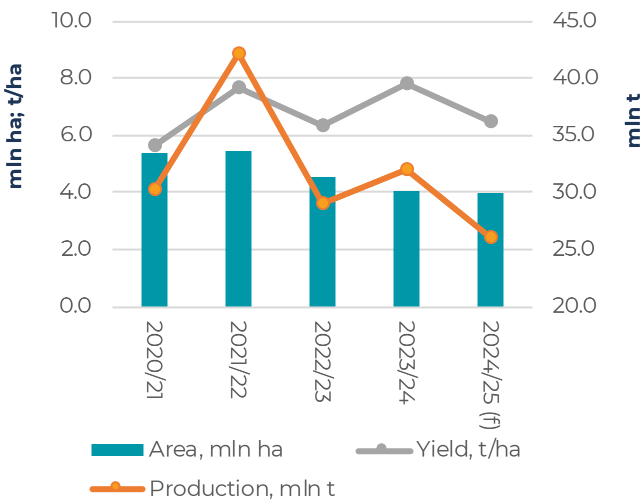
Ukraine has always been a major exporter of wheat. Wheat imports have always been minimal. In 2023/24 MY, Ukraine exported 18.6 mln tons of wheat (9.0% above the last MY). The main reason for the growth is the organization of Ukraine's own export sea route, which helped to reduce the transition stocks of previous periods. Due to the absence of transitional stocks, wheat exports in 2024/25 MY are expected to reach 16.8 mln tons (9.8% below the previous period).

### Ukrainian wheat supply and use, thousand tons

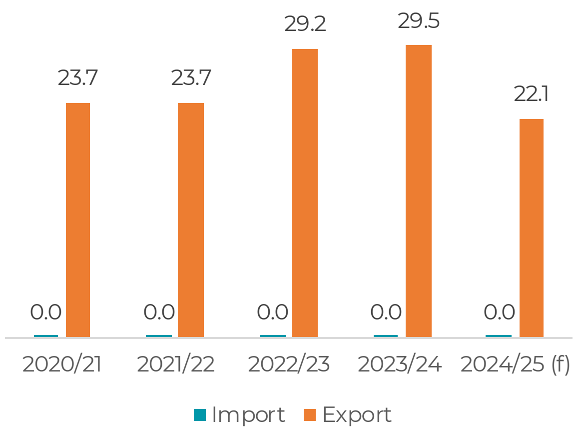
| | 2021/22 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|
| **Beginning stocks** | 1 699 | 6 209 | 3 963 | 1 428 |
| **Production** | 32 151 | 21 396 | 22 236 | 22 679 |
| **Import** | 98 | 44 | 68 | 62 |
| **Animal feed** | 1 171 | 1 410 | 1 351 | 1 311 |
| **Consumption** | 4 241 | 3 815 | 3 851 | 3 815 |
| **Seed** | 1 514 | 940 | 808 | 986 |
| **Non-food processing** | 42 | 60 | 59 | 55 |
| **Losses** | 1 856 | 375 | 143 | 160 |
| **Export** | 18 913 | 17 086 | 18 627 | 16 794 |
| **Ending stocks** | 6 209 | 3 963 | 1 428 | 1 048 |

# Corn

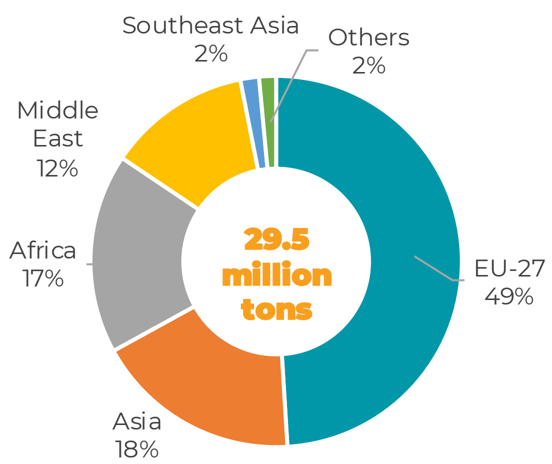
### Ukrainian area, production and yield of corn




### Ukrainian corn trade, million tons




### Export geography in 2023/24 MY




- **Corn production**

In 2024/25 MY, the area under corn was 4.0 mln ha (2.5% below the last marketing year and 18.5% below the 5-year average). As with all crops, corn areas decreased significantly due to the temporary occupation of part of Ukraine by russian troops.

In 2024/25 MY, Ukraine suffered from a severe drought, especially in the southern and eastern parts of the country. This reduced the yields of late crops, mainly corn. In 2024/25 MY, the average corn yield was 6.5 t/ha (16.6% below the last marketing year and 6.0% below the 5-year average).

According to preliminary estimates, Ukraine will produce 26.1 mln tons of corn in 2024/25 MY (18.7% below the last marketing year and 23.1% below the 5-year average).

- **Domestic consumption of corn in Ukraine**

In 2024/25 MY, the domestic consumption of corn is estimated at 5.6 mln tons, of which 4.7 mln tons will be used as feed. The consumption of corn for feed is expected to increase gradually, but due to the reduction of livestock, it will not reach the pre-war level.

- **Ukrainian corn trade**

In 2023/24 MY, Ukraine exported 29.5 mln tons of corn (1.0% above the previous marketing year). Although production was higher than in the last period, exports remained at the same level. In 2022/23 MY, the prior year's stocks were additionally exported.

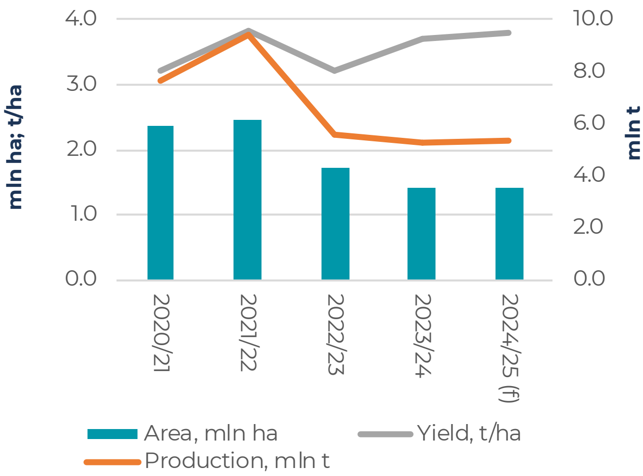
In 2024/25 MY, exports are expected to reach 22.1 mln tons of corn (25.1% below the previous period). Two reasons for this trend are reduced corn production and reduced transitional stocks.

### Ukrainian corn supply and use, thousand tons

| | 2021/22 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|
| **Beginning stocks** | 1 610 | 12 731 | 6 452 | 3 696 |
| **Production** | 42 110 | 29 044 | 32 056 | 26 055 |
| **Import** | 18 | 30 | 24 | 27 |
| **Animal feed** | 5 241 | 4 980 | 4 420 | 4 650 |
| **Consumption** | 195 | 190 | 153 | 160 |
| **Seed** | 312 | 185 | 169 | 184 |
| **Non-food processing** | 542 | 260 | 300 | 315 |
| **Losses** | 980 | 510 | 271 | 251 |
| **Export** | 23 737 | 29 228 | 29 523 | 22 114 |
| **Ending stocks** | 12 731 | 6 452 | 3 696 | 2 103 |

# Barley

### Ukrainian area, production and yield of barley



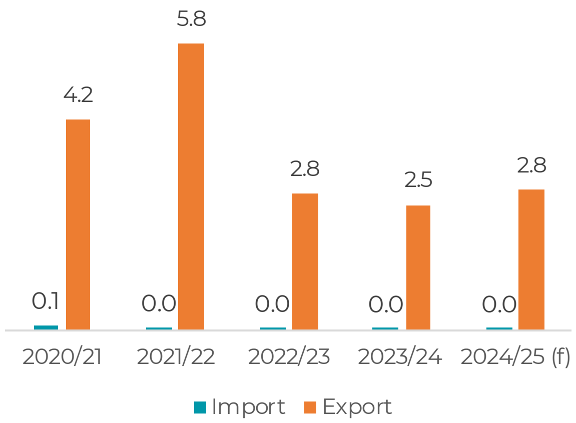

- **Barley production**

In 2024/25 MY, barley was cultivated on 1.4 mln ha (0.5% below the last marketing year and 33.5% below the 5-year average). Among all grains, barley areas decreased the most. In addition to the temporary occupation of part of the territory, the lower export potential in the context of limited export capacity also played a role.

In 2024/25 MY, barley yield was 3.8 t/ha (3.0% above the last marketing year and 9.5% above the 5-year average). This is the only grain crop that showed higher yields in 2024/25 MY compared to the previous periods.

In 2024/25 MY, Ukraine harvested 5.4 mln tons of barley (2.5% above the last marketing year and 27.0% below the 5-year average).

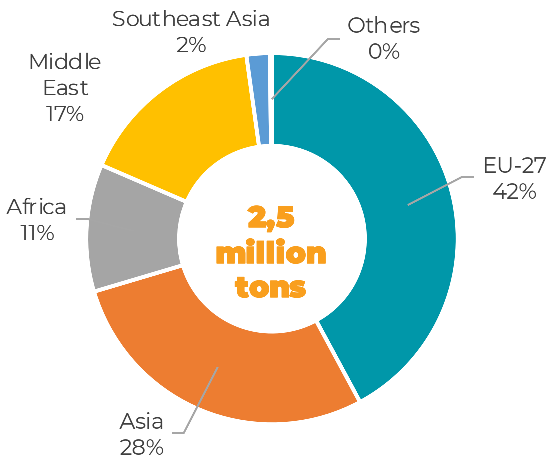
### Ukrainian barley trade, million tons




- **Domestic consumption of barley in Ukraine**

Domestic consumption of barley in 2024/25 MY is estimated at 2.6 mln tons, of which 1.7 mln tons are for feed and 0.2 mln tons – for food. Domestic barley consumption in Ukraine has been declining for a long time.

### Export geography in 2023/24 MY




- **Ukrainian barley trade**

In 2023/24 MY, the export volume of barley was 2.5 mln tons (8.0% below the previous marketing year) due to the decline in production.

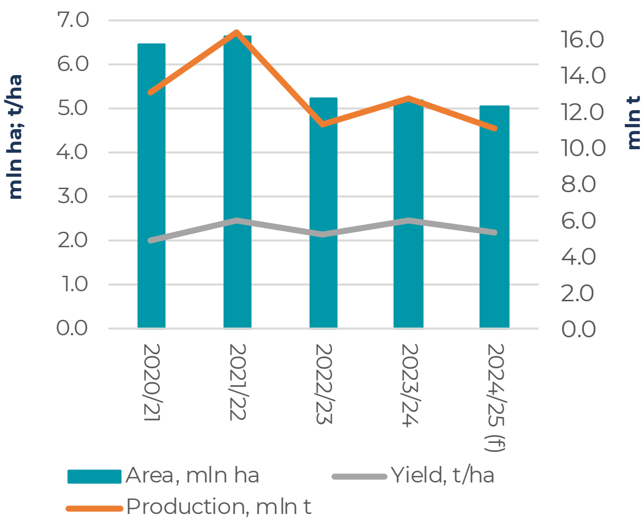
Exports are expected to increase by 11.7% to 2.8 million tons in 2024/25 MY. This growth will be possible due to increased production and reduced domestic consumption.

### Ukrainian barley supply and use, thousand tons

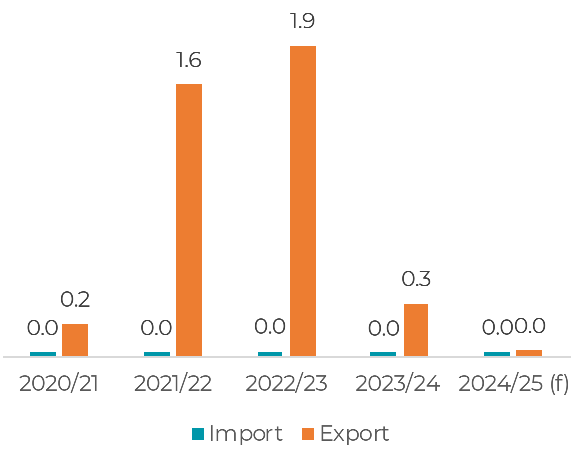
| | 2021/22 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|
| **Beginning stocks** | 407 | 432 | 538 | 463 |
| **Production** | 9 437 | 5 608 | 5 247 | 5 378 |
| **Import** | 33 | 20 | 7 | 7 |
| **Animal feed** | 2 381 | 1 710 | 1 750 | 1 722 |
| **Consumption** | 197 | 185 | 184 | 181 |
| **Seed** | 447 | 414 | 386 | 329 |
| **Non-food processing** | 301 | 260 | 312 | 303 |
| **Losses** | 334 | 200 | 165 | 54 |
| **Export** | 5 786 | 2 753 | 2 532 | 2 828 |
| **Ending stocks** | 432 | 538 | 463 | 431 |

# Sunflower seed

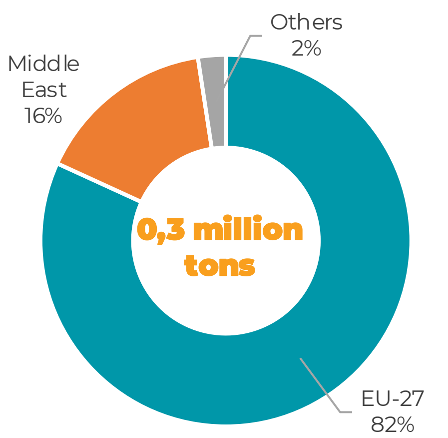
**Ukrainian area, production and yield of sunflower seed**




**Ukrainian sunflower seed trade, million tons**




**Export geography in 2023/24 MY**




## • Sunflower seed production

In 2024/25 MY, the total area under sunflower seeds was 5.1 mln ha (2.3% below the last marketing year and 14.0% below the 5-year average). The main factor behind the decrease in sunflower areas is the temporary occupation of part of the territory. However, in this case, the reduction in sown regions was not as significant as in other crops. In the context of the war and limited export logistics, growing oilseeds was more profitable, and the area under sunflower seeds in the controlled territory of Ukraine increased.
The drought summer of 2024/25 MY harmed sunflower seed yield. This year, the sunflower seed yield was 2.2 t/ha (11.2% below the last marketing year and 6.7% below the 5-year average).
Due to the decrease in sown areas and yields, the harvest of sunflower seeds in 2024/25 MY was 11.0 million tons (13.4% below the last marketing year and 19.8% below the 5-year average).

## • Domestic consumption of sunflower seed in Ukraine

Almost all sunflower seed production is processed in Ukraine. A significant part of it (except for domestic needs) is exported as sunflower oil and sunflower meal. In 2024/25 MY, the processing volumes of sunflower seeds are estimated at 11.2 mln tons. Processing volumes are higher than production due to the previous year's stocks.

## • Ukrainian sunflower seed trade

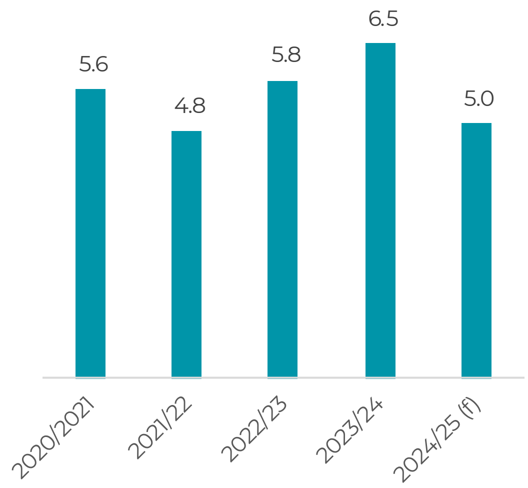
Minimal exports characterise the Ukrainian sunflower seed market. The only exception was for 2 years when the war started in Ukraine. Due to the lack of sea export logistics, the domestic processing of sunflower oil was also suspended. At that time, Ukrainian farmers were forced to export sunflower seeds, and exports reached more than 1.5 million tons per year. In 2023/24 MY, the situation stabilised and 0.3 mln tons were exported, 5.9 times less than in the previous period. In 2024/25 MY, the exports are expected to be even lower – 35 thous. tons, due to the recovery of sunflower oil exports.

**Ukrainian sunflower seed supply and use, thousand tons**

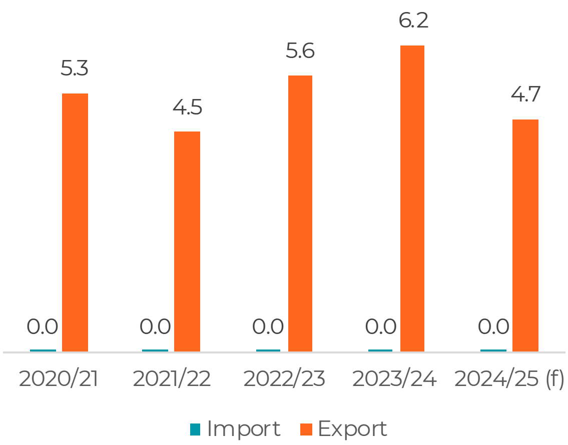
| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Beginning stocks** | 78 | 101 | 2 942 | 1 394 | 230 |
| **Production** | 13 755 | 16 392 | 13 301 | 14 017 | 11 048 |
| **Import** | 21 | 21 | 31 | 20 | 24 |
| **Export** | 191 | 1 623 | 1 855 | 313 | 35 |
| **Processing** | 13 562 | 11 262 | 13 025 | 14 888 | 11 167 |
| **Ending stocks** | 101 | 2 942 | 1 394 | 230 | 100 |

# Sunflower oil

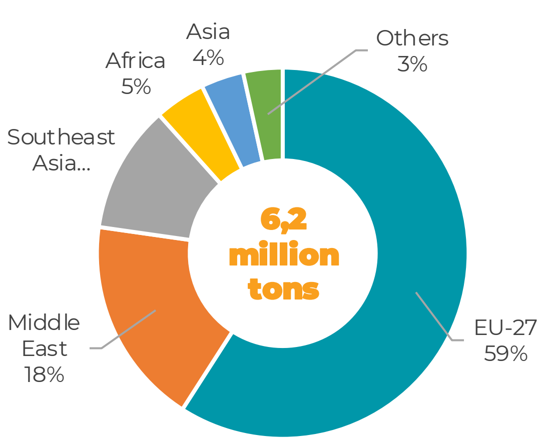
### Production of sunflower oil, million tons




### Ukrainian sunflower oil trade, million tons




### Export geography in 2023/24 MY




- **Sunflower oil production**

In 2023/24 MY, Ukraine produced 6.5 mln tons of sunflower oil (12.2% above the previous marketing year). This high production was achieved due to significant stocks of sunflower seeds, which were formed due to limited exports and the inability to export sunflower oil at the beginning of the war freely.

In 2024/25 MY, sunflower oil production is expected to decline significantly due to the current year's lower harvest of sunflower seeds and the absence of stocks. According to preliminary estimates, this year's production is expected to reach 5.0 mln tons (23.9% below the last marketing year and 16.4% below the 5-year average).

- **Domestic consumption of sunflower oil in Ukraine**

In 2024/25 MY, Ukraine's domestic consumption of sunflower oil is estimated at 235 thousand tons (6.0% below the previous marketing year). In recent years, the consumption of sunflower oil in Ukraine has been decreasing. This is related to the partial temporary occupation of the territory of Ukraine, together with the forced migration of the population due to active hostilities in Ukraine.

- **Ukrainian sunflower oil trade**

Ukraine is a net exporter of sunflower oil. In 2024, this position was preserved, and producers earned the largest export revenue among all agricultural products.

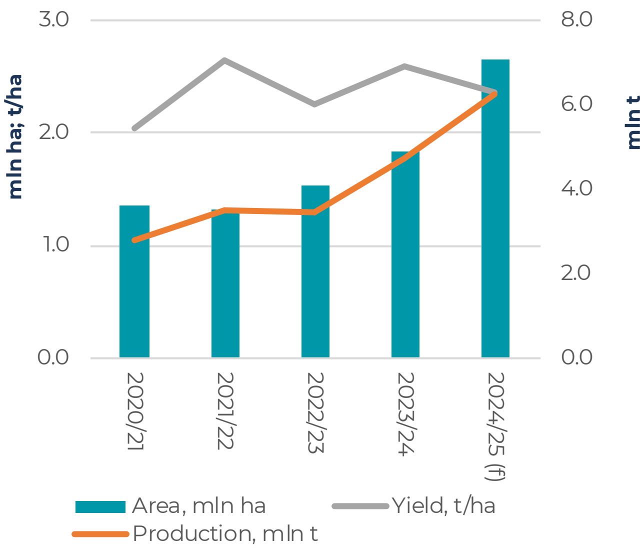
The export volume is expected to reach 4.7 mln tons in 2024/25 MY, 26.2% below the previous marketing year due to a decrease in sunflower seed production.

### Ukrainian sunflower oil supply and use, thousand tons

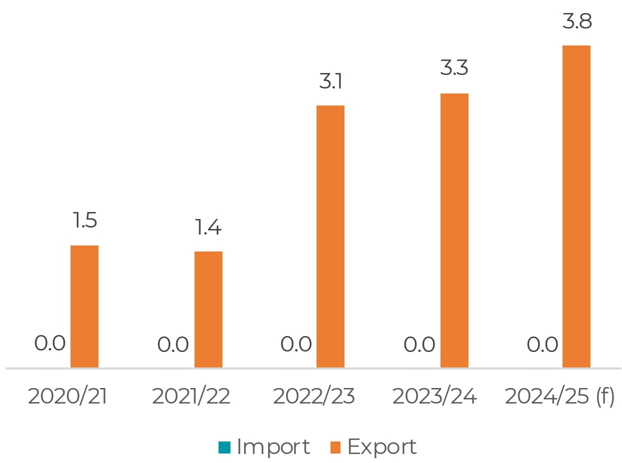
| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Production** | 5 636 | 4 825 | 5 822 | 6 532 | 4 969 |
| **Stock change** | 57 | 67 | -60 | 26 | -10 |
| **Import** | 0 | 1 | 1 | 1 | 1 |
| **Export** | 5 271 | 4 471 | 5 624 | 6 248 | 4 738 |
| **Loses** | 6 | 8 | 10 | 9 | 7 |
| **Consumption** | 302 | 280 | 249 | 250 | 235 |

# Soybean

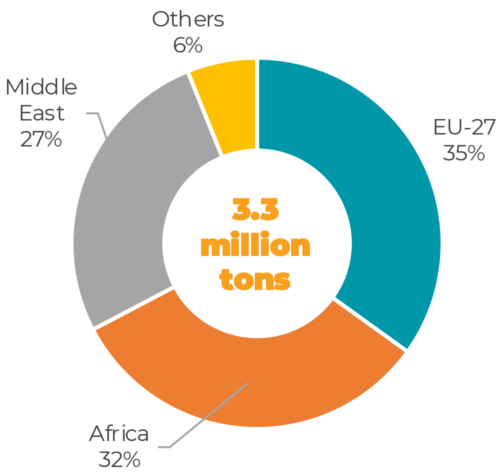
### Ukrainian area, production and yield of soybean




### Ukrainian soybean trade, mln t




### Export geography in 2023/24 MY




- **Soybean production**

In 2024/25 MY, Ukrainian farmers sowed about 2.7 mln ha of soybeans (44.8% above the last marketing year and 73.3% above the 5-year average). These are all-time high soybean sown areas for independent Ukraine. Such rapid growth is explained by the fact that in 2022/23 and 2023/25 MY, in the context of russian aggression against Ukraine, soybeans were almost the only profitable crop due to favourable global market conditions, which logically led to the increase in its sown areas.

Unfavorable weather conditions (high temperatures and lack of precipitation) in 2024/25 MY resulted in lower soybean yields than in previous periods. Ukrainian farmers achieved an average yield of 2.4 t/ha (8.9% below the last marketing years and 0.3% below the 5-year average).

The soybean harvest in 2024/25 MY is estimated at 6.3 mln tons (32.1% above the last marketing year and 72.4% above the 5-year average).

- **Domestic consumption of soybeans in Ukraine**

The volume of domestic soybean use in Ukraine is increasing every year. This is mainly due to the growth of processing, namely the production of soybean oil and soybean meal. According to the preliminary estimates, in 2024/25 MY, this figure is expected to reach 2.3 mln tons (7.8% above the last marketing year and 33.4% above the 5-year average).

- **Ukrainian soybean trade**

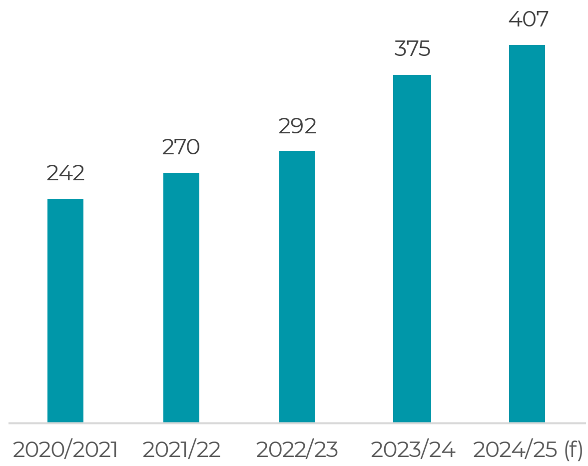
Export volumes are growing in proportion to the growth of soybean production. In 2024/25 MY, soybean exports are expected to reach 3.8 mln tons (16.8% above the last marketing year).

### Ukrainian soybean supply and use, thousand tons

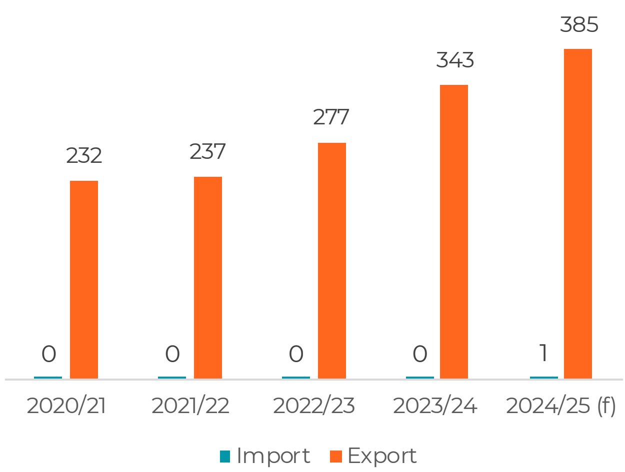
| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Beginning stocks** | 246 | 199 | 581 | 178 | 190 |
| **Production** | 2 798 | 3 493 | 4 313 | 5 359 | 6 267 |
| **Import** | 2 | 1 | 2 | 1 | 1 |
| **Export** | 1 466 | 1 384 | 3 097 | 3 257 | 3 805 |
| **Processing and others** | 1 380 | 1 603 | 1 622 | 2 091 | 2 254 |
| **Ending stocks** | 199 | 581 | 178 | 190 | 400 |

# Soybean oil

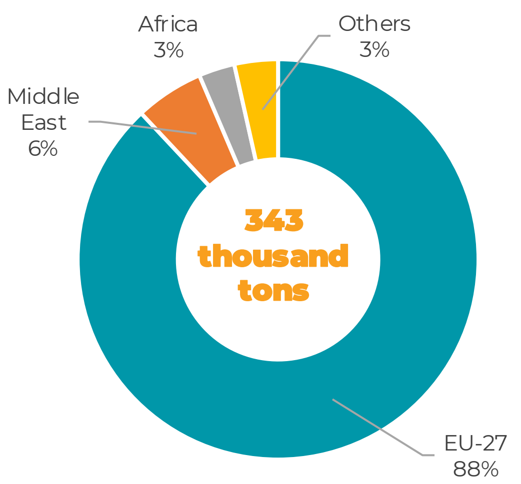
Production of soybean oil, thousand tons




Ukrainian soybean oil trade, thousand tons




Export geography in 2023/24 MY




- **Soybean oil production**

In 2023/24 MY, Ukraine produced 375 thousand tons of soybean oil (28.5% above the previous marketing year). The upward trend of soybean oil production has been observed for several years. Therefore, in 2024/25 MY, according to the preliminary estimates, the production is expected to grow further to 407 thousand tons (8.5% above 2023/24 MY).

- **Domestic consumption of soybean oil in Ukraine**

Ukrainian consumers are more accustomed to using sunflower oil. That is why the domestic consumption of soybean oil is minimal - at 24-25 thousand tons. Therefore, in 2024/25 MY, about 95% of soybean oil production will be exported.

- **Ukrainian soybean oil trade**

Although soybean oil imports to Ukraine are minimal, exports have been growing simultaneously with production growth. In 2023/24 MY, Ukraine exported 343 thousand tons of the product (24.1% above the previous marketing year). Exports are forecasted to grow by 12.1% to 385 thousand tons in 2024/25 MY.

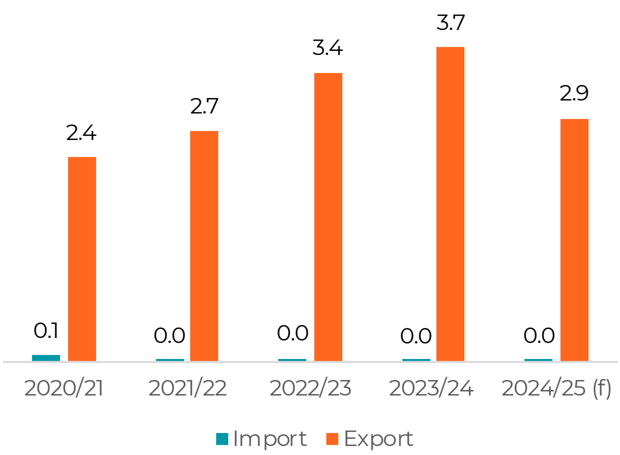
Ukrainian soybean oil supply and use, thousand tons

| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Production** | 242 | 270 | 292 | 375 | 407 |
| **Stock change** | -5 | 12 | -2 | 5 | -5 |
| **Import** | 0 | 0 | 0 | 0 | 1 |
| **Export** | 232 | 237 | 277 | 343 | 385 |
| **Loses** | 1 | 5 | 2 | 3 | 4 |
| **Consumption** | 14 | 16 | 15 | 24 | 25 |

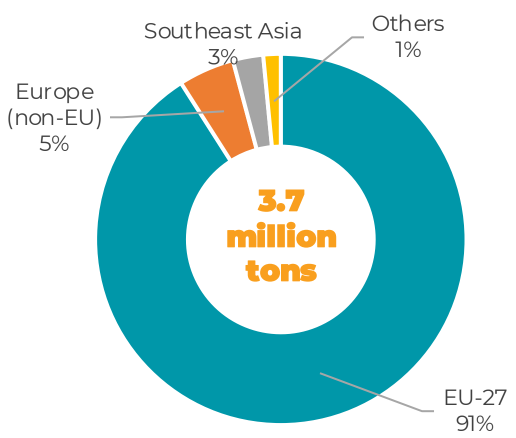
# Rapeseed

**Ukrainian area, production and yield of rapeseed**


**Ukrainian rapeseed trade, million tons**




**Export geography in 2023/24 MY**




- **Rapeseed production**

In 2024/25 MY, the rapeseed area was 1.3 mln ha (11.6% below the previous marketing year and 5.8% above the 5-year average). The sown area was expected to be higher than in previous years, as rapeseed cultivation's profitability was better than most crops during the war. However, unfavourable weather conditions during the autumn sowing campaign made adjustments, and the area under rapeseed was reduced.

However, in 2024/25 MY, despite unfavourable weather conditions during the sowing season, the rapeseed yield was relatively high: 2.9 t/ha (1.9% below the previous marketing year and 5.5% above the 5-year average).

Due to smaller sown areas and lower yields, the rapeseed harvest in 2024/25 MY was 3.6 mln tons (13.3% below the previous marketing year but 11.3% above the 5-year average).

- **Domestic consumption of rapeseed in Ukraine**

Domestic rapeseed consumption and processing in 2024/25 MY are estimated at 771 thousand tons (30.9% below the previous marketing year). This significant reduction in rapeseed use is due to decreased production and stable export demand. Accordingly, domestic rapeseed processing and consumption stocks are decreasing.

- **Ukrainian rapeseed trade**

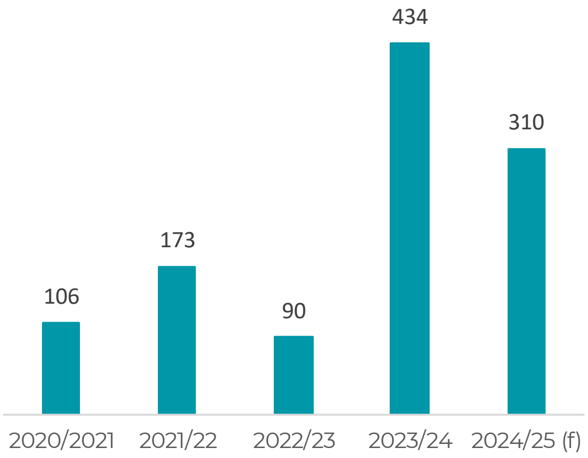
In 2023/24 MY, Ukraine exported 3.7 mln tons of rapeseed (8.7% above the 2022/23 MY). However, due to the decline in rapeseed production, export volumes are expected to decline in 2024/25 MY, reaching 2.9 million tons (22.6% below the 2023/24 MY).

**Ukrainian rapeseed supply and use, thousand tons**

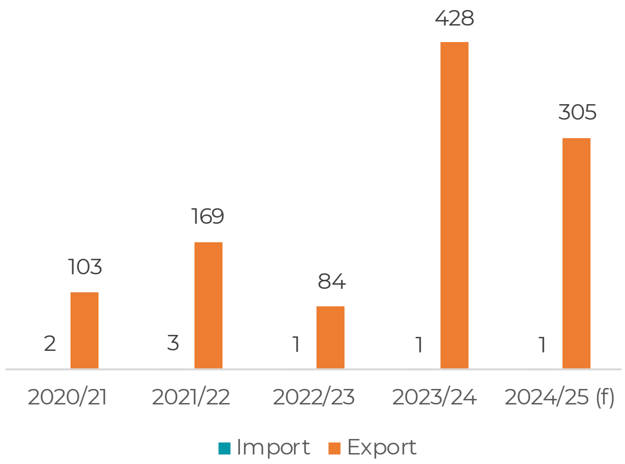
| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Beginning stocks** | 143 | 108 | 70 | 90 | 75 |
| **Production** | 2 574 | 3 119 | 3 625 | 4 788 | 3 627 |
| **Import** | 72 | 12 | 40 | 7 | 10 |
| **Export** | 2 396 | 2 710 | 3 399 | 3 695 | 2 861 |
| **Processing and others** | 284 | 457 | 245 | 1 115 | 771 |
| **Ending stocks** | 108 | 70 | 90 | 75 | 80 |

# Rapeseed oil

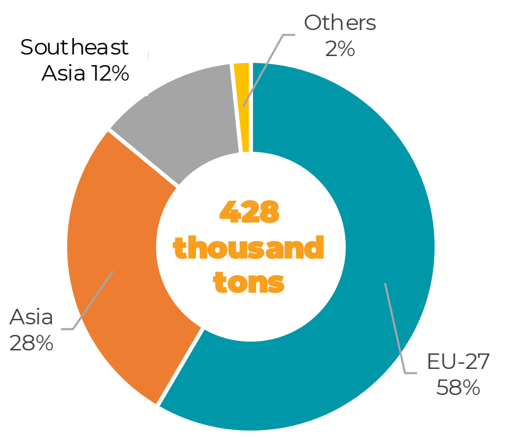
**Production of rapeseed oil, thousand tons**




**Ukrainian rapeseed oil trade, thousand tons**




**Export geography in 2023/24 MY**




- **Rapeseed oil production**

In 2023/24 MY, Ukraine produced 434 thousand tons of rapeseed oil (up 4.8 times the previous marketing year). Due to limited and expensive logistics during this period, it was incredibly profitable to export the processed product, which led to rapid growth in rapeseed oil production.

At the same time, rapeseed oil production in 2024/25 MY is expected to decrease by 28.4% to 310 thousand tons due to the decline in rapeseed production and stable demand.

- **Domestic consumption of rapeseed oil in Ukraine**

As with soybean oil, rapeseed oil consumption is extremely low because Ukrainians prefer sunflower oil. The annual consumption of rapeseed oil is 4 thousand tons, and the rest produced is exported.

- **Ukrainian rapeseed oil trade**

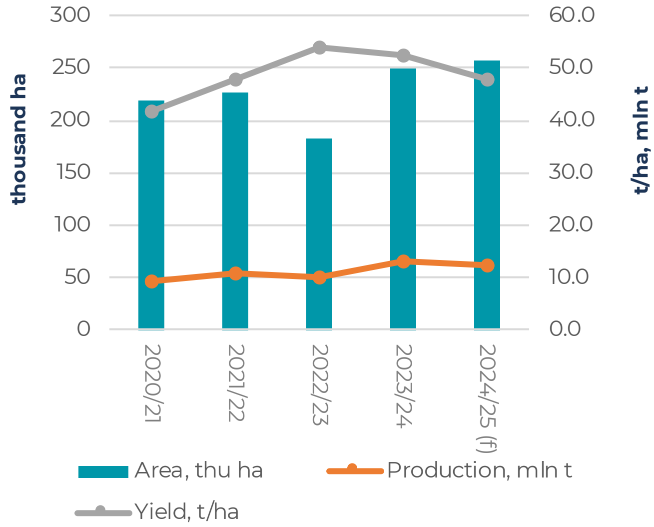
Due to the low consumption of rapeseed oil, almost all of the produced volume is exported. In 2023/24 MY, the export volume was 428 thousand tons (up 5.1 times the previous marketing year). In 2024/25 MY, the exports are expected to decrease by 28.9% to 305 thousand tons.

