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**Report Name:** Grain and Feed Quarterly

**Country:** Ukraine

**Post:** Kyiv

**Report Category:** Grain and Feed

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**Report Highlights:**

This report contains updated Marketing Year (MY) 2020/21 and MY2021/22 production, trade, and consumption estimates for Ukraine. According to the recent national statistical data MY2021/22 production numbers for wheat, barley, corn and rye are higher compared to MY2020/21, thus translating into higher export volumes. MY2021/22 corn production estimate qualifies for a historical record.

## **Production:**

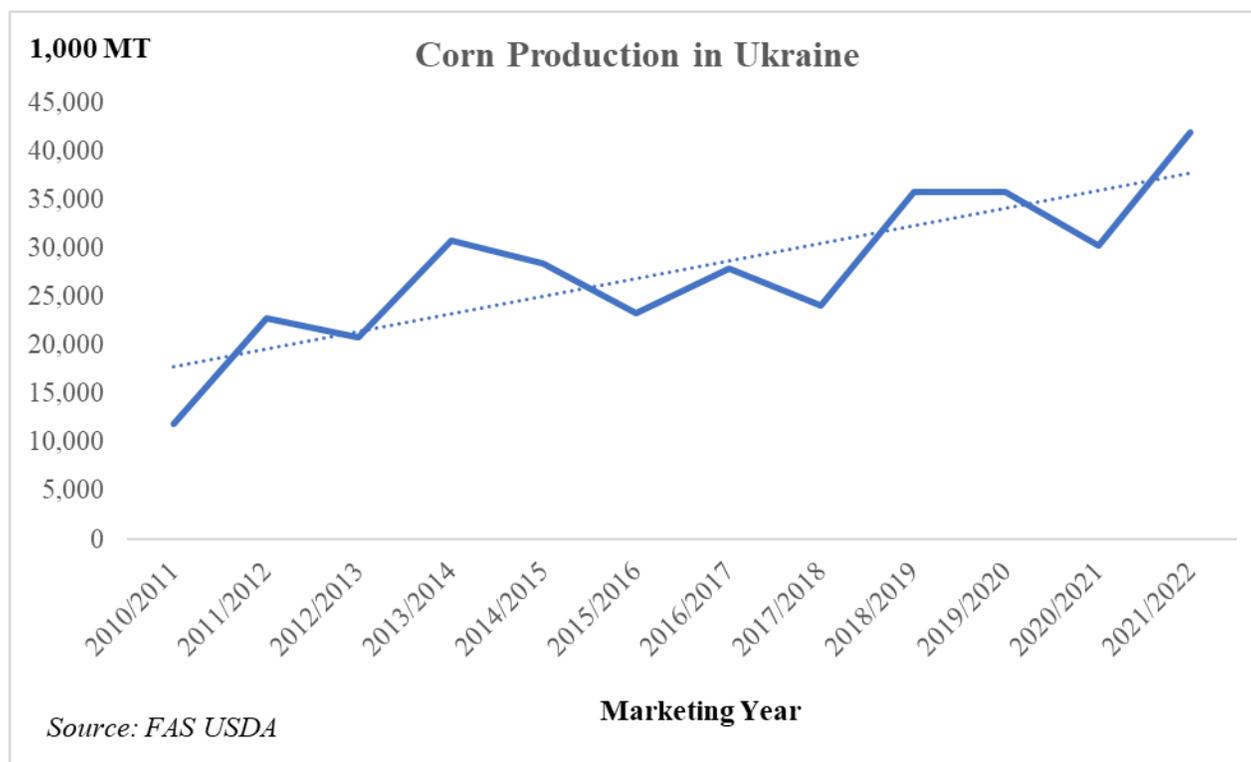
Production of all major grains concluded in Ukraine as of January 31, 2022. The State Statistics Service of Ukraine (SSSU) will publish its 2021 final production totals in April 2022, but has published its production numbers as of December 1, 2021 as follows:

- Wheat – harvested 7.1 million hectares (ha), resulting in approximately 32.7 million metric tons (MMT) of grain;
- Barley – under 2.5 million ha, resulting in approximately 9.6 MMT of grain;
- Rye – approximately 172,000 ha, resulting in slightly over 600,000 MT of grain;
- Corn – harvested slightly under 5 million ha, resulting in almost 40 MMT of grain, which is a record for Ukraine.

It should be noted that corn planting area reported by SSSU was around 5.5 million ha for MY2021/22. Given that it is not an uncommon practice for Ukrainian farmers to leave their corn in the fields during the winter, and the fact that there was no significant crop loss reported, Post believes that the final corn production estimate is around 43 MMT in bunker weight.

Corn production in Ukraine is clearly following an upward trend over the last 12 years (see Figure 1 below). Farmers are happily allocating more of their production areas to this crop, as it offers higher yields compared to other major grains (wheat and barley). Corn also benefits from having international buyers lined up, and normally is not considered a crop that impacts country's food security in contrast to wheat (see Policy section below). MY2021/22 production especially sticks out compared to MY2020/21, when agricultural output was hampered by a combination of lack of precipitation and hot weather that resulted in lower grain yields, including for corn.

**Figure 1. Corn Production in Ukraine**



According to the information from the Ministry of Agriculture for Autonomous Republic of Crimea, grain production in the Crimean Peninsula included:

- Wheat – approximately 340,000 ha, resulting in approximately 945,000 MT of grain;
- Barley – approximately 223,000 ha, resulting in approximately 532,000 MT;
- Rye – approximately 3,000 ha, resulting in approximately 7,000 MT;
- Corn - approximately 4,000 ha, resulting in approximately 13,000 MT.

All the above-mentioned numbers are given in bunker weight, which are subsequently converted into the final weight in relevant Production, Supply and Distribution (PSD) tables below.

#### **Trade:**

MY2020/21 final trade estimates are incorporated in the relevant PSD tables below. Export tables for wheat, barley and rye as well as a brief outline of trade aspects are available in Ukraine's previous [GAIN Report UP2021-0040](#).

According to data published by the Ministry of Agrarian Policy and Food of Ukraine (MAPFU) (as of January 17, 2022), MY2021/22 (local MY is July through June for all grains) exports were:

- Wheat –16.3 MMT;

- Barley –5.3 MMT;
- Corn –13 MMT;
- Rye –147,000 MT.

Based on the abovementioned corn export number, Post estimates that Ukraine has already exported 12 MMT of corn since October 2021.

The final MY2020/21 corn export numbers totaled nearly 24 MMT (see Trade Data section), a 17 percent decrease compared to the previous MY. Corn exports were lower due to inferior yields triggered by drought, forcing the Government of Ukraine to establish a 24 MMT export threshold for corn exports (see [GAIN Report UP2021-0006](#) for more details).

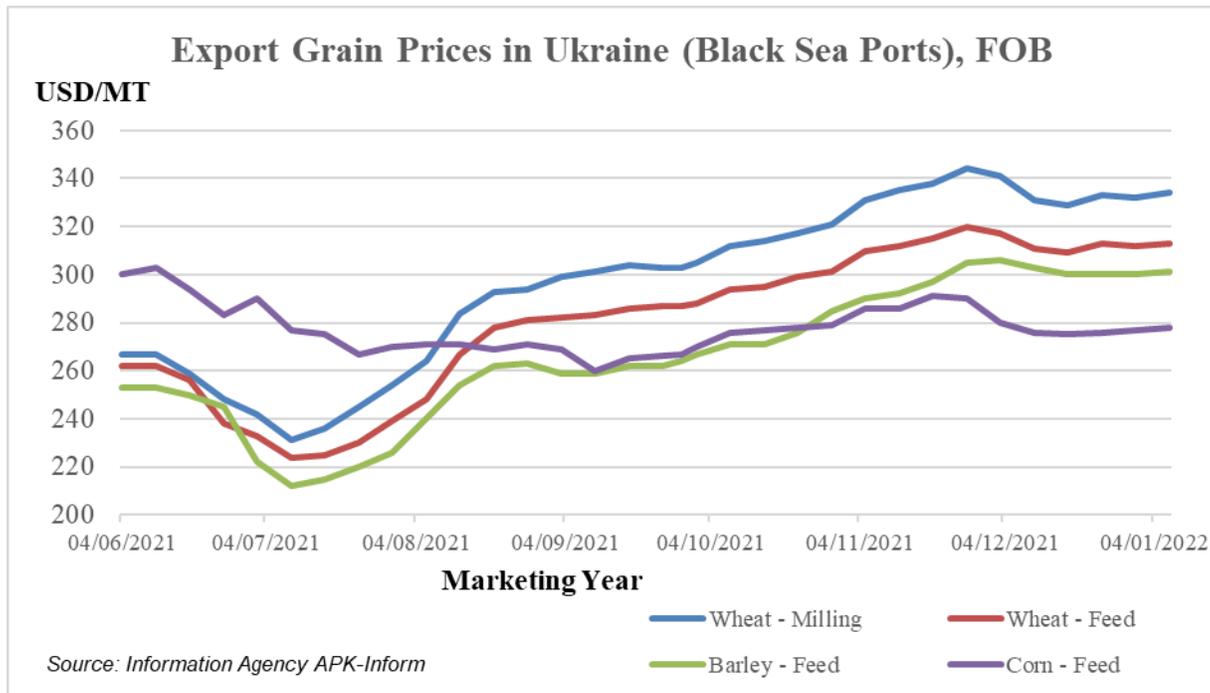
China remained the major consumer for MY2020/21, with 8.5 MMT of exports to this destination (around 36 percent of total exports from Ukraine), closely followed by the EU, buying 7.4 MMT (31 percent of total exports).

Ukraine almost exclusively imported corn seeds for planting, with 88 percent of its planting material coming from the EU for MY2020/21.

**Consumption and Ending Stocks:**

Corn again became the lowest priced feed ingredient for MY2020/21, as shown on Figure 2 below.

**Figure 2. Export Grain Prices in Ukraine**



Post estimates that this trend will stretch into MY2021/22 based on record-breaking corn production volumes in CY2021. Post updated its previous feed estimates available in the previous [GAIN Report UP2021-0040](#) by slightly increasing corn feed and decreasing feed consumption both for wheat and barley for MY2021/22. Table 1 captures the total feed consumption for all grains, which fluctuates slightly based on relatively stable animal numbers, as well as individual crops based on feed prices. See our annual [GAIN Report UP2021-0017](#) for more details.

**Table 1. Estimated Feed Consumption**

	<b>MY2019/2020</b>	<b>MY2020/2021</b>	<b>MY2021/2022</b>
Barley	3,400	2,900	2,700
Corn	5,100	4,100	5,800
Rye	2	2	2
Wheat	2,200	3,300	2,100
<b>Total</b>	<b>10,702</b>	<b>10,302</b>	<b>10,602</b>

*Source: FAS-Kyiv Estimates*

For more rationale behind consumption and ending stocks estimates included in PSD tables below, see our annual [GAIN Report UP2021-0017](#).

**Policy:**

MAPFU signed the Addendum to the Memorandum of Understanding, setting a blanket export cap for wheat (HS 1001) at 25.3 MMT for MY2021/22.

**Production, Supply and Distribution Data Statistics**

**Wheat**

MY2021/22 Post’s production estimate is one percent lower than USDA’s official number based on numbers included in the production section above.

MY2019/20 and MY2020/21 Post’s import estimates are 16 and six percent lower, respectively, compared to the USDA’s official numbers, based on numbers included in the trade section above.

MY2020/21 and MY2021/22 Post’s feed and residual consumption estimates are approximately 27 percent higher and 22 percent lower, respectively, compared to the USDA’s official numbers based on arguments discussed in the consumption section above.

MY2019/20, MY2020/21, and MY2021/22 Post’s ending stocks estimates are three, 43 and 24 percent lower, respectively, compared to USDA’s official numbers based on estimated production and export volumes for the relevant MYs.

Please be advised that in the PSD table below, 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) in order to present a comprehensive picture of wheat trade by Ukraine.

**Table 2. Production, Supply and Distribution**

Wheat Market Year Begins  Ukraine	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	7020	6808	6847	6847	7400	7393
Beginning Stocks (1000 MT)	1555	1555	1504	1465	1505	862
Production (1000 MT)	29171	29144	25420	25420	33000	32655
MY Imports (1000 MT)	94	79	132	124	100	100
TY Imports (1000 MT)	94	82	132	124	100	100
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	30820	30778	27056	27009	34605	33617
MY Exports (1000 MT)	21016	21013	16851	16847	24200	24300
TY Exports (1000 MT)	21016	21013	16851	16847	24200	24300
Feed and Residual (1000 MT)	2200	2200	2600	3300	2700	2100
FSI Consumption (1000 MT)	6100	6100	6100	6000	6100	6000
Total Consumption (1000 MT)	8300	8300	8700	9300	8800	8100
Ending Stocks (1000 MT)	1504	1465	1505	862	1605	1217
Total Distribution (1000 MT)	30820	30778	27056	27009	34605	33617
Yield (MT/HA)	4.1554	4.2808	3.7126	3.7126	4.4595	4.417
(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 2021/2022 = July 2021 - June 2022						

## Barley

MY2021/22 Post's production estimate is approximately three percent lower compared to USDA's official number based on numbers included in the production section above.

MY2021/22 Post's export estimate is approximately three percent lower than USDA's official number based on production and domestic consumption estimates from official statistics.

Post's feed and residual consumption estimates are approximately three percent higher for both MY2019/20 and MY2020/21 and approximately 10 percent lower for MY2021/22 compared to USDA's official numbers based on arguments discussed in the Consumption section above.

MY2019/20, MY2020/21 and MY2021/22 Post's ending stock estimates are approximately 16, 30, and 10 percent lower, respectively, compared to USDA's official numbers based on estimated production and export volumes for the relevant MYs.

**Table 3. Production, Supply and Distribution**

Barley Market Year Begins  Ukraine	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2782	2605	2584	2592	2670	2687
Beginning Stocks (1000 MT)	1008	1008	1053	884	861	601
Production (1000 MT)	9528	9459	7947	7947	10200	9873
MY Imports (1000 MT)	1	1	48	48	10	10
TY Imports (1000 MT)	0	0	48	48	10	10
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	10537	10468	9048	8879	11071	10484
MY Exports (1000 MT)	4984	4984	4187	4178	6000	5800
TY Exports (1000 MT)	4990	4990	5053	4178	6000	5800
Feed and Residual (1000 MT)	3300	3400	2800	2900	3000	2700
FSI Consumption (1000 MT)	1200	1200	1200	1200	1200	1200
Total Consumption (1000 MT)	4500	4600	4000	4100	4200	3900
Ending Stocks (1000 MT)	1053	884	861	601	871	784
Total Distribution (1000 MT)	10537	10468	9048	8879	11071	10484
Yield (MT/HA)	3.4249	3.6311	3.0755	3.066	3.8202	3.6744
(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 2021/2022 = October 2021 - September 2022						

**Corn**

MY2021/22 Post's import estimate is approximately 87 percent higher than USDA's official number based on relatively stable corn production areas over the last three years, suggesting stable planting seed imports.

MY2021/22 Post's export estimate is approximately nine percent higher than USDA's official number based estimated production and consumption numbers.

MY2020/21 and MY2021/22 Post's feed and residual consumption estimate is approximately 30 and 13 percent lower, respectively, compared to USDA's official numbers based on arguments discussed in the consumption section above.

MY2020/21 Post's FSI consumption estimate is approximately eight percent lower compared to the USDA's official number, based on stable consumption patterns.

MY2019/20, MY2020/21 and MY2021/22 Post's ending stocks estimates are around five percent higher, 336 percent higher and 11 percent lower, respectively, compared to USDA's official numbers based on estimated production and export volumes for the relevant MYs.

**Table 4. Production, Supply and Distribution**

Corn Market Year Begins Ukraine	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4991	5005	5395	5395	5300	4976
Beginning Stocks (1000 MT)	891	891	1478	1546	832	2800
Production (1000 MT)	35887	35855	30297	30297	42000	41960
MY Imports (1000 MT)	29	29	21	21	15	28
TY Imports (1000 MT)	29	29	21	21	15	28
TY Imp. from U.S. (1000 MT)	1	1	0	0	0	1
Total Supply (1000 MT)	36807	36775	31796	31864	42847	44788
MY Exports (1000 MT)	28929	28929	23864	23864	33500	36500
TY Exports (1000 MT)	28929	28929	23864	23864	33500	36500
Feed and Residual (1000 MT)	5200	5100	5900	4100	6700	5800
FSI Consumption (1000 MT)	1200	1200	1200	1100	1200	1200
Total Consumption (1000 MT)	6400	6300	7100	5200	7900	7000
Ending Stocks (1000 MT)	1478	1546	832	2800	1447	1288
Total Distribution (1000 MT)	36807	36775	31796	31864	42847	44788
Yield (MT/HA)	7.1903	7.1638	5.6158	5.6158	7.9245	8.4325
(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 2021/2022 = October 2021 - September 2022						

## Rye

MY2021/22 Post's import estimate is two-fold higher compared to USDA's official number, based on stable consumption patterns as well as relatively stable production volumes historically keeping imports at stable levels.

MY2021/22 Post's export estimate is 4.1-fold higher compared to USDA's official number, based on estimated production and domestic consumption numbers.

MY2020/21 and MY2021/22 Post's feed and residual consumption estimates are 80 and 87 percent lower, respectively, compared to the USDA's official number based on minimum rye usage in animal feeds.

MY2020/21 and MY2021/22 Post's FSI estimates are 17 and 35 percent lower, respectively, compared to USDA's official numbers based on stable consumption patterns for this crop in baking industry.

MY2020/21 and MY2021/22 Post's ending stocks estimates are 95 and 15 percent higher, respectively, compared to USDA's official numbers based on estimated production and export volumes for the relevant MYs.

**Table 5. Production, Supply and Distribution**

Rye Market Year Begins Ukraine	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	117	117	140	140	170	174
Beginning Stocks (1000 MT)	47	47	48	48	82	160
Production (1000 MT)	339	339	459	459	600	604
MY Imports (1000 MT)	2	2	2	2	1	2
TY Imports (1000 MT)	2	2	2	2	1	2
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	388	388	509	509	683	766
MY Exports (1000 MT)	8	8	17	17	85	350
TY Exports (1000 MT)	8	8	58	17	55	350
Feed and Residual (1000 MT)	2	2	10	2	15	2
FSI Consumption (1000 MT)	330	330	400	330	510	330
Total Consumption (1000 MT)	332	332	410	332	525	332
Ending Stocks (1000 MT)	48	48	82	160	73	84
Total Distribution (1000 MT)	388	388	509	509	683	766
Yield (MT/HA)	2.8974	2.8974	3.2786	3.2786	3.5294	3.4713

(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 2021/2022 = October 2021 - September 2022

## Trade Data

### Corn Exports from Ukraine by Destination, MY, 1000 MT (HS Code 1005)

Origin	MY 2017/18 (Oct. 17-Sept. 18)		MY 2019/20 (Oct. 19-Sept. 20)		MY 2020/21 (Oct. 20-Sept. 21)		% Change MY 2020/21 to 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
_World	30,321.3	100.0	28,928.8	100.0	23,864.2	100.0	-17.5
East and Southeast Asia	4,186.1	13.8	7,584.9	26.2	8,563.3	35.9	12.9
EU 27 Brexit	15,249.8	50.3	10,308.0	35.6	7,408.0	31.0	-28.1
Africa	4,909.0	16.2	5,361.5	18.5	3,782.3	15.9	-29.5
Middle East	4,715.4	15.6	4,605.2	15.9	3,351.5	14.0	-27.2
Eurasian Economic Union	202.9	0.7	118.1	0.4	10.2	0.0	-91.4
South Asia	205.7	0.7	233.5	0.8	0.0	0.0	-100.0
China	3,820.0	12.6	5,424.5	18.8	8,498.1	35.6	56.7
Netherlands	4,128.6	13.6	3,108.4	10.8	2,544.0	10.7	-18.2
Egypt	3,053.0	10.1	3,151.9	10.9	2,415.2	10.1	-23.4
Spain	4,270.2	14.1	3,530.2	12.2	1,982.8	8.3	-43.8
Iran	777.4	2.6	1,232.9	4.3	1,319.6	5.5	7.0
Belgium	735.0	2.4	602.5	2.1	743.2	3.1	23.4
United Kingdom	803.9	2.7	640.2	2.2	741.8	3.1	15.9
Portugal	695.8	2.3	816.0	2.8	731.4	3.1	-10.4
Italy	1,682.6	5.6	756.6	2.6	703.2	3.0	-7.1
Turkey	2,424.7	8.0	1,723.9	6.0	639.5	2.7	-62.9
Israel	1,127.9	3.7	833.6	2.9	533.5	2.2	-36.0
Libya	519.8	1.7	554.1	1.9	468.0	2.0	-15.5
Algeria	744.2	2.5	874.6	3.0	420.2	1.8	-52.0
Tunisia	514.6	1.7	473.3	1.6	414.3	1.7	-12.5
Germany	1,819.0	6.0	491.6	1.7	301.1	1.3	-38.8
Lebanon	299.2	1.0	189.7	0.7	274.3	1.2	44.6
Oman	0.1	0.0	128.2	0.4	261.4	1.1	103.9
Ireland	643.4	2.1	657.7	2.3	259.5	1.1	-60.6
Iraq	0.0	0.0	150.4	0.5	226.9	1.0	50.9
United Arab Emirates	67.9	0.2	184.3	0.6	86.9	0.4	-52.8
South Korea	339.2	1.1	1,963.8	6.8	52.6	0.2	-97.3
Cyprus	56.7	0.2	42.2	0.2	51.4	0.2	21.9
Lithuania	415.8	1.4	259.8	0.9	46.0	0.2	-82.3
Morocco	64.8	0.2	286.4	1.0	31.5	0.1	-89.0
Angola	0.0	0.0	0.2	0.0	22.0	0.1	11,482.6
Hungary	21.1	0.1	18.8	0.1	15.6	0.1	-16.8
Thailand	0.0	0.0	0.0	0.0	10.0	0.0	0.0
Other	1,296.5	0.0	832.9	0.0	69.9	0.0	-91.6

Source: Trade Data Monitor, LLC

### Corn Imports to Ukraine by Country of Origin, MY, 1000 MT (HS Code 1005)

Origin	MY 2017/18 (Oct. 17-Sept. 18)		MY 2019/20 (Oct. 19-Sept. 20)		MY 2020/21 (Oct. 20-Sept. 21)		% Change MY 2020/21 to 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
_World	35.3	100.0	28.8	100.0	20.5	100.0	-28.7
EU 27 Brexit	29.7	84.2	23.4	81.5	18.0	88.0	-23.0
France	5.1	14.4	5.4	18.8	6.6	32.3	22.3
Hungary	9.4	26.8	8.4	29.2	6.0	29.1	-28.9
Romania	13.7	38.7	7.8	27.3	2.8	13.4	-64.9
Austria	0.7	1.9	1.0	3.6	1.2	5.8	13.8
Belarus	0.1	0.2	0.1	0.2	1.1	5.2	1,664.9
Slovakia	0.5	1.3	0.1	0.5	0.5	2.4	276.8
Spain	0.0	0.1	0.1	0.4	0.5	2.4	316.3
Serbia	2.4	6.8	1.5	5.3	0.4	1.8	-76.1
Croatia	0.2	0.4	0.4	1.3	0.3	1.6	-11.7
Switzerland	1.7	4.7	1.8	6.2	0.3	1.4	-83.8
Chile	0.0	0.1	0.0	0.2	0.3	1.3	476.0
United States	1.2	3.3	0.8	2.7	0.3	1.2	-67.5
Turkey	0.1	0.4	0.9	3.2	0.2	0.9	-78.8
Germany	0.2	0.5	0.1	0.4	0.1	0.4	-27.5
Italy	0.0	0.0	0.0	0.0	0.1	0.4	1,934.0
Poland	0.0	0.0	0.0	0.1	0.0	0.1	-11.2
Greece	0.0	0.0	0.0	0.0	0.0	0.1	0.0
New Zealand	0.0	0.0	0.0	0.0	0.0	0.1	18.5
Georgia	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Canada	0.0	0.0	0.0	0.0	0.0	0.0	-75.9
Mexico	0.0	0.0	0.0	0.0	0.0	0.0	-28.8
Moldova	0.0	0.0	0.1	0.2	0.0	0.0	-96.0
India	0.0	0.0	0.0	0.0	0.0	0.0	125.8
Senegal	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Puerto Rico	0.0	0.0	0.0	0.0	0.0	0.0	-100.0
South Africa	0.0	0.1	0.1	0.4	0.0	0.0	-100.0
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Guatemala	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bulgaria	0.0	0.1	0.0	0.0	0.0	0.0	0.0
Antigua and Barbuda	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Argentina	0.1	0.2	0.0	0.1	0.0	0.0	-100.0

Source: Trade Data Monitor, LLC

**Attachments:**

No Attachments