

Required Report: Required - Public Distribution

Date: March 21, 2025

Report Number: UP2025-0006

Report Name: Livestock and Products Semi-annual

Country: Ukraine

Post: Kyiv

Report Category: Livestock and Products

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Report Highlights:

The efficiency of Ukraine's beef production remains low, with most beef derived from dairy animals. Post expects livestock numbers and beef production to decrease in 2025, continuing a three-decade-long trend. Ukraine will remain a large live cattle exporter, with the Middle East as the primary export market, but exports of both live animals and beef will be depressed by lower animal inventory. In 2025, swine inventory is expected to decrease further after the 2024 drop caused by African Swine Fever (ASF). The number of ASF cases was significant in January-February 2025, endangering production in both household and industrial farms; however, the production decline is likely to be small and will depend on ASF developments over the rest of the year. Ukraine will have to resume pork imports to sustain domestic consumption.

Executive Summary:

In 2025, the Russia-Ukraine war will remain the most critical factor affecting meat production, consumption, and trade. The Ministry of Agrarian Policy and Food of Ukraine (MAPFU) has measured losses from February 2022 at 238,000 head of cattle and 544,000 pigs. However, the impact stretches beyond direct animal loss. In 2025, Ukrainian farms continue to suffer from electricity outages, personnel shortages due to mobilization, high macroeconomic risks, decreased domestic consumption due to refugee outflows, insufficient disease controls, and increased war taxes.

Cattle

Following the long-term trend, Post estimates the number of cattle will decrease further in 2025. Meat production will remain a function of dairy production and will yield little or no profit. Industrial dairy farms sell most young male calves and some heifers to households for low-cost finishing; therefore, households will remain responsible for the majority of cattle inventory and meat production. Household production efficiency will remain low. Households will rely on community pasture grazing and local feed production. Post expects live animal exports to remain strong, although lower than 2024 due to decreased animal inventory.

Beef

Post estimates the expected 2025 animal inventory decrease will lead to a drop in beef production. Post also anticipates in-country beef consumption will remain depressed due to its relative higher cost. Consumers are moving to other proteins, with poultry seeing the largest boost, due to war-related difficulties and the historic trend of increased poultry consumption. Post expects beef exports to become more diversified, moving away from the Chinese market to the Middle East and Black Sea regions.

Swine

In 2025, swine beginning stocks decreased dramatically. Official numbers remain unavailable, but industry reported a significant decrease in the number of swine. The number of African Swine Fever (ASF) cases is rising significantly. There is also a high probability of many unreported cases, especially near the front lines where veterinary controls are minimal. Increased real and perceived risks led to increased slaughter in 2024 which depressed pork prices. The farmgate live hog price recovered in December 2024, when excess supply dried out, and remained high in January-February 2025.

Pork

Post estimates pork consumption will continue to weaken in 2025 due to decreased inventory, lower slaughter, and higher prices; however, Ukraine will return to importing to cover demand. The number of ASF cases continues to rise. While some industrial farms invested heavily into biosecurity practices and expressed optimism about 2025 production plans due to higher pork prices, most of the industry is negative regarding their production plans. FAS/Kyiv expects limited 2025 exports due to Ukraine's swine disease status.

Important Official Statistics Note: Due to the Russia-Ukraine war, Ukraine limited the publication of several statistical indicators. It also frequently updates published official animal inventory and slaughter numbers. Post has updated all statistical tables to reflect the most recent changes.

Cattle

Table 1: Ukraine Animal Numbers, Cattle

Animal Numbers, Cattle Market Begin Year Ukraine, Thousand Head	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks	2403	2403	2250	2250	2100	2120
Dairy Cows Beg. Stocks	1400	1400	1310	1310	1220	1225
Beef Cows Beg. Stocks	18	18	18	18	18	17
Production (Calf Crop)	1287	1287	1230	1230	1200	1200
Total Imports	2	2	2	1	2	2
Total Supply	3692	3692	3482	3481	3302	3322
Total Exports	79	79	60	68	60	60
Cow Slaughter	0	0	0	0	0	0
Calf Slaughter	0	0	0	0	0	0
Other Slaughter	1329	1329	1290	1260	1240	1230
Total Slaughter	1329	1329	1290	1260	1240	1230
Loss	34	34	32	33	32	32
Ending Inventories	2250	2250	2100	2120	1970	2000
Total Distribution	3692	3692	3482	3481	3302	3322

