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**Post:** Kyiv

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**Prepared By:** Denys Sobolev

**Approved By:** Megan Francic

**Report Highlights:**

This report contains final export estimates for wheat, barley, and rye as marketing year (MY) 2024/25 has concluded. Post updated its production and export forecasts for MY2025/26 based on reported production areas as well as its own yield estimates. The European Union updated its import policies for Ukrainian agricultural commodities, including grains.

## Abbreviations:

MAPFU – Ministry of Agrarian Policy and Food of Ukraine

FSI – Food, Seed, and Industrial

ha – Hectare

MY – Marketing Year

MT – Metric Ton

MMT – Million Metric Ton

PSD – Production, Supply, and Distribution

SSSU – State Statistics Service of Ukraine

This report focuses on production and export forecasts for marketing year (MY) 2025/26, which runs from July 2025 to June 2026 for wheat, barley, and rye and from October 2025 to September 2026 for corn. It also contains updated export estimates for MY2024/25 based on available trade data. For detailed information on estimates and a general overview of Ukraine's agriculture sector, see the [2025 Ukraine Grain and Feed Annual Report \(UP2025-0010\)](#).

## Production

The State Statistics Service of Ukraine (SSSU) reported the following final MY2025/26 planted areas for grains:

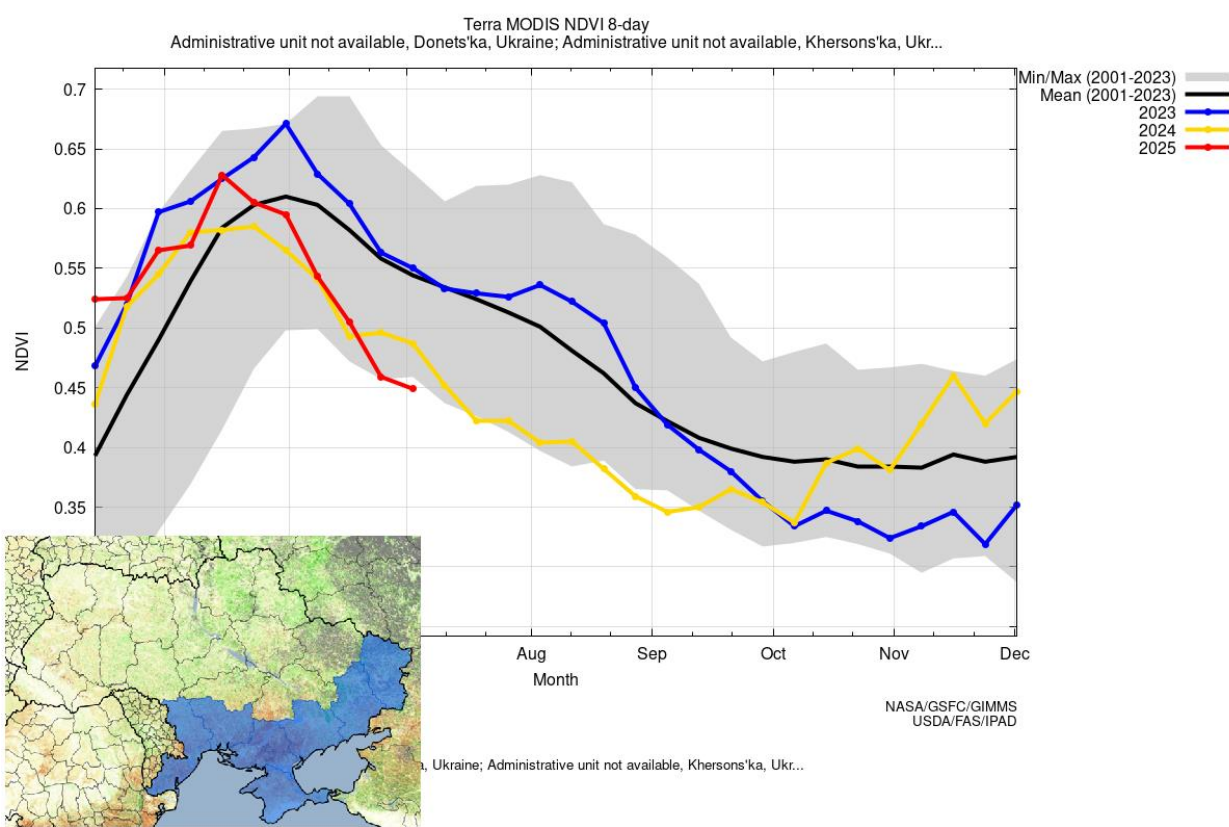
- Wheat – 5.2 million ha, similar to Post's MY2024/25 estimate
- Barley – 1.4 million ha, a 10 percent decrease
- Corn – 4.5 million ha, a 10 percent increase
- Rye – 60,000 ha, a 14 percent decrease

