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Country: Ukraine

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Report Highlights:

This report contains updated estimates for marketing year (MY) 2025/26 and MY2026/27 for wheat, corn, barley, and rye. Increased MY2026/27 production areas and favorable weather conditions suggest higher grain production against the previous MY. Post slashed MY2026/27 exports due to the recent deterioration of the security situation in the Black Sea. This will lead to a hike in ending stocks and could possibly trigger increased domestic consumption of corn for processing.

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 Agricultural Policy and Food of Ukraine
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 predominantly focuses on production and export forecasts for marketing year (MY) 2026/27, which runs from July 2026 to June 2027 for wheat, barley, and rye and from October 2026 to September 2027 for corn. For detailed information on estimates and a general overview of Ukraine's grain sector, see the 2026 Ukraine Grain and Feed Annual Report (UP2026-0012).

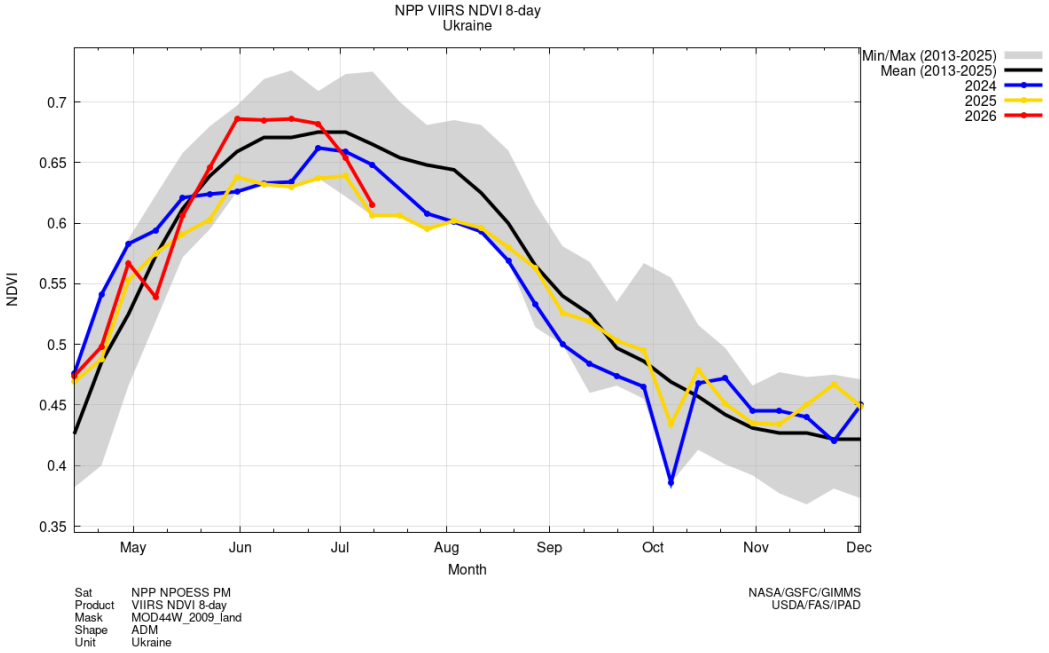
Production

Post updated its MY2026/27 area estimates for Ukrainian-controlled territory from UP2026-0012 based on SSSU data:

- Wheat – 5.2 million ha
- Corn – 4.7 million ha
- Barley – 1.4 million ha
- Rye – 90,000 ha

