Required Report: Required - Public Distribution **Date:** November 21, 2025

Report Number: UP2025-0033

Report Name: Grain and Feed Quarterly

Country: Ukraine

Post: Kyiv

Report Category: Grain and Feed

Prepared By: Denys Sobolev

Approved By: Megan Francic

Report Highlights:

This report contains final export estimates for corn for marketing year (MY) 2024/25. While the MY2025/26 corn harvest is still underway, preliminary yield estimates suggest a larger crop compared to the previous MY, which will translate into higher exports. Post revised its corn consumption estimates upwards for MY2024/25 and MY2025/26 due to higher demand following the commissioning of new biofuel facilities. The European Union (EU) updated its import tariff rate quotas (TRQ) for Ukrainian grains on October 29, 2025. The TRQs will be a limiting factor for Ukrainian wheat and barley exports to the EU, necessitating a diversion of Ukrainian supplies to other markets.

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

Abbreviations:

MEEA – Ministry of Economy, Environment, and Agriculture
FSI – Food, Seed, and Industrial
ha – Hectare
MY – Marketing Year
MT – Metric Ton
MMT – Million Metric Ton
NDVI – Normalized Difference Vegetation Index
PSD – Production, Supply, and Distribution
TRQ – Tariff Rate Quota
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 corn export estimates for MY2024/25 based on 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 Ministry of Economy, Environment, and Agriculture (MEEA) published the following MY2025/26 production numbers:

- Wheat – 22.8 MMT, similar to MY2024/25
- Barley – 5.4 MMT, a 4 percent decrease against MY2024/25

Post accepts these as MY2025/26 production volume estimates for government-controlled areas of Ukraine. These figures may be retrospectively revised based on final State Statistics Service of Ukraine (SSSU) production numbers. Post's PSD tables are supplemented to include Post's estimates for the Crimean Peninsula.

Ukraine's corn harvest remains in progress at the time of report writing. According to MEEA, as of October 30, 40 percent of total area has been harvested, resulting in 10.4 MMT of corn. Initial corn yields are higher as compared to CY2024, which were negatively affected by adverse weather conditions (see the Production section of GAIN Report UP2025-0010). CY2025 corn harvest progress is slower compared to CY2024 due to a combination of rainfall and farmers prioritizing soybean and sunflower harvesting.

Post estimates MY2025/26 corn production at 31.0 MMT, a 15 percent increase compared to Post's previous MY estimate due to more favorable weather conditions in the late summer and early autumn of 2025. MEEA-reported yields for wheat and barley were only marginally better than for MY2024/25. For barley these higher yields were partially offset by a drop in area harvested.

Exports

Based on State Customs Service of Ukraine data, Post's MY2024/25 corn export estimate was 20.0 MMT, a 32 percent decrease against the previous MY. The two largest destinations were the EU, importing 9.0 MMT, which is over 45 percent Ukraine's total export volume, and Türkiye with 5.7 MMT, accounting for 28 percent. Remaining exports went to a number of smaller destinations, including Egypt (8 percent of total volume) and South Korea and Libya (approximately 4 percent each). Given the EU's import duty mechanism, Post expects the EU to remain the major export destination for corn in MY2025/26 despite the introduction of TRQs (see Policy Section).