Post accepts these as MY2025/26 production area estimates for government-controlled areas of Ukraine.

Post used different approaches to estimate yields for different geographic areas of Ukraine, as opposing weather patterns manifested on the normalized difference vegetation index (NDVI). NDVI is a standardized measure of healthy vegetation. High NDVI values indicate healthier vegetation, while low NDVI values indicate low or no vegetation.

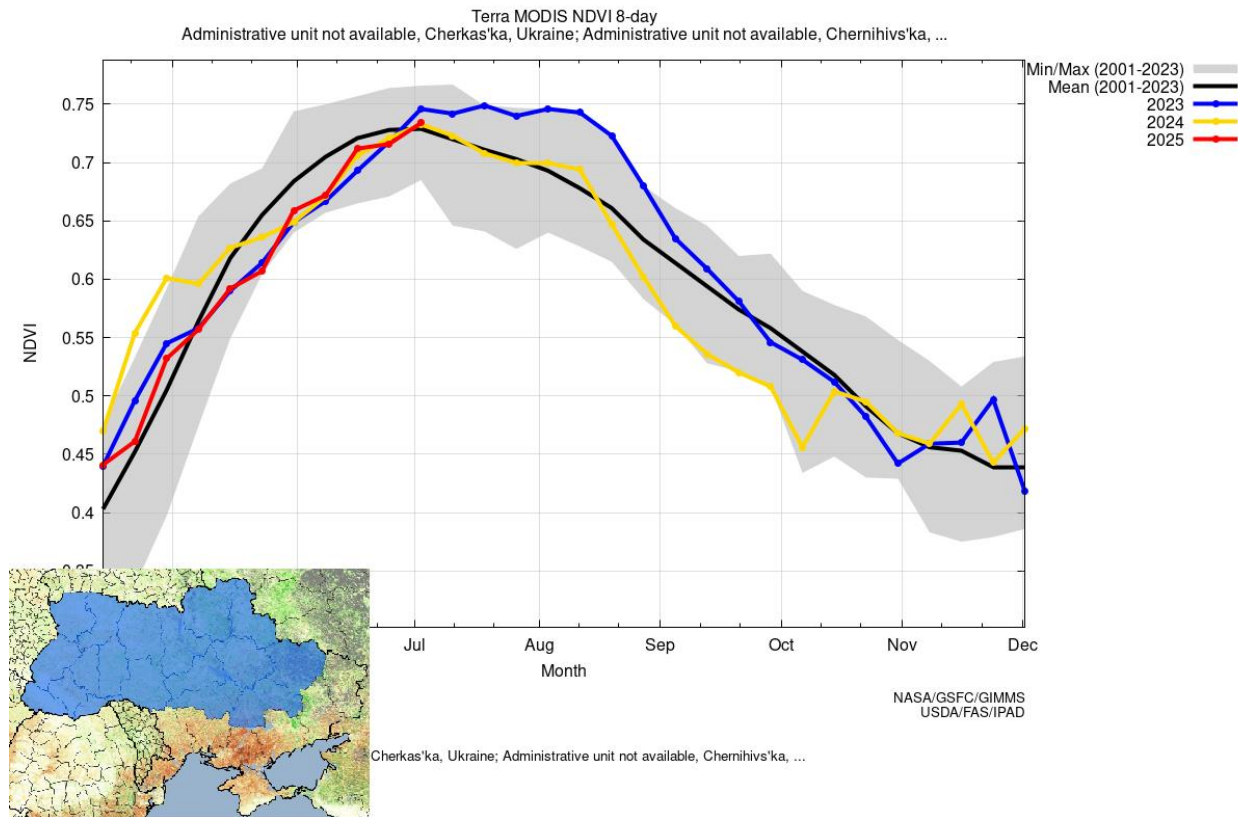
Seven oblasts in southern Ukraine (Odesa, Mykolaiv, Kherson, Zaporizhzhia, Donetsk, Luhansk, and the Crimean Peninsula) had a different NDVI pattern compared to the rest of Ukraine (Figures 1 and 2). For these oblasts, NDVI was very close to the historical minimum and resembled the NDVI in MY2024/25.