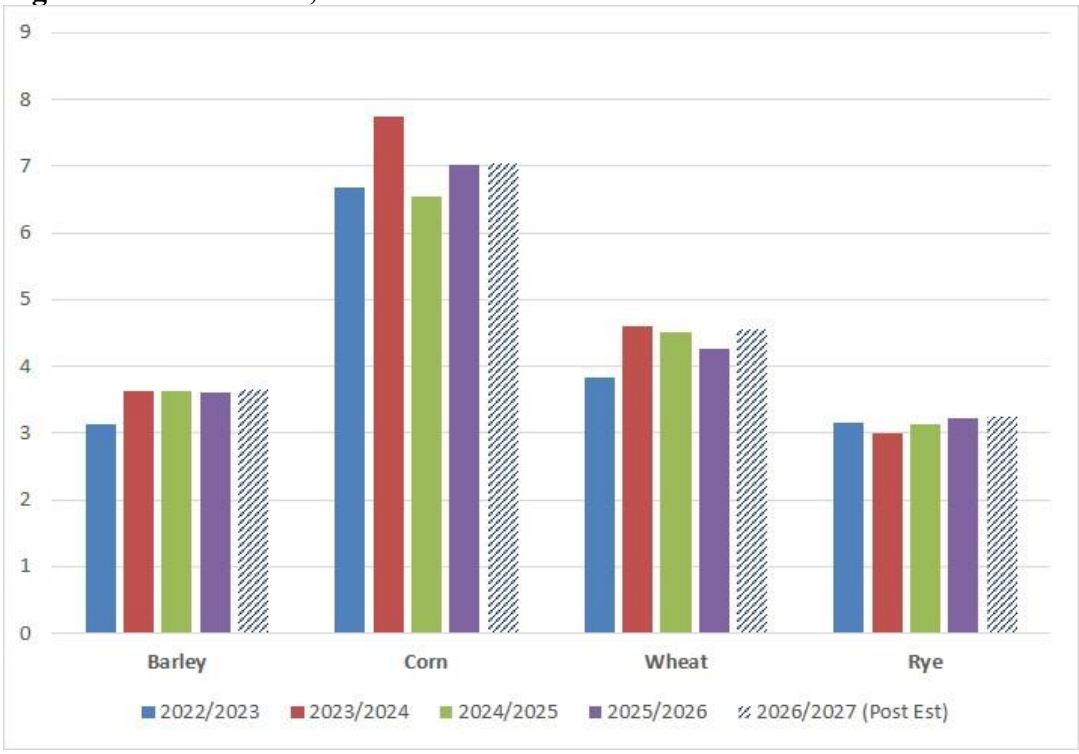
At the time of report writing, the normalized difference vegetation index (NDVI) was favorable for winter crops (Figure 1). Post uses this argument for increased yields for winter crops (wheat, rye, and half of barley). Spring crops (corn and half of barley) enjoyed favorable weather conditions during planting; however, an NDVI dip at the end of June might result in reduced yields. Note NDVI is a standardized measure of vegetation. High values indicate healthier vegetation, while low values indicate low or no vegetation.

Figure 1: NDVI for Ukraine



Post estimates MY2026/27 wheat yields 6 percent higher than the Post's previous MY estimate based on NDVI dynamics (Figure 2). Post estimates barley, corn, and rye yields at roughly similar levels.

Figure 2: Grain Yields, MT/ha



Source: USDA Official; Post Estimates

Post's MY2026/27 revised production estimates for Ukrainian-controlled territory are:

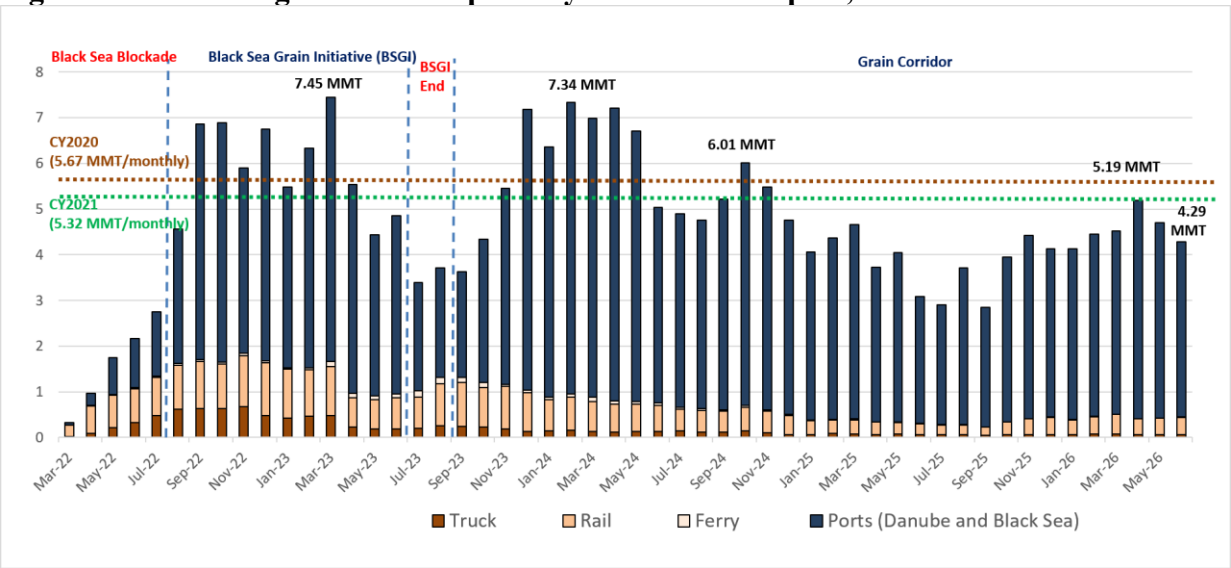
- Wheat – 23.9 MMT
- Corn – 33.0 MMT
- Barley – 5.1 MMT
- Rye – 280,000 MT

Exports

At the time of report writing, Russian attacks on civilian vessels in Ukrainian territorial waters and on Ukraine's port infrastructure have intensified. Ukraine maintains its ability to export grains from its greater Odesa ports (Chornomorsk, Odesa, Pivdennyi), and the Government of Ukraine did not formally close shipping routes. However, military attacks on incoming and outgoing vessels prompted shipowners to reevaluate serving this route, which has led to a lack of vessels. Note Ukraine has numerous alternate export routes. Based on the current situation, Post is cutting its export forecast for wheat, barley, and rye for MY2026/27 and corn for both MY2025/26 and MY2026/27.

Ukraine experienced a total naval blockade from March to July 2022 (Figure 3). Therefore, Post uses July 2022 as the baseline for estimates should the greater Odesa ports close or operate at reduced capacity for prolonged periods. Note this estimate is dynamic and dependent on the security situation in Black Sea, as well as in-land and river logistics and prices.

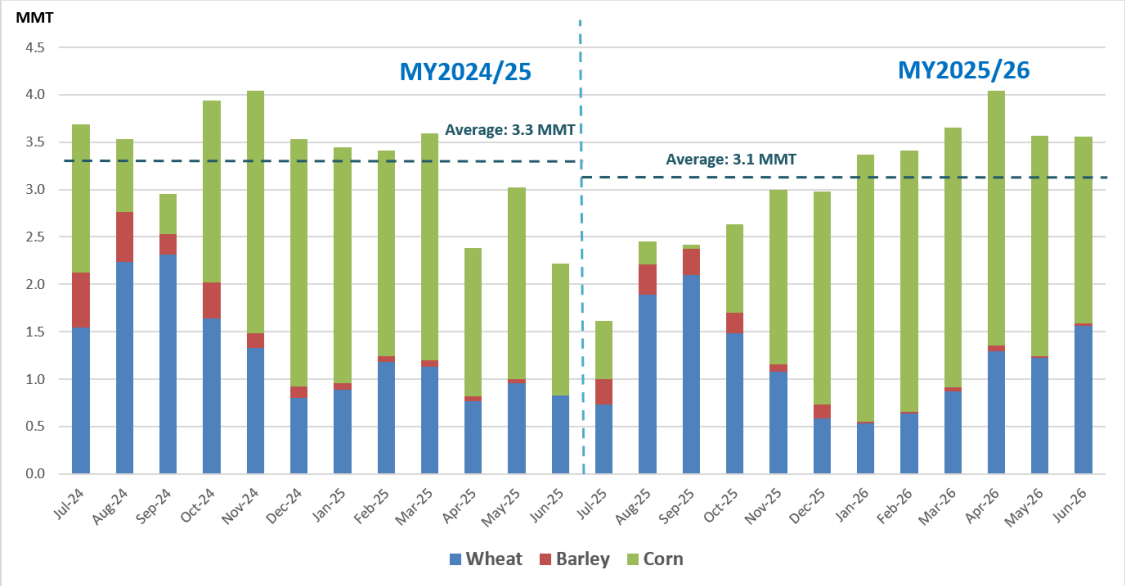
Figure 3: Ukraine Agricultural Exports by Mode of Transport, MMT