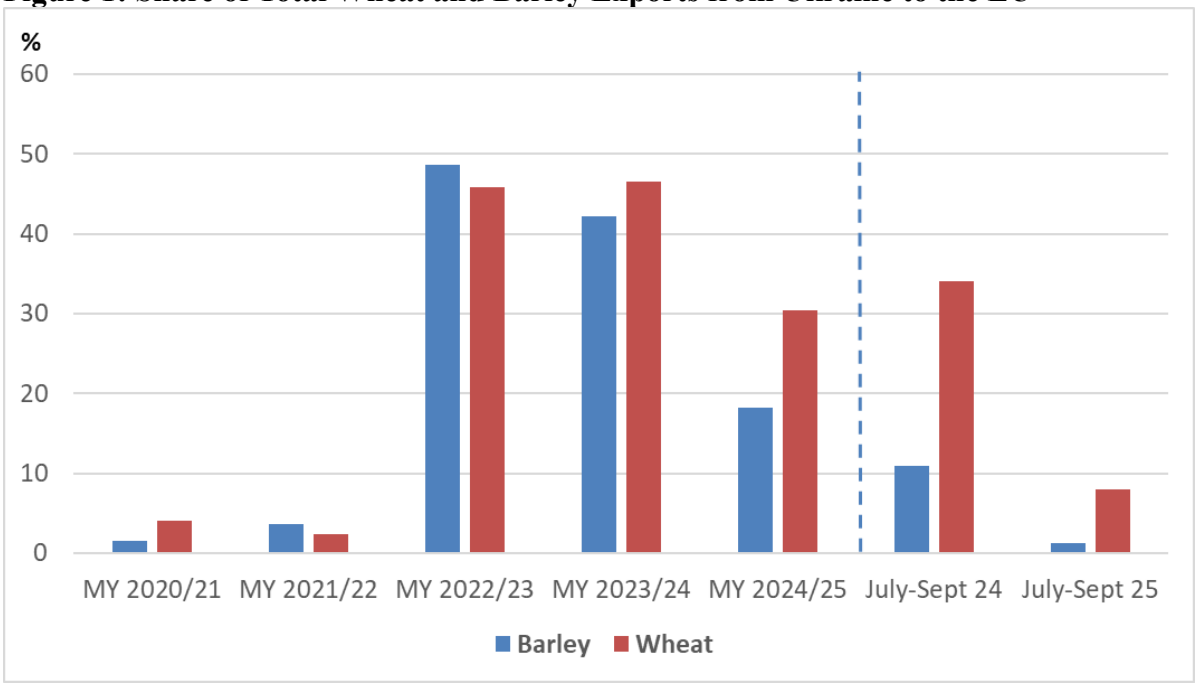
MY2025/26 exports from July to September 2025 for other major grains declined year-on-year (Figure 1):

- Wheat – 4.7 MMT, a 23 percent decrease against July-September 2024
- Barley – 864,000 MT, 34 percent decrease

Exports for these two commodities declined due to a combination of factors, including:

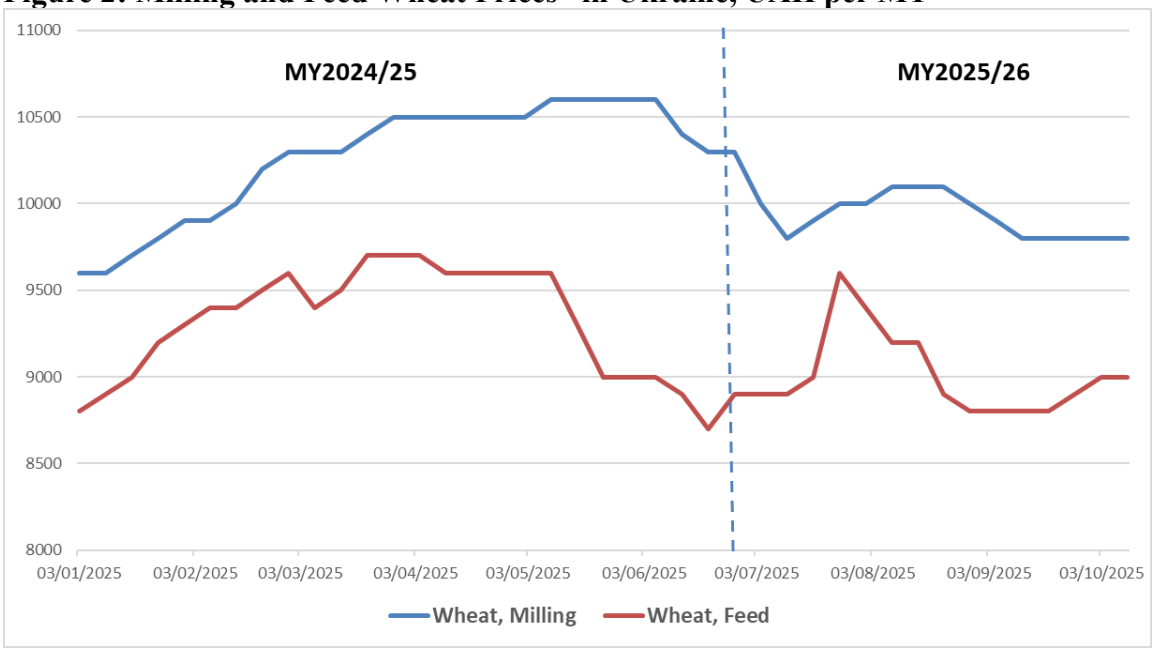
- Delayed harvest and lower production volumes
- New TRQs introduced by the EU forcing exporters to find alternative markets (Egypt for wheat and Türkiye and Lebanon for barley)
- Relatively weak domestic wheat prices that encouraged farmers to hold onto their stocks (Figure 2)
    - According to preliminary wheat quality estimates available to Post, the MY2025/26 share of milling wheat (combined local Class 1 to 3) is around 40 percent of the domestic market, which is higher than the MY2024/25 level of 25 percent. This gives local farmers additional leverage in negotiating prices with exporters.