Figure 1: NDVI for Selected Oblasts in Southern Ukraine



The MY2025/26 NDVI in other Ukrainian oblasts is more comparable to the MY2023/24 pattern and higher than the historic average.

**Figure 2: NDVI for the Other Oblasts in Ukraine**



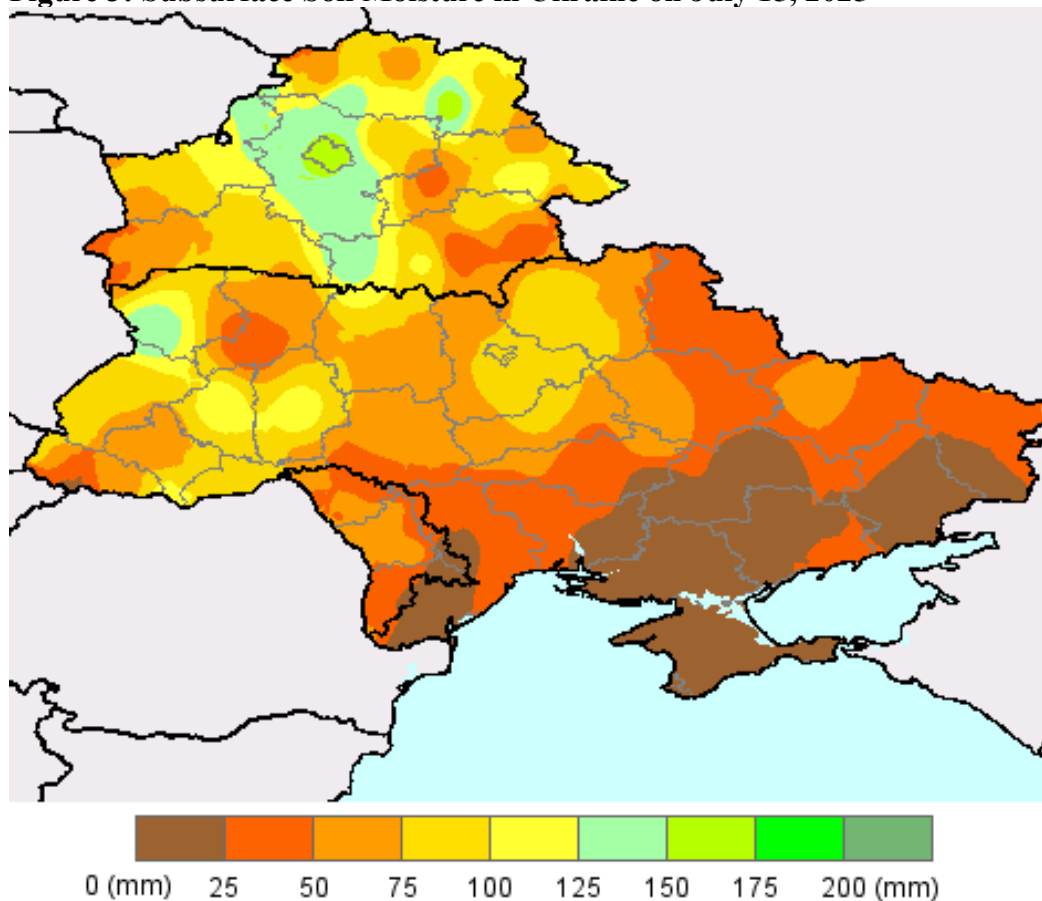
Source: NASA/USDA

Based on a combination of Ministry of Agrarian Policy and Food of Ukraine (MAPFU) reported planted areas and yield estimates, Post estimates the following MY2025/26 production:

- Wheat – 22.8 MMT, similar to Post's MY2024/25 estimate
- Barley – 4.9 MMT, a 10 percent decrease
- Corn – 34.7 MMT, a 29 percent increase
- Rye – 200,000 MT, an 8 percent decrease

At the time of report writing, a deficit of subsurface soil moisture was developing across almost all of Ukraine that could have an adverse effect on corn yields for MY2025/26 (Figure 3). Post could downgrade its corn yield forecast should the situation continue.

**Figure 3: Subsurface Soil Moisture in Ukraine on July 15, 2025**



Source: World Meteorological Organization

## Exports

MY2024/25 has concluded for all grains except corn. Post updated its export estimates based on State Customs Service of Ukraine data:

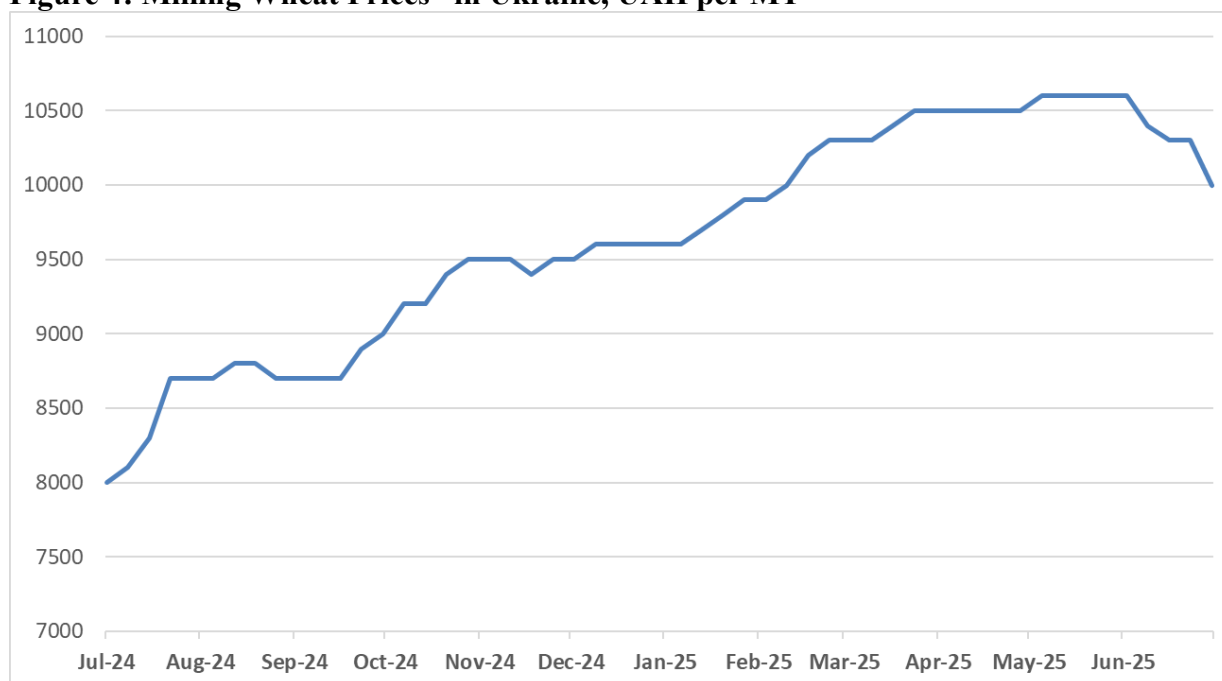
- Wheat – 15.8 MMT, a 15 percent decrease compared to Post's MY2023/24 estimate
- Barley – 2.3 MMT, a 9 percent decrease
- Rye – 11,000 MT, a 550 percent increase

Since the beginning of the Russia-Ukraine war, Ukraine has expanded its grain exports to the EU market. See the Trade Section of [GAIN Report UP2025-0010](#) for more details. However, the EU's share in Ukraine's exports has declined for both wheat and barley in MY2024/25, due to the uncertainty surrounding the EU's introduction of import duties and tariff rate quotas (TRQs).

