

Required Report: Required - Public Distribution

Date: April 15, 2024

Report Number: UP2024-0008

Report Name: Grain and Feed Annual

Country: Ukraine

Post: Kyiv

Report Category: Grain and Feed

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Report Highlights:

Grain production in Ukraine has remained unprofitable since the Russia's invasion, and this is expected to translate into decreased grain area for MY2024/25. With CY2024 yields forecast below the previous near-record-breaking CY2023, the total grain MY2024/25 production volume is forecast to be lower than for the previous marketing year. Exports are also forecast to be down, but improved port logistics in the Black Sea are supporting exports and resulting in low ending stocks estimated and forecast for MY2023/24 and MY2024/25. The EU became the primary market for Ukrainian grains for MY2023/24 due to the temporary suspension of import duties and quotas, and this is expected to continue in MY2024/25.

Abbreviations:

MAPFU – the Ministry of Agrarian Policy and Food of Ukraine

BSGI – Black Sea Grain Initiative

CY – Calendar Year

FSI - Food, Seed, and Industrial

ha - Hectare

MY – Marketing Year

MT – Metric Ton

MMT – Million Metric Tons

NDVI – Normalized Difference Vegetation Index

PSD – Production, Supply, and Distribution.

SSSU – State Statistics Service of Ukraine

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>

Disclaimer: *Due to the military situation, there have been delays in publishing SSSU information on the status of Ukrainian agriculture in Ukrainian government-controlled areas. MAPFU data was used instead, as referenced. For this report, FAS Kyiv cannot provide any production estimates on Russia-occupied territories (except for the Crimean Peninsula) due to the need for more credible and verifiable information on the status of affairs there. Due to the rapidly changing situation, this report provides a snapshot of the situation accompanied by assumptions and estimates that made sense at the time of the report writing.*

Executive Summary

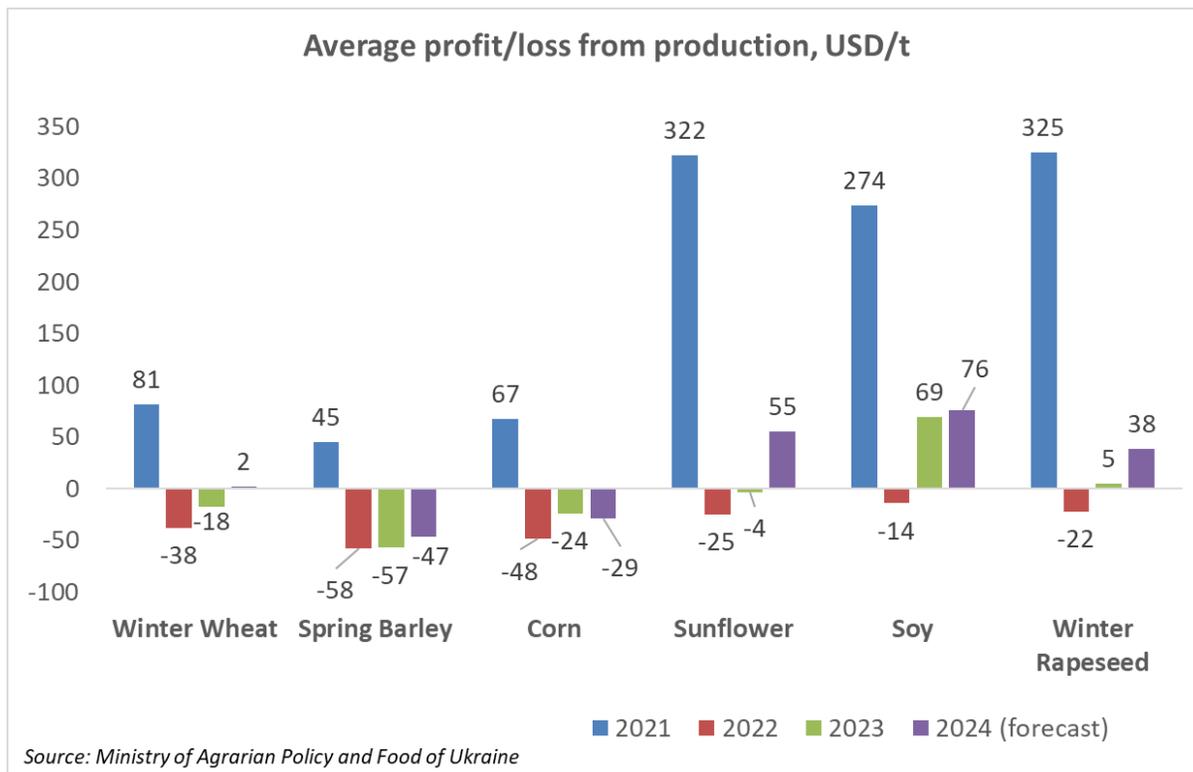
Overall Ukrainian grain production and exports are expected to fall in marketing year (MY) 2024/25. FAS Kyiv forecasts a three percent decrease of total grain (wheat, barley, corn, and rye) production area for MY2024/25 as grains have had lower profitability compared to oilseeds. The total MY2024/25 grain production volume is forecast six percent down based on a combination of smaller area and lower yields. Although yields are still expected to be above the five-year average due to positive conditions so far, they are unlikely to reach the near-record yields of MY2023/24. Grain exports are also expected to ease in MY2024/25 due to the smaller expected crops. Border blockages and export limitations imposed by neighboring EU countries did not have a significant effect on total MY2023/24 grain exports (except for rye). In addition, Ukraine managed to resume operations of its Black Sea ports. The EU is the major market for Ukrainian grain exports due to the temporary suspension of import duties and quotas. Domestic consumption (both food and feed) is gradually recovering as both population and industry are adjusting to post-invasion realities since the beginning of MY2022/23. Restored trade logistics and lower production volumes suggest minimal ending stocks for both MY2023/24 and MY2024/25.

Production:

A full-scale invasion by the Russian Federation in February 2022 caused havoc for exports of bulk agricultural commodities out of Ukraine. It subsequently translated into skyrocketing logistical costs, eating into the farm-gate price offered to producers. According to the research paper "Ukraine: The impact of war on a profitability of agricultural production" ([in Ukrainian](#)) published by MAPFU, farmers accrued losses for almost all major bulk commodity crops (except for soybeans) for two consecutive years (CY2022 and CY2023). This paper also suggests that only oilseeds will be profitable for CY2024 (see Figure 1) while grains remain in the negative territory, which naturally has impacted farmers' planting decisions for MY2024/25.

For more information on MY2024/25 oilseed production forecasts, see the relevant section of our GAIN Report [UP2024-0007](#).

Figure 1: Average Profit/Loss from Production of Major Grains and Oilseeds



Winter crop area for MY2024/25 is estimated lower compared to the previous marketing year, with MAPFU reporting total winter crop area down by nearly nine percent (see Table 1). One of the reasons for this decline was that planting took place in the autumn of 2023, around the period when export volumes were at their lowest (see Figure 6). As a result, industry might have felt uncertain whether the normal pace of exports could resume, and this could have impacted farmers' decisions to plant.

Table 1: Winter Crop Areas

1000 ha	MY2023/24	MY2024/25	MY2024/25 vs MY2023/24
Wheat	4,455.4	4,161.9	-6.6%
Barley	612.2	558.8	-8.7%
Rye	82.1	77.2	-6.0%
Rapeseed	1,375.5	1,164.2	-15.4%
Total Winter Crops	6,525.2	5,962.1	-8.6%
Spring Crop Area (forecast)	12,294.5	13,037.9	6.0%

Source: MAPFU

According to a farmer survey conducted by MAPFU ([in Ukrainian](#)) regarding grains, farmers plan to increase area under spring wheat and spring barley while decreasing area under corn. FAS Kyiv uses this research as the baseline for forecasting MY2024/25 spring crop area.

FAS Kyiv created the forecast for total MY2024/25 spring planting area by subtracting winter crop area (almost six million ha as per MAPFU report, details in Table 1) planted by November 2023 from 19 million ha, which is similar to last year's harvested area reported by MAPFU. FAS Kyiv does not expect any significant year-on-year changes and 19 million ha is estimated as the total production area available for both spring and winter crops.

FAS Kyiv then used numbers from MAPFU's farmer survey results (mentioned above) to estimate the split of available MY2024/25 total spring crop production area (13 million ha) between various crops. The resulting areas are included in Table 2.

Table 2: Forecast for MY2024/25 Spring Crop Production Areas

	(%)	1000 ha
Wheat	102.0%	494.2
Barley	107.0%	999.5
Corn	91.0%	3,690.2
Sugar Beet	108.0%	269.9
Sunflower Seeds	98.0%	4,958.5
Soybeans	118.0%	2,137.0
Rapeseed	124.0%	324.1
Rye	100.0%	2.2
Total Spring Area		12,875.6

Source: FAS Kyiv Estimates

FAS Kyiv’s MY2024/25 total area forecasts are:

- Barley – 1.9 million ha, a 10-percent increase compared to the previous marketing year
- Corn – 3.7 million ha, an eight-percent decrease
- Wheat – 4.8 million ha, a five-percent decrease
- Rye – 82,000 ha, similar to MY2023/24

According to MAPFU, spring planting has already started in Ukraine. As of April 4, 2024, grain area already sown includes:

- Wheat – 118,000 ha., 48 percent of anticipated planting area
- Barley – 543,000 ha., 66 percent of anticipated planting area

MY2024/25 yield forecasts are based on 5-year averages (see Figure 5) with upward adjustments based on a combination of factors, including positive weather conditions so far. Below are two graphs showing the Normalized Difference Vegetation Index (NDVI), a standardized measure of healthy vegetation. High NDVI values indicate healthier vegetation, while low NDVI values indicate low or no vegetation. Both graphs for CY2023 (Figure 2) and CY2024 (Figure 3) suggest better-than-average growth conditions for winter crops (wheat, barley, and rye) planted in CY2023 and scheduled to be harvested in MY2024/25.

Figure 2: NDVI for CY2023

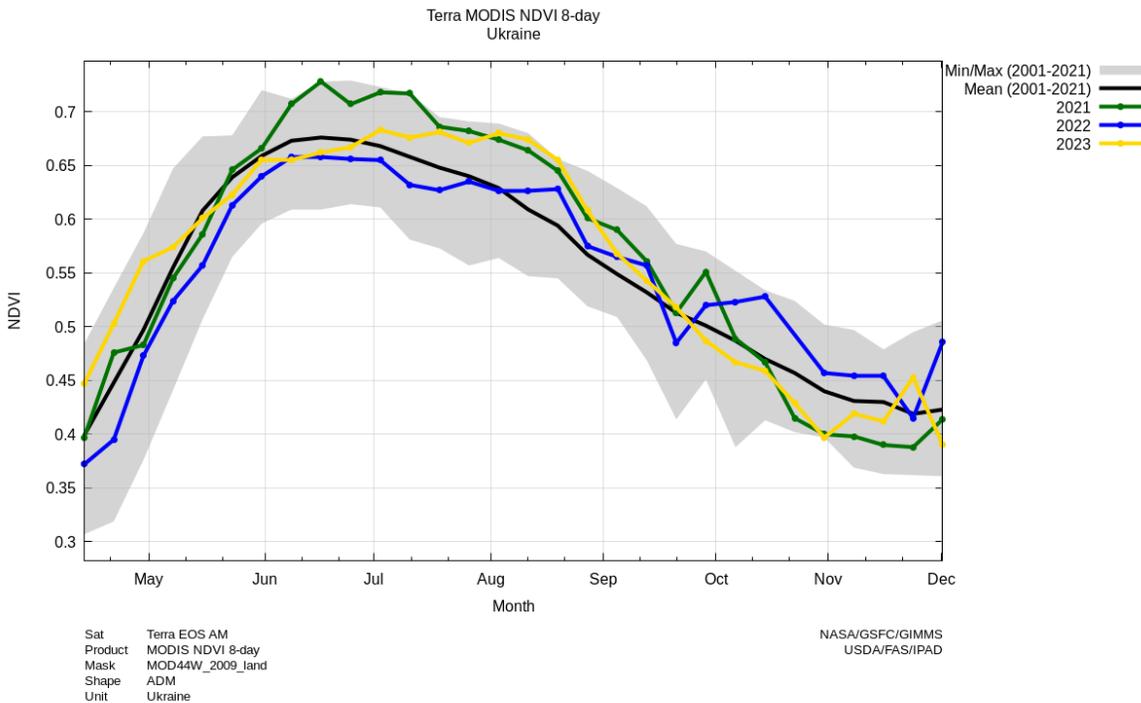
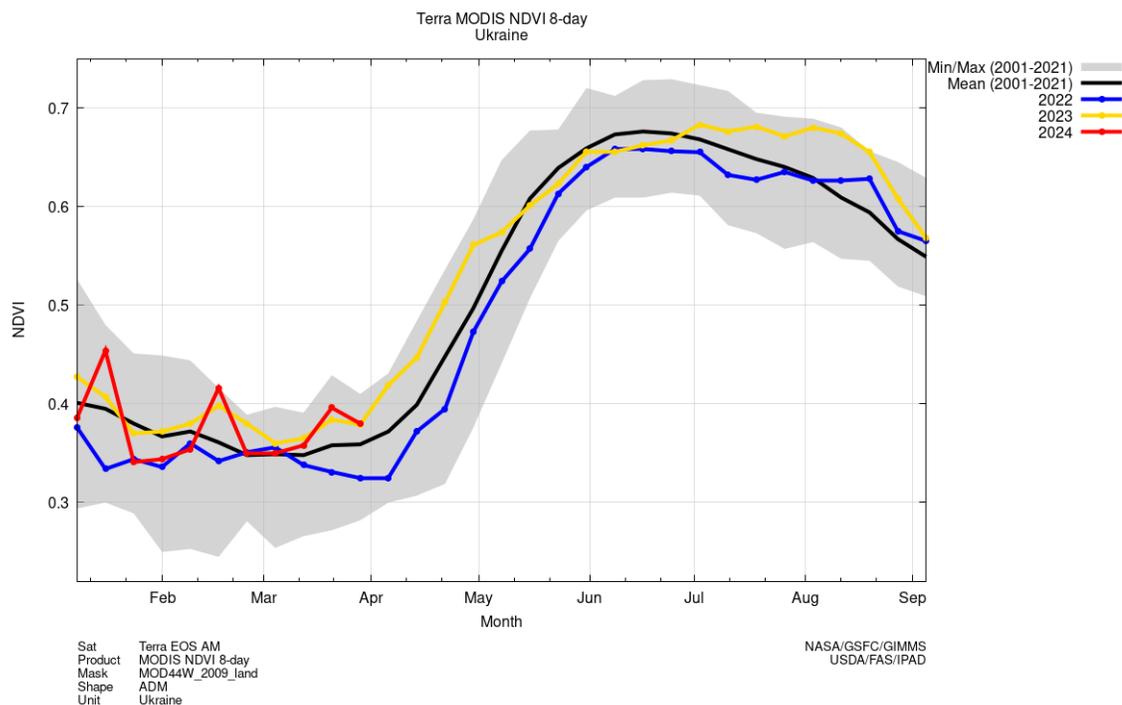
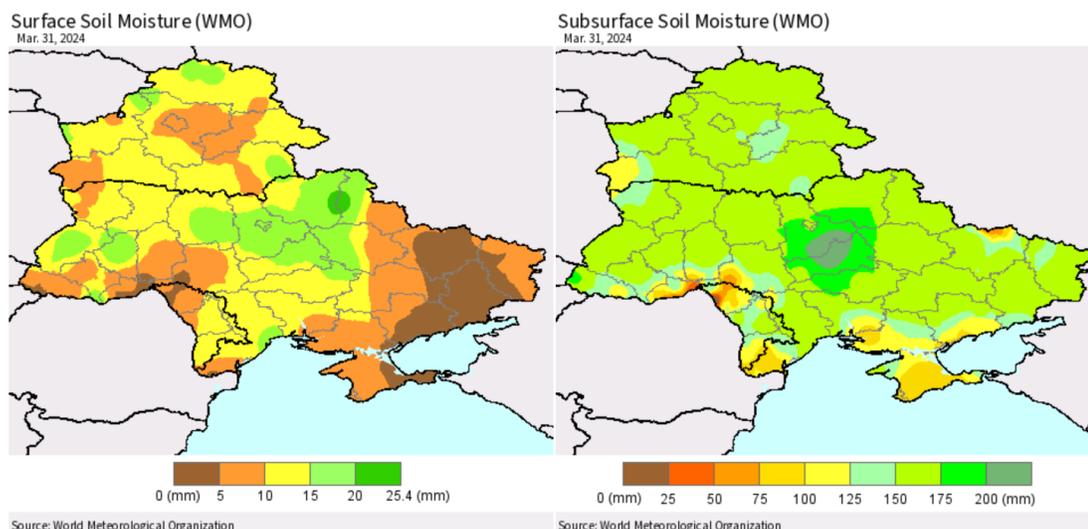


Figure 3: NDVI for CY2024



The soil moisture situation (see Figure 4) suggests favorable planting conditions for spring crops (corn, wheat, and barley) and supports the growth of winter crops already planted in CY2023. The deficit of surface soil moisture observed in southern and eastern Ukraine will not significantly impact the planting of these crops as a significant part of these territories are either occupied by Russia or have military activities. At the time of the report writing, some farmers had difficulty planting spring crops because of intensive rains in specific regions that prevented agricultural machinery from going to the fields. So far, FAS Kyiv does not consider it a significant enough factor to lead to decreased grain area.

Figure 4: Soil Moisture (Surface and Subsurface) Maps



Another factor that might suggest higher-than-average yields is the level of imports of mineral fertilizers (see Table 3). These increased from June 2023 to January 2024 compared to the same period the previous year. The time interval July 2023 to January 2024 was used for comparison under the assumption that these are most likely to be used for the subsequent crop (i.e. June 23-January 24 input imports would be used for the MY2024/25 crop).

Table 3: Imports of Selected Fertilizers and Agrochemicals to Ukraine

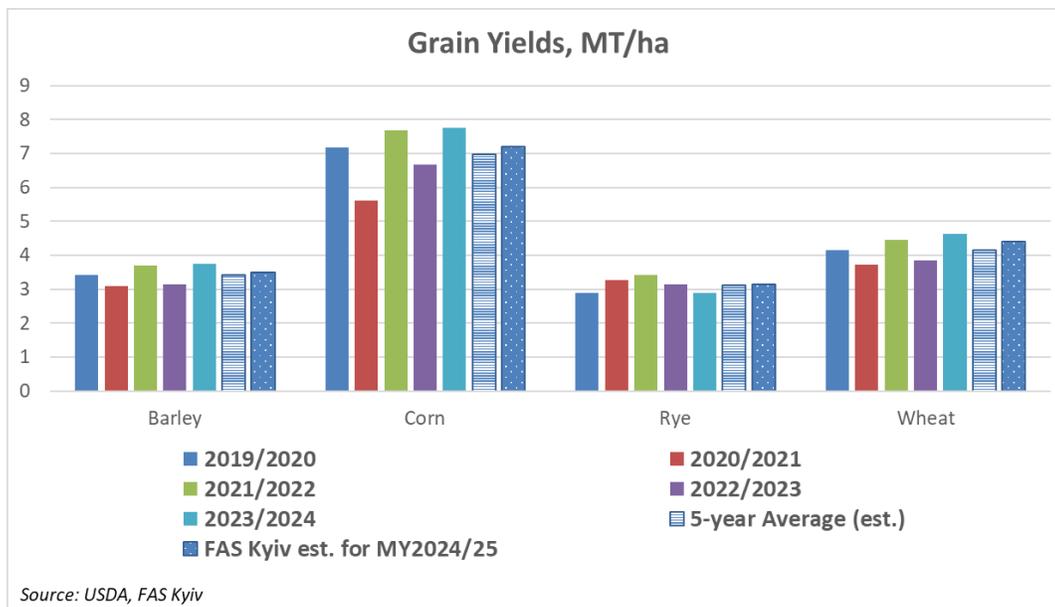
HS Code	Description	Unit	June 22-Jan 23	June 23-Jan 24	%Δ
310210	urea, whether or not in aqueous solution	KNI	43,091,582	66,218,984	53.67
310229	double salts and mixtures of ammonium sulfate and ammonium nitrate, nesoi	KNI	1,508,970	3,208,001	112.6
310230	ammonium nitrate, whether or not in aqueous solution	KNI	12,519,984	38,563,342	208.01
310240	mixtures of ammonium nitrate with calcium carbonate or other inorganic nonfertilizing substances	KNI	2,162,540	2,087,865	-3.45
310250	sodium nitrate	KNI	31,226	63,369	102.94
310260	double salts and mixtures of calcium nitrate and ammonium nitrate	KNI	167,766	592,718	253.3
310280	mixtures of urea and ammonium nitrate in aqueous or ammoniacal solution	KNI	4,498,315	5,745,999	27.74
310290	nitrogenous mineral or chemical fertilizers, including mixtures, nesoi	KNI	25,838	8,590	-66.75
310310	superphosphates (single, double or triple) fertilizers	KPP	0	0	0
310390	phosphatic mineral or chemical fertilizers, nesoi	KPP	0	0	0
310420	potassium chloride	KKO	13,510,498	60,735,542	349.54

HS Code	Description	Unit	June 22-Jan 23	June 23-Jan 24	%Δ
310430	potassium sulfate	KKO	273,799	698,769	155.21
310490	potassic mineral or chemical fertilizer, nesoi	KKO	10,264	128,526	1152.2
310510	fertilizing materials, in tablets or similar forms or in packages of a gross weight not exceeding 10 kg	T	331	357	7.85
310530	diammonium hydrogenorthophosphate (diammonium phosphate)	T	5,375	53,251	890.72
310551	mineral or chemical fertilizers containing nitrates and phosphates	T	911	1,342	47.31
310560	mineral or chemical fertilizers containing the two fertilizing elements phosphorus and potassium	T	12,924	11,530	-10.79
310590	fertilizers, nesoi	T	1,716	845	-50.76
380891	insecticides, excluding those specified in subheading note 1 to chapter 38	T	3,461	3,467	0.17
380892	fungicides, excluding those specified in subheading note 1 to chapter 38	T	6,916	5,134	-25.77
380893	herbacides, antisprouting products and plant-growth regulators, excluding those specified in subheading note 1 to chapter 38	T	28,333	23,813	-15.95

Source: Trade Data Monitor, LLC

As mentioned, FAS Kyiv’s MY2024/24 yield forecasts are based on five-year averages (see Figure 5) with some upward adjustments based on the above factors. However, these forecasts are still below near-record MY2023/24 yield estimates as this marketing year featured very favorable growth conditions as suggested by the NDVI line for CY2023 (see Figure 2).

Figure 5: Grain Yields



Based on the abovementioned area and yield assumptions, the resulting forecast MY2024/25 production volumes are:

- Wheat – 21.1 MMT, a nine-percent decrease compared to the MY2023/24 estimate
- Barley – 6.6 MMT, similar to MY2023/24
- Corn – 26.6 MMT, a six-percent decrease
- Rye – 260,000 MT, a seven-percent increase

For more information about MY2023/24 production estimates, please see the relevant section of our GAIN Report [UP2024-0002](#). It should be noted that FAS Kyiv decreased its MY2023/24 corn production estimate to 28.3 MMT compared to its previous report (30.5 MMT). This reduction is based on industry opinions suggesting that winter weather might not have been favorable for retaining the quality parameters of the corn that was still left in the fields. This estimate (as well as for other grains) will be finalized based on the final SSSU report later this year.

The production area and volume numbers discussed in this section are included in PSD tables, with the addition of FAS Kyiv MY2024/25 area and volume forecasts for the Russia-controlled Crimean Peninsula.

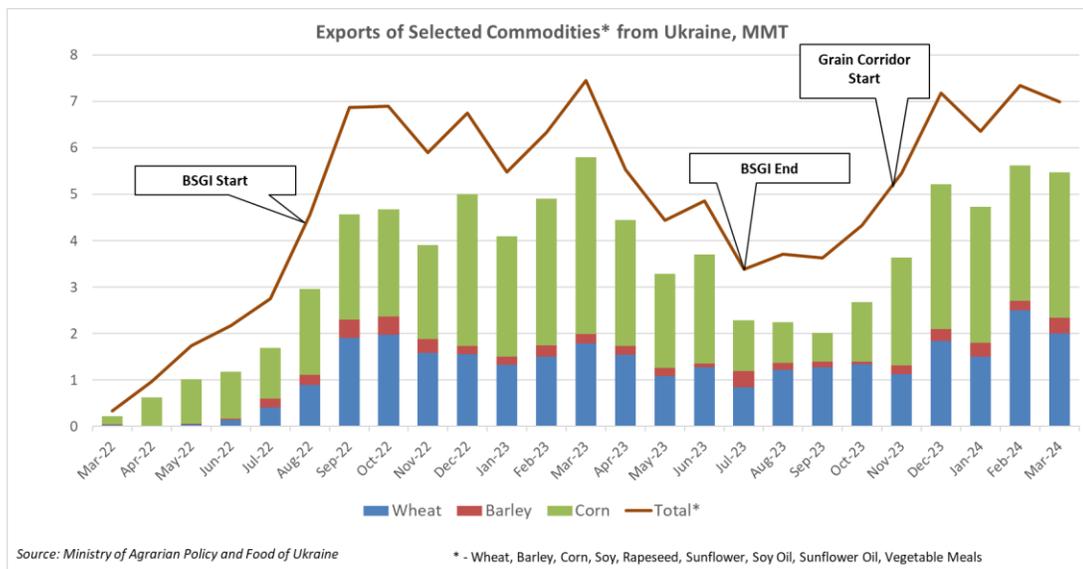
Trade:

Ukraine is a major net exporter of bulk agricultural commodities, including all major grains and oilseeds. Thus, access to ports and sea routes critically depends on ensuring cost-efficient logistics for large volumes of oilseeds, oils, and meals. For more details about Ukraine's logistics challenges during the post-invasion period, please refer to the relevant Trade Sections of our GAIN Report [UP2023-0012](#) (comprehensive description before April 2023) and GAIN Report [UP2024-0002](#) (recent developments as of January 2024).

Notably, most export bandwidth is dedicated to grains. The spread between the line (total agricultural export volume) and bar (wheat, barley, and corn) charts in Figure 6 below represent oilseed exports (beans/kernels and oils and meals). At the time of this report writing, Ukraine successfully launched and maintained the grain export corridor from three of its Black Sea ports (Odesa, Pivdenny, and Chornomorsk) independently of Russia and Türkiye. Since most grain exports are done by boat, they were largely unaffected by current farmer and trucker border protests and blockades in the adjacent EU countries (as of March 2024).

FAS Kyiv's baseline logistics scenario for MY2024/25 is based on two assumptions: Ukraine would maintain control over the logistics corridor in the Black Sea, and there would be no critical damage to port infrastructure and the country-wide energy grid.

Figure 6: Exports of Selected Commodities from Ukraine

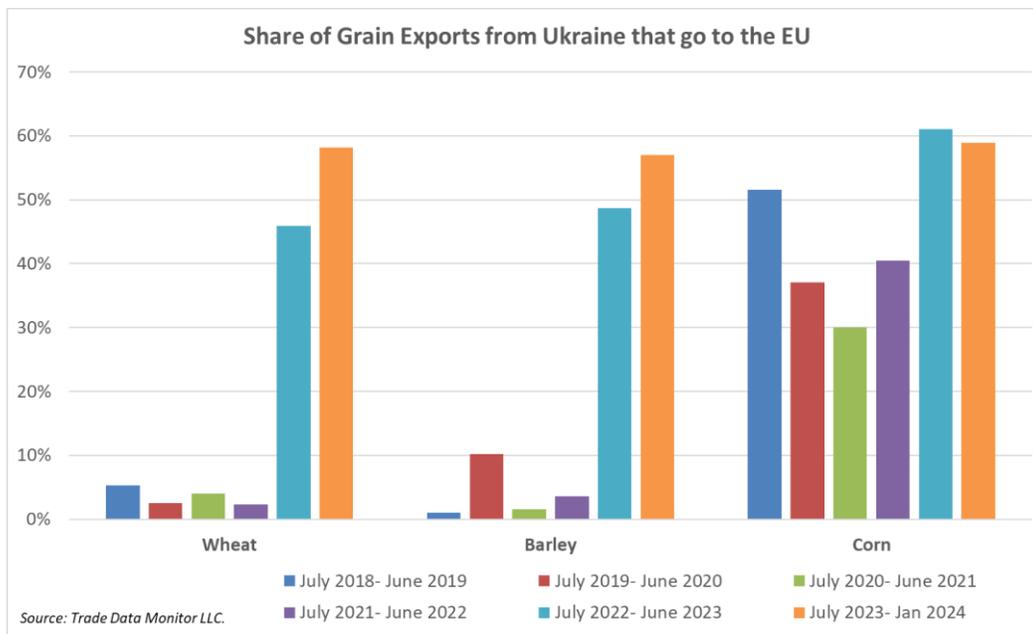


As a result of the smaller production forecasts, Ukraine’s exports of wheat and corn are forecast by FAS Kyiv to see the largest drop in MY2024/25, and export forecasts are as follows:

- Barley – 2.9 MMT, a three-percent decrease compared to MY2023/24
- Corn – 22.3 MMT, a nine-percent decrease
- Wheat – 12.8 MMT, a 27-percent decrease
- Rye – 10,000 MT, a two-fold increase

The EU is expected to remain the largest market for Ukrainian commodities (see Figure 7), including grains. Since the temporary suspension of import duties and quotas on Ukrainian agricultural exports to the EU, initially set by [Regulation 2022/870](#) by the European Parliament and the Council in July 2022, Ukrainian grains have been predominantly exported to the European market. It should be noted, however, that for some of these exports, the EU might not be the final destination. For instance, commodities heading to Romania, a well-known transshipment point for Ukrainian agricultural products heading out the Danube River to the Port of Constanta, would likely be exported to non-EU countries.

Figure 7: Share of Grain Exports from Ukraine that go to the EU



Barley exports for July 2023 – January 2024 were 1.4 MMT, a 22-percent decrease compared to the same period in 2022. The EU became the largest buyer (808,000 MT), with Spain (391,000 MT) the largest EU destination as it is a large feed consumer. Exports to Romania were also substantial (198,000 MT), although this trade was most likely transshipments to international markets through the Port of Constanta. At the same time, China is regaining its position as the second largest buyer (371,000 MT), a 2.9-fold increase compared to the same period of 2022.

Corn exports for October 2023 – January 2024 were 10.3 MMT, similar to 2022. The EU retained its status as the single largest destination, importing almost 6 MMT, with Spain receiving half (2.9 MMT)

of this volume. Exports to China (1.6 MMT) dropped by 30 percent. Egypt unexpectedly became the third largest importer with 1.3 MMT, a 4.7-fold increase compared to 2022.

Wheat exports for July 2023 – January 2024 were 9.2 MMT, a five-percent decrease compared to 2022. Over 58 percent of this volume (5.3 MMT) was exported to the EU, mostly to Spain (3.2 MMT) and Romania (1 MMT – although as mentioned this was most likely transshipped to other markets). Exports to Türkiye dropped by 70 percent due to BSGI's collapse. Ukraine's ability to open its own Grain Corridor allowed Ukraine to boost its export volumes to other overseas markets: exports to Egypt grew two-fold (up to 716,000 MT) and to Indonesia – by 75 percent (611,000 MT). After a total absence of exports in MY2022/23, wheat also started going to Pakistan again (505,000 MT).

Wheat flour (over 82 percent of total export volume of processed wheat products) and pasta exports for July 2023 – January 2024 were 77,000 MT, an eight-percent increase compared to the same period in 2022. Over 55 percent of this volume (42,000 MT) was exported to the EU, followed by neighboring Moldova (15,000 MT), the Gaza Strip and West Bank (10,000 MT), and Israel (5,000 MT).

Rye exports for July 2023 – January 2024 were around 1,000 MT, which is around eight percent of what was exported (over 12,000 MT) in the same period of 2022. Border blockades impacted this commodity more than the rest of the other grains. FAS Kyiv assumes that the further uncertainty of transit of Ukrainian grains through the EU borders will result in minimal exports of this crop for the rest of MY2023/24.

According to the MAPFU, Ukraine exported from July 1, 2023, to March 31, 2024:

- Wheat – 13.6 MMT, a five-percent increase to the same period of 2022/23
- Barley – 1.9 MMT, a 14-percent decrease
- Corn – 18.3 MMT, an 18-percent decrease

Based on the abovementioned trade data by MAPFU and under the assumption that Ukraine would be able to export at least 4 MMT of grains a month until October 2024, FAS Kyiv export estimates are as follows for MY2023/24:

- Barley – 3 MMT, a three-percent decrease compared to MY2022/23
- Corn – 24.6 MMT, a nine-percent decrease
- Wheat – 17.5 MMT, a two-percent increase
- Rye – 5,000 MT, a 72-percent decrease

Ukraine imported around 23,000 MT of wheat flour and pasta products for July 2023 – January 2024, a 17-percent increase compared to 2022. Ukraine imports predominantly processed products: 65 percent of the total volume (predominantly pasta) comes from the EU and 29 percent (bulgur and pasta) – from Türkiye.

Consumption:

Total feed consumption in Ukraine is expected to be relatively stable in MY2024/25, after rising by four percent in MY2023/24 (see Table 4). The growth of feed consumption is based on the recovery of poultry numbers, relatively stable pig numbers, but partially offset by a slight decrease in the cow herd. See our GAIN Reports [UP2024-0004](#) (Poultry) and [UP2024-0005](#) (Livestock) for more details.

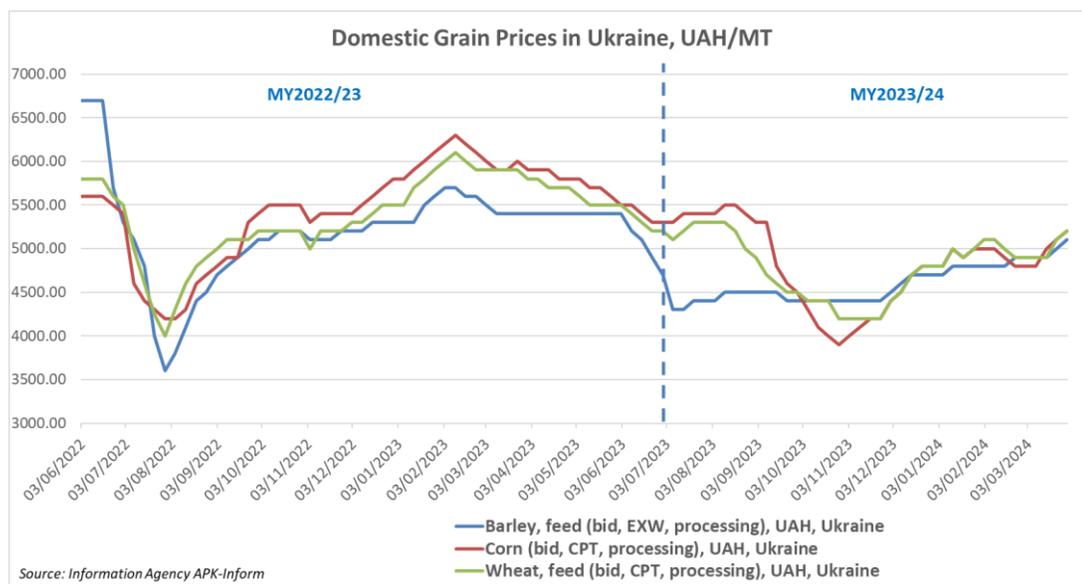
Table 4: Total Feed Consumption in Ukraine

	MY2022/23	MY2023/24	MY2024/25
Total	9,066	9,478	9,581
Barley	2,500	2,500	2,700
Corn	3,200	3,900	3,500
Rye	2	2	2
Wheat	3,400	3,100	3,400
Total	9,102	9,502	9,602

Source: FAS Kyiv Estimates

The relative consumption of individual grains in the animal feed mix depends on domestic price spreads (see Figure 8) as well as the availability of specific crops on the market. Currently, domestic prices are relatively similar for the different major grains. The seemingly lower price for barley is caused by different price bases (EXW where transportation costs are not included vs CPT) compared to corn and wheat. Given the price similarity, FAS Kyiv estimates individual grains in total feed consumption volume based on their availability (aka, production volumes) with corn as the most available, followed by wheat and then barley.

Figure 8: Domestic Grain Prices in Ukraine



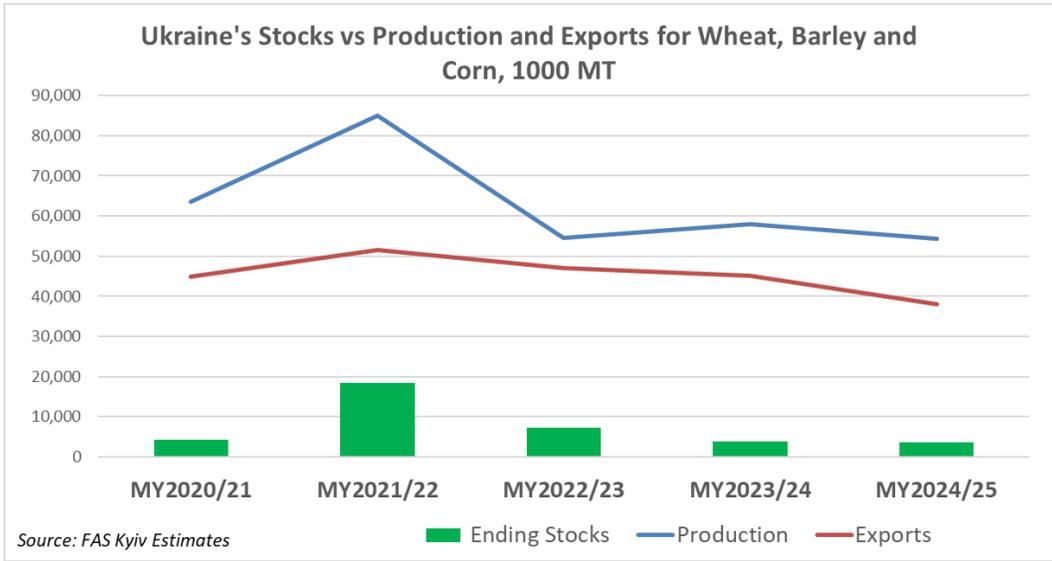
Food consumption for individual grains is estimated based on the currently available number of refugees who have left Ukraine but have now returned, as per a recent [UNHCR report](#). The recorded number of refugees who had left Ukraine dropped from its peak at 8.1 million during MY2022/23, down to 6.5 million at the time of the report writing. Therefore, the MY2023/24 Food, Seed, and Industrial estimate for wheat is five percent higher compared to the previous marketing year. The MY2024/25 FSI forecast for wheat is similar to MY2023/24 under the assumption of no further escalation of military activities resulting in changes in number of refugees.

It is possible that food consumption (predominantly for wheat) is even lower than estimated based on the reasonable argument that the dietary preferences of individuals close to conflict areas (both military and civilian) have been altered and that they tend to consume more canned and instant food at the expense of bakery products and pasta. However, specific adjustments could be made only upon the availability of SSSU's data on domestic production for specific products, which is not available at the time of this report writing.

Stocks:

A combination of improved MY2023/24 logistics (see Trade Section) and lower production estimates for MY2024/25 are expected to result in total grain ending stocks for both MY2023/24 and MY2024/25 to be at low levels and approximately at pre-war volumes (see Figure 9).

Figure 9: Ukraine's Stocks vs Production and Exports for Wheat, Barley and Corn



PSD Data Statistics:

Barley

Barley Market Year Begins Ukraine	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1950	1922	1700	1712	0	1878
Beginning Stocks (1000 MT)	780	780	770	821	0	862
Production (1000 MT)	6100	6211	6350	6547	0	6600
MY Imports (1000 MT)	2	2	2	1	0	1
TY Imports (1000 MT)	2	2	2	1	0	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	6882	6993	7122	7369	0	7463
MY Exports (1000 MT)	2712	2712	2300	3000	0	2900
TY Exports (1000 MT)	2559	2559	2200	3000	0	2900
Feed and Residual (1000 MT)	2400	2500	2500	2500	0	2700
FSI Consumption (1000 MT)	1000	960	1050	1007	0	1007
Total Consumption (1000 MT)	3400	3460	3550	3507	0	3707
Ending Stocks (1000 MT)	770	821	1272	862	0	856
Total Distribution (1000 MT)	6882	6993	7122	7369	0	7463
Yield (MT/HA)	3.1282	3.2315	3.7353	3.8242	0	3.5144

(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 2024/2025 = October 2024 - September 2025

FAS Kyiv’s MY2023/24 barley export estimate is 30 percent higher than USDA’s official number based on improved logistics as discussed in the Trade section.

FAS Kyiv’s MY2023/24 barley ending stocks estimate is 32 percent lower than USDA’s official number based on the higher export estimate.

Corn

Corn Market Year Begins	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4050	4128	3800	4010	0	3690
Beginning Stocks (1000 MT)	7796	7796	2795	2815	0	1707
Production (1000 MT)	27000	26200	29500	28300	0	26600
MY Imports (1000 MT)	21	21	20	15	0	20
TY Imports (1000 MT)	21	21	20	15	0	20
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	34817	34017	32315	31130	0	28327
MY Exports (1000 MT)	27122	27122	24500	24600	0	22300
TY Exports (1000 MT)	27122	27122	24500	24600	0	22300
Feed and Residual (1000 MT)	4000	3200	4000	3900	0	3500
FSI Consumption (1000 MT)	900	880	1000	923	0	928
Total Consumption (1000 MT)	4900	4080	5000	4823	0	4428
Ending Stocks (1000 MT)	2795	2815	2815	1707	0	1599
Total Distribution (1000 MT)	34817	34017	32315	31130	0	28327
Yield (MT/HA)	6.6667	6.3469	7.7632	7.0574	0	7.2087

(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 2024/2025 = October 2024 - September 2025

Wheat

Wheat Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5600	5631	5050	5040	0	4806
Beginning Stocks (1000 MT)	6765	6765	3502	3602	0	1186
Production (1000 MT)	21500	22075	23400	23141	0	21100
MY Imports (1000 MT)	59	83	80	80	0	80
TY Imports (1000 MT)	59	83	80	80	0	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	28324	28923	26982	26823	0	22366
MY Exports (1000 MT)	17122	17122	16000	17500	0	12800
TY Exports (1000 MT)	17122	17122	16000	17500	0	12800
Feed and Residual (1000 MT)	2700	3400	2700	3100	0	3400
FSI Consumption (1000 MT)	5000	4799	5000	5037	0	5061
Total Consumption (1000 MT)	7700	8199	7700	8137	0	8461
Ending Stocks (1000 MT)	3502	3602	3282	1186	0	1105
Total Distribution (1000 MT)	28324	28923	26982	26823	0	22366
Yield (MT/HA)	3.8393	3.9203	4.6337	4.5915	0	4.3903

(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 2024/2025 = July 2024 - June 2025

Please note that in the PSD table above, 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 added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of wheat trade by Ukraine.

FAS Kyiv's MY2023/24 wheat feed and residual estimate is 15 percent higher than USDA's official number based on the wider availability of this crop in feeding diets.

Rye

Rye Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	100	106	80	82	0	82
Beginning Stocks (1000 MT)	164	164	109	202	0	78
Production (1000 MT)	315	322	230	243	0	260
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	479	486	339	445	0	338
MY Exports (1000 MT)	18	18	10	5	0	10
TY Exports (1000 MT)	14	14	10	5	0	10
Feed and Residual (1000 MT)	2	2	2	2	0	2
FSI Consumption (1000 MT)	350	264	275	360	0	278
Total Consumption (1000 MT)	352	266	277	362	0	280
Ending Stocks (1000 MT)	109	202	52	78	0	48
Total Distribution (1000 MT)	479	486	339	445	0	338
Yield (MT/HA)	3.15	3.0377	2.875	2.9634	0	3.1707
(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 2024/2025 = October 2024 - September 2025						

FAS Kyiv's MY2023/24 rye export estimate is 50 percent lower than USDA's official number, based on the current export dynamics suggesting a minimum exportable volume as discussed in Trade section.

FAS Kyiv's MY2023/24 rye FSI consumption estimate is 31 percent higher than USDA's official number, based on a combination of production and export numbers that might stimulate to increased consumption in food industry (predominantly for bread baking).

Trade Data

Barley Export Statistics by Month and Destination, Ukraine, 1000 MT (HS Code 1003)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	2,712.1	1,817.5	295.3	203.1	123.5	60.3	191.8	200.3	342.3	1,416.4	77.9
EU 27 Brexit	1,320.6	1,115.0	236.7	148.4	91.4	46.9	94.0	91.4	99.0	807.8	72.5
China	341.7	127.0	0.3	0.2	0.1	0.0	66.0	92.5	211.8	371.1	292.3
Spain	450.1	410.3	89.7	79.9	34.7	27.2	56.1	28.5	74.6	390.6	95.2
Tunisia	84.1	48.6	24.2	0.0	0.0	0.0	6.5	12.3	22.0	65.0	133.7
Cyprus	121.5	63.3	20.8	11.8	14.8	3.8	10.9	38.6	17.3	118.0	186.3
Romania	591.5	506.3	108.7	39.6	18.4	6.4	12.3	7.0	6.2	198.5	39.2
Turkey	663.9	305.0	0.0	0.2	0.6	0.1	0.0	2.9	4.4	8.2	2.7
Jordan	11.3	11.3	0.0	3.1	2.7	0.0	0.0	0.0	2.9	8.7	77.3
Singapore	0.0	0.0	1.5	13.3	13.3	6.1	2.9	1.1	1.0	39.1	∞
United Arab Emirates	1.0	1.0	0.1	4.6	1.6	4.3	1.2	0.0	1.0	12.7	1240.3
Netherlands	1.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	34.1
Greece	39.6	33.5	6.3	4.7	2.8	4.3	6.2	7.1	0.2	31.5	93.9
United Kingdom	0.0	0.0	0.0	0.0	1.3	0.3	0.0	0.0	0.2	1.7	∞
Austria	0.8	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	17.8
Poland	50.8	40.6	2.0	8.6	11.6	2.9	6.7	0.6	0.1	32.5	80.1
Lithuania	0.6	0.6	0.0	0.1	0.3	0.1	0.0	0.1	0.0	0.7	119.6
Malaysia	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	∞
Moldova	13.0	13.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Morocco	0.0	0.0	6.8	0.0	0.0	0.0	0.0	0.0	0.0	6.8	∞
Portugal	15.4	15.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.7
Croatia	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3	∞
United States	0.0	0.0	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.7	∞
Other	325.1	239.7	34.5	36.8	21.3	2.9	23.1	9.4	0.0	128.0	53.4

Source: Trade Data Monitor, LLC

Barley Import Statistics by Month and Country of Origin, Ukraine, MT (HS Code 1003)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	1,788	1,788	0	0	273	5	0	0	41	319	17.8
EU 27 Brexit	1,788	1,788	0	0	273	5	0	0	41	319	17.8
France	10	10	0	0	3	0	0	0	41	44	440.0
Germany	84	84	0	0	56	0	0	0	0	56	66.7
Hungary	0	0	0	0	0	5	0	0	0	5	∞
Poland	1,670	1,670	0	0	205	0	0	0	0	205	12.3
Austria	0	0	0	0	5	0	0	0	0	5	∞
Czech Republic	24	24	0	0	3	0	0	0	0	3	12.5

Source: Trade Data Monitor, LLC

Corn Export Statistics by Month and Destination, Ukraine, 1000 MT (HS Code 1005)

Destination	MY2022/23	Subtotal Oct 2022- Jan 2023	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Oct 2023- Jan 2024	% Change Oct 2023- Jan 2024 to Oct 2022- Jan 2023
World	27,122.0	10,462.4	1,118.5	2,376.4	3,451.6	3,363.2	10,309.7	98.5
EU 27 Brexit	15,980.8	6,491.0	881.4	1,609.7	1,801.2	1,683.6	5,976.0	92.1
China	5,632.5	2,330.0	104.4	330.6	722.5	480.8	1,638.5	70.3
Spain	2,904.0	1,181.6	381.9	928.6	728.4	934.6	2,973.6	251.7
Romania	3,904.3	1,525.0	0.0	8.9	1.4	7.7	18.1	1.2
Egypt	2,243.0	283.7	63.3	300.7	475.5	501.5	1,341.0	472.8
Italy	2,354.4	745.1	141.0	272.7	333.7	223.0	970.5	130.3
Netherlands	1,483.5	415.9	146.2	140.0	411.9	220.7	918.6	220.9
Hungary	1,307.3	822.0	0.0	0.7	1.3	2.1	4.0	0.5
Poland	1,184.9	800.4	0.1	0.7	1.2	0.9	2.8	0.4
Portugal	552.4	76.3	105.8	119.3	109.6	36.9	371.6	487.3
Turkey	728.4	362.8	0.0	4.6	65.6	123.8	194.0	53.5
Germany	667.0	224.4	36.8	49.1	90.6	72.5	249.1	111.0
Israel	635.4	334.3	13.6	42.4	45.1	41.5	142.6	42.6
Tunisia	438.8	158.8	0.0	42.4	138.7	38.3	219.4	138.2
Libya	464.6	236.9	11.4	0.0	17.9	107.4	136.7	57.7
Slovakia	426.3	256.5	0.0	0.0	0.0	0.0	0.0	0.0
South Korea	296.2	121.2	3.8	5.4	44.1	64.0	117.3	96.8
Lebanon	300.5	95.5	6.6	10.5	46.7	41.3	105.0	110.0
Cyprus	219.6	48.9	18.9	14.5	43.8	20.2	97.4	199.3
Greece	165.2	66.3	14.9	28.9	15.9	26.0	85.6	129.2
Malta	106.6	39.7	7.9	27.2	43.1	38.8	117.0	294.9
Belgium	189.4	97.8	0.0	0.0	1.8	4.8	6.6	6.8
Lithuania	155.2	76.0	2.7	0.9	3.4	2.5	9.6	12.6
Iraq	42.3	1.6	0.0	13.7	52.2	49.4	115.3	7257.5
Austria	142.2	70.2	0.3	2.7	3.6	5.4	12.1	17.2
Japan	56.0	0.0	0.0	0.1	0.1	66.1	66.3	∞
Ireland	26.4	0.0	0.0	5.9	5.4	84.0	95.3	∞
Other	495.6	91.7	58.8	25.8	48.0	169.0	301.6	328.9

Source: Trade Data Monitor, LLC

Corn Import Statistics by Month and Country of Origin, Ukraine, MT (HS Code 1005)

Destination	MY2022/23	Subtotal Oct 2022- Jan 2023	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Oct 2023- Jan 2024	% Change Oct 2023- Jan 2024 to Oct 2022- Jan 2023
World	19,180	9,720	1,413	563	993	1,829	4,798	49.4
EU 27 Brexit	18,530	9,539	1,233	451	896	1,741	4,321	45.3
Romania	2,385	1,491	342	80	83	466	971	65.1
Hungary	5,320	3,939	0	21	295	414	730	18.5
France	2,439	774	144	288	364	381	1,177	152.1
Austria	995	545	0	40	24	346	410	75.2
Italy	30	2	1	1	1	83	86	4300.0
United States	403	158	135	63	83	83	364	230.4
Slovakia	105	0	249	0	0	52	301	∞
Turkey	165	0	23	49	1	5	78	∞
Spain	101	61	20	0	20	0	40	65.6
Switzerland	1	0	0	0	0	0	0	∞
Serbia	17	0	0	0	0	0	0	∞
Lithuania	242	0	0	0	0	0	0	∞
Mexico	1	0	0	0	0	0	0	∞
Moldova	2	0	0	0	12	0	12	∞
New Zealand	8	0	0	0	0	0	0	∞
Poland	5,617	1,621	477	21	109	0	607	37.4
South Africa	0	0	22	0	0	0	22	∞
Canada	2	0	0	0	0	0	0	∞
Chile	48	21	0	0	0	0	0	0.0
Croatia	1,109	1,107	0	0	0	0	0	0.0
Estonia	23	0	0	0	0	0	0	∞
Germany	164	0	0	0	1	0	1	∞
India	1	0	0	0	0	0	0	∞

Source: Trade Data Monitor, LLC

Corn Seed Imports to Ukraine by Country of Origin, Calendar Year, MT (HS Code 100510)

Destination	MY2022/23	Subtotal Oct 2022- Jan 2023	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Oct 2023- Jan 2024	% Change Oct 2023- Jan 2024 to Oct 2022- Jan 2023
World	6,257	3,087	443	500	803	1,676	3,422	110.9
EU 27 Brexit	6,153	3,065	443	451	803	1,676	3,373	110.0
Romania	1,640	916	342	80	83	466	971	106.0
Hungary	1,105	887	0	21	268	392	681	76.8
Austria	994	545	0	40	24	346	410	75.2
France	2,188	688	100	288	319	337	1,044	151.7
Italy	28	2	0	0	0	83	83	4150.0
Slovakia	4	0	0	0	0	52	52	∞
Spain	21	21	0	0	0	0	0	0.0
Switzerland	1	0	0	0	0	0	0	∞
Turkey	27	0	0	49	0	0	49	∞
India	1	0	0	0	0	0	0	∞
Serbia	17	0	0	0	0	0	0	∞
Moldova	2	0	0	0	0	0	0	∞
New Zealand	8	0	0	0	0	0	0	∞
Poland	66	0	0	21	109	0	130	∞
Germany	95	0	0	0	0	0	0	∞
Chile	48	21	0	0	0	0	0	0.0
Croatia	6	4	0	0	0	0	0	0.0

Source: Trade Data Monitor, LLC

Wheat Export Statistics by Month and Destination, Ukraine, 1000 MT (HS Code 1001)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	16,899.5	9,729.3	821.4	1,205.0	1,309.6	1,296.8	1,278.4	1,714.6	1,602.1	9,228.1	94.8
EU 27 Brexit	7,754.3	4,778.6	536.2	850.9	892.8	828.5	564.2	907.7	783.7	5,364.0	112.3
Spain	2,556.6	1,377.3	169.9	286.6	336.7	638.9	437.1	717.2	650.1	3,236.5	235.0
Pakistan	0.0	0.0	0.0	0.0	0.0	54.5	66.7	144.2	239.8	505.2	∞
Turkey	3,671.3	1,883.5	93.8	13.5	51.8	66.8	56.7	87.4	198.3	568.3	30.2
Egypt	856.4	355.9	64.5	204.3	185.5	110.6	29.6	13.2	108.4	716.2	201.2
Israel	220.0	131.5	19.4	22.2	18.4	0.0	38.0	55.8	71.1	224.9	171.0
Indonesia	458.2	348.7	25.2	21.1	24.6	16.7	251.8	211.6	60.3	611.3	175.3
Algeria	181.2	181.2	0.0	1.5	0.0	0.0	0.0	30.5	59.8	91.8	50.6
Italy	593.8	431.2	54.8	73.6	49.0	42.5	37.9	113.5	39.7	411.0	95.3
Tunisia	247.3	175.0	0.0	6.5	6.7	0.0	19.6	12.6	28.9	74.3	42.5
South Korea	64.7	64.4	0.1	2.9	3.7	5.9	1.8	45.1	27.8	87.3	135.6
Greece	297.7	228.2	46.8	63.4	46.0	13.1	20.5	21.5	27.4	238.7	104.6
Netherlands	71.6	9.0	4.4	4.6	26.5	8.2	5.7	5.9	15.7	70.9	791.5
Ireland	0.0	0.0	0.0	0.0	2.0	12.5	3.8	5.7	10.8	34.8	∞
Romania	2,645.9	1,561.5	220.8	379.7	336.9	26.9	8.1	26.0	8.2	1,006.5	64.5
Belgium	0.3	0.1	0.0	0.1	2.8	12.8	0.4	5.8	6.4	28.3	29752.6
Czech Republic	1.8	0.3	0.1	0.3	1.1	0.2	0.1	0.4	6.1	8.2	2929.0
Latvia	27.2	12.6	9.0	4.5	11.7	9.9	2.4	1.1	6.0	44.7	355.0
Albania	40.2	20.3	5.0	0.0	3.3	7.2	5.9	0.0	6.0	27.4	135.2
United Kingdom	2.4	1.0	0.0	6.0	0.5	0.0	2.1	0.5	4.1	13.4	1387.7
Croatia	1.9	0.1	0.0	9.2	13.6	7.6	6.4	2.5	4.1	43.4	38043.9
Malta	40.6	0.0	9.3	0.0	9.6	18.2	1.6	0.0	4.0	42.6	∞
Germany	81.4	45.0	4.2	7.6	14.6	13.9	8.1	3.8	3.9	56.2	124.7
India	3.4	0.0	0.7	1.5	0.5	1.0	1.8	6.2	3.4	15.2	∞
Malaysia	39.0	2.3	12.1	5.7	7.0	5.3	3.2	3.6	2.6	39.4	1693.0
Vietnam	178.4	123.0	1.3	3.9	40.1	95.2	109.8	42.8	2.4	295.4	240.2
Thailand	89.8	4.8	2.3	4.5	3.6	13.8	2.2	20.2	2.2	48.8	1025.7
Philippines	0.0	0.0	1.2	2.2	2.2	1.0	47.4	14.6	1.4	70.0	∞
Estonia	12.6	10.7	0.0	0.1	1.6	0.2	0.1	0.1	1.3	3.5	32.2
Other	4,515.9	2,761.8	76.6	79.6	109.6	113.9	109.4	122.7	2.0	613.9	22.2

Source: Trade Data Monitor, LLC

Wheat Flour and Products Export Statistics by Month and Destination, Ukraine, MT
(HS Codes 1101, 190219, 190230, 190240, 190430)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	162,981	71,528	10,943	15,663	12,654	9,275	8,594	10,255	9,746	77,130	107.8
EU 27 Brexit	88,825	34,141	6,932	9,996	7,164	6,326	4,647	3,377	4,051	42,493	124.5
Moldova	35,548	19,118	2,353	2,506	3,051	1,224	1,826	2,325	2,208	15,493	81.0
Gaza Strip and West Bank	14,630	6,534	882	1,176	1,730	1,221	1,073	2,570	1,959	10,611	162.4
Israel	6,858	2,598	490	1,123	423	58	394	1,505	1,174	5,167	198.9
Czech Republic	5,792	1,311	564	819	1,409	1,718	1,053	617	919	7,099	541.5
Germany	4,532	1,745	399	571	432	859	633	550	614	4,058	232.6
Lithuania	4,166	1,968	312	480	598	384	282	307	401	2,764	140.4
Spain	201	40	7	96	135	221	180	155	296	1,090	2725.0
United Kingdom	873	279	111	151	107	190	389	347	271	1,566	561.3
Poland	23,738	10,297	1,899	2,190	720	222	154	150	236	5,571	54.1
Bulgaria	2,336	1,153	102	656	273	143	316	84	211	1,785	154.8
Sweden	1,124	131	163	207	235	95	54	69	206	1,029	785.5
Romania	15,389	7,869	324	612	517	489	341	367	189	2,839	36.1
Croatia	10,738	3,136	1,011	1,317	937	603	270	41	159	4,338	138.3
Latvia	2,080	991	305	342	406	118	118	180	155	1,624	163.9
France	632	0	212	1,094	699	651	425	396	139	3,616	∞
Austria	200	0	15	83	61	62	99	65	105	490	∞
Hungary	8,689	2,858	826	671	265	73	84	63	80	2,062	72.1
Cyprus	103	25	25	123	2	49	25	25	72	321	1284.0
Greece	300	69	39	17	67	81	125	22	66	417	604.3
Denmark	89	0	21	0	24	15	18	51	54	183	∞
Slovakia	6,713	2,406	470	315	126	182	311	32	39	1,475	61.3
Other	18,243	8,996	412	1,111	438	618	423	332	190	3,524	39.2

Source: Trade Data Monitor, LLC

**Wheat Flour and Products Import Statistics by Month and Country of Origin, Ukraine, MT
(HS Codes 1101, 190219, 190230, 190240, 190430)**

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	34,838	19,490	3,089	2,239	3,361	3,725	3,170	3,439	3,719	22,742	116.7
EU 27 Brexit	22,829	12,744	2,160	1,190	2,343	2,674	2,092	2,010	2,321	14,790	116.1
Italy	17,304	9,602	1,768	829	1,652	2,273	1,713	1,591	1,735	11,561	120.4
Turkey	10,537	6,052	681	973	795	876	930	1,180	1,213	6,648	109.8
Poland	3,190	1,614	245	212	566	274	167	263	383	2,110	130.7
Latvia	915	720	17	17	39	34	51	18	90	266	36.9
Tunisia	157	75	83	0	77	62	59	82	82	445	593.3
China	774	318	148	61	105	73	78	62	74	601	189.0
Greece	697	410	68	74	39	38	132	93	63	507	123.7
Hungary	246	129	21	24	0	25	22	3	23	118	91.5
Lithuania	85	35	0	0	20	1	3	3	21	48	137.1
South Korea	107	37	11	15	0	12	8	6	20	72	194.6
Thailand	65	31	5	0	18	4	0	3	9	39	125.8
France	57	38	4	14	2	9	0	0	6	35	92.1
Georgia	0	0	0	0	22	0	0	0	0	22	∞
Germany	40	11	23	0	20	0	1	1	0	45	409.1
Indonesia	7	0	0	0	0	0	0	0	0	0	∞
Iran	9	9	0	0	0	0	0	0	0	0	0.0
Cyprus	0	0	0	0	0	0	0	25	0	25	∞
Czech Republic	93	76	0	14	1	15	0	0	0	30	39.5
Estonia	1	1	0	0	0	0	0	0	0	0	0.0
Finland	94	42	14	4	0	1	1	3	0	23	54.8
Austria	9	5	0	2	0	0	1	1	0	4	80.0
Other	451	287	3	1	4	27	2	104	0	141	49.1

Source: Trade Data Monitor, LLC

Rye Export Statistics by Month and Destination, Ukraine, MT (HS Code 1002)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	17,988	12,733	509	149	119	123	0	48	46	994	7.8
EU 27 Brexit	17,923	12,714	509	149	119	123	0	0	46	946	7.4
Bulgaria	0	0	0	0	0	0	0	0	46	46	∞
Germany	1,435	210	356	48	0	49	0	0	0	453	215.7
Hungary	22	0	0	0	0	0	0	0	0	0	∞
Iraq	47	0	0	0	0	0	0	0	0	0	∞
Moldova	0	0	0	0	0	0	0	48	0	48	∞
Oman	19	19	0	0	0	0	0	0	0	0	0.0
Poland	8,894	7,021	153	101	119	74	0	0	0	447	6.4
Romania	220	120	0	0	0	0	0	0	0	0	0.0
Slovakia	2,549	558	0	0	0	0	0	0	0	0	0.0
Spain	4,805	4,805	0	0	0	0	0	0	0	0	0.0

Source: Trade Data Monitor, LLC

Rye Import Statistics by Month and Country of Origin, Ukraine, MT (HS Code 1002)

Destination	MY2022/23	Subtotal Jul 2022 - Jan 2023	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Subtotal Jul 2023 - Jan 2024	% Change Jul 2023 - Jan 2024 to Jul 2022 - Jan 2023
World	117	117	37	0	4	0	0	49	0	90	76.9
EU 27 Brexit	117	117	37	0	4	0	0	49	0	90	76.9
France	0	0	37	0	1	0	0	0	0	38	∞
Germany	103	103	0	0	2	0	0	0	0	2	1.9
Italy	1	1	0	0	0	0	0	0	0	0	0.0
Poland	13	13	0	0	0	0	0	49	0	49	376.9

Source: Trade Data Monitor, LLC

Attachments:

No Attachments