Figure 1: Share of Total Wheat and Barley Exports from Ukraine to the EU



Source: TDM, LLC

Figure 2: Milling and Feed Wheat Prices* in Ukraine, UAH per MT



Source: Information Agency "APK-Inform"
* EXW basis

Post's MY2025/26 export estimates are as follows:

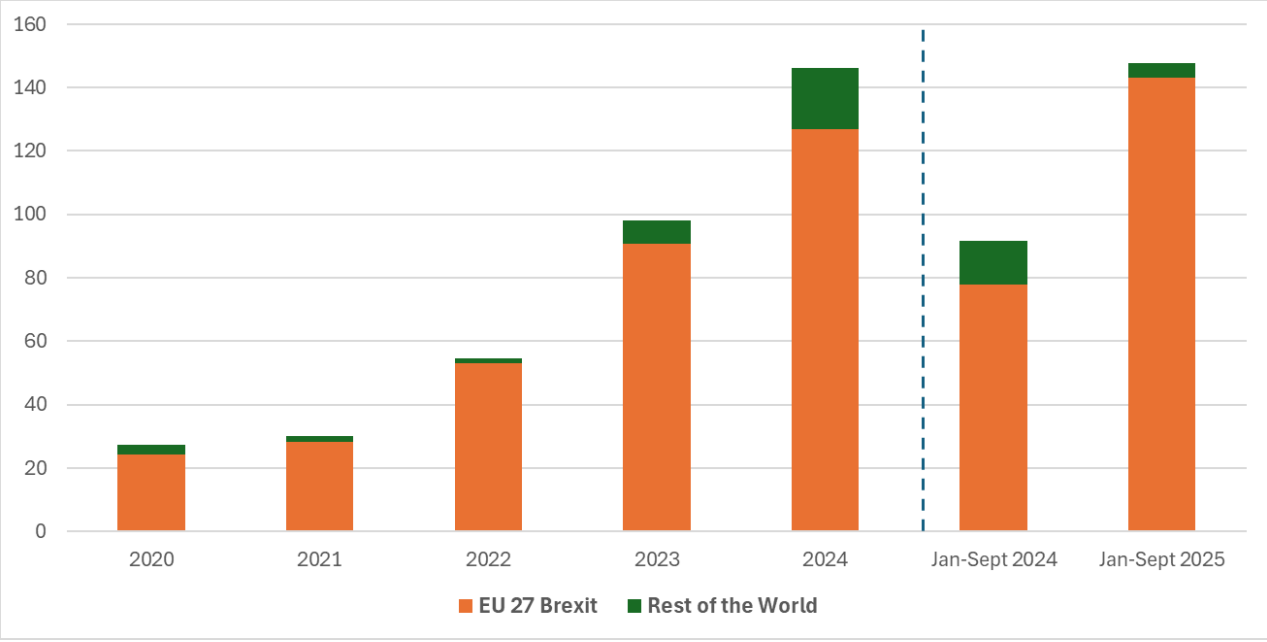
- Wheat – 14.8 MMT, a 6 percent decrease against Post's MY2024/25 estimate
    - This estimate stems from a combination of a lower MY2025/26 beginning stocks and an unchanged MY2025/26 production estimate against MY2024/25.
- Barley – 3.8 MMT, a 68 percent increase
    - Post anticipates higher corn production will make barley less attractive for domestic feed use, shifting supplies to exports. Export markets will include China, Türkiye, Libya, and Saudi Arabia.
- Corn – 25.0 MMT, a 25 percent increase driven by higher MY2025/56 production

Consumption

Post increased FSI consumption for corn both for MY2024/25 and MY2025/26 against its previous GAIN Report UP2025-0023. This upward revision is based on news reports of several domestic processing facilities entering production, including several bioethanol plants and one starch plant.