For MY2024/25 wheat exports, the EU imported 4.7 MMT, or 30 percent of total Ukrainian exports, a decrease from 47 percent of total exports in MY2023/24. Decreased shipments to the European market allowed Ukraine to boost exports to a diverse mix of traditional and new markets, including Egypt (2.1 MMT), Algeria (1.9 MMT), Indonesia (1.6 MMT), Vietnam (1.0 MMT), and Bangladesh (1.0 MMT).

The EU's share of Ukraine's wheat flour and pasta exports remained at 52 percent of total exports for MY2024/25, which is similar to the previous MY; however, total MY2024/25 wheat flour and pasta exports from Ukraine decreased by 24 percent compared to the previous MY to 88,500 MT. Industry notes local millers lost their competitive edge to wheat exporters as domestic wheat prices grew during MY2024/25 (Figure 4).

**Figure 4: Milling Wheat Prices\* in Ukraine, UAH per MT**



Source: Information Agency "APK-Inform"

\* CPT (Carriage Paid To) Basis

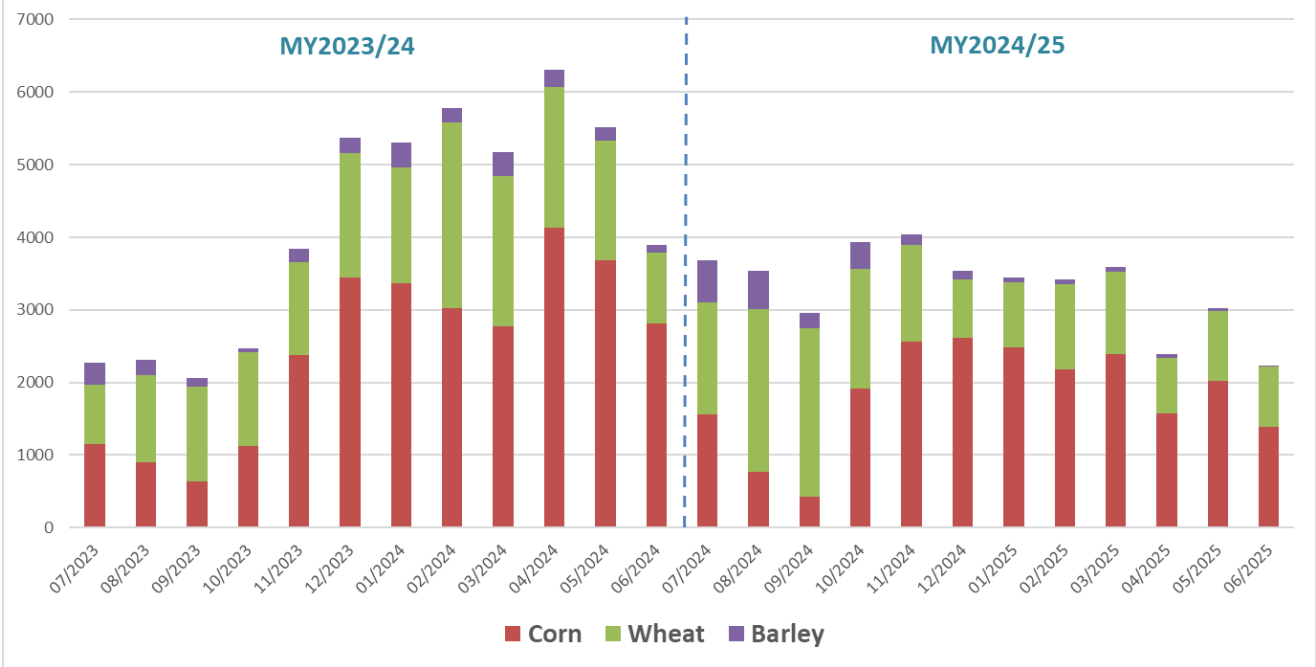
For barley, the EU's share plunged significantly. Ukraine exported 411,300 MT to the EU in MY2024/25, with the EU's share shrinking to 18 percent of total exports, compared to 42 percent in MY2023/24. China became Ukraine's largest market in MY2024/25, with exports stable at 708,000 MT, while available volumes were routed to Libya (323,000 MT), Jordan (145,000 MT), Algeria (118,000 MT), and Lebanon (103,000 MT), resulting in growing exports to these destinations.

