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Report Highlights:

Ukrainian chicken meat production continues its slow recovery in 2025, approaching pre-February 2022 production levels. Ukraine's largest producer, MHP SE, reports stable production at full capacity. Limited production growth is possible through fine-tuning production processes and production increases by smaller producers. The negative impacts of electricity outages, workforce mobilization, and other Russia-Ukraine war-related factors are currently limited but remain a significant production risk. Post estimates 2025 chicken meat exports will be strong, driven by increased export prices. The Middle East market replaced the EU as the major export destination for Ukrainian chicken meat. The EU's current autonomous trade measures, which allow for broader market access, will expire in June 2025, which could further restrict access to the EU market. Therefore, Ukrainian exports will shift toward markets with smaller trade margins.

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>

Executive Summary

In 2025, chicken meat production will continue to climb, approaching the annual pre-February 2022 production maximum of 1.4 million metric tons (MT). Similar to the rest of the economy, the Ukrainian poultry industry has been suffering from country-wide electricity outages, workforce mobilization, restricted and more expensive logistics, limited domestic demand, increased war taxes, and other factors stemming from the ongoing Russia-Ukraine war. Although the combined impact of these factors was limited in 2024 and early 2025, constant drone and missile attacks remain the major production risk. Post's chicken meat production estimate increased slightly for 2024 and 2025 to reflect industry-reported 2024 performance. Official production and trade numbers remain unavailable due to war-related restrictions.

Post estimates domestic demand will be strong in 2025. Chicken meat remains the most affordable animal protein, and some consumption growth will occur despite ongoing population outflows. According to the Office of the United Nations High Commissioner for Refugees (UNHCR), the number of registered Ukrainian refugees grew by 0.4 million between January 2024 and January 2025. However, population outflow has been offset by increasing per capita incomes. According to the National Bank of Ukraine's January 2025 Macroeconomic and Monetary Review, 2024 quarter three (Q3) incomes were 7.2 percent above pre-February 2022 levels, allowing for increased consumption of poultry and poultry products.

Trade in poultry meat will shift further toward Middle Eastern markets in 2025. The EU's introduction of the autonomous trade measures ([ATMs](#)) in May 2024 established an export limit of 133.3 thousand MT of chicken meat in 2024 and an emergency brake mechanism with high import duties in case of over-the-limit supplies. Although no end of year trade data was available at the time of report drafting, 2024 chicken meat exports to the EU are likely to be very close to the ATM limit. The expiration of the ATMs in June 2025 may further affect Ukraine's poultry exports. In 2025, Post estimates exports will shift toward less lucrative but larger and less restrictive Middle Eastern and African markets. Ukraine remains an efficient chicken meat producer; therefore, Post does not expect a production drop due to the redistribution of foreign trade flows.

Production

Large vertically integrated chicken meat producers dominate Ukraine, with one large producer—MHP SE—responsible for almost 80 percent of industrial production. These producers control the entire production and distribution chain, including hatcheries, parental, and grandparental flocks, and own crop and feed production and meat distribution networks. Industry made most investments into production in the late 2010s and has been concentrating on survival since the start of the Russia-Ukraine war in early 2022. At least two large frozen poultry batches were lost to Russian missile attacks on cold storage facilities in different regions in March 2022 and May 2024. In 2024-2025, Ukrainian poultry producers invested in alternative energy supplies, bought additional diesel generators, and hired new people to replace their mobilized workforce. These issues remain acute as of January 2025.

Table 1: Chicken Meat Production, Supply, and Distribution (PSD)*

Meat, Chicken Ukraine Thousand MT	2023		2024		2025	
	Market Year Begin: Jan 2023		Market Year Begin: Jan 2024		Market Year Begin: Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	1,312	1,312	1,320	1,376	1,330	1,410
Total Imports	60	60	45	46	40	40
Total Supply	1,372	1,372	1,365	1,422	1,370	1,450
Total Exports	428	428	445	462	450	480
Human Consumption	944	944	920	960	920	970
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	944	944	920	960	920	970
Total Use	1,372	1,372	1,365	1,422	1,370	1,450
Ending Stocks	0	0	0	0	0	0
Total Distribution	1,372	1,372	1,365	1,422	1,370	1,450

***Not Official USDA Data;** official data can be accessed at: [PSD Online Advanced Query](#)

Export numbers exclude exports of chicken paws to China and Hong Kong and chicken meat exports to Vietnam; exports of salted poultry (HS 021099) are included. The production number includes Crimea.

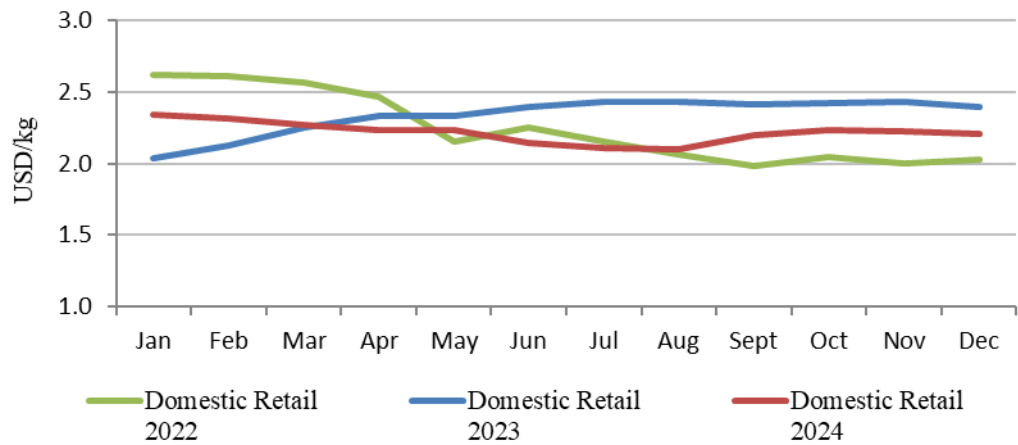
Industry did not announce any expansion plans for 2025 due to the limited capacity of the domestic market and trade barriers curbing foreign expansion. Purchasing foreign poultry producing establishments or creating joint ventures in large export markets remains one of the only ways to expand. MHP SE [acquired Slovenian chicken meat producer Perutnina Ptuj](#) in 2019 and announced a [strategic partnership](#) with Saudi's Desert Hills Veterinary Services Company in early 2023. The Public Investment Fund of the Kingdom of Saudi Arabia, acting via its subsidiary, the Saudi Agricultural and Livestock Investment Company, acquired 12.6 percent of MHP's total outstanding shares in 2024. In December 2024, international expansion continued, with MHP SE attempting to [acquire](#) a sizeable Spanish poultry and pork producer, UVESA Group. Domestically, MHP SE sees growth opportunities in processing chicken into "ready to cook" or "ready to consume" products, meat-centered retail outlets, street food franchising networks, vegetable production, and catering businesses. None of these expansion projects envisage a notable domestic chicken meat production increase.

No end of year MHP SE reports were available at the time of report drafting. However, earlier reports declared the company’s operations close to full production capacity despite the ongoing Russia-Ukraine war and the corresponding production and distribution risks. There are five smaller poultry producers in Ukraine. These companies are privately owned and publish limited production data. All producers continued with chicken meat production in 2024, including a producer that has most of its production facilities in proximity to the frontline in central Ukraine.

The household sector is responsible for 9 percent of meat production, while layers and other sources of chicken meat are responsible for close to 3 percent of production. Although a part of the chicken meat balance, non-broiler industrial chicken meat production will not be further discussed in this report as chicken meat from these sources does not take part in international trade. A small share of household-produced chicken is sold at farmers’ markets. All references to “poultry” or “chicken meat” in the analysis below refer to industrially produced chicken.