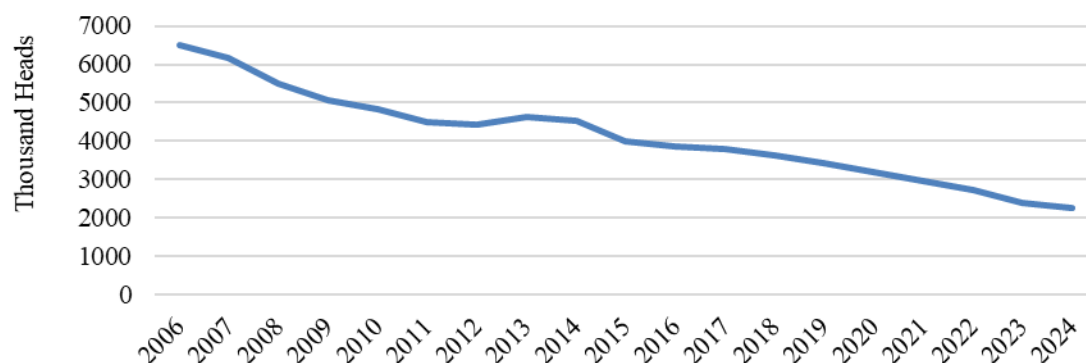
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This table includes indicators for Crimea.

Production

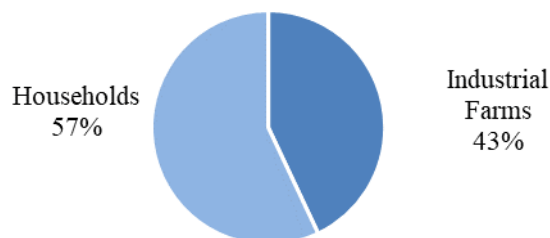
The number of cattle will continue to decrease in 2025 (Figure 1). Post does not expect a change to the three-decade long downward production trend, although it predicts the decline will slow. Ukrainian cattle inventory is composed predominately of dairy and dual-purpose animals. Large and medium-sized industrial dairy farms generated notable profits in 2024, benefiting from the raw milk price spike, and increased their animal inventory. However, some small industrial farms and many private households, which are responsible for 57 percent of total cattle inventory, remained unprofitable (Figure 2). Those contradictory trends resulted in a consequential 2024 cattle inventory drop, but a group of large, profitable, and stable farms is being formed. These profitable dairy farms will be responsible for future animal inventory stabilization and the slowdown in animal inventory decline in 2025.

Figure 1: Number of Cattle in Ukraine (Farms of All Types as of Jan. 1 of each Year)



Source: State Statistics Service of Ukraine

Figure 2: Ukraine's Cattle Inventory Composition in 2024



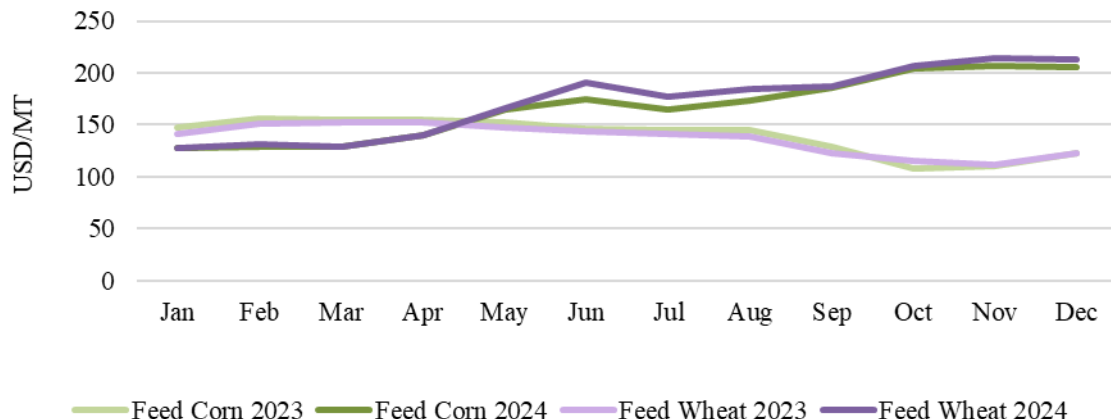
Source: State Statistics Service of Ukraine; FAS/Kyiv estimates

Specialized beef cattle constitute a small and static share of Ukraine's total inventory. Although a market for premium beef cuts is being formed, Ukrainian farmers could not turn finishing operations into a profitable business. MAPFU has published [a beef production cost structure 2024 forecast](#) (in Ukrainian) for industrial farms. With an average beef cattle sales price of \$1.45 per 1 kilogram of live weight, MAPFU declared an average \$0.60 per kilogram loss.

The vast majority of young male calves and some heifers end up being sold to private households where they enter a low-cost finishing stage for further slaughter or export. Household finishing operations include intensive grazing at community pastures with minimal investments into concentrated feeds, feed supplements, or veterinary control.

According to the MAPFU estimate, feed costs account for 80 percent of the total cost of beef production. Feed prices grew in the second half of 2024, encouraged by uninterrupted exports and strong world demand (Figure 3). In January-February 2025, corn and wheat prices climbed even higher, driven by lower end-of-year inventory and still strong foreign demand. Growing feed costs will continue to depress animal inventory and support beef costs.

Figure 3: Ukraine's Corn and Feed Wheat Prices



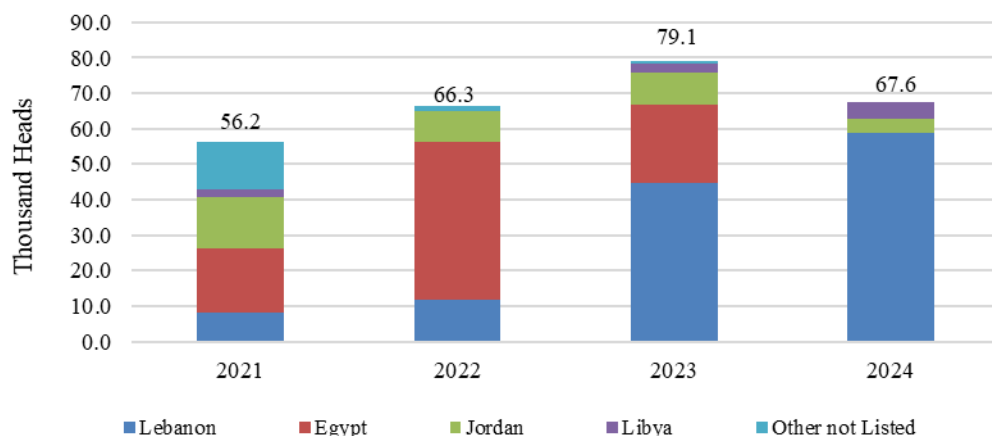
Source: APK-Inform agency; FAS/Kyiv estimates

Trade

Post estimates lower 2025 live animal exports due to declining animal inventory. While Post expects 2025 exports to be more diversified, they will still be limited to traditional markets in the Middle East and North Africa regions (Figure 4). Post increased the 2024 live cattle export number due to unusually high December exports (Figure 5). All additional end-of-year sales went to Lebanon.

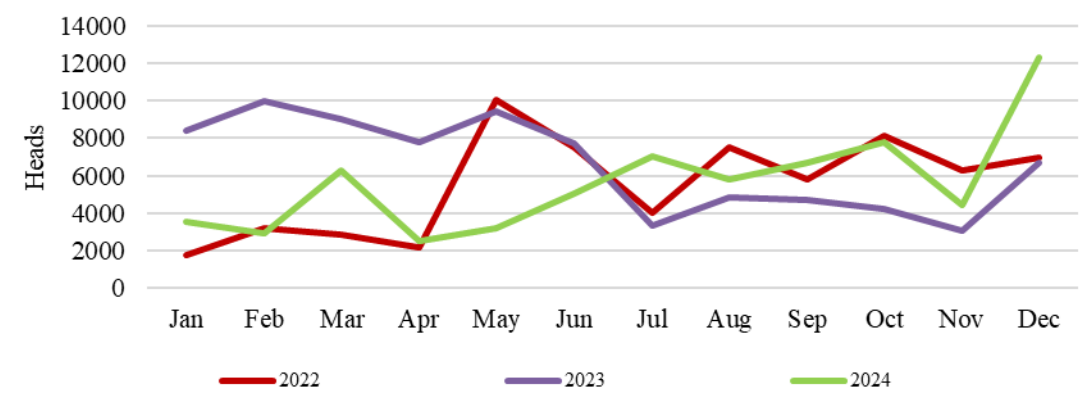
Lebanon also became Ukraine’s largest 2024 export destination, with other traditional Middle Eastern markets losing their share. The Russia-Ukraine war has not resulted in export interruptions despite air strikes on Black Sea and Danube River ports.

Figure 4: Ukraine Cattle Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Figure 5: Ukraine's Monthly Live Cattle Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Beef

Table 2: Meat, Beef, and Veal

Meat, Beef, and Veal Market Begin Year Ukraine, Thousand Metric Tons	2023		2024		2025	
	Jan-23		Jan-24		Jan-25	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1329	1329	1290	1260	1240	1230
Beginning Stocks	0	0	0	0	0	0
Production	235	235	230	225	220	217
Total Imports	3	3	3	4	3	3
Total Supply	238	238	233	229	223	220
Total Exports	28	28	22	25	20	20
Human Dom. Consumption	210	210	211	204	203	200
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	210	210	211	204	203	200
Ending Stocks	0	0	0	0	0	0
Total Distribution	238	238	233	229	223	220

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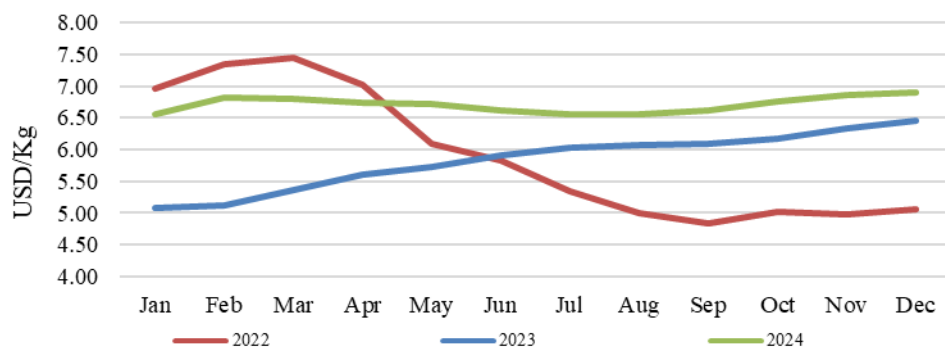
This table includes indicators for Crimea.

Production

Similar to cattle inventory, Post expects beef production to continue its gradual decline in 2025. The industry will remain inherently unprofitable and unattractive for investors. Households will remain responsible for the largest share of beef production. Attacks on Ukraine's critical infrastructure, including electric grids and port facilities, are expected to have limited impact due to the geographic distribution cattle and beef production, but attacks will remain the major risk factor in 2025.

After the significant beef price collapse that followed the 2022 mass slaughter, beef prices returned to a gradual upward trend in 2023 and 2024, responding to shrinking supply (Figure 6). Growing beef prices positively impact production but also disadvantage beef consumption compared to pork or poultry. Both proteins became comparatively cheaper in 2024, attracting more consumers (Figure 7).

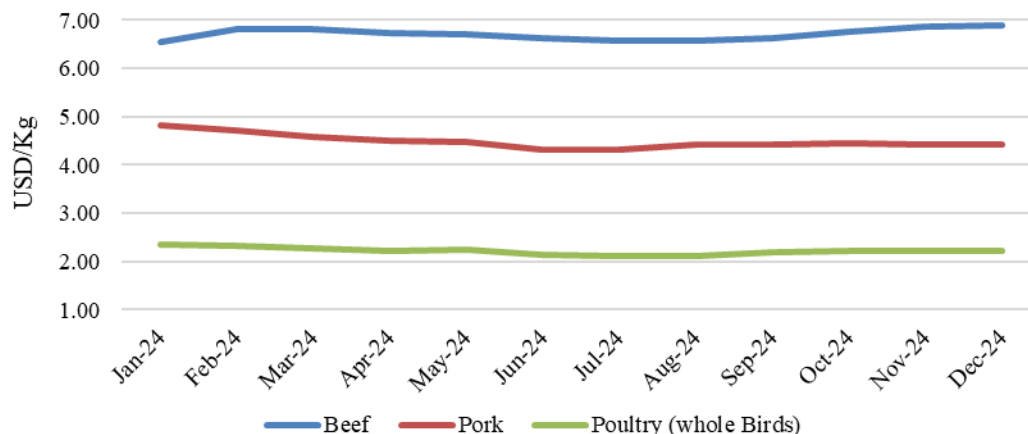
Figure 6: Beef Retail* Price in Ukraine



Source: State Statistics Service of Ukraine

*Ukraine has stopped the official publication of producer prices for the duration of the Russia-Ukraine war

Figure 7: Beef, Pork and Poultry Retail* Price in Ukraine



Source: State Statistics Service of Ukraine

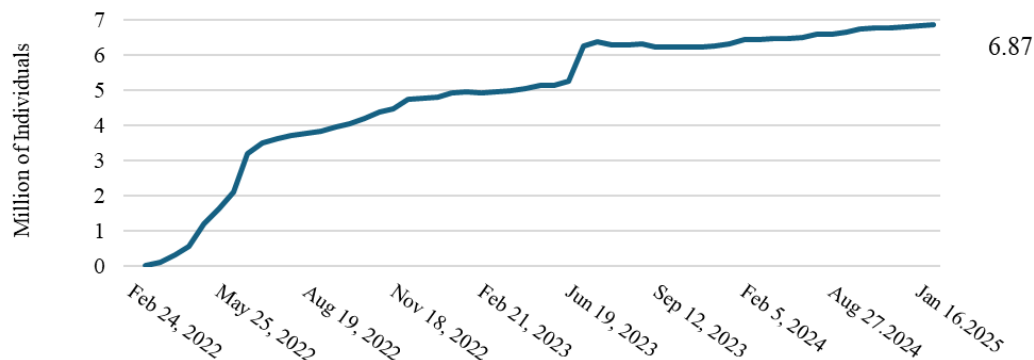
*Ukraine has stopped the official publication of producer prices for the duration of the Russia-Ukraine war

Consumption

FAS/Kyiv expects beef consumption to decrease in 2025. The main reasons are the increasing beef price, the widening beef/pork price gap, the shrinking number of consumers, and the depressed incomes of internally displaced individuals.

Due to the ongoing Russia-Ukraine war, the number of refugees officially registered continues to increase (Figure 8). From January 2024 to January 2025, the number of refugees in the EU increased by 300,000 individuals, while the number of refugees outside the EU increased by 100,000, raising the total to 6.9 million. In addition, the number of internally displaced persons, as of January 2025, reached 3.6 million. Those individuals moved to different, safer places in Ukraine but lost their income sources and changed their consumption habits. The situation is expected to remain static throughout the Russia-Ukraine war.

Figure 8: Number of Refugees from Ukraine Recorded across the EU



Source: UNHCR

* This graph does not include individual refugees (refugees who did not apply for temporary protection status)

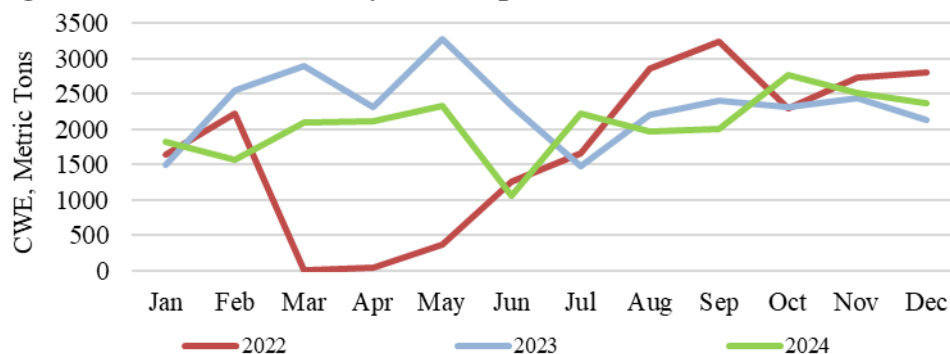
Ukraine's macroeconomic performance remains stable, with 3.6 percent GDP growth in 2024 and a stable 2025 outlook according to the Ministry of Economy of Ukraine. Good economic performance resulted in disposable incomes returning to pre-war levels. In quarter 3 (Q3) 2024, disposable incomes surpassed Q3 2021 levels by 7.2 percent according to the National Bank of Ukraine. However, many Ukrainians are price-conscious consumers, preferring more affordable pork and poultry products to beef.

Trade

Exports

Post estimates 2025 beef exports to decrease as animal inventory numbers continue to contract (Figure 9). Ukraine generally exports live animals to halal markets, while beef is exported to other destinations. Beef exports remain the major market-shaping factor that support animal inventory and prevent domestic market prices from collapsing.

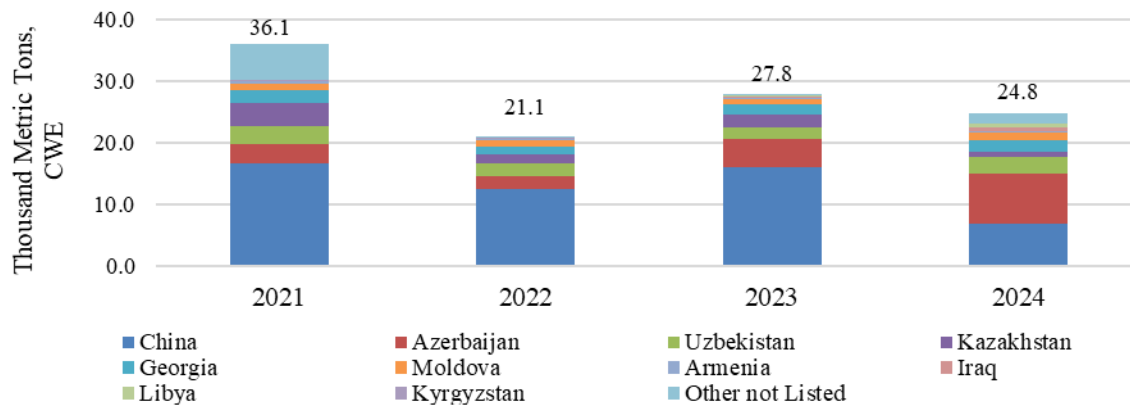
Figure 9: Ukraine's Monthly Beef Exports



Source: State Statistics Service of Ukraine

Ukraine restored its traditional exports routes to Central Asia and the Black Sea through the EU and Türkiye (Figure 10). This resulted in increased exports even while China was no longer the major importer.

Figure 10: Ukraine's Beef Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Exports to EU member states are insignificant as [no Ukrainian meatpackers](#) are cleared for export. More relaxed veterinary requirements, lack of non-tariff barriers, and good trade margins keep Ukrainian exports flowing to the former Soviet Union and Middle Eastern markets.

Imports

Ukraine imports premium-quality beef from the EU, Brazil, and the United States. Upscale Ukrainian restaurants and supermarkets are the leading importers. Both subsectors are depressed due to the Russia-Ukraine war, with demand standing at one-third of pre-2022 levels. Due to the closure of air and sea routes, transshipments of U.S. beef through the EU are limited to EU-approved establishments, without exceptions. This makes imports more expensive and further depresses an already depressed market.

Swine

Table 3: Ukraine Animal Numbers, Swine

Animal Numbers, Swine Market Begin Year Ukraine, Thousand Heads	2023		2024		2025	
	Jan 23		Jan 24		Jan 25	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	5058	5058	5204	5204	5160	4600
Sow Beginning Stocks	360	360	371	372	350	350
Production (Pig Crop)	8375	8375	8700	8700	8400	8200
Total Imports	6	6	7	8	7	8
Total Supply	13439	13439	13911	13912	13567	12808
Total Exports	0	0	0	0	0	0
Sow Slaughter	0	0	0	0	0	0
Other Slaughter	7355	7355	7850	7812	7586	7158
Total Slaughter	7355	7355	7850	7812	7586	7158
Loss and Residual	880	880	901	1500	881	1200
Ending Inventories	5204	5204	5160	4600	5100	4450
Total Distribution	13439	13439	13911	13912	13567	12808

Not Official USDA Data

This table includes indicators for Crimea.

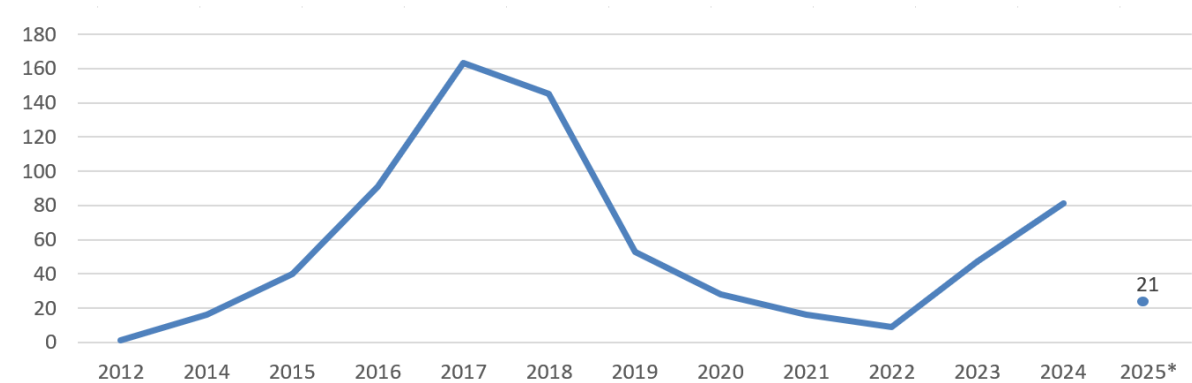
Production

According to industry data, Ukraine's swine inventory collapsed in 2024, and FAS/Kyiv expects it to reach a new low in 2025. The main reason for the unexpected decline was the continued spread of ASF (Figure 11). Two prominent industry groups representing pig farmers and meat processors are pessimistic about recent developments and cautious about 2025 perspectives. Actual and perceived risks result in decreased investments into new stocks, even as hog sales prices are favorable, as they were from December 2024 to February 2025.

The majority of ASF cases are registered in wild fauna and private households where biosecurity measures are rudimentary. Control over wild fauna outbreaks is complicated due to the unpredictable migration of wild pigs and military activities in southern and eastern Ukraine. Sporadic registered ASF outbreaks in proximity to large industrial producers create risk factors beyond those producers' control. The imposition of quarantine and inevitable swine farm depopulation results in abrupt business stoppage or even bankruptcy of industrial farms, some of which implemented superior biosecurity measures and have no disease on the premise.