Source: MAPFU
Includes HS Codes: 1001, 1003, 1005, 1201, 1205, 1206, 1507, 1512, 2306 (grains, oilseeds, vegetable oils and meals)

Therefore, FAS/Kyiv forecasts average monthly grain exports for MY2026/27 at 2.3 MMT, below the average monthly exports in the first half of CY2026 (Figure 4).

Figure 4: Dynamics of Grain Exports from Ukraine



Source: Trade Data Monitor, LLC (TDM)

MY2025/26 wheat exports were 14.1 MMT. Ukraine shipped approximately 50 percent (7.3 MMT) to Africa, with Egypt (3.8 MMT) and Algeria (2.8 MMT) the major buyers. Exports to Middle East were 2.4 MMT, a 100 percent increase against the previous MY. This volume went to a number of destinations, including, Lebanon, Saudi Arabia, Türkiye, Israel, Syria, and Oman.

The hike in exports to Africa and Middle East was possible due to the redirection of export volumes that were previously going to the EU. Exports to the EU decreased to 1.1 MMT on the introduction of TRQs for agricultural products from Ukraine in October 2025 (see GAIN Report UP2025-0034). Ukraine shipped 3.0 MMT to East and Southeast Asia, with the vast majority (2.1 MMT) going to Indonesia.

MY2025/26 exports of wheat products and flour were 84,000 MT. Ukraine exported predominantly wheat flour (72 percent of total volume) and pasta (27 percent) to neighboring markets: 47 percent went to the EU and 26 percent to Moldova. Gaza and the West Bank became the third largest market with 10,000 MT of wheat flour shipped.

MY2025/26 imports of wheat products and flour were 56,000 MT. Ukraine predominantly imports ready-to-cook products: pasta (75 percent of total volume), bulgur, and couscous (20 percent). The major suppliers were Italy, Türkiye, and Poland.

MY2025/26 barley exports were down to 1.5 MMT. The major reason was sluggish exports to the EU; only 66,000 MT versus 411,000 MT for the previous MY. Major markets included China (490,000 MT), Türkiye (300,000 MT), Libya (230,000 MT), Saudi Arabia (121,000 MT), and Lebanon (115,000 MT).

Corn exports were 20.3 MMT from October 2025 to June 2026. Slight less than half of the total volume went to the EU through ports in Italy, Spain, and the Netherlands. Türkiye became the second-largest buyer, with 31 percent. Some traditional buyers reduced purchases; exports to Egypt, which was the major destination in MY2024/25, importing 1.6 MMT, fell by 46 percent. Exports to China also did not recover, with the country importing 62,000 MT from October 2025 to June 2026.

There were no meaningful MY2025/26 rye exports.

Domestic Consumption

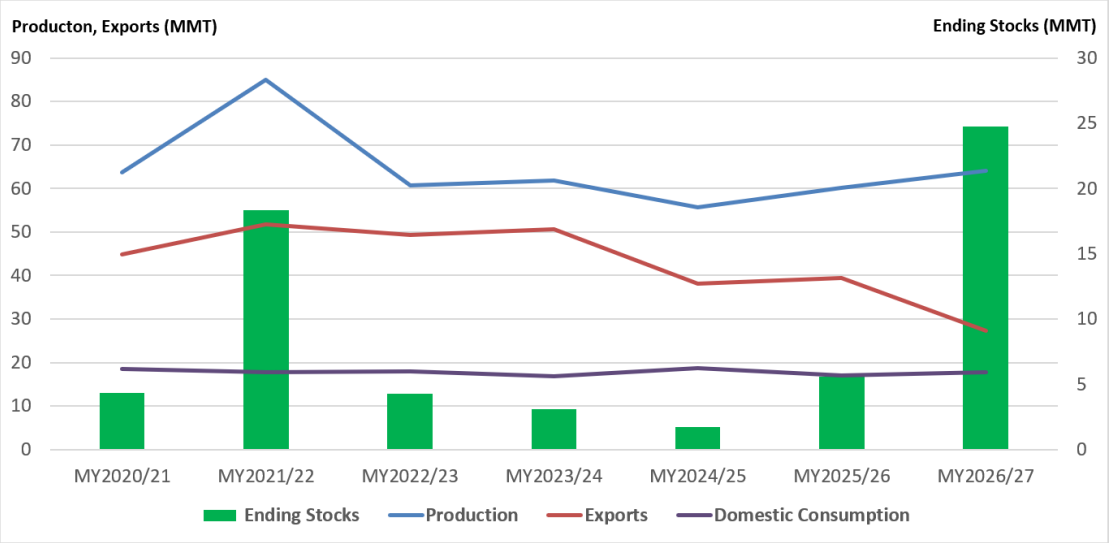
Post increased MY2026/27 feed consumption for all grains against the previous estimate in GAIN Report UP2025-0034 based on a forecasted increase in domestic poultry production.

Post may increase MY2026/27 industrial consumption of corn for bioethanol. FAS/Kyiv estimates currently suggest approximately 150,000 MT of corn are being processed into biofuels. The available bioethanol facilities in Ukraine could process 450,000-650,000 MT of corn a year. The rapid expansion of domestic ethanol production is dependent on crude oil and domestic corn prices dynamics.

Ending Stocks
Post estimates increased MY2026/27 ending stocks based on the estimated drop in exports due to deteriorating security situation in the Black Sea (Figure 5). Post expects MY2026/27 ending stocks for all grains at almost 25 MMT.

According to SSSU data, Ukraine has over 74 MMT of total storage capacity for both grains and oilseeds, including around 23 MMT of certified grain warehouses. This should allow Ukrainian farmers to keep large stocks for MY2026/27. At the same time, the Minister of Agricultural Policy and Food of Ukraine noted (in Ukrainian) Ukraine might require an additional 10-12 MMT of temporary storage if disruptions in the Black Sea continue, to allow Ukrainian farmers to get through corn harvest, especially in regions close to the front lines.

Figure 5: Ukraine's Stocks vs. Production and Exports for Wheat, Barley, and Corn



Source: FAS/Kyiv estimates

PSD Tables

All PSD tables below sum the estimated production numbers for government-controlled areas and Russian-occupied Crimea. The MY2024/25, MY2025/26, and MY2026/27 estimates do not include data for other regions currently occupied by Russia, as production figures and data are unavailable for those areas.

Table 1: Barley

Barley	**2024/2025**		**2025/2026**		**2026/2027**	
Market Year Begins	**Jul 2024**		**Jul 2025**		**Jul 2026**	
Ukraine	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	1600	1556	1550	1520	1450	1590
Beginning Stocks (1000 MT)	539	539	383	355	1699	1811
Production (1000 MT)	5800	5472	5600	5540	5500	5800
MY Imports (1000 MT)	0	0	0	0	1	0
TY Imports (1000 MT)	0	0	0	0	1	0
Total Supply (1000 MT)	6339	6011	5983	5895	7200	7611
MY Exports (1000 MT)	2256	2256	1484	1484	2400	2500
TY Exports (1000 MT)	1805	1804	1600	1484	2300	2500
Feed and Residual (1000 MT)	2600	2200	1600	1400	2000	900
FSI Consumption (1000 MT)	1100	1200	1200	1200	1200	1200
Total Consumption (1000 MT)	3700	3400	2800	2600	3200	2100
Ending Stocks (1000 MT)	383	355	1699	1811	1600	3011
Total Distribution (1000 MT)	6339	6011	5983	5895	7200	7611
Yield (MT/HA)	3.625	3.5167	3.6129	3.6447	3.7931	3.6478
(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 2026/2027 = October 2026 - September 2027						
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Table 2: Corn

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4100	4071	4400	4370	4200	4680
Beginning Stocks (1000 MT)	542	542	838	706	2248	1301
Production (1000 MT)	26800	26867	30900	30680	30000	32990
MY Imports (1000 MT)	15	15	10	15	10	14
TY Imports (1000 MT)	15	15	10	15	10	14
Total Supply (1000 MT)	27357	27424	31748	31401	32258	34305
MY Exports (1000 MT)	20019	20018	23000	23800	23000	14000
TY Exports (1000 MT)	20019	20018	23000	23800	23000	14000
Feed and Residual (1000 MT)	5300	5300	5000	4800	5500	5100
FSI Consumption (1000 MT)	1200	1400	1500	1500	1700	1700
Total Consumption (1000 MT)	6500	6700	6500	6300	7200	6800
Ending Stocks (1000 MT)	838	706	2248	1301	2058	13505
Total Distribution (1000 MT)	27357	27424	31748	31401	32258	34305
Yield (MT/HA)	6.5366	6.5996	7.0227	7.0206	7.1429	7.0491

(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 2026/2027 = October 2026 - September 2027

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Table 3: Wheat

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5200	5182	5650	5440	5200	5560
Beginning Stocks (1000 MT)	1506	1506	726	629	2126	2463
Production (1000 MT)	23400	23373	24100	24010	24000	25300
MY Imports (1000 MT)	71	71	100	78	100	80
TY Imports (1000 MT)	71	71	100	78	100	80
Total Supply (1000 MT)	24977	24950	24926	24717	26226	27843
MY Exports (1000 MT)	15751	15751	14000	14104	14500	10800
TY Exports (1000 MT)	15751	15751	14000	14104	14500	10800
Feed and Residual (1000 MT)	3600	3600	3800	3200	4200	3900
FSI Consumption (1000 MT)	4900	4970	5000	4950	5000	4930
Total Consumption (1000 MT)	8500	8570	8800	8150	9200	8830
Ending Stocks (1000 MT)	726	629	2126	2463	2526	8213
Total Distribution (1000 MT)	24977	24950	24926	24717	26226	27843
Yield (MT/HA)	4.5	4.5104	4.2655	4.4136	4.6154	4.5504
(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 2026/2027 = July 2026 - June 2027						
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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	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	70	70	65	70	85	90
Beginning Stocks (1000 MT)	155	155	93	90	48	33
Production (1000 MT)	220	218	210	210	270	290
MY Imports (1000 MT)	1	0	5	5	0	0
TY Imports (1000 MT)	2	0	5	5	0	0
Total Supply (1000 MT)	376	373	308	305	318	323
MY Exports (1000 MT)	11	11	0	0	15	1
TY Exports (1000 MT)	3	3	3	0	15	1
Feed and Residual (1000 MT)	2	2	5	2	5	1
FSI Consumption (1000 MT)	270	270	255	270	250	240
Total Consumption (1000 MT)	272	272	260	272	255	241
Ending Stocks (1000 MT)	93	90	48	33	48	81
Total Distribution (1000 MT)	376	373	308	305	318	323
Yield (MT/HA)	3.1429	3.1143	3.2308	3	3.1765	3.2222
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments