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Report Name: Grain and Feed Annual

Country: Ukraine

Post: Kyiv

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Report Highlights:

Unfavorable weather conditions in autumn 2024 resulted in decreased winter wheat area. Functioning maritime logistics in MY2023/24 and the first half of MY2024/25 kept shipping rates stable and have allowed Ukraine to quicky and cost efficiently export large volumes of commodities to distant markets. Post forecasts Ukrainian farmers will expand their corn area in MY2025/26, as profitability is dependent on logistics costs. For MY2024/25, the EU is the principal export destination, importing approximately half of Ukraine's total grain exports.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Abbreviations:

MAPFU – Ministry of Agrarian Policy and Food of Ukraine
CY – Calendar Year
ha – Hectare
MY – Marketing Year
MT – Metric Ton
MMT – Million Metric Ton
NDVI – Normalized Difference Vegetation Index
PSD – Production, Supply, and Distribution
SSSU – State Statistics Service of Ukraine

Data included in this report is not official USDA data. Official USDA data is available at https://apps.fas.usda.gov/psdonline/app/index.html#/app/home

Disclaimer: *Due to the Russia-Ukraine war, there have been delays in publishing SSSU information on the status of Ukrainian agriculture in Ukrainian government-controlled areas. MAPFU data was used instead, as referenced. In this report, FAS/Kyiv cannot provide any production estimates for Russia-occupied territories, except for the Crimean Peninsula, due to the need for more credible and verifiable information. Because of the rapidly changing situation, this report provides a snapshot of the situation accompanied by assumptions and estimates that were valid at the time of report writing.*

Production

According to available information, preliminary MY2024/25 production volumes for Ukrainian government-controlled areas are:

- Barley – 5.3 MMT
- Corn – 26.8 MMT
- Wheat – 22.4 MMT
- Rye – 220,000 MT

MY2024/25 production estimates for the Crimean Peninsula are 930,000 MT of wheat and 430,000 MT of barley.

Post accepts these as the initial estimates in the relevant PSD tables.

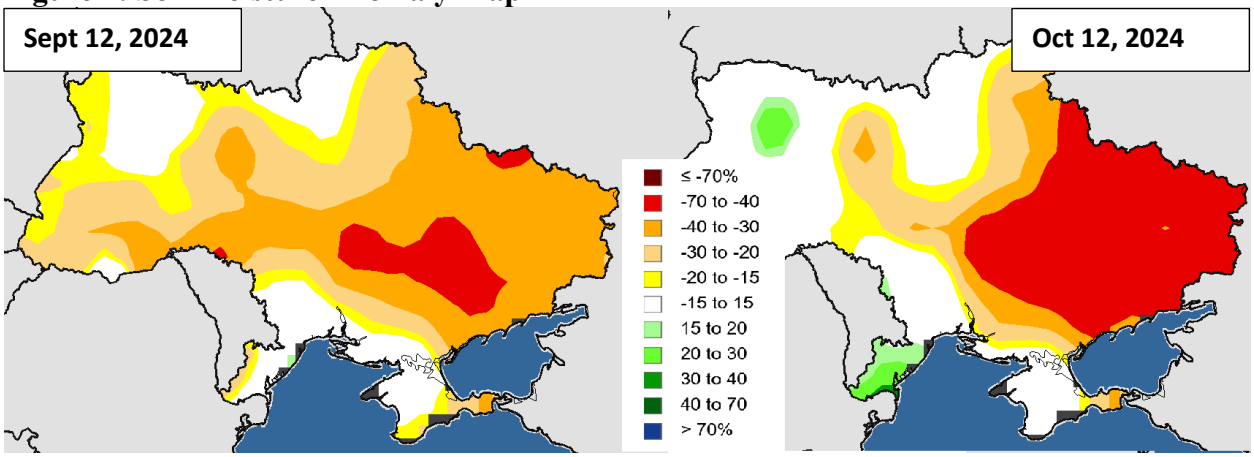
MAPFU reported actual planted areas for MY2025/26 winter crops (Table 1). Winter wheat production area is down by over 6 percent compared to MY2024/25. Post posits this could be the result of very dry soil conditions in September-October, the optimum planting period for winter wheat in Ukraine, as well as the generally low profitability of the crop (Figure 1). In general, farmers keep winter wheat in crop rotations to ensure optimal starting conditions for more profitable spring grains, specifically corn, and to an even greater extent, oilseeds, predominately sunflower, that follow winter wheat in the rotation.

Table 1: Winter Crop Areas

1000 ha	MY2024/25	MY2025/26	MY2025/26 vs MY2024/25
Wheat	4,690	4,380	-6.6%
Barley	570	610	7.0%
Rye	70	70	0.0%
Rapeseed	1,250	1,080	-13.6%
Total Winter Crops	**6,580**	**6,140**	**-6.7%**

Source: MAPFU
* includes actual planted areas for MY2025/26 winter crops per MAPFU

Figure 1: Soil Moisture Anomaly Map



Source: USDA

Post's estimates for MY2025/26 spring planting areas are based on the assumption that the total production area (i.e. winter and spring combined) for all bulk commodity crops (grains and oilseeds) stays the same as in MY2024/25 at slightly over 20 million ha (Table 2).