The EU's May 2024 introduction of an emergency brake mechanism set a 11.1 MMT cap for corn exports from Ukraine. The autonomous trade measures (ATMs) expired in June 2025, and the EU subsequently adopted new quotas. Historically, EU import quotas for corn were not a limiting factor for Ukrainian exports due to the import duty mechanism. Sources indicate the new quotas will not limit Ukrainian corn exports to the EU, unless Ukrainian export prices fall below a specific threshold.

MY2024/25 corn exports were in progress at the time of report writing. For October 2024 to June 2025, Ukraine exported 19.1 MMT, a 35 percent decrease compared to the same period in the previous year. Post estimates total MY2024/25 corn exports at 22.0 MMT based on a combination of the current export volumes and production estimates.

MY2024/25 grain exports have demonstrated less monthly volatility compared to the previous MY (Figure 5).

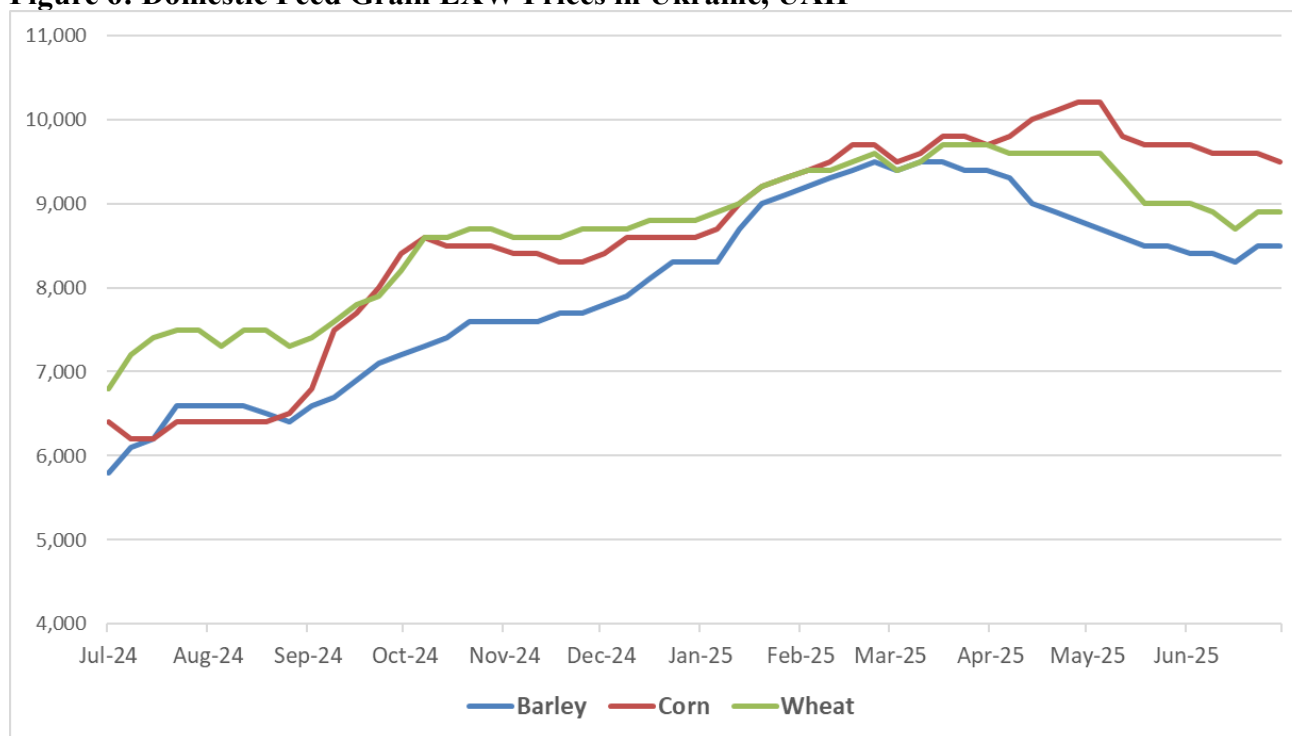
**Figure 5: Exports of Major Grains from Ukraine, 1000 MT**



Source: TDM, LLC

Contacts suggest this decrease in volatility might be the result of local farmers gaining more bargaining power vis-à-vis traders for two reasons. The first is the decreased supply of grains on the domestic market. On average, production volumes from MY2022/2023 to MY2024/25 were 13 percent lower than pre-full-scale invasion numbers, as Russia is currently occupying parts of Ukraine. The second is agricultural producers, including small and medium farmers, invested into storage infrastructure, allowing them to cost-effectively retain stocks to take advantage of market fluctuations. These changes are supported by a steady rise in domestic prices and further reinforced by the weakening of the Ukrainian hryvnia, which is tied to the U.S. dollar (Figure 6).

**Figure 6: Domestic Feed Grain EXW Prices in Ukraine, UAH**



Source: Information Agency “APK-Inform”

Post updated its MY2025/26 export forecasts on production forecasts:

- Wheat – 15.0 MMT, a 5 percent decrease from Post’s MY2024/25 estimate
- Corn – 28.5 MMT, a 29 percent increase
- Barley – 3.2 MMT, a 42 percent increase
- Rye – 10,000 MT, a 9 percent decrease

## Policy

On June 3, 2025, the European Commission published [Regulation \(EU\) 2025/1132](#) on TRQs for products originating in Ukraine for calendar year 2025. It phases out the ATMs, reverting to the following TRQs:

- Wheat – 1 MMT
- Corn - 650,000 MT
- Barley – 350,000 MT

For more information about the updated EU import quotas for Ukraine, see [GAIN Report UP2025-0022](#).

The official announcement of new TRQs came two days before the ATMs were scheduled to expire; the uncertainty affected Ukrainian grain exports at the end of MY2024/25.



The EU sets import duties on separate reference prices for six grain types: high-quality wheat; durum wheat (high quality); durum wheat (medium quality); maize (corn); flint corn; rye; and sorghum. On July 1, 2024, [Commission Implementing Regulation \(EU\) 2024/1801](#) set the duties at €0/MT for the abovementioned products. [Implementing Regulation 2023/2384](#) outlines the references for duty calculations and provides a sample calculation. For more information about the EU's import duty policies, please refer to the EU Grains Import Policy Section of [GAIN Report E42025-0004](#).

## PSD Statistics

All PSD tables below sum the estimated production numbers for government-controlled areas and Russian-occupied Crimea. The MY2023/24, MY2024/25, and MY2025/26 estimates do not include data for regions currently occupied by Russia, as production figures and data are unavailable.

**Table 1: Barley**

Barley Market Year Begins  Ukraine	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	1680	1676	1600	1556	1600	1400
<b>Beginning Stocks</b> (1000 MT)	720	720	689	683	591	399
<b>Production</b> (1000 MT)	6350	6350	5800	5472	5500	4900
<b>MY Imports</b> (1000 MT)	1	1	2	0	0	1
<b>TY Imports</b> (1000 MT)	0	0	2	0	0	1
<b>TY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	7071	7071	6491	6155	6091	5300
<b>MY Exports</b> (1000 MT)	2482	2481	2300	2256	3500	3200
<b>TY Exports</b> (1000 MT)	3176	3176	2700	2256	3500	3200
<b>Feed and Residual</b> (1000 MT)	2900	2900	2600	2400	1200	700
<b>FSI Consumption</b> (1000 MT)	1000	1007	1000	1100	1000	1000
<b>Total Consumption</b> (1000 MT)	3900	3907	3600	3500	2200	1700
<b>Ending Stocks</b> (1000 MT)	689	683	591	399	391	400
<b>Total Distribution</b> (1000 MT)	7071	7071	6491	6155	6091	5300
<b>Yield</b> (MT/HA)	3.7798	3.7888	3.625	3.5167	3.4375	3.5

(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](#)

**Table 2: Corn**

Corn Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Area Harvested (1000 HA)	4200	4128	4100	4071	4200	4500
Beginning Stocks (1000 MT)	2995	2995	642	637	312	809
Production (1000 MT)	32500	32500	26800	26867	30500	34700
MY Imports (1000 MT)	10	10	20	15	10	10
TY Imports (1000 MT)	10	10	20	15	10	10
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	35505	35505	27462	27519	30822	35519
MY Exports (1000 MT)	29488	29488	22000	22000	24000	28500
TY Exports (1000 MT)	29488	29488	22000	22000	24000	28500
Feed and Residual (1000 MT)	4500	4500	4200	3800	5300	5200
FSI Consumption (1000 MT)	875	880	950	910	925	920
Total Consumption (1000 MT)	5375	5380	5150	4710	6225	6120
Ending Stocks (1000 MT)	642	637	312	809	597	899
Total Distribution (1000 MT)	35505	35505	27462	27519	30822	35519
Yield (MT/HA)	7.7381	7.8731	6.5366	6.5996	7.2619	7.7111

(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](#)

**Table 3: Wheat**

<b>Wheat Market Year Begins  Ukraine</b>	<b>2023/2024</b>		<b>2024/2025</b>		<b>2025/2026</b>	
	<b>Jul 2023</b>		<b>Jul 2024</b>		<b>Jul 2025</b>	
	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b> (1000 HA)	5010	5007	5200	5182	5000	5200
<b>Beginning Stocks</b> (1000 MT)	2926	2926	706	1806	1586	929
<b>Production</b> (1000 MT)	23000	23000	23400	23373	22000	22800
<b>MY Imports</b> (1000 MT)	57	57	80	71	100	80
<b>TY Imports</b> (1000 MT)	57	57	80	71	100	80
<b>TY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	25983	25983	24186	25250	23686	23809
<b>MY Exports</b> (1000 MT)	18577	18577	15900	15751	15500	15000
<b>TY Exports</b> (1000 MT)	18577	18577	15900	15751	15500	15000
<b>Feed and Residual</b> (1000 MT)	2000	1600	2000	3600	2000	3400
<b>FSI Consumption</b> (1000 MT)	4700	4000	4700	4970	4600	4990
<b>Total Consumption</b> (1000 MT)	6700	5600	6700	8570	6600	8390
<b>Ending Stocks</b> (1000 MT)	706	1806	1586	929	1586	419
<b>Total Distribution</b> (1000 MT)	25983	25983	24186	25250	23686	23809
<b>Yield</b> (MT/HA)	4.5908	4.5936	4.5	4.5104	4.4	4.3846
(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: <a href="#">PSD Online Advanced Query</a>						

*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 are added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of Ukrainian wheat trade.*

**Table 4: Rye**

<b>Rye Market Year Begins  Ukraine</b>	<b>2023/2024</b>		<b>2024/2025</b>		<b>2025/2026</b>	
	<b>Jul 2023</b>		<b>Jul 2024</b>		<b>Jul 2025</b>	
	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b> (1000 HA)	80	78	70	70	70	70
<b>Beginning Stocks</b> (1000 MT)	199	199	155	146	69	91
<b>Production</b> (1000 MT)	240	231	220	218	220	200
<b>MY Imports</b> (1000 MT)	0	0	1	0	0	0
<b>TY Imports</b> (1000 MT)	0	0	1	0	0	0
<b>TY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	439	430	376	364	289	291
<b>MY Exports</b> (1000 MT)	2	2	15	11	10	10
<b>TY Exports</b> (1000 MT)	8	8	10	11	10	10
<b>Feed and Residual</b> (1000 MT)	2	2	2	2	2	2
<b>FSI Consumption</b> (1000 MT)	280	280	290	260	250	250
<b>Total Consumption</b> (1000 MT)	282	282	292	262	252	252
<b>Ending Stocks</b> (1000 MT)	155	146	69	91	27	29
<b>Total Distribution</b> (1000 MT)	439	430	376	364	289	291
<b>Yield</b> (MT/HA)	3	2.9615	3.1429	3.1143	3.1429	3.3333
(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: <a href="#">PSD Online Advanced Query</a>						

**Attachments:**

No Attachments