Due to a lack of financing and the ongoing Russia-Ukraine war, Ukrainian industrial farms are not eligible for compensation for lost animals. Commercial pig insurance is also unavailable due to the high risk; therefore, farm owners must absorb losses caused by outbreaks.

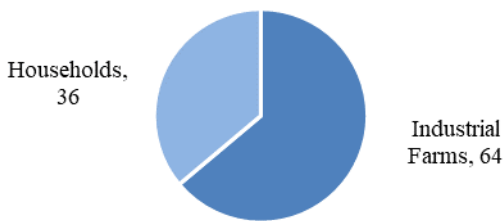
Figure 11: Number of Officially Registered ASF Cases



Source: <http://www.asf.vet.ua>, State Service of Ukraine for Food Safety and Consumer Protection, Institute for Laboratory Diagnostics and Veterinary-Sanitary Expertise
*21 cases were registered in January-February 2025

The share of households in total inventory remains on a downward trend, but these small, not-biosecure farms are still responsible for over one third of domestic animal inventory (Figure 12). Small households are less concerned about ASF due more minor loss potential, the possibility to hide an outbreak, and the monetary compensation they can receive from the authorities. However, industry sources state that financial hardships in 2024 and 2025 make those compensatory payments to households less likely, increasing incentives to conceal any backyard slaughter of infected animals.

Figure 12: Ukraine Swine Inventory Composition in 2024, percent



Source: State Statistics Service of Ukraine; FAS/Kyiv calculations

In 2025, massive attacks on Ukraine’s critical infrastructure and the loss of qualified personnel due to conscription continue to affect the pig industry. Diesel generators contribute to increased production costs, and some farms had to survive prolonged outages. However, industry sources do not consider this cost increase to be critical.

Pork

Table 4: Meat, Swine

Meat, Swine Market Begin Year Ukraine, Thousand Metric Tons	2023		2024		2025	
	Jan-23		Jan-24		Jan-25	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	7355	7355	7850	7812	7586	7158
Beginning Stocks	0	0	0	0	0	0
Production	660	660	710	690	670	645
Total Imports	19	19	8	5	15	35
Total Supply	679	679	718	695	685	680
Total Exports	1	1	3	4	2	5
Human Dom. Consumption	678	678	715	691	683	675
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	678	678	715	695	683	675
Ending Stocks	0	0	0	0	0	0
Total Distribution	679	679	718	691	685	680

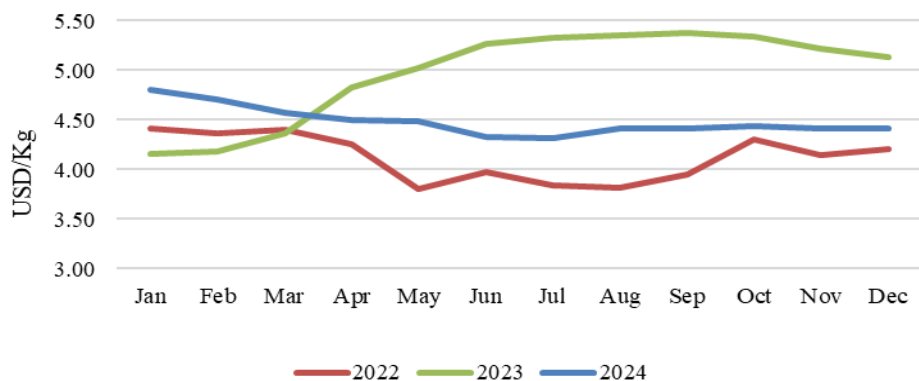
*Not Official USDA Data

This table includes indicators for Crimea

FAS/Kyiv expects pork production to decrease in 2025. Decreased animal inventory is the main reason. Public statements from some large industrial farms are neutral at best, with none of them declaring expansion plans exceeding 2024 levels. The growing number of ASF outbreaks in 2025 will continue to depress production despite the hog price increase in early 2025.

The increased spread of ASF has also resulted in increased animal loss and sporadic panic slaughters. Rumors about an ASF case in proximity to a farm or town often lead to premature hog slaughter, both in industrial farms and households. Increased slaughter resulted in a temporary increase in pork supply in 2024 and kept pork prices down throughout the year (Figure 13).

Figure 13: Pork Retail Price*



Source: State Statistics Service of Ukraine

*Ukraine stopped the official publication of producer prices for the duration of the Russia-Ukraine war

Consumption

In 2025, Post expects pork consumption to decrease. A shrinking number of consumers due to refugee outflows and depressed incomes of internally displaced individuals will contribute to a demand drop. Although some consumers are able to retain their level of disposable income, the number of internally displaced individuals who lost their main income sources remains high. Supply issues will also contribute to decreased consumption, as decreased animal inventory will result in decreased pork production and higher prices.