Table 2: Area Estimates for MY2025/26

Areas	Total MY2024/25*	Winter**	Spring (Post Est.)	Total (Post Est.)	% Change
Barley	1,400	610	900	1,510	7.9%
Corn	4,070	0	4,300	4,300	5.7%
Rye	70	70	0	70	0.0%
Wheat	4,870	4,380	150	4,530	-7.0%
Rapeseed	1,260	1,080	50	1,130	-10.3%
Soybean	2,700	0	3,000	3,000	11.1%
Sunflower Seed	6,200	0	6,100	6,100	-1.6%
Total	**20,570**	**6,140**	**14,430**	**20,640**	

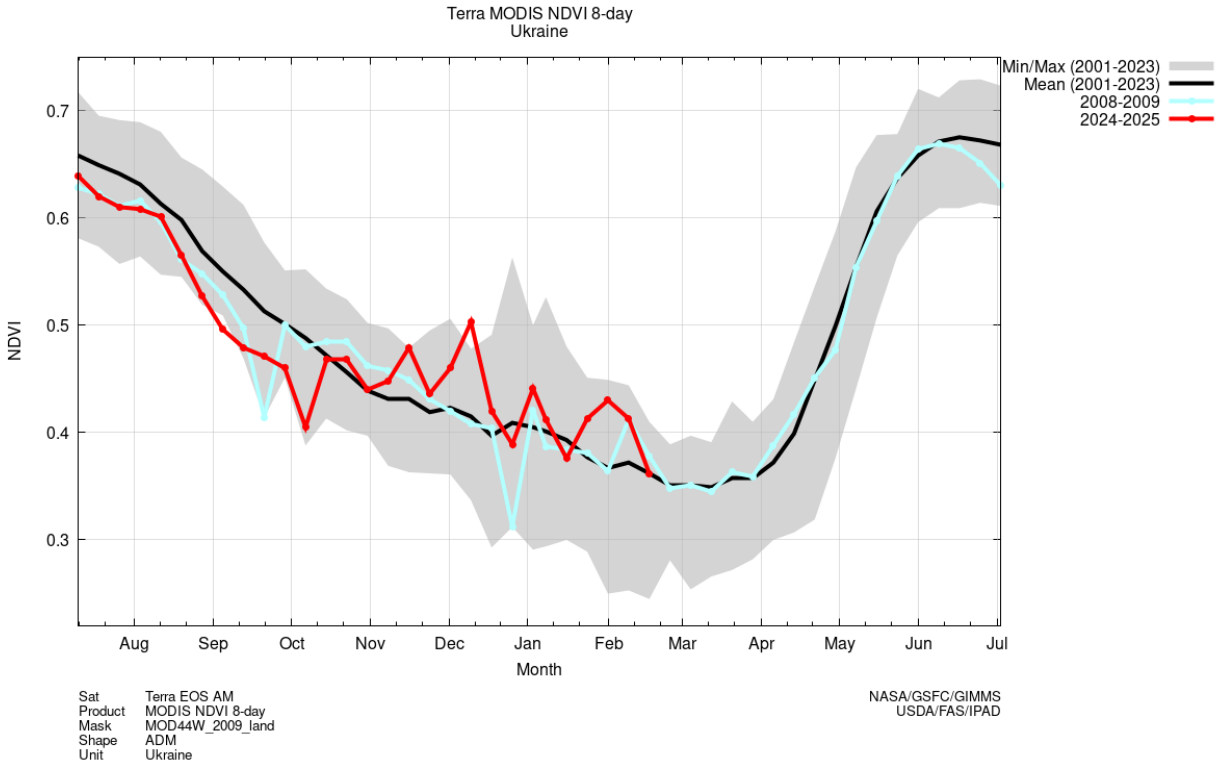
Source: * SSSU; Sunflower seed – USDA official; ** MAPFU

According to MAPFU, spring planting started in Ukraine mid-March. As of April 10, 2025, the following was planted:

- Wheat – 141,000 ha, 62 percent of MAPFU anticipated planting area
- Barley – 612,000 ha, 79 percent of MAPFU anticipated planting area

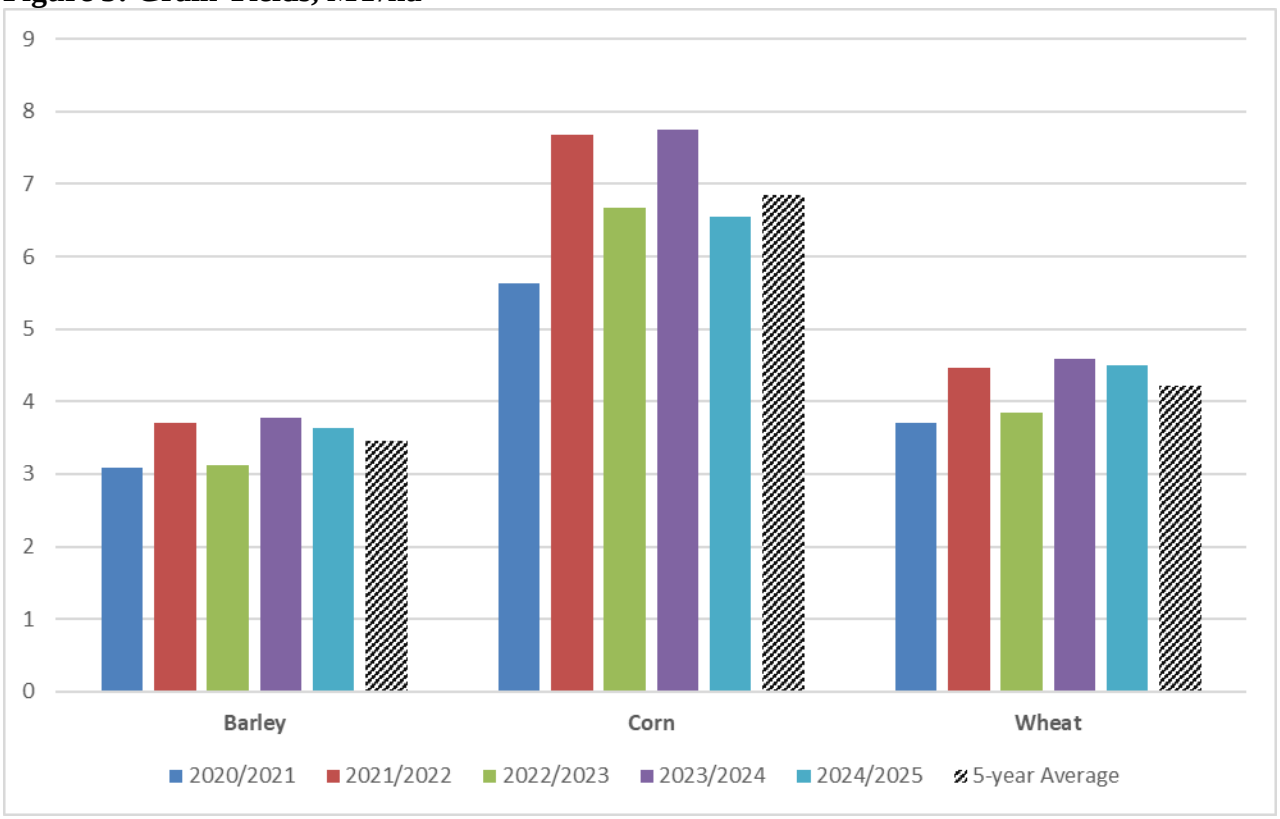
Because Ukraine has both wheat and barley planted in the winter and spring, as well as winter rye and spring corn, Post uses different yield estimation strategies for each crop. Post based MY2025/26 winter yield estimates on the MY2008/09 pattern, as the normalized difference vegetation (NDVI) index is very similar for the August-November period, the time before the plants are dormant (Figure 2). Note that NDVI is a standardized measure of vegetation. High values indicate healthier vegetation, while low values indicate low or no vegetation.

Figure 2: NDVI for Ukraine



At the time of the report writing, Post estimates yields for all spring crops based on 5-year averages (Figure 3).

Figure 3: Grain Yields, MT/ha



Source: USDA

There is no lack of imported fertilizer and agrochemicals for MY2025/26 at the time of the report writing. Therefore, Post will not take into account the possibility of yield drops due to this factor.

FAS/Kyiv's MY2025/26 production forecast is:

- Barley – 5.1 MMT, a 7 percent decrease against Post's MY2024/25 estimate
- Corn – 29.5 MMT, a 10 percent increase against MY2024/25
- Wheat – 17.9 MMT, a 23 percent decrease against MY2024/25
- Rye – 190,000 MT, a 13 percent decrease against MY2024/25

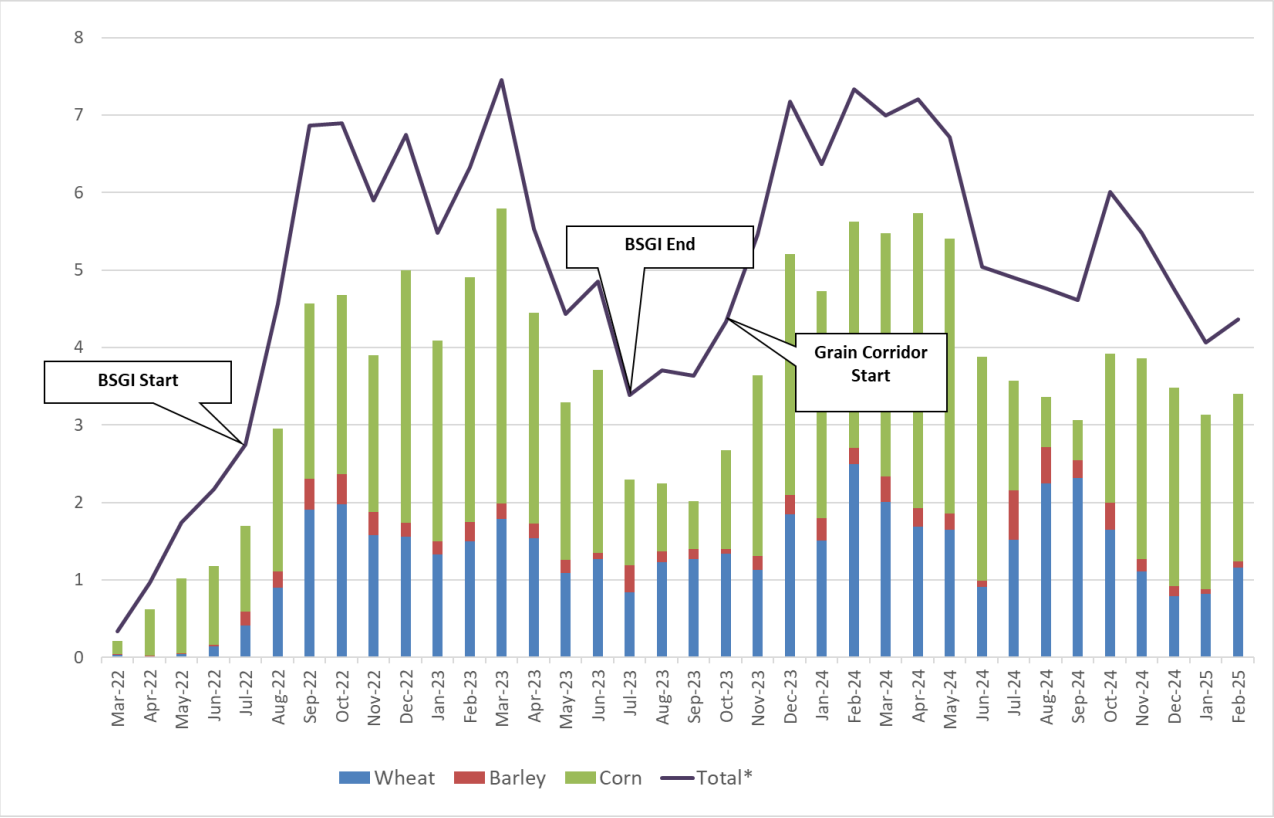
Post also performed a backdated upward revision of MY2022/23 corn production to 32.5 MMT, based on export and domestic consumption estimates.

Trade

Ukraine is a net exporter of bulk agricultural commodities, including all major grains and oilseeds. It is critically dependent on its access to ports and marine routes to ensure cost-efficient logistics for large export volumes. Most export bandwidth is dedicated to grains (Figure 4). Oilseed exports (beans/kernels, oils, and meals) fluctuate in line with available export capacity, including rail, truck, and

port channels. Marine logistics are more critical for grains due to limited domestic market capacity and the need for timely exports of large volumes of product. Changes in logistic costs immediately affect farmgate prices, shifting the balance between grain and oilseed areas each MY.

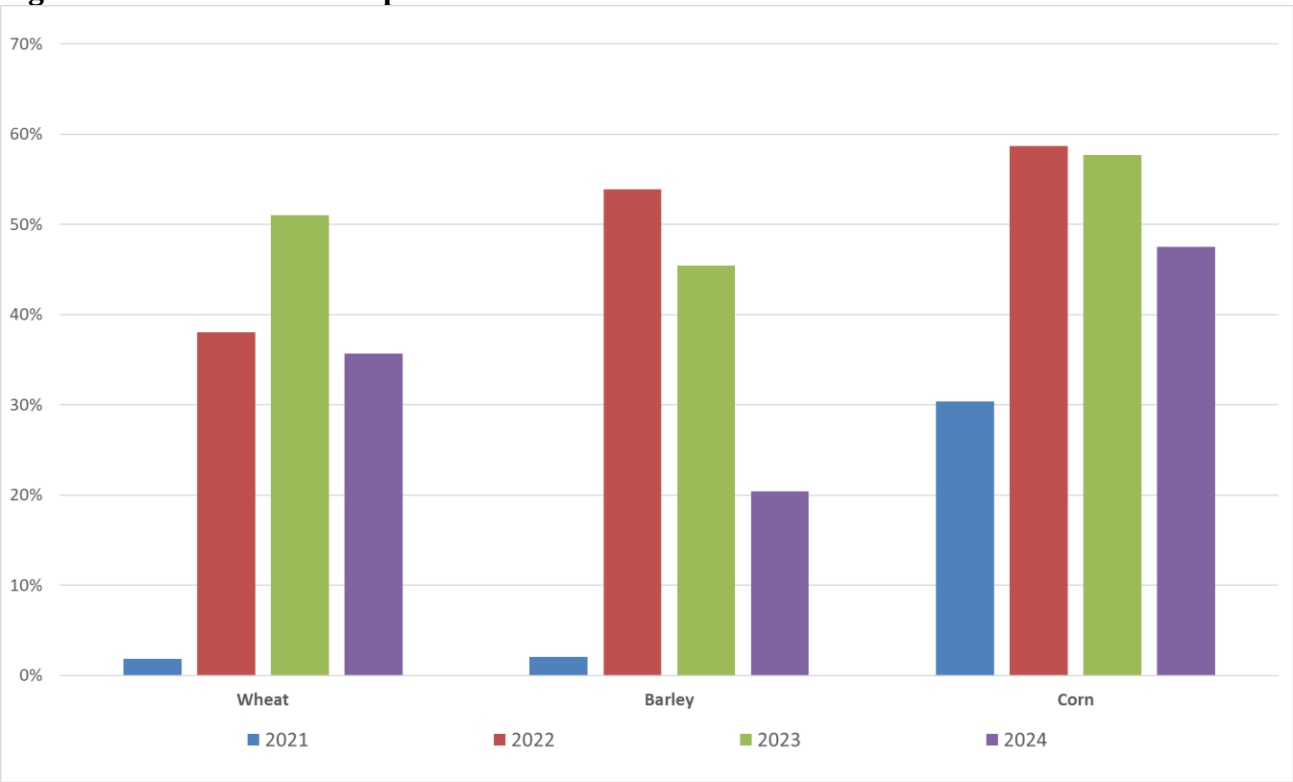
Figure 4: Exports of Selected Commodities from Ukraine, MMT



Source: MAPFU
* Wheat, Barley, Corn, Soy, Rapeseed, Sunflower, Soy Oil, Sunflower Oil, Vegetable Meals

The EU is Ukraine's principal market destination for agricultural products, importing 44 percent of Ukraine's total grain export volume (wheat, corn, and barley) in CY2024 (Figure 5). This has been the case since the temporary suspension of import duties and quotas on Ukrainian agricultural exports to the EU, initially set by Regulation 2022/870 of the European Parliament and the Council in July 2022. The EU's introduction of the autonomous trade measures in May 2024 retained an opening for Ukrainian grains to the European market. Ukraine maintains export licenses for wheat and corn to Bulgaria, Romania, Slovakia, Hungary, and Poland, as there are export limitations imposed by these individual countries. For more details, see Annex 4 (in Ukrainian) in Resolution #1481.

Figure 5: Share of Grain Exports from Ukraine to the EU



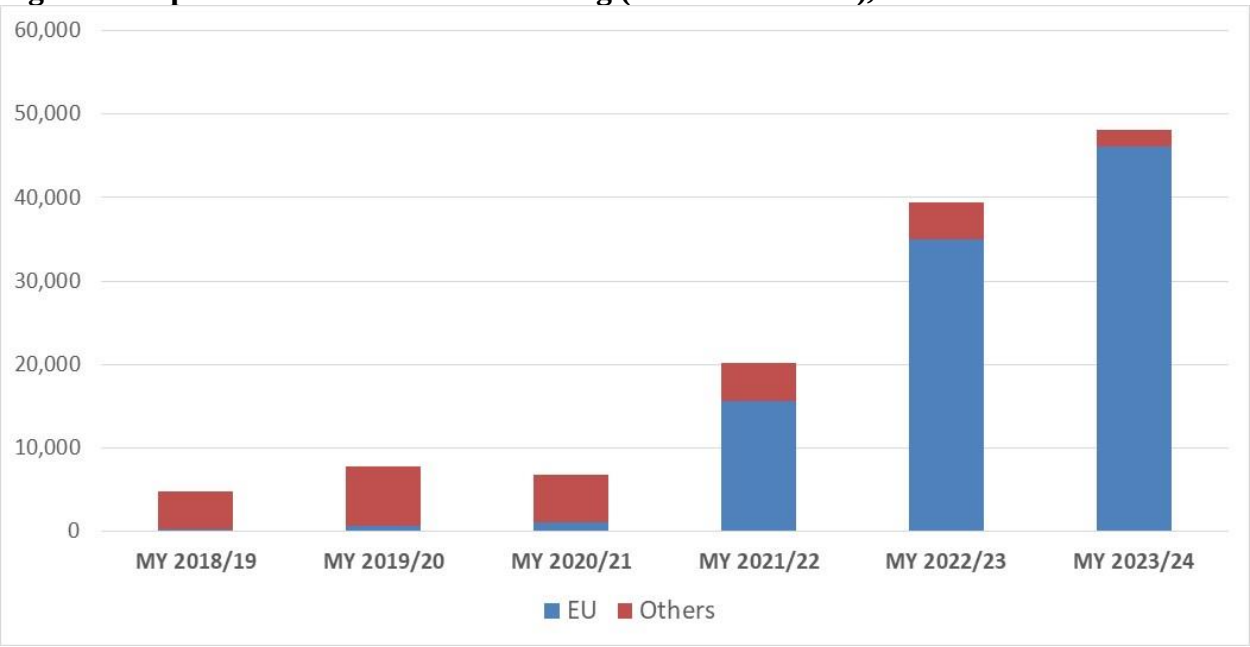
Source: Trade Data Monitor (TDM)

Total barley exports from July 2024 to January 2025 were 2 MMT, a 44 percent increase compared to the same period in the previous year, according to TDM. The EU's share (363,000 MT) of total barley exports fell to 18 percent, compared to 57 percent in the previous period, as Ukraine returned to its traditional destinations, including China (708,000 MT), Libya (280,000 MT), and Israel and Jordan (over 210,000 MT combined).

Wheat exports from July 2024 to January 2025 were 10.8 MMT, a 17 percent increase compared to the same period in the previous year. The EU's share (3.7 MMT) of total wheat exports decreased to 34 percent, compared to 58 percent during the previous year's period, as exports grew to four larger destinations: Indonesia (1.5 MMT); Egypt (960,000 MT); Algeria; and Vietnam (approximately 900,000 MT each).

Corn exports from October 2024 to January 2025 were 9.6 MMT, 7 percent lower than the same period in the previous year. The EU retained its status as the single largest export destination, importing 5 MMT through the ports of Spain, Italy, and the Netherlands. Türkiye became the second largest destination (1.9 MMT), followed by Egypt (860,000 MT). Ukraine significantly boosted its exports of seed corn for planting to the EU starting in 2020, when Ukrainian seeds were granted equivalency (see GAIN Report UP2020-0054) (Figure 6).

Figure 6: Exports of Corn Seeds for Planting (HS Code 100510), MT



Source: TDM

Wheat flour and pasta exports from July 2024 to January 2025 were 53,000 MT, a 31 percent decrease compared to the same period in the previous year. Approximately half of this volume (26,000 MT) was exported to the EU, followed by neighboring Moldova (14,000 MT), and the Gaza Strip and West Bank (8,000 MT). Some of these volumes are likely food aid.

Ukraine also imported around 28,000 MT of wheat flour and pasta products from July 2024 to January 2025, a 24 percent increase compared to the same period in the previous year. Ukraine imports largely processed products; 70 percent of the total volume is pasta, predominantly from the EU, and 15 percent is couscous, from Türkiye and Tunisia.

According to MAPFU data, from the beginning of MY2024/25 (July 2024 to February 2025 for barley and wheat and October 2024 to February 2025 for corn), Ukraine exported:

- Wheat – 11.6 MMT, similar to the same period last year
- Barley – 2.1 MMT, a 31 percent increase
- Corn – 11.5 MMT, a 9 percent decrease

Based on the production estimates and abovementioned MAPFU trade data, FAS/Kyiv's export estimates for MY2024/25 are:

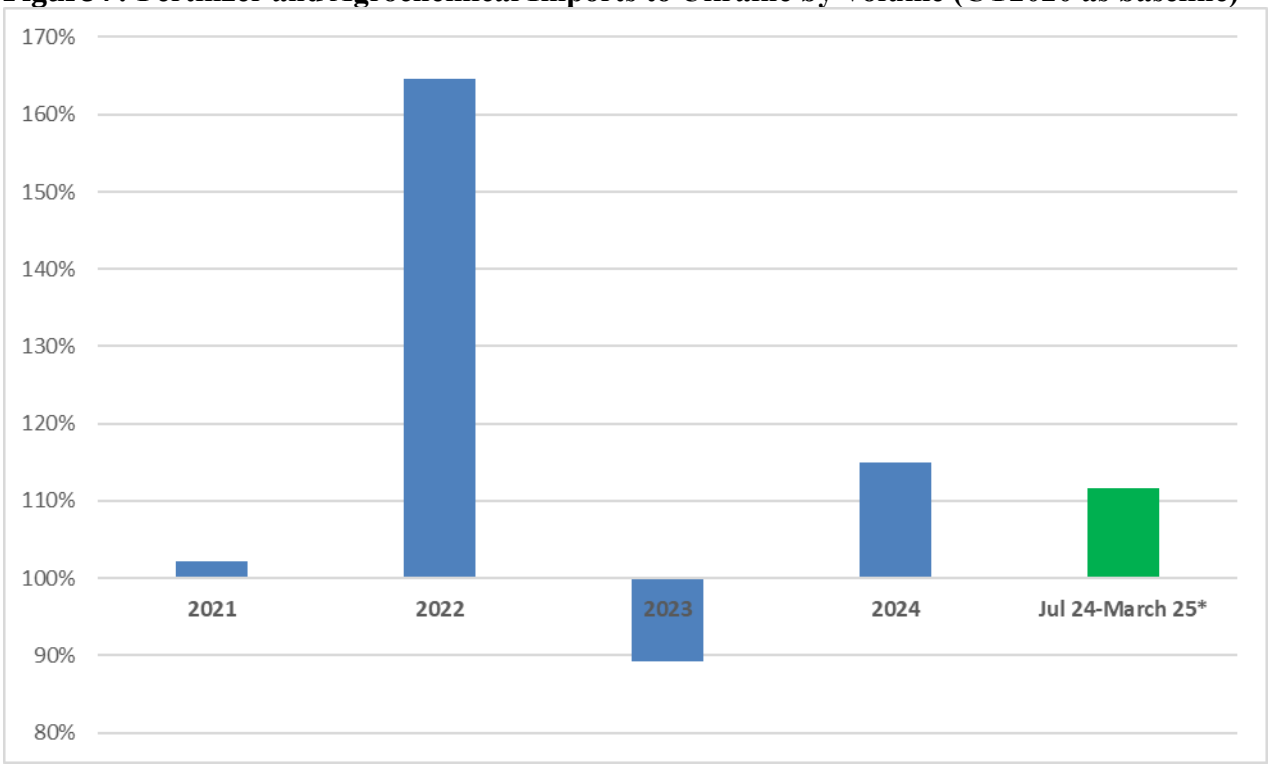
- Barley – 2.2 MMT, a 10 percent decrease compared to Post's MY2023/24 estimate
- Corn – 22.2 MMT, a 25 percent decrease
- Wheat – 15.5 MMT, a 17 percent decrease
- Rye – 15,000 MT, a 650 percent increase

Based on Post's grain production forecast, FAS/Kyiv forecasts MY2025/26 export numbers at:

- Barley – 3.2 MMT, a 43 percent increase compared to Post's MY2024/25 estimate
- Corn – 23.2 MMT, a 5 percent increase
- Wheat – 10.0 MMT, a 35 percent decrease
- Rye – 10,000 MT, a 33 percent decrease

Ukraine has an industrialized agricultural sector where yields correlate with input availability, including fertilizers and agrochemicals. While there is domestic production of nitrogen fertilizers and generic agrochemicals, Ukraine is reliant on imports (Figure 7). FAS/Kyiv used CY2020 as a base year for comparisons because it was the last "normal," pre-war year. Note the increase in CY2022 could be due to a combination of customs processing of imports from late CY2021, when importers were unable to customs clear at the beginning of the Russia-Ukraine war, additional imports, and humanitarian relief to replace lost and destroyed stocks.

Figure 7: Fertilizer and Agrochemical Imports to Ukraine by Volume (CY2020 as baseline)



Source: TDM
* compared to July 2023-March 2024

Consumption

Post estimates MY2024/25 feed consumption estimates down 2 percent from its previous MY estimate on animal and production numbers from poultry (UP2025-0003) and livestock (UP2025-0006) and forecasts MY2025/26 total feed consumption to remain static (Table 3).