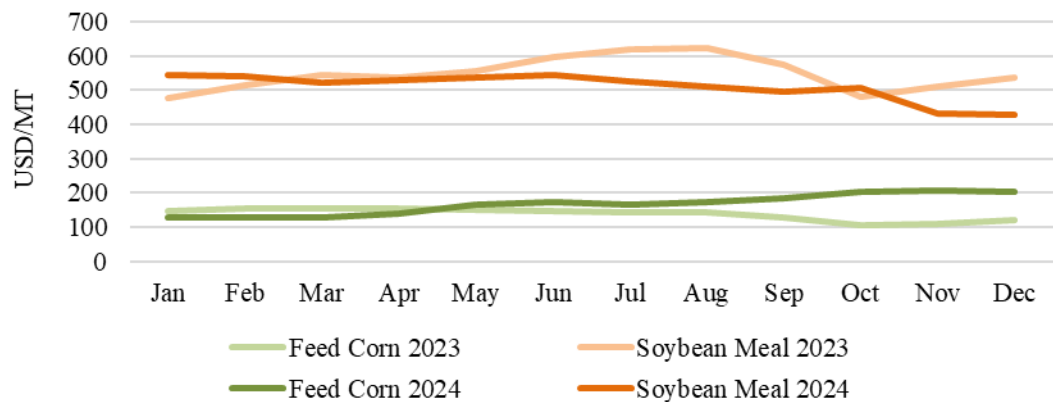
Poultry meat production remained profitable despite somewhat lower chicken retail prices (Figure 1). Lower feed protein prices toward the end 2024 somewhat offset the meat price drop (Figure 2). Ukraine remains a net exporter of most feed crops, and steady exports resulted in stable feed prices and lower end of year stocks. In 2025, chicken meat production will not be able to benefit from the rock-bottom feed prices observed in 2022 to early 2023; however, industry does not expect a feed shortage.

Figure 1: Retail* Chicken Meat Price for Whole Birds



*Ukraine has stopped official publication of producers’ poultry prices until the end of the Russia-Ukraine war
Source: State Statistics Service based on Ministry of Economic Development and Trade surveys

Figure 2: Ukraine's Feed Prices



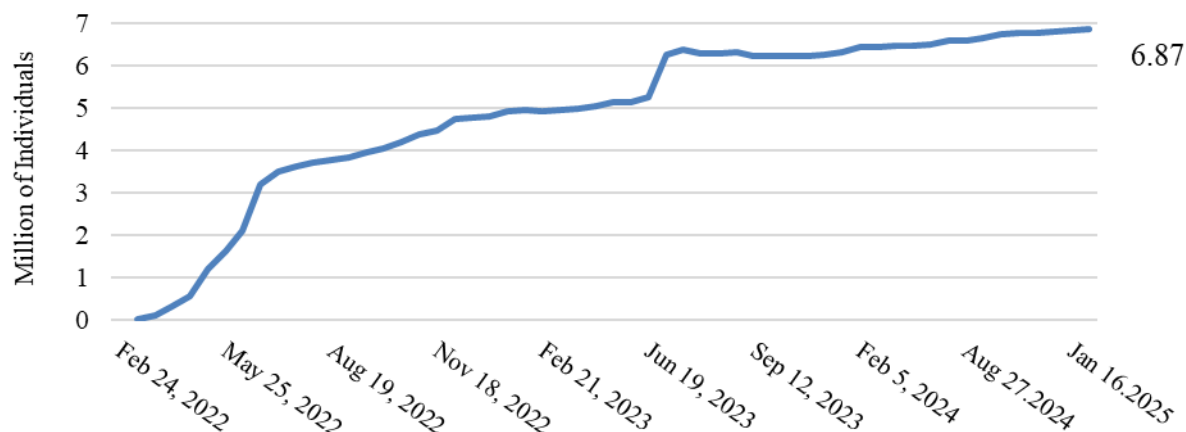
Source: APK-Inform

Disease spread remains a production and export risk factor. No highly pathogenic avian influenza outbreaks in industrial poultry flocks were registered in Ukraine last year. However, Ukraine reported a few non-poultry cases. Ukraine adopted poultry production zoning to mitigate possible risks, and the EU recognizes its zoning.

Consumption

Due to the ongoing Russia-Ukraine war, the number of refugees officially registered continues to increase (Figure 3). 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 3: Number of Refugees from Ukraine



Source: UNHCR (<https://data.unhcr.org/>)

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

Despite decreasing population numbers, 2025 poultry consumption is expected to increase slightly, driven by increased disposable incomes and changes in meat consumption patterns. 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 Q3 2024, disposable incomes surpassed pre-war Q3 2021 levels by 7.2 percent according to the National Bank of Ukraine. This allowed for stable or even growing food consumption in late 2024-2025. Many temporarily displaced individuals switched to poultry due to reduced incomes and reliance on limited social assistance payments. More affluent Ukrainians also increased their poultry consumption, following the pre-war trend of consuming less red meat.

Trade

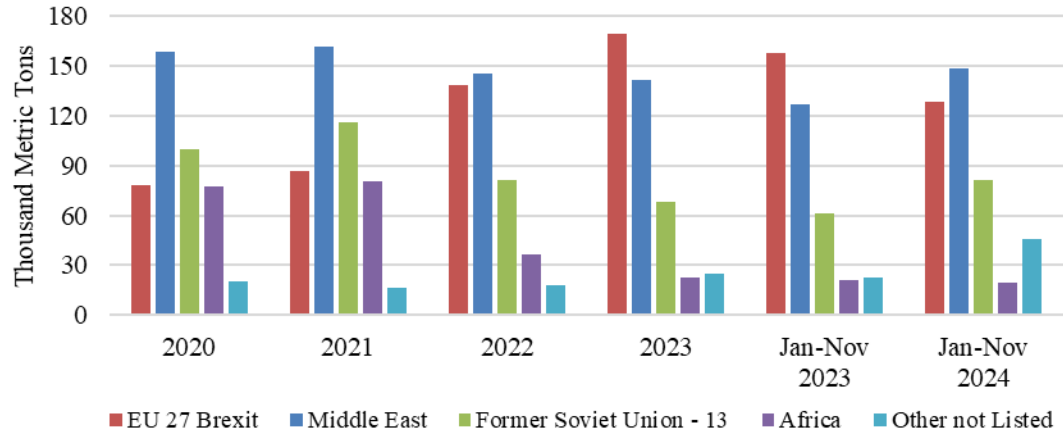
In 2025, Post estimates Ukraine will marginally increase chicken meat exports and decrease imports. Ukraine is close to its full production capacity, and the industry is concentrating on war risk mitigation rather than production expansion. Domestic poultry consumption will grow insignificantly, leaving some poultry available for export. Importing cheap poultry offal will continue due to the zero duty import quotas available for EU producers. However, over quota imports generally do not occur for economic reasons, as domestic Ukrainian industry also supplies in the cheapest market segment.

Exports

The EU's introduction of the 2024 ATMs was the major trade-shaping factor in 2024 and the first half of 2025. The new regulations limited Ukraine's annual chicken meat exports to the EU to 133.3 thousand MT and introduced an emergency brake mechanism that imposed prohibitive import duties for shipments above this level. The economic impact of the ATMs has not differed from that of the tariff rate quotas (TRQs) that have shaped EU-Ukraine trade since the implementation of the Deep and Comprehensive Free Trade Area Agreement (DCFTA) in January 2016.

The EU market restrictions resulted in major changes to trade flows, with Middle Eastern destinations returning as Ukraine’s major export markets (Figure 4). MHP SE will remain Ukraine’s largest exporter, with close to 90 percent of the country’s exports. Industry notes that MHP’s joint venture with Saudi Arabia’s Desert Hills Veterinary Services Company may help the company maintain market access.

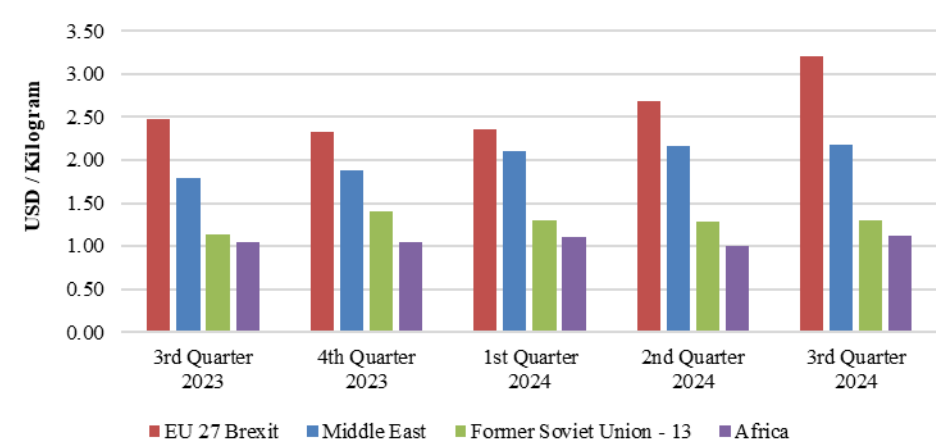
Figure 4: Ukraine’s Chicken Meat Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Ukraine remains an extremely efficient chicken meat producer, with meat production costs close to [USD 0.71 per kilogram](#) (in Ukrainian) in live weight. This gives Ukraine significant flexibility and the ability to supply to markets with different margins. The availability of premium EU markets, and to a lesser extent Middle Eastern markets, generates additional profits for Ukrainian exporters (Figure 5). Former Soviet Union markets and African markets are significantly less attractive.

Figure 5: Chicken Export Prices by Export Destination

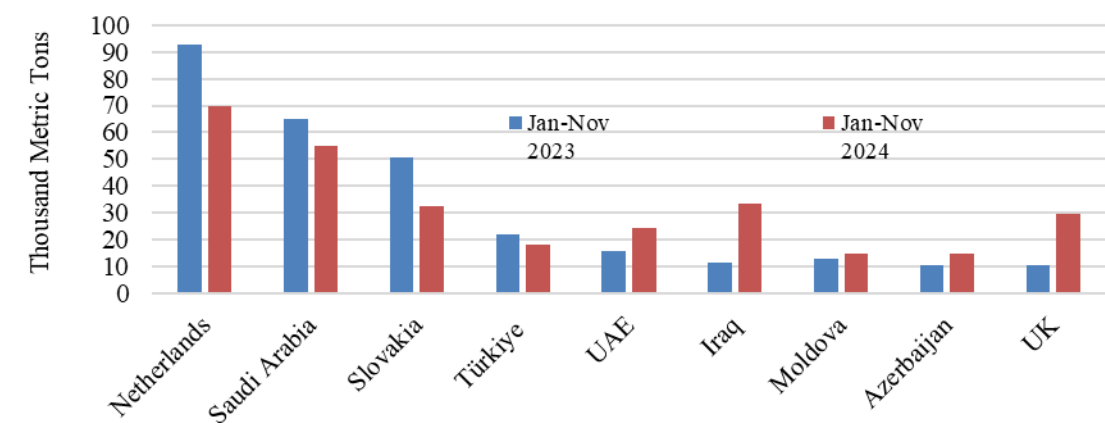


Source: Trade Data Monitor

In 2025, Ukraine will continue to diversify its exports (Figure 6). For example, after a long period of low sales, Ukraine increased its direct sales to Iraq. Simultaneously, Ukraine's sales to Türkiye, from which poultry is transshipped to other Middle Eastern markets, including Iraq, Central Asian, and African markets, decayed.

Ukraine also increased its shipments to the United Kingdom (UK), which did not introduce any market restrictions. In the UK market, Ukrainian poultry substitutes domestically produced poultry, which finds its way to other markets, including the EU.

Figure 6: Ukraine Chicken Meat Top Export Destinations



Source: Trade Data Monitor

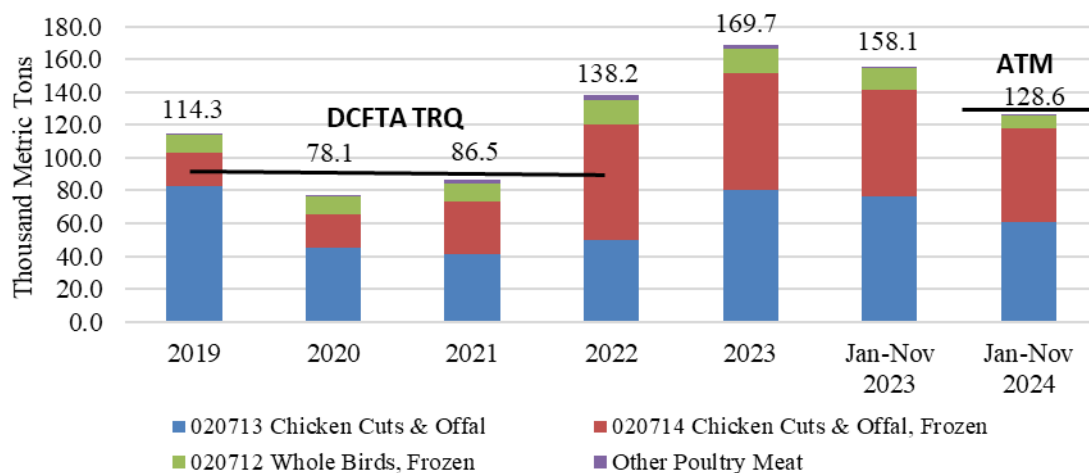
Exports to the EU

Two large (both belonging to MHP SE), many mid-size, and one small Ukrainian chicken meat processing facilities are [EU-approved](#). By January 2025, there were 15 approved facilities, a six facility increase over 2024, most of which transship, store, or process poultry and poultry products. The EU and Ukraine also agreed on the transit of products from non-EU-approved facilities to third countries.

From January 1 to June 5, 2025, Ukraine’s poultry exports to the EU will be conducted under restrictions set by the ATMs (Figure 7). The ATMs allow for 133.3 MT of chicken meat exports in annual trade equivalency before the emergency brake mechanism is triggered; therefore, Ukraine is eligible for 55.5 thousand MT of poultry exports over this period. Ukraine and the EU may negotiate a different export volume for the remaining months of 2025. If that does not occur, Ukraine’s exports will automatically return to the DCFTA TRQ level, which transfers into 51.5 thousand MT of exports from June 5 to December 31, 2025. Therefore, Ukraine’s 2025 total exports to the EU could be limited to 107.0 thousand MT.

To avoid over the limit chicken meat supplies, the Government of Ukraine introduced [export licensing](#) (in Ukrainian), limiting 2025 chicken meat exports to 55,536.2 MT. The government also introduced a separate 1,565 MT turkey meat export limit. Ukraine adopted licensing in late December 2024 and will review it by June 5, 2025, when the rest of the year’s export regime becomes clearer. The Ministry of Economy of Ukraine oversees export licenses. Current regulations impose a “first come, first served” distribution principle.

Figure 7: Ukraine's Chicken Meat Exports to the EU



Source: Trade Data Monitor; FAS/Kyiv estimates

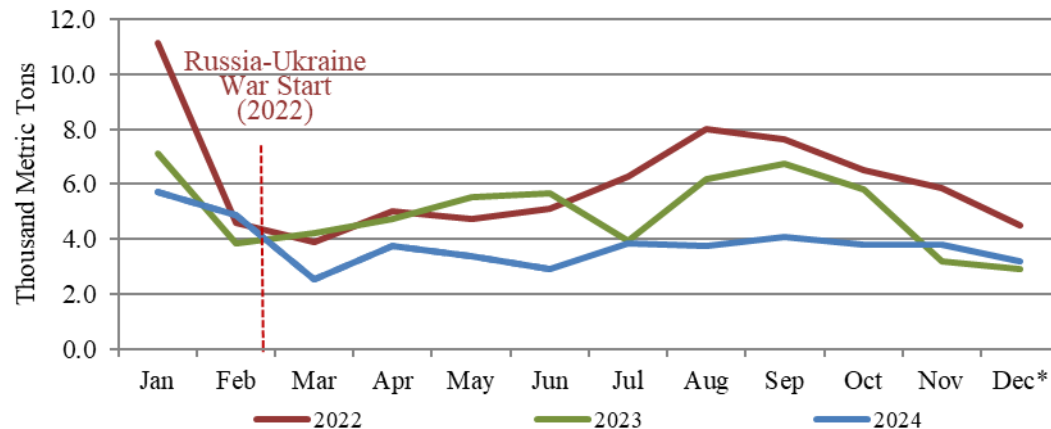
DCFTA TRQ increased to 90,000 MT in 2019 and was suspended from June 2022

ATM of 133,283 MT established in 2024 and enforced through Ukraine's voluntary export restrictions

Imports

Post estimates that imports of chicken offal will decline further in 2025, driven by increased domestic production and Ukrainian interest in the low-margin market segment (Figure 8). Demand for imported chicken is concentrated on cheap offal for further processing. Due to the availability of zero import duty TRQs and geographical proximity, imports are dominated by European producers. However, over time, Ukrainian domestic producers have been exhibiting greater interest in the low-margin segment, covering some demand. Imported products are predominantly processed into bologna, sausages, and similar products.

Figure 8: Ukraine's Monthly Chicken Meat Imports

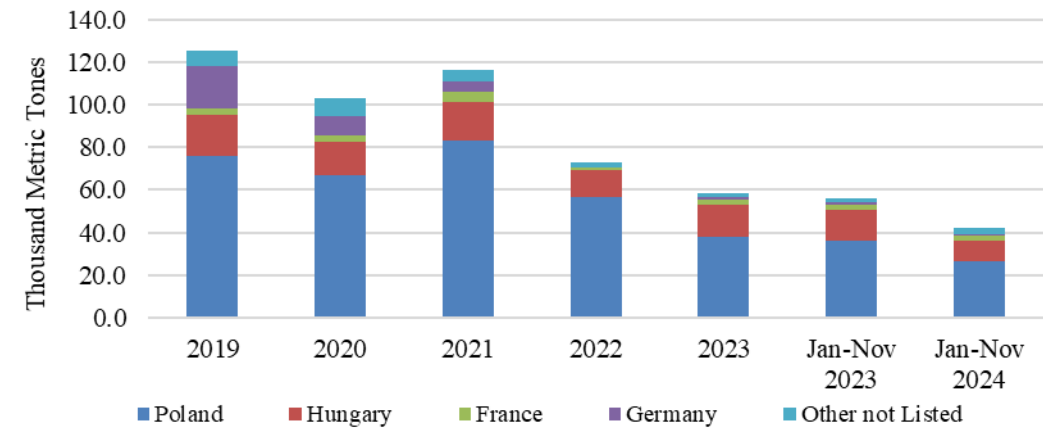


* Industry data-based forecast

Source: Trade Data Monitor; FAS/Kyiv estimates

There were limited and unusual chicken meat imports from Saudi Arabia and the UAE in 2024. Both countries are among MHP’s largest foreign destinations for chicken meat. Post does not estimate the composition of import sources will change significantly in 2025 (Figure 9).

Figure 9: Ukraine Chicken Meat Imports by Country



Source: Trade Data Monitor

Appendix

DCFTA Duty-Free TRQs for Poultry Products

Product	HS Code	For Ukraine's exports to the EU, MT, expressed in net weight	For the EU's exports to Ukraine, MT, expressed in net weight
Poultry: Whole Birds and Poultry Cuts	0207.11.(30-90)	20000 ¹	10000 ²
	0207.13.(10-20-30-50-60-99)		
	0207.14.(10-20-30-50-60-99)		
	0207.24.(10-90)		
	0207.25.(10-90)		
	0207.26.(10-20-30-50-60-70-80-99)		
	0207.27.(10-20-30-50-60-70-80-99)		
	0207.32.(15-19-51-59-90)		
	0207.33.(11-19-59-90)		
	0207.35.(11-15-21-23-25-31-41-51-53-61-63-71-79-99)		
	0207.36.(11-15-21-23-31-41-51-53- 61-63-79-90)		
	0210.99.(39)		
	1602.31.(11-19-30-90)		
	1602.32.(11-19-30-90)		
	1602.39.(21)		
Poultry: Whole Birds	0207.12.(10-90)	20000 ¹	10000 ²

Source: [Annex I-A](#) to Title IV of the Association Agreement

Note: TRQs are administered on a first-come, first-served basis; import of poultry products is subject to quarterly AGRIM Licenses

¹ Initially scheduled for a linear increase over five years from 16,000 MT in 2016 to 20,000 MT in 2021, but unilaterally implemented by the EU from 2014

² Linear increase over 5 years from 8,000 MT in 2016 to 10,000 MT in 2021

Attachments:

No Attachments