**Ukrainian rapeseed oil supply and use, thousand tons**

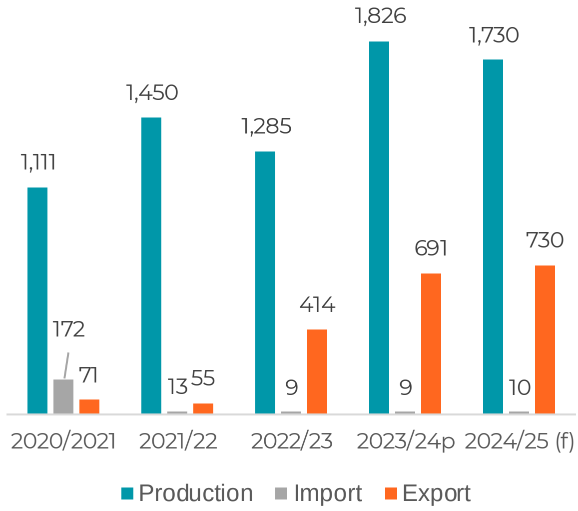
| | 2021/22 | 2022/23 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|---|
| **Production** | 106 | 173 | 90 | 434 | 310 |
| **Stock change** | 0 | -1 | 1 | 1 | -2 |
| **Import** | 2 | 3 | 1 | 1 | 1 |
| **Export** | 103 | 169 | 84 | 428 | 305 |
| **Loses** | 1 | 2 | 4 | 2 | 2 |
| **Consumption** | 5 | 5 | 3 | 4 | 4 |

# Sugar

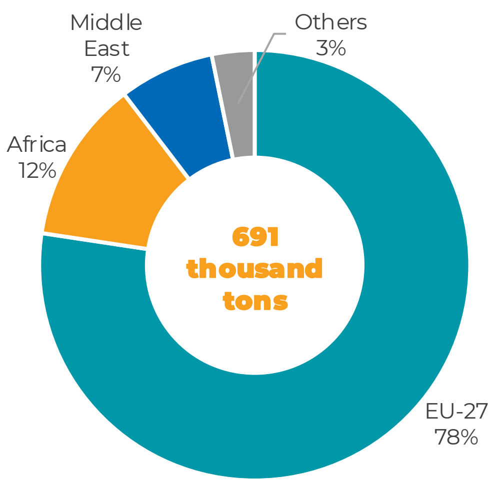
## Ukrainian area, production and yield of sugar beet




## Ukrainian sugar production and foreign trade, thousand tons




## Export geography in 2023/24 MY




- **Sugar beet production**

In 2024/25 MY, Ukraine had 258 thousand ha of sugar beet area (3.2% above the previous marketing year and 17.0% above the 5-year average). With the beginning of the full-scale war, Ukraine's sugar beet sown area increased due to the limited ability to export other crops.

At the same time, the sugar beet yield was 47.7 t/ha (9.1% below the previous marketing year and 1.5% below the 5-year average) due to lack of precipitation and high air and soil temperatures.

Due to the lower yields, despite the increase in sown areas, the sugar beet harvest is expected to reach 12.3 mln tons, which is 6.2% less than the previous year but 15.5% higher than the average for the last 5 years.

- **Sugar production and consumption in Ukraine**

Considering the sugar beet harvest, Ukraine will be able to produce about 1.7 mln tons of sugar in the current marketing year (5.3% below the previous MY but 20.9% above the 5-year average).

Before the full-scale war, domestic sugar consumption was at 1.1 mln tons. In 20224/25 MY, it is forecasted to decline to 0.9 mln tons, mainly due to a decrease in Ukraine's population.

- **Ukrainian sugar trade**

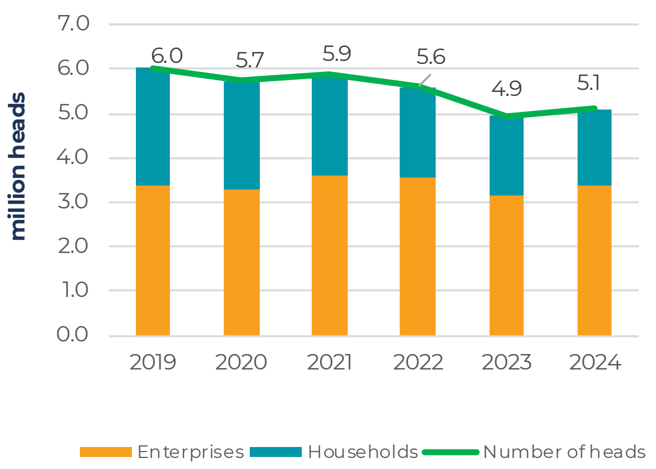
Ukraine has almost always been a sugar exporter and rarely imported it. In 2023/24 MY, the country exported 691 thousand tons of sugar (67.0% above the previous MY). This growth was due to the ability to export to the EU countries during a significant loss in internal consumption and the inability to export to traditional markets by sea. In 2024, with establishing the Ukrainian export sea route, shipments to the traditional markets of Africa and the Middle East resumed. In 2024/25 MY, exports are expected to reach 730 thousand tons, with an increased share of traditional markets.

## Ukrainian sugar supply and use, thousand tons

| | 2021/22 | 2022/23 | 2023/24 | 2024/25 (f) |
|---|---|---|---|---|
| **Production** | 1 450 | 1 285 | 1 826 | 1 730 |
| **Beginning stocks** | 332 | 470 | 313 | 435 |
| **Import** | 13 | 9 | 9 | 10 |
| **Export** | 91 | 452 | 733 | 770 |
| **including sugar** | 55 | 414 | 691 | 730 |
| **Loses and wastes** | 80 | 50 | 55 | 55 |
| **Ending stocks** | 470 | 313 | 435 | 450 |
| **Consumption** | 1 154 | 949 | 926 | 900 |

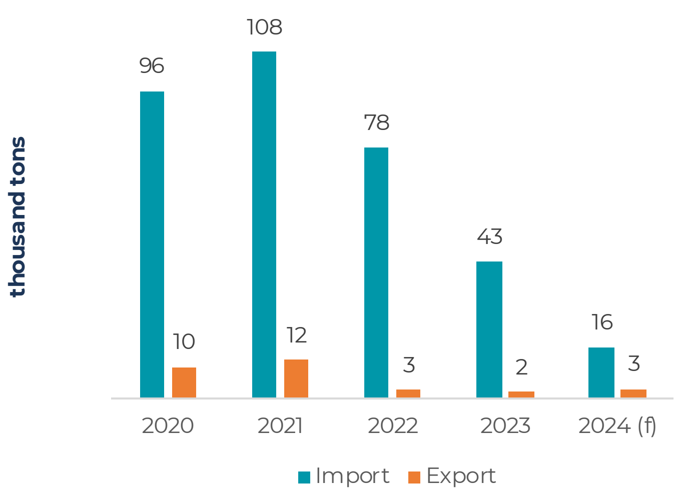
# Pork

### Number of heads

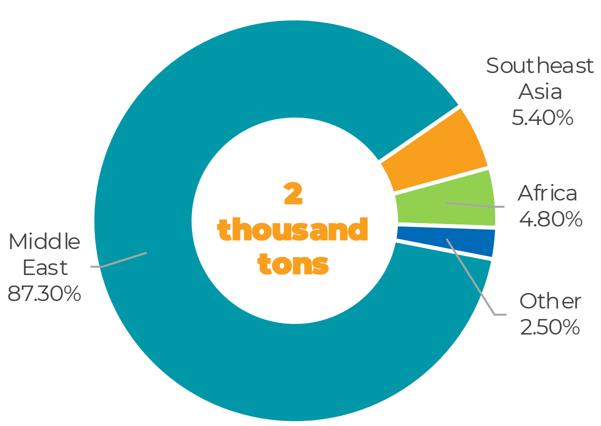



*structure as of January 1, 2024

### Ukrainian pork trade




### Export geography in 2024 (8m)




- **Pig stock and production**

In 2024, the pig population is 5.1 mln heads (+4% above 2023 and -9% below the 5-year average). The share of heads in enterprises is 66% (3.4 million heads) and 34% (1.7 mln heads) in households. The population decreased due to the temporary occupation of Ukraine's territories and the destruction of enterprises in Kyiv, Chernihiv, Sumy, Kharkiv, and Mykolaiv regions. Due to the low feed price on the domestic market, the population restoration began in the second half of 2022.
Pork production in 2023 was 638 thousand tons, 4% below 2022, and is expected to be 660 thousand tons in 2024.

- **Ukrainian trade of pork**

Since the 2014 Revolution of Dignity and EU integration of Ukraine, sales markets and supply volumes have changed for pork producers and exporters. Until 2014, 95% of products were exported to Russia. From 2014 to 2022, Ukraine was able to find new sales markets, but supply volumes changed significantly. In 2023, Ukraine exported 2 thousand tons of pork, 25% below 2022. A significant decline in export trade occurred in 2022 (by 4.5 times) due to the blocked logistic channels. Sea logistics accounted for 99% of pork exports. It is expected that exports will increase in 2024 to 3 thousand tons.
Pork imports in 2023 are 42.7 thousand tons, -46% to 2022. In recent years, imports have decreased due to reduced domestic demand. Imports in 2024 are forecasted to be 16 thousand tons.

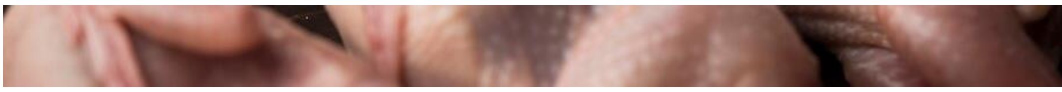
- **Ukrainian export geography of pork**

The main export region for Ukrainian pork is the Middle East. Ukraine does not export pork to the European Union because it does not have the appropriate permit. In the first eight months of 2024, 2,000 tons were exported, 3.3 times more than in the same period in 2023. The largest importers of Ukrainian pork are in the Middle East, 87.3%, Southeast Asia, 5.4%, and Africa, 4.8%.

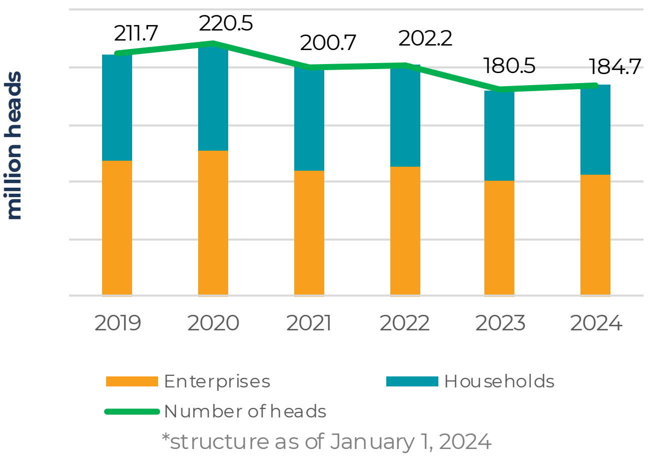
### Ukrainian pork supply and use, thousand tons

| | 2020 | 2021 | 2022 | 2023 | 2024 (f) |
|---|---|---|---|---|---|
| **Production** | 697 | 724 | 659 | 638 | 660 |
| **Stock change** | -4 | 2 | 2 | -1 | 2 |
| **Import** | 96 | 108 | 78 | 43 | 16 |
| **Export** | 10 | 12 | 3 | 2 | 3 |
| **Other uses** | 1 | 2 | 3 | 3 | 3 |
| **Consumption** | 786 | 816 | 729 | 677 | 668 |

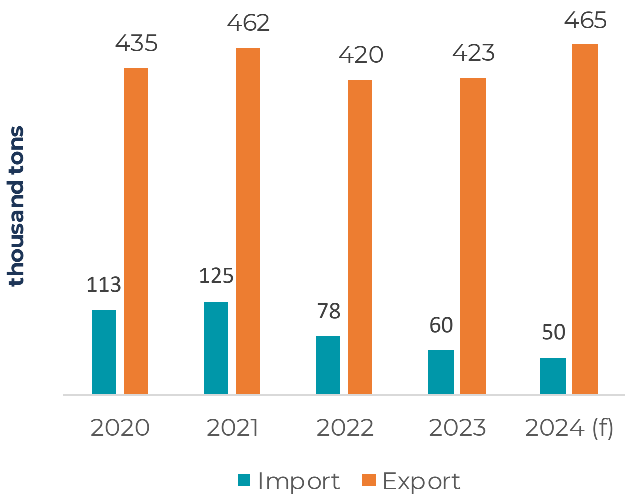
# Poultry



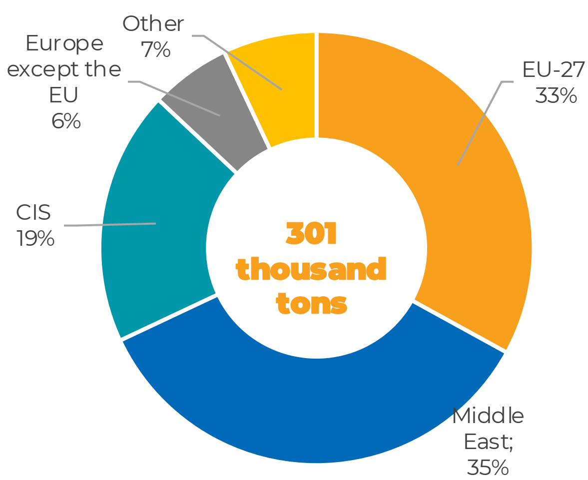
### Number of heads




### Ukrainian poultry trade




### Export geography in 2024 (8 m)




- **Poultry stock and production**

In 2024, the poultry stock is 184.7 mln heads (2.3% above 2023 and 9.1% below the 5-year average). The population decreased due to the temporary occupation of territories, damage to poultry farms, decreased internal consumption, and problematic logistics. The share of heads in enterprises is 57% (106,172 thous. heads), and 43% (78,538 thous. heads) in households.

Poultry meat production in 2023 was 1.3 mln tons, 5.2% above 2022. It is predicted that meat production will be 1.4 mln tons in 2024.

- **Ukrainian trade of poultry meat**

Poultry trade in recent years has shown cyclical trends. The war significantly affected the volume and geography of trade in 2022, reducing exports by -10% to 420 thous. tons. However, in 2023, the trend began to recover and continued in 2024. In 2023, Ukraine exported 423 thous. tons of poultry meat, 2% above 2022. In March 2022, there was a record decrease in supplies due to the blockade of seaports and disrupted logistics. During 2024, stable supplies of poultry meat continued due to stabilising export routes (incl. through Solidarity Lanes). In 2024, export volumes will amount to 465 thous. tons, +10.1% above 2023.

Imports in 2023 were 60 thousand tons, 24% below 2022. They are forecasted to continue decreasing to 50 thousand tons in 2024. The decrease in imports occurs against the background of a reduction in domestic demand due to the departure of Ukrainians abroad.

- **Ukrainian export geography of poultry meat**

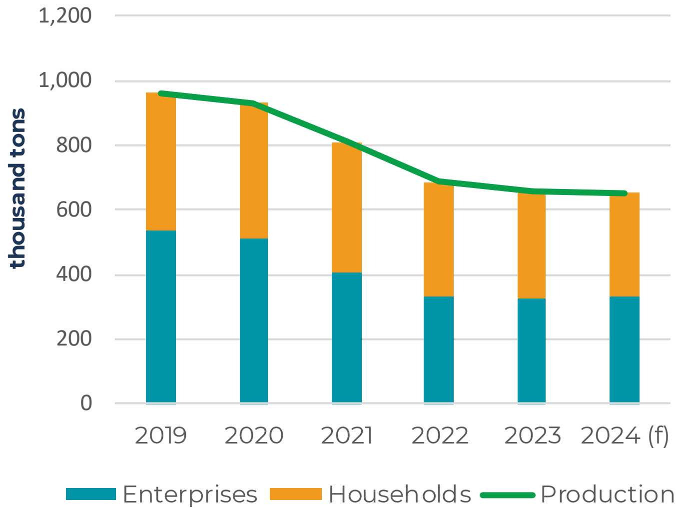
Ukraine has had a positive trade balance in poultry meat for the past 10 years (2014-2024). Ukraine remains an export leader and ranks 7th among the world's largest poultry meat suppliers. Currently, 15 companies are certified to export to the EU, and exports to the EU in 2023 reached 171 thousand tons (+24% compared to 2022). In the first 8 months of 2024, 300.8 thousand tons were exported worldwide, 4% above the 8 months of 2023. The largest importers of Ukrainian poultry meat are: the Middle East - 35%, the EU 33%, and the CIS - 19%.

### Ukrainian poultry supply and use, thousand tons

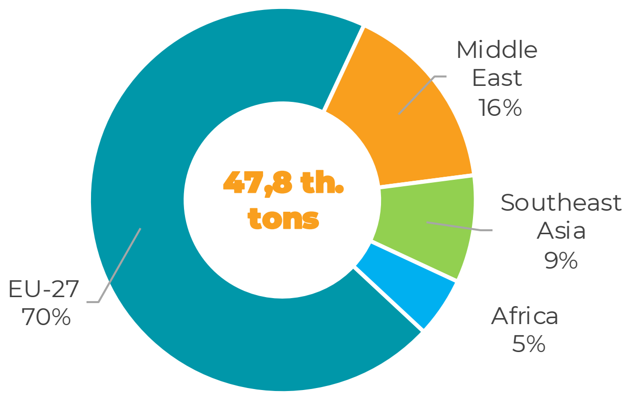
| | 2020 | 2021 | 2022 | 2023 | 2024 (f) |
|---|---|---|---|---|---|
| **Production** | 1 405 | 1 374 | 1 253 | 1 318 | 1 354 |
| **Stock change** | -9 | 7 | 3 | 2 | -2 |
| **Import** | 113 | 125 | 78 | 60 | 50 |
| **Export** | 435 | 462 | 420 | 423 | 465 |
| **Other uses** | 3 | 3 | 5 | 6 | 5 |
| **Consumption** | 1 089 | 1 027 | 903 | 947 | 936 |

# Eggs

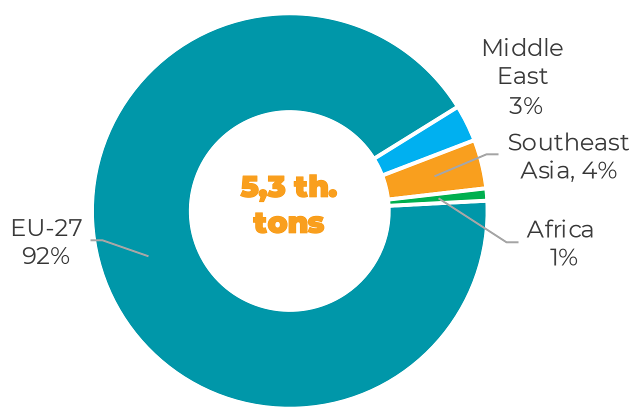
### Production structure




### Export Eggs (8m)




### Export of Egg products (8m)




- **Eggs production**

In 2023, egg production is 657 thousand tons (-5% below 2022). Egg production in 2024 is forecasted to be 653 thousand tons (1% below 2023). Enterprises, traditionally the main producers of eggs, have lost a significant part of their capacity. In 2019, they produced 540 thousand tons, but by the end of 2024, this figure will decrease to 333 thousand tons. This reduction is the result of both direct losses due to the destruction of poultry farms and the increase in production costs, which have become unaffordable for many producers. In addition, large producers are facing difficulties in financing, modernisation and labour. Households, which also play an important role in egg production, show a similar trend. In 2019, they provided 419 thousand tons, but in 2024, this figure will fall to 320 thousand tons. The main reason for this decline is the economic difficulties of small farmers associated with expensive production inputs and limited financial resources.

- **Ukrainian export volumes of eggs and egg products**

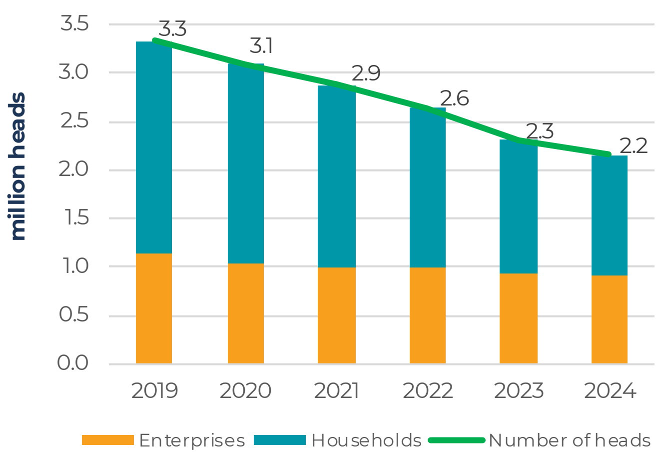
Egg exports from Ukraine demonstrate positive dynamics and recovery of positions in foreign markets after a significant drop in 2022. The biggest export challenges remain with logistics, especially to the traditional markets. In 2023, 48.4 thousand tons of eggs were exported, 80% above 2022. In the first 8 months of 2024, 47.8 thousand tons were exported, 36% above 8 months of 2023. The largest importers of Ukrainian eggs are EU-27 – 70%, Middle East – 16%, Southeast Asia – 9% and Africa – 5%.
In 2023, 8.6 thousand tons of egg products were exported, 70% more than in 2022. In the first eight months of 2024, 5.3 thousand tons were exported, 6% less than in the eight months of 2023. The largest importers of Ukrainian egg products are the EU-27, 92%; the Middle East, 3%; Southeast Asia, 4%; and Africa, 1%.

### Ukrainian eggs supply and use, million pieces

| | 2020 | 2021 | 2022 | 2023 | 2024 (f) |
|---|---|---|---|---|---|
| **Production** | 16 167 | 14 071 | 11 922 | 11 379 | 11 304 |
| **Stock change** | -17 | -52 | 17 | -21 | 12 |
| **Import** | 69 | 69 | 107 | 174 | 161 |
| **Export** | 3 325 | 1 680 | 1 474 | 1 783 | 2 169 |
| **Other uses** | 1 333 | 1 264 | 1 075 | 1 030 | 994 |
| **Consumption** | 11 596 | 11 249 | 9 464 | 8 761 | 8 250 |

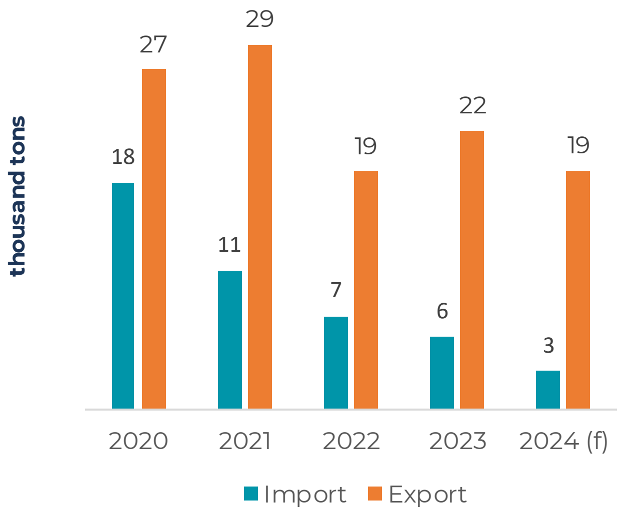
# Beef

## Number of heads

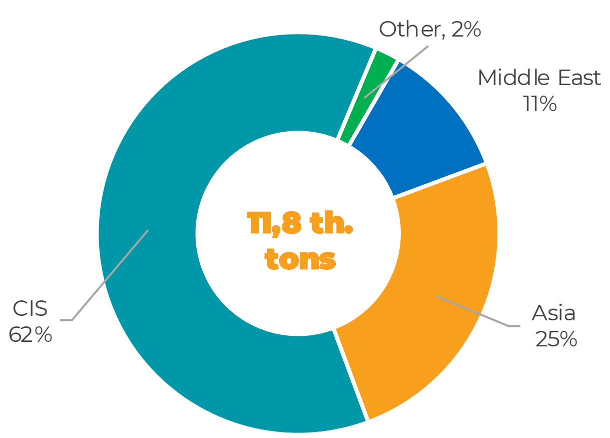



*structure as of January 1, 2024

## Trade of beef




## Export geography in 2024 (8m)




- **Cattle stock and production**

In 2024, the cattle population is 2.2 mln heads (-5% less than in 2023 and -23% below the 5-year average). The share of heads in enterprises is 46% (0.9 mln heads) and 54% (1.2 mln heads) in households. The largest decrease in the population occurs in households due to the low profitability of milk and meat production. In Ukraine, enterprises mainly keep cattle for milk production, not beef. Enterprises also have higher cattle productivity than households. Ukraine does not have many enterprises engaged in specialised meat cattle breeding.
In 2023, Ukraine produced 257 thousand tons of beef (4.3% below 2022). Beef production is expected to decline further by 3.4% to 248 thousand tons in 2024.

- **Ukrainian trade of beef**

Since the full-scale war, exporting meat and meat products from Ukraine has become problematic. Until 2022, Asian countries were the main consumers of Ukrainian beef; the share of beef transportation by sea was 77% and only 23% by road. In 2023, Ukraine exported 22.1 thousand tons of meat, +17% more than in 2022. A significant decline in export trade occurred in 2022 (by -35%) due to the blocked logistics. It is predicted that exports will decrease in 2024 to 19 thousand tons due to a decrease in livestock.
Beef imports in 2023 were 5.7 thousand tons, 33% less than in 2022. In recent years, imports have been decreasing due to a reduction in domestic demand for beef, which continues to be the most expensive type of meat. Demand for beef is declining due to the population's economic difficulties. Imports are forecasted to reach 2.4 thousand tons in 2024.

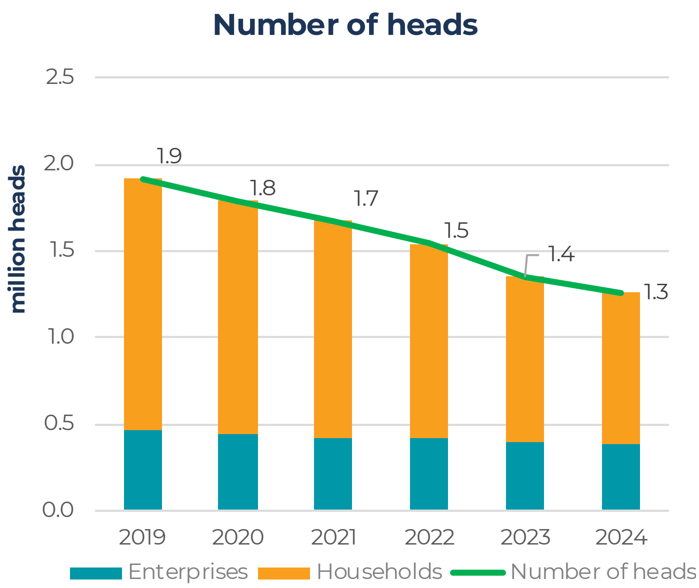
- **Ukrainian export geography of beef**

The main export region is the CIS. Ukraine does not export beef to the European Union because it is not certified. In the first eight months of 2024, 11.8 thousand tons were exported, 17% below the eight months of 2023. The largest importers are the CIS—62%, Asia—25%, and the Middle East—11%.

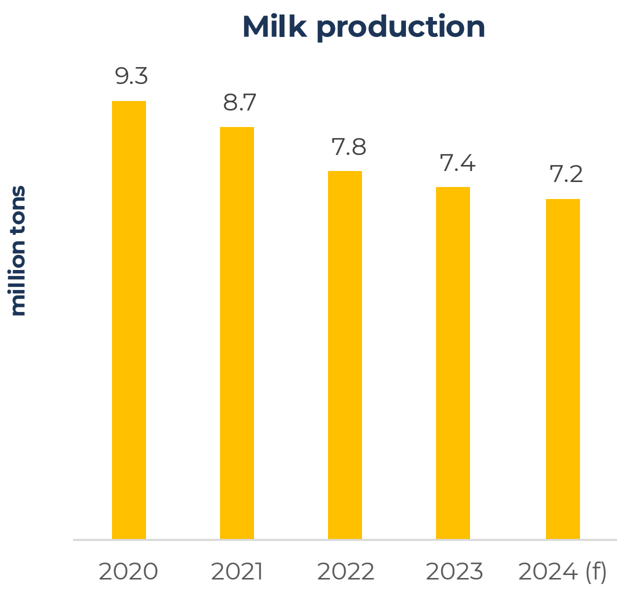
## Ukrainian beef supply and use, thousand tons

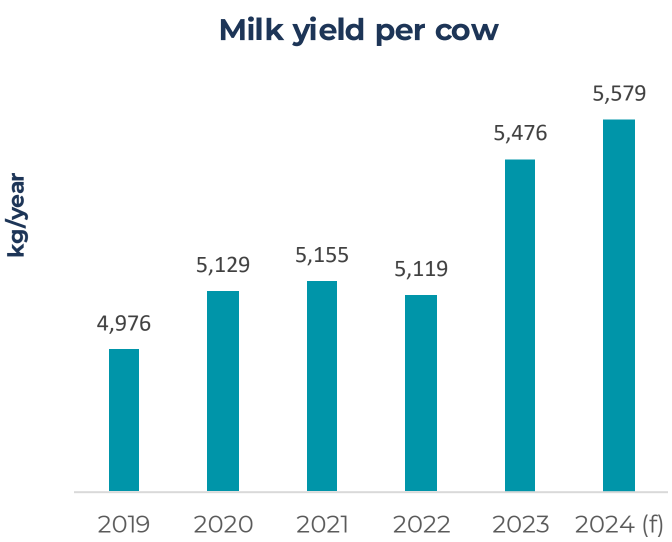
| | 2020 | 2021 | 2022 | 2023 | 2024 (f) |
|---|---|---|---|---|---|
| **Production** | 345 | 311 | 268 | 257 | 248 |
| **Stock change** | -2 | 1 | -1 | 0 | -1 |
| **Import** | 18 | 11 | 7.4 | 5.7 | 3 |
| **Export** | 27 | 29 | 18.9 | 22.1 | 19 |
| **Other uses** | 1 | 1 | 1 | 1 | 1 |
| **Consumption** | 337 | 291 | 257 | 239 | 232 |

# Milk




*structure as of January 1, 2024




- **Cows stock and production**

In 2024, the cow population is 1.3 mln heads (8% less than in 2023 and -21% below the 5-year average). The share of heads in enterprises is 31% (0.4 mln heads), and 69% (0.9 mln heads) in households. The largest decrease in the population occurred in households due to the low profitability of milk production and the high costs of animal husbandry. The production of raw milk in Ukraine is decreasing due to difficult household conditions caused by the full-scale war.

Dairy companies are implementing modern management models and purchasing new breeds of productive cows. In 2023, 7.4 mln tons of milk were produced, -5% less than in 2022. Compared to the previous year, the reduction in raw milk production in Ukraine was due to a decrease in the number of cows, the impact of abnormal heat, and the consequences of long-term power outages after Russian missile strikes on energy infrastructure facilities. Milk production in 2024 is forecasted to be 7.2 mln tons (3.6% below 2023).

In 2023, average milk yields per cow increased by +7% to 5,476 kg per year. They are forecasted to grow again in 2024 to 5,579 kg per year.

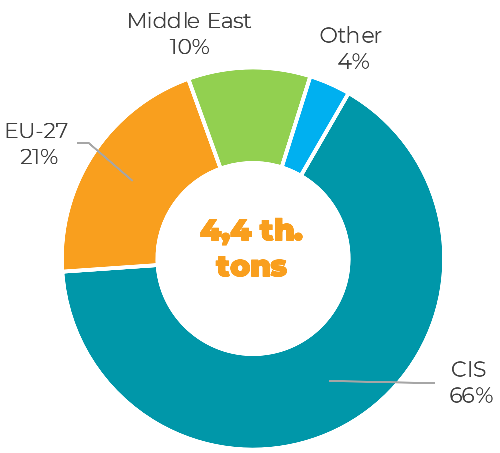
- **Ukrainian export volumes of milk products**

The dairy sector of Ukraine has significant export potential due to favourable natural and climatic conditions, many years of production experience, and increasing quality of products that meet international standards. Ukraine is one of the largest milk producers in Europe, which creates the prerequisites for expanding export markets and strengthening its position in the global arena. Every year, the country produces more than 7 million tons of milk, a significant part of which is directed to domestic consumption. Still, the export of dairy products is becoming increasingly important in foreign trade.
The main export items are milk and cream, butter, cheeses, powdered milk, whey, and other dairy products. The European market remains an important direction for the export of Ukrainian dairy products, particularly butter and cheeses.

**Ukrainian milk supply and use, thousand tons**

| | 2020 | 2021 | 2022 | 2023 | 2024 (f) |
|---|---|---|---|---|---|
| **Production** | 9 267 | 8 714 | 7 768 | 7 430 | 7 161 |
| **Stock change** | 34 | -6 | 5 | -4 | 3 |
| **Import** | 745 | 841 | 402 | 431 | 475 |
| **Export** | 409 | 395 | 519 | 372 | 401 |
| **Other uses** | 652 | 610 | 528 | 493 | 485 |
| **Consumption** | 8 917 | 8 556 | 7 118 | 7 001 | 6 747 |

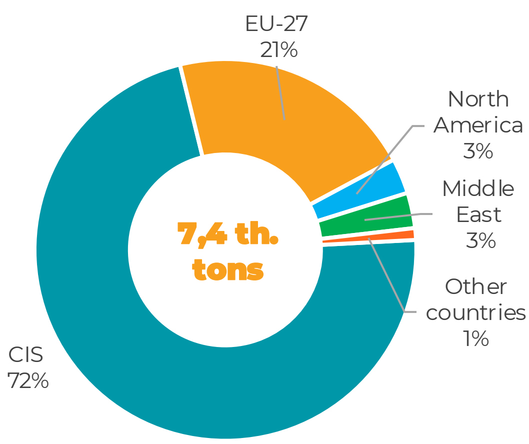
### Export geography of butter in 2024 (8m)




- **Butter export**

Butter is one of the key export items in Ukraine's dairy sector. Traditionally, the main markets for Ukrainian butter are the countries of the Middle East, North Africa, Southeast Asia, and the CIS, as these regions show growing demand for butter. At the same time, the European market remains challenging to develop due to high competition with local producers. In 2023, 7.7 thousand tons of butter were exported -84% less than in 2022. In the first 8 months of 2024, 4.4 thousand tons were exported, 25% below 8 months of 2023. The largest importers of Ukrainian butter are CIS – 66%, the EU – 21% and the Middle East – 10%.

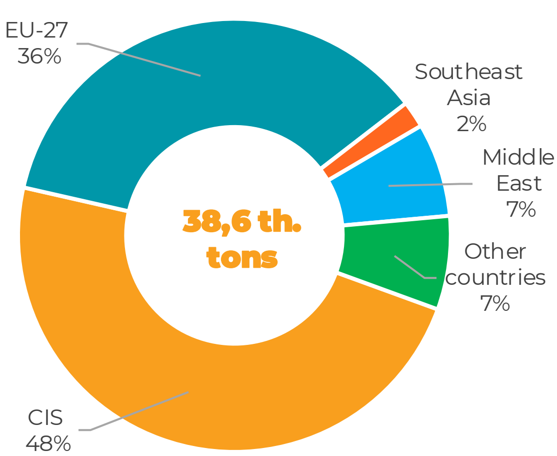
### Export geography of Cheese in 2024 (8m)




- **Cheese export**

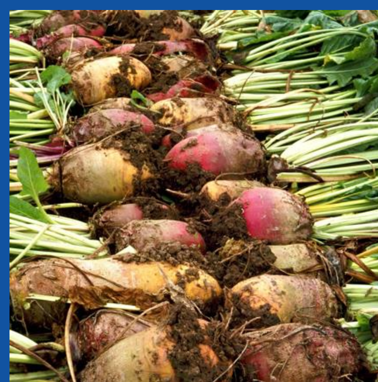
Ukrainian cheeses are gradually gaining popularity in international markets due to their affordable price and traditional production technologies. The main types of cheeses exported are hard and semi-hard varieties and processed cheeses, which are in demand in various consumer segments. The main sales markets for Ukrainian cheeses are the CIS countries, particularly Kazakhstan, Moldova, Azerbaijan, and the Middle East. Demand for cheeses in these regions is stable due to their versatility in consumption and accessibility compared to European counterparts. Entry into the European market is taking place gradually. In 2023, 8.8 thousand tons of cheese were exported -1.5% below 2022. In the first 8 months of 2024, 7.4 thousand tons were exported, 40% above 8 months of 2023. The largest importers of Ukrainian cheeses are CIS – 72%, EU-27 – 21% and the Middle East – 3%.

### Export geography in 2024 (8m)




- **Export of milk and cream**

Ukraine has significant opportunities for milk and cream exports. Manufacturers offer a wide range of fresh and pasteurised dairy products, powdered milk and concentrated cream. Powdered milk has increasing demand in world markets due to its versatility and long shelf life. The main consumers of Ukrainian products remain the CIS countries and some Middle Eastern countries. These regions value Ukrainian milk for its quality and competitive cost, which allows it to compete effectively with other suppliers. However, the export of milk and cream has several challenges. For example, logistics for fresh products are complicated due to the short shelf life. In 2023, 55.3 thousand tons of milk and cream were exported -1% below 2022. In the first 8 months of 2024, 38.6 thousand tons were exported, equal to the indicators for the same period in 2023. The largest importers of Ukrainian milk and cream are CIS – 48%, EU-27 – 36% and the Middle East – 7%.



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