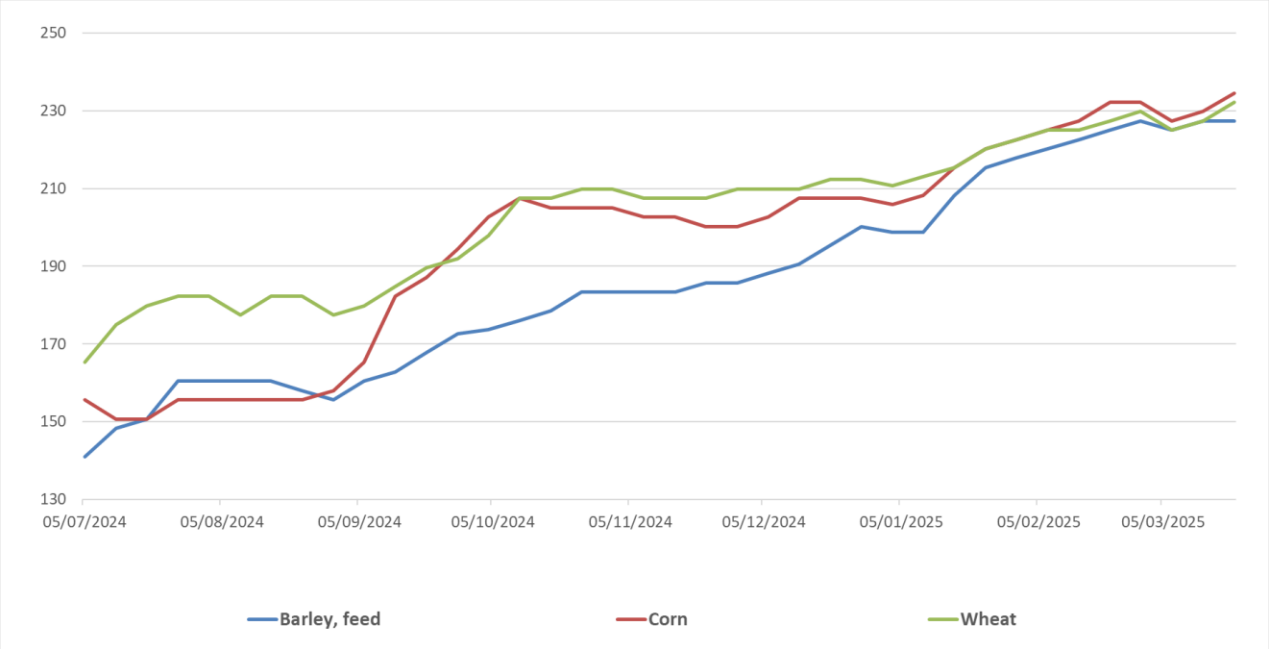
Table 3: Total Feed Consumption in Ukraine

	MY2023/24	MY2024/25	MY2025/26
Barley	2,900	2,400	900
Corn	4,500	4,200	5,300
Rye	0	0	0
Wheat	2,200	2,800	3,200
Total	**9,600**	**9,400**	**9,400**

Source: FAS/Kyiv Estimate

The consumption of individual grains in animal feed depends on domestic price spreads and the availability of specific crops (Figure 8). At the time of report writing, domestic grain prices are relatively similar. The barley price has converged with wheat and barley, as its stocks were most likely depleted by mid-March 2025. Feed quality wheat and corn are widely available and are staples of feeding diets. The overall growth in domestic grain prices is the result of the lower CY2024 crop, forcing exporters to compete for available stocks.