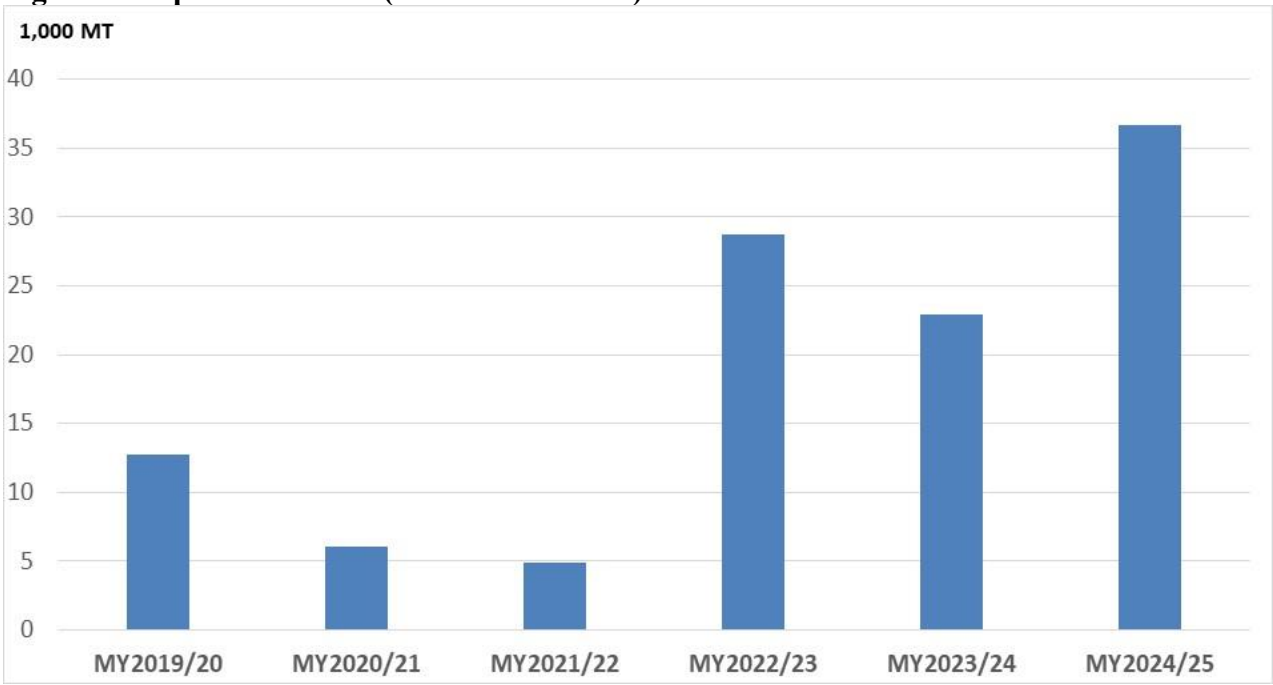
Post estimates MY2025/26 corn FSI consumption on stable demand for biofuels from the EU in CY2026, which is supported by an increase in Ukrainian bioethanol exports (Figure 3). Ukrainian biofuels are primarily produced from sugar beets; however, at least some of this volume is sourced from corn. A major piece of evidence of increased corn processing into bioethanol is the growth of exports of dried distillers grains with solubles (DDGS) for three MYs in the row (Figure 4). DDGS are a co-product of ethanol processing.

Figure 3: Exports of Ethanol (HS Codes 220710 & 220720) from Ukraine, ML



Source: TDM

Figure 4: Exports of DDGS (HS Codes 230330) from Ukraine



Source: TDM
Note: MY is October – September as for corn

Policy

On October 29, 2025, European Commission Regulation (EU) 2025/2199 came into force updating TRQs for products originating in Ukraine:

- Wheat – 1.3 MMT, a 30 percent increase compared to the previous TRQ (1 MMT), as per Regulation (EU) 2025/1132
- Corn – 1 MMT, a 54 percent increase (650,000 MT)
- Barley – 450,000 MT, a 28 percent increase (350,000 MT)
- Flour – 30,000 MT, a new combined TRQ for wheat, barley and corn flour

The abovementioned volumes are applied proportionally from June 6 – December 31, 2025 to the amount of 7/12 of the annual TRQ volumes noted above.

Despite higher TRQs for grains, they remain lower than export levels to the EU in MY2023/24 (approximately 1 MMT for barley and 8.6 MMT for wheat). Ukrainian exporters will be forced to significantly rearrange their export destinations for MY2025/26 in order to compensate for limited access to the EU market.

The EU's import quotas for corn will likely not be a limiting factor for Ukrainian exporters due to the design of the import duty mechanism. Industry sources indicate the new quotas will not limit Ukrainian corn exports to the EU, unless Ukrainian export prices fall below a specific threshold. 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 Tables

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 for those areas.

Table 1: 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	1556	1600	1500
Beginning Stocks (1000 MT)	720	720	689	683	433	399
Production (1000 MT)	6350	6350	5800	5472	5700	5789
MY Imports (1000 MT)	1	1	0	0	1	1
TY Imports (1000 MT)	0	0	0	0	1	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	7071	7071	6489	6155	6134	6189
MY Exports (1000 MT)	2482	2481	2256	2256	3000	3800
TY Exports (1000 MT)	3176	3176	2200	2256	3000	3800
Feed and Residual (1000 MT)	2900	2900	2700	2400	1700	900
FSI Consumption (1000 MT)	1000	1007	1100	1100	1050	1000
Total Consumption (1000 MT)	3900	3907	3800	3500	2750	1900
Ending Stocks (1000 MT)	689	683	433	399	384	489
Total Distribution (1000 MT)	7071	7071	6489	6155	6134	6189
Yield (MT/HA)	3.7798	3.7888	3.625	3.5167	3.5625	3.8593

(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	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	4071	4400	4190
Beginning Stocks (1000 MT)	2995	2995	642	537	1062	801
Production (1000 MT)	32500	32500	26800	26867	32000	31000
MY Imports (1000 MT)	10	10	20	15	10	14
TY Imports (1000 MT)	10	10	20	15	10	14
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	35505	35505	27462	27419	33072	31815
MY Exports (1000 MT)	29488	29488	20600	20018	25500	25000
TY Exports (1000 MT)	29488	29488	20600	20018	25500	25000
Feed and Residual (1000 MT)	4500	4600	4900	5500	5500	4800
FSI Consumption (1000 MT)	875	880	900	1100	925	1200
Total Consumption (1000 MT)	5375	5480	5800	6600	6425	6000
Ending Stocks (1000 MT)	642	537	1062	801	1147	815
Total Distribution (1000 MT)	35505	35505	27462	27419	33072	31815
Yield (MT/HA)	7.7381	7.8731	6.5366	6.5996	7.2727	7.3986

(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

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	5182	5500	5350
Beginning Stocks (1000 MT)	2926	2926	1406	1806	926	929
Production (1000 MT)	23000	23000	23400	23373	23000	23413
MY Imports (1000 MT)	57	57	71	71	100	80
TY Imports (1000 MT)	57	57	71	71	100	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	25983	25983	24877	25250	24026	24422
MY Exports (1000 MT)	18577	18577	15751	15751	15000	14800
TY Exports (1000 MT)	18577	18577	15751	15751	15000	14800
Feed and Residual (1000 MT)	1500	1600	3600	3600	2500	3800
FSI Consumption (1000 MT)	4500	4000	4600	4970	4600	4990
Total Consumption (1000 MT)	6000	5600	8200	8570	7100	8790
Ending Stocks (1000 MT)	1406	1806	926	929	1926	832
Total Distribution (1000 MT)	25983	25983	24877	25250	24026	24422
Yield (MT/HA)	4.5908	4.5936	4.5	4.5104	4.1818	4.3763
(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 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

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	65	65
Beginning Stocks (1000 MT)	199	199	155	146	93	91
Production (1000 MT)	240	231	220	218	205	200
MY Imports (1000 MT)	0	0	1	0	0	0
TY Imports (1000 MT)	0	0	1	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	439	430	376	364	298	291
MY Exports (1000 MT)	2	2	11	11	10	10
TY Exports (1000 MT)	8	8	8	11	10	10
Feed and Residual (1000 MT)	2	2	2	2	2	2
FSI Consumption (1000 MT)	280	280	270	260	250	250
Total Consumption (1000 MT)	282	282	272	262	252	252
Ending Stocks (1000 MT)	155	146	93	91	36	29
Total Distribution (1000 MT)	439	430	376	364	298	291
Yield (MT/HA)	3	2.9615	3.1429	3.1143	3.1538	3.0769
(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