In December 2024, Ukraine increased its military tax from 1.5 percent to 5.0 percent of personal income. Contacts note the increase will negatively impact consumption of all products, including pork.

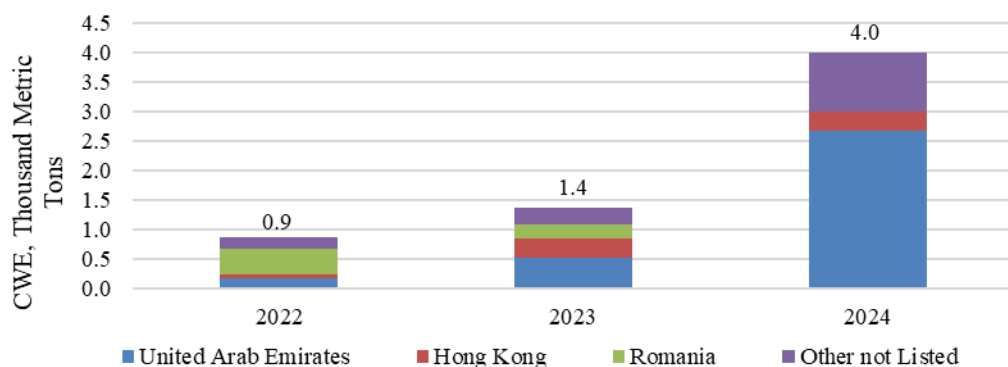
Trade

Exports

In 2025, pork exports will be limited, not exceeding a few thousand metric tons due to a production decrease and the spread of ASF. Many trading partners have maintained import bans for over a decade. A small number of markets without their own swine population, including the UAE and Hong Kong, allow imports. In 2024, the UAE returned as the major pork importer, with the exports destined for the country's non-Muslim populations (Figure 14).

Ukraine restored some of its export routes, allowing exports to Georgia and other former Soviet Union destinations; however, logistics remain more expensive than in pre-2022.

Figure 14: Ukraine's Pork Export Destinations



Source: Trade Data Monitor

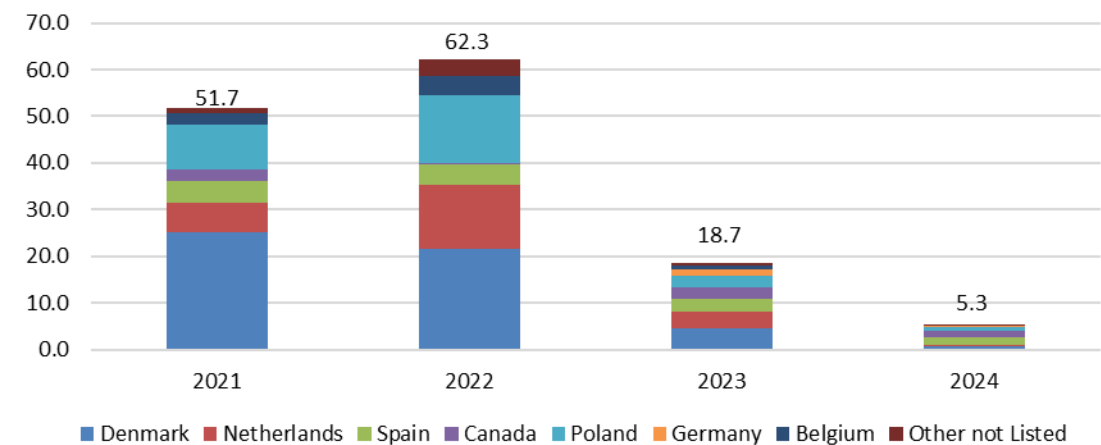
Imports

Due to a significant drop in pork production, Ukraine will likely increase its pork product imports in 2025. European producers will likely restore their market presence to pre-2022 levels. EU producers may utilize their 20,000 MT zero import duty pork and pork products tariff rate quota as indicated in Appendix 1 and 2 to [Annex I-A](#) of the Deep and Comprehensive Free Trade Agreement. Recently, the EU import quota was unfulfilled only in 2023 and 2024. Ukraine adopted several veterinary, technical,

and animal welfare regulations through its EU-approximation agenda, removing Ukraine-EU technical trade barriers. Geographical proximity will also prop up imports from the EU.

Canada is the only non-EU supplier in the top five pork source markets (Figure 15). Canadian producers benefit from the Ukraine-Canada Free Trade Agreement. However, high export prices and logistics costs and the necessity of transit through the EU limit Canadian exports significantly.

Figure 15: Ukraine's Pork Imports by Country



Source: Trade Data Monitor; FAS/Kyiv estimates

Attachments:

No Attachments