Figure 8: Domestic Grain Prices in Ukraine, EXW, USD/MT



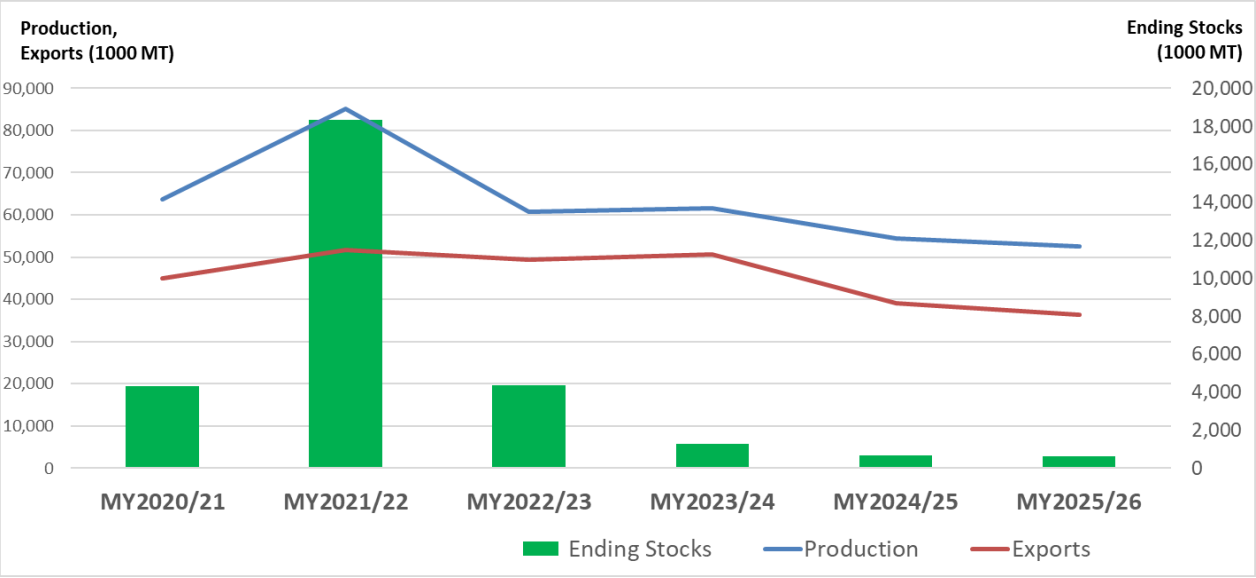
Source: APK-Inform

Post estimates food consumption for individual grains on the number of refugees who have left Ukraine, per the United Nations High Commissioner for Refugees. The number of registered refugees dropped from its peak of 8.1 million in MY2022/23 to 6.5 million in MY2023/24, to its current 6.9 million. Therefore, Post's MY2024/25 FSI estimate for wheat is 1 percent lower than the previous MY. Post's MY2025/26 FSI wheat forecast is similar to MY2024/25, under the assumption that refugee flows remain in CY2025 and CY2026.

Stocks

A combination of improved logistics and lower production estimates suggests minimal ending stocks from MY2023/24 through MY2025/26 (Figure 9). Industry has cited growing domestic prices as an additional argument for minimal MY2024/25 stocks.

Figure 9: Ukraine's Stocks vs. Production and Exports for Wheat, Barley and Corn



Source: FAS/Kyiv Estimates

Production, Supply, and Distribution Data

Barley

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1680	1676	1600	1553	0	1500
Beginning Stocks (1000 MT)	720	720	789	442	0	279
Production (1000 MT)	6350	6109	5800	5456	0	5100
MY Imports (1000 MT)	1	1	2	1	0	1
TY Imports (1000 MT)	0	0	2	1	0	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	7071	6830	6591	5899	0	5380
MY Exports (1000 MT)	2482	2481	2500	2230	0	3200
TY Exports (1000 MT)	3176	3176	2400	2230	0	3200
Feed and Residual (1000 MT)	2800	2900	2500	2400	0	900
FSI Consumption (1000 MT)	1000	1007	1000	990	0	1000
Total Consumption (1000 MT)	3800	3907	3500	3390	0	1900
Ending Stocks (1000 MT)	789	442	591	279	0	280
Total Distribution (1000 MT)	7071	6830	6591	5899	0	5380
Yield (MT/HA)	3.7798	3.645	3.625	3.5132	0	3.4

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Corn

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4200	4128	4100	4065	0	4300
Beginning Stocks (1000 MT)	2995	2995	1067	637	0	160
Production (1000 MT)	32500	32500	26800	26823	0	29500
MY Imports (1000 MT)	10	10	20	10	0	10
TY Imports (1000 MT)	10	10	20	10	0	10
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	35505	35505	27887	27470	0	29670
MY Exports (1000 MT)	29488	29488	22000	22200	0	23200
TY Exports (1000 MT)	29488	29488	22000	22200	0	23200
Feed and Residual (1000 MT)	4000	4500	4200	4200	0	5300
FSI Consumption (1000 MT)	950	880	950	910	0	920
Total Consumption (1000 MT)	4950	5380	5150	5110	0	6220
Ending Stocks (1000 MT)	1067	637	737	160	0	250
Total Distribution (1000 MT)	35505	35505	27887	27470	0	29670
Yield (MT/HA)	7.7381	7.8731	6.5366	6.5985	0	6.8605

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Wheat

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5010	5007	5200	5168	0	4500
Beginning Stocks (1000 MT)	2926	2926	706	226	0	478
Production (1000 MT)	23000	22970	23400	23337	0	17900
MY Imports (1000 MT)	57	57	80	95	0	80
TY Imports (1000 MT)	57	57	80	95	0	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	25983	25953	24186	23658	0	18458
MY Exports (1000 MT)	18577	18577	15500	15500	0	10000
TY Exports (1000 MT)	18577	18577	15500	15500	0	10000
Feed and Residual (1000 MT)	2000	2200	2300	2800	0	3200
FSI Consumption (1000 MT)	4700	4950	4700	4880	0	4910
Total Consumption (1000 MT)	6700	7150	7000	7680	0	8110
Ending Stocks (1000 MT)	706	226	1686	478	0	348
Total Distribution (1000 MT)	25983	25953	24186	23658	0	18458
Yield (MT/HA)	4.5908	4.5876	4.5	4.5157	0	3.9778
(1000 HA), (1000 MT), (MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note that in the Wheat PSD, both export and import volumes for flour and wheat products (HS Codes 1101, 190219, 190230, 190240) are converted to wheat grain equivalent by multiplying the product weight by 1.368 and added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of wheat trade by Ukraine.

FAS/Kyiv's MY2024/25 wheat feed and residual estimate is 22 percent higher than USDA's official number based on higher inclusion in feeding diets.

Rye

Rye	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	80	78	70	70	0	70
Beginning Stocks (1000 MT)	199	199	155	146	0	87
Production (1000 MT)	240	231	220	218	0	190
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	439	430	375	364	0	277
MY Exports (1000 MT)	2	2	15	15	0	10
TY Exports (1000 MT)	8	8	10	15	0	10
Feed and Residual (1000 MT)	2	2	2	2	0	2
FSI Consumption (1000 MT)	280	280	290	260	0	250
Total Consumption (1000 MT)	282	282	292	262	0	252
Ending Stocks (1000 MT)	155	146	68	87	0	15
Total Distribution (1000 MT)	439	430	375	364	0	277
Yield (MT/HA)	3	2.9615	3.1429	3.1143	0	2.7143
(1000 HA), (1000 MT), (MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Rye begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments