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Report Highlights:

The cattle number will remain on its downward trend in 2025 and 2026. Post expects industrial cattle numbers to stabilize in 2026, while less efficient households will continue to contract their inventories, pulling down the aggregate cattle number. Ukraine's beef production will remain predominantly a function of the dairy sector and will shrink, following decreased inventory. High beef prices in 2025 will have limited influence, as domestic consumption slowly migrates to cheaper animal proteins. Exports of live cattle and beef will remain strong despite shrinking animal inventory. Limited swine industry recovery started in the second half of 2025, and Post expects animal number growth in 2026. The EU remains the leading supplier of pork.

Executive Summary:

The majority of Ukraine's cattle come from dairy farms. The number of beef animals is stable, but insignificant. Household milk production is inefficient and remains on a three-decade-long downward trend. It is primarily subsistent in nature, with little entering the market. Industrial dairy production experienced a significant transformation toward greater efficiency in recent years, and the Russia-Ukraine war did not stop the trend despite decreased investments and war-related risks. Industrial cattle numbers stabilized in 2025 and may even grow slightly in 2026; however, due to the significant share of household farming, Post expects the aggregate cattle number to decrease in both 2025 and 2026.

Beef production will follow the same trend as cattle, and Post expects it to decrease in 2025 and 2026. Domestic beef consumption will stagnate as beef prices hit all-time highs and consumers continue to shift toward cheaper poultry products. Exports of live cattle and beef will be significant, but will lose momentum due to a decrease in inventory. Ukraine will export live animals to traditional North African and Middle Eastern markets in 2025, with Lebanon being the primary destination. Exports of beef shifted to former Soviet Union (FSU) destinations despite high war-related logistics costs. Exports to China will decay in 2025.

The Russia-Ukraine war remained the major factor influencing the Ukrainian swine industry. The abundance of Ukrainian grain in the domestic market in 2022-2023, associated with a bumper crop and limited export capabilities, resulted in a pork market spike. Some non-specialized producers entered the market, concentrating on hog finishing. Production in 2022-23 was high as producers looked for a way to convert cheap grain into higher-value-added pork products. Excess supply led to a price collapse in late 2024, and production decreased. The decrease continued into the first half of 2025. Subsequently, the price climbed again, and producers started to increase the number of sows in summer 2025. However, industry does not expect swine inventory to increase until 2026. Industry also notes non-specialized producers have been exiting the market.

African swine fever (ASF) remains the major problem for the industry. Lack of commercial or state-subsidized insurance discourages production and limits export opportunities. Outbreak elimination and depopulation regulations often result in increased production risks that are beyond producers' control. The increased pork price in 2025 resulted in the resumption of imports. The EU remains the major pork supplier in 2025.

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

Cattle

Production

Table 1: Ukraine Animal Numbers, Cattle

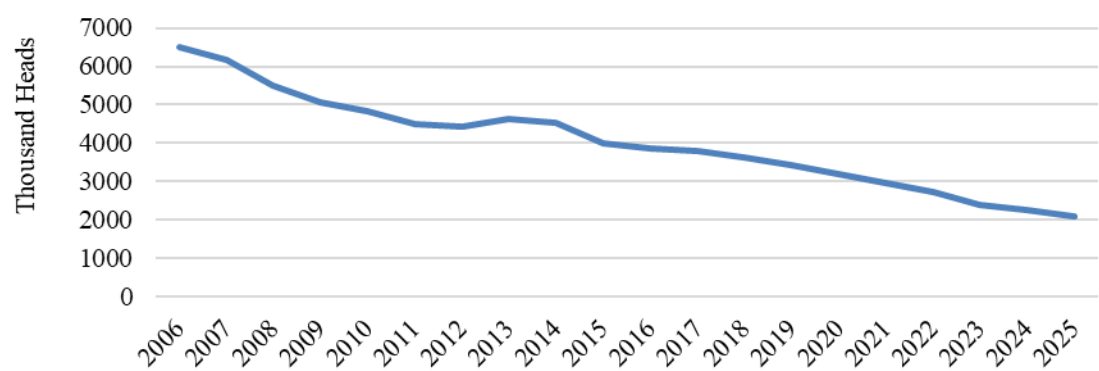
Animal Numbers, Cattle Market Begin Year Ukraine, Thousand Heads	2024		2025		2026
	Jan 2024		Jan 2025		Jan 2026
	USDA Official	New Post	USDA Official	New Post	New Post
Total Cattle Beg. Stocks	2250	2250	2120	2094	1940
Dairy Cows Beg. Stocks	1310	1310	1225	1202	1140
Beef Cows Beg. Stocks	18	18	17	19	18
Production (Calf Crop)	1230	1316	1200	1163	1110
Total Imports	1	1	2	1	0
Total Supply	3481	3567	3322	3258	3050
Total Exports	68	68	60	65	60
Cow Slaughter	0	0	0	0	0
Calf Slaughter	0	0	0	0	0
Other Slaughter	1260	1380	1230	1230	1148
Total Slaughter	1260	1380	1230	1230	1148
Loss	33	25	32	23	22
Ending Inventories	2120	2094	2000	1940	1820
Total Distribution	3481	3567	3322	3258	3050

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

This table includes indicators for Crimea.

Inefficient dairy enterprises remain the main reason for the decline in Ukrainian cattle in the first half of 2025, and Post forecasts this situation to extend into 2026. The slow downward trend has remained the same for over thirty years (Figure 1). However, there are signs of animal inventory stabilization in the industrial farm subsector. Its share grew by over 10 percentage points in the last 10 years and approached half of Ukraine's cattle inventory (Figure 2). Industrial sector animal numbers remained stable in the first half of 2025. Ukraine's dairy industry expects it to stay stable or exhibit insignificant growth in 2026.

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



Source: State Statistics Service of Ukraine

Household cattle production remains semi-subsistent. According to industry, the procurement of household-produced milk by industrial dairy processors dropped to negligible levels in 2025, due to its low quality. Therefore, milk production is further discouraged, resulting in further animal number decline. Backyard slaughter remains a widespread practice. Some live animals from households are sold for export or further industrial processing and enter official market channels.

Figure 2: Ukraine's Cattle Inventory Composition in 2023



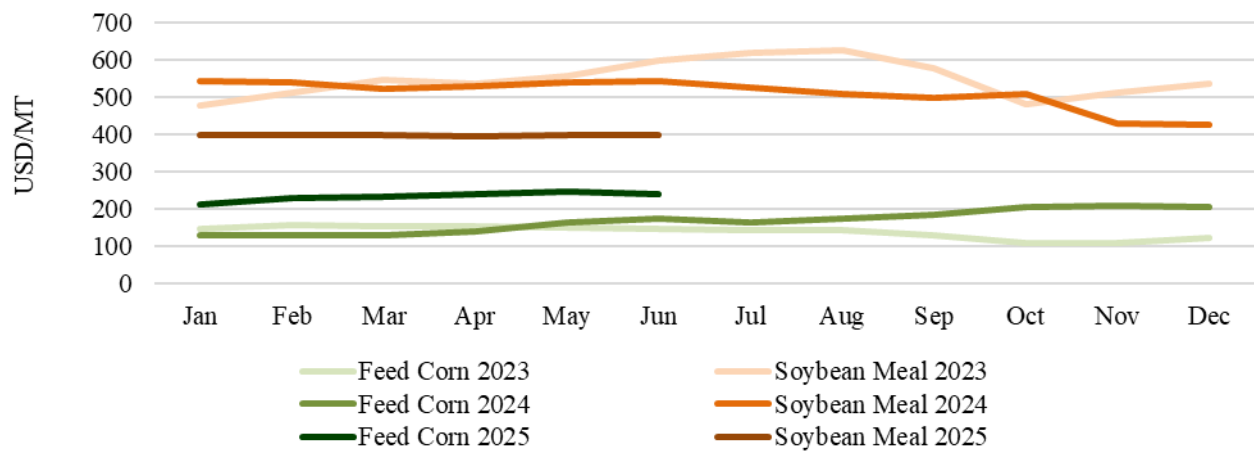
Source: State Statistics Service of Ukraine; FAS/Kyiv estimates

In 2025, households continued to be the major cattle owners and the major beef producers. The efficiency of dairy and dual-purpose animal growing and finishing remains very low. In many cases, dairy farms sell young calves as soon as possible to cut losses, and private households often purchase young dairy calves for low-cost finishing. Households keep the animals on a grassfed diet and sell them for export or slaughter at a relatively young age (often under two years old). According to the Ministry of Agricultural Policy and Food of Ukraine’s industrial beef farm [production cost structure](#) (in Ukrainian), the cost of beef production reached \$2.05 per kilogram of live weight, resulting in an average loss of \$0.60 per kilogram of live weight sold.

Ukraine is one of the world's largest exporters of feeds and feed grains, with domestic prices generally below world market prices due to transportation and marketing costs. This provides commercial Ukrainian livestock producers with a significant competitive advantage. Feed costs remained low in 2025, with a substantial drop in soybean meal prices that more than offset some of the increase in corn prices (Figure 3). The introduction of a soybean export tariff in July 2025, along with the construction of

new oilseed crushing facilities in 2024 and 2025, is likely to keep the soymeal price depressed until the end of 2025.

Figure 3: Ukraine’s Feed Prices

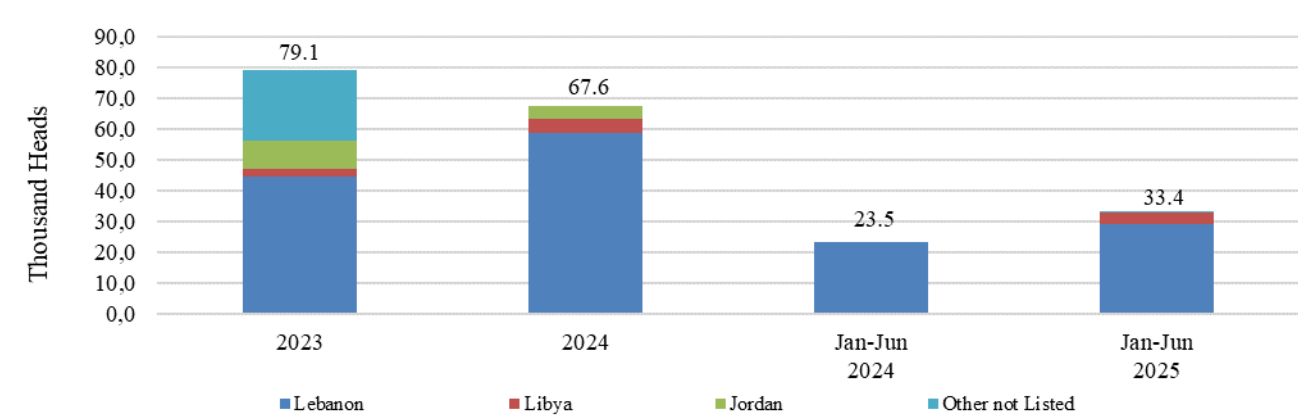


Source: APK-Inform Consulting

Trade

Post estimates indicate decreasing animal inventory will lead to decreased live animal exports in 2025, despite slightly increased exports in the first half of the year (Figure 4). Post does not expect the situation to change in 2026. Cattle exports remain one of the significant sources of income for Ukrainian cattle farmers due to plummeting domestic demand for relatively more expensive beef, compared to pork, white fish, and poultry. The Russia-Ukraine war resulted in increased logistics costs and a subsequent loss of the FSU Central Asia markets. They were almost entirely replaced by the Middle East and North African markets in 2024. Lebanon dominated as an export destination in 2024 and the first half of 2025.

Figure 4: Ukraine Cattle Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Beef

Production

Table 2: Meat, Beef, and Veal

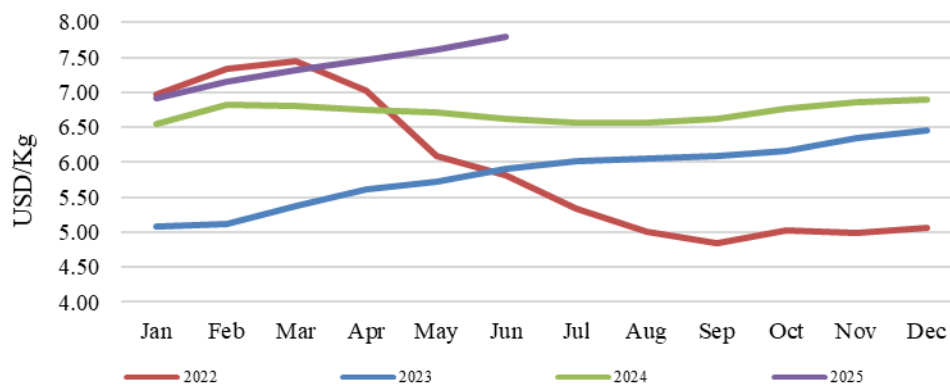
Meat, Beef, and Veal Market Begin Year Ukraine, Thousand Metric Tons	2024		2025		2026
	Jan-24		Jan-25		Jan-26
	USDA Official	New Post	USDA Official	New Post	New Post
Slaughter (Reference)	1260	1380	1230	1230	1148
Beginning Stocks	0	0	0	0	0
Production	225	250	217	225	210
Total Imports	4	4	3	3	3
Total Supply	229	254	220	228	213
Total Exports	25	25	20	23	20
Human Dom. Consumption	204	229	200	205	193
Other Use, Losses	0	0	0	0	0
Total Dom. Consumption	204	229	200	205	193
Ending Stocks	0	0	0	0	0
Total Distribution	229	254	220	228	213

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

This table includes indicators for Crimea.

Post expects beef production to follow the same trend as live cattle, decreasing in both 2025 and 2026. Shrinking live cattle supplies led to increased competition between domestic slaughterhouses and live cattle exporters. The reduced availability of live cattle led to record-high beef prices in May and June 2025, influencing beef and other animal protein markets (Figures 5 and 6). Although increased, the price of bovine animals for slaughter remained insufficient for profitable animal feeding operations in the first half of 2025.

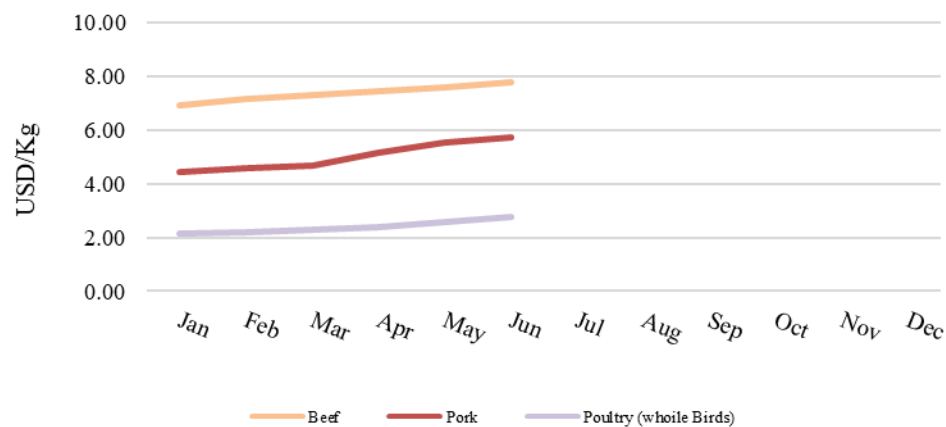
Figure 5: Beef Retail* Price in Ukraine



Source: State Statistics Service of Ukraine

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

Figure 6: Beef, Pork, and Poultry Prices in 2023-24

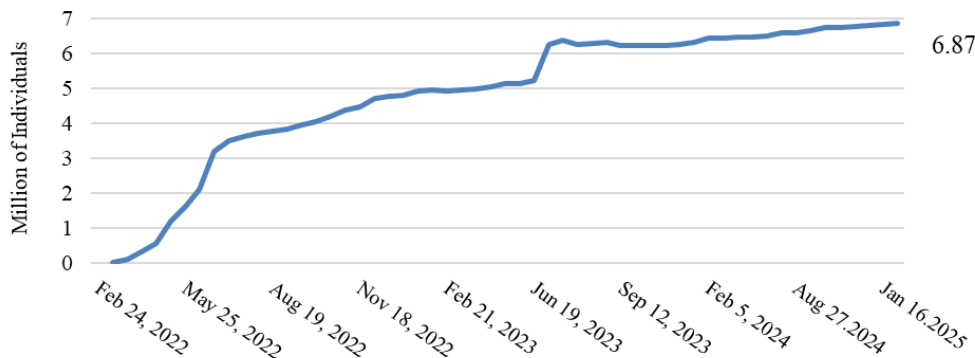


Source: State Statistics Service of Ukraine

Consumption

In the first half of 2025, decreased supplies and rising beef prices led to a gradual decline in beef consumption. Post expects this trend to continue in the remaining months of 2025 and in 2026. Population outflows also contribute to the consumption drop, although not to the extent as in 2022 and 2023 (Figure 7).

Figure 7: Number of Refugees from Ukraine



Source: United Nations High Commissioner for Refugees

* This graph does not include individual refugees (refugees who did not apply for the temporary protection status) and refugees outside of the EU

The beef-to-pork price ratio decreased in 2025. However, record-high prices approaching \$8/kg limit the possibility for consumption stabilization or increase. Incomes grew in 2024 and the first half of 2025 due to higher salaries and increased government spending on war-related activities. However, according to World Bank [data](#), Ukraine’s total GDP (purchasing power parity) remained well below pre-war levels.

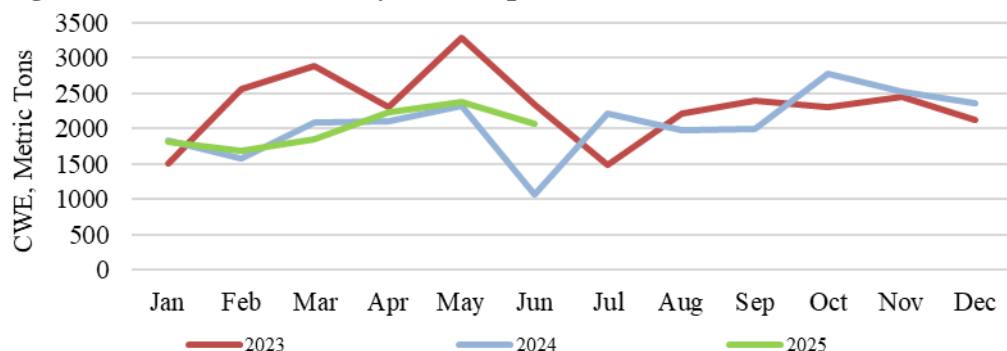
Trade

Exports

Decreased animal inventory and slaughter resulted in increased beef export prices, but the drop in exports in 2024 and the first half of 2025 was insignificant (Figure 8). Post expects this contraction to continue in 2026. According to the industry, FSU countries were ready to pay a premium and return as the major export destination. This import increase took place despite high logistics costs associated with exports around Russia. Many exports were transshipped through Türkiye, as traditional sea container routes remain unavailable.

China remains the largest importer, but its share in total exports dropped in 2024 and further in the first half of 2025. According to local industry, the “low Chinese domestic beef price is the main reason for decreased Ukrainian exports. Chinese importers decreased imports due to decreasing consumption of expensive beef as their economy experiences turbulence.”

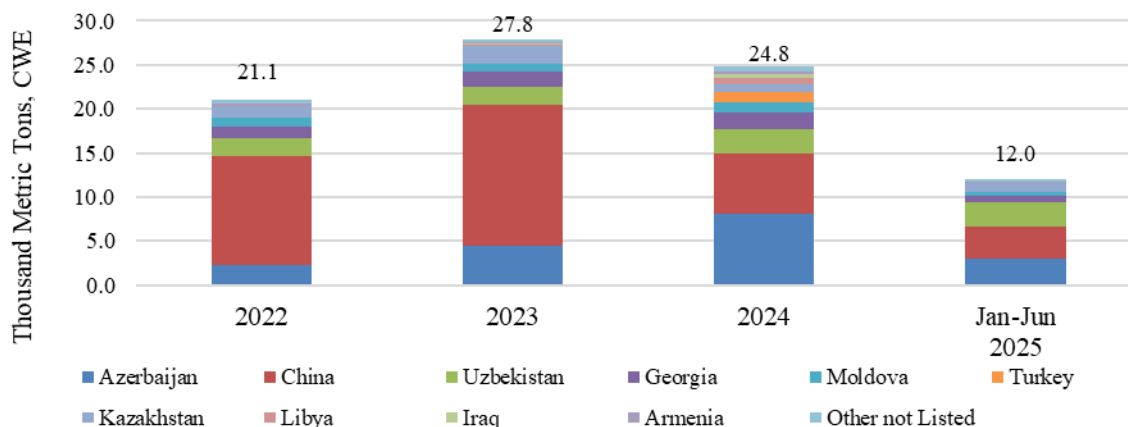
Figure 8: Ukraine's Monthly Beef Exports



Source: State Statistics Service of Ukraine

In Ukraine, beef exports compete with exports of live bovine animals for slaughter. Ukraine exports live animals to markets where halal slaughter is important and beef to a broader range of destinations (Figure 9). In 2024, Ukraine was able to restore some traditional (pre-2022) markets in Azerbaijan and Central Asia.

Figure 9: Ukraine's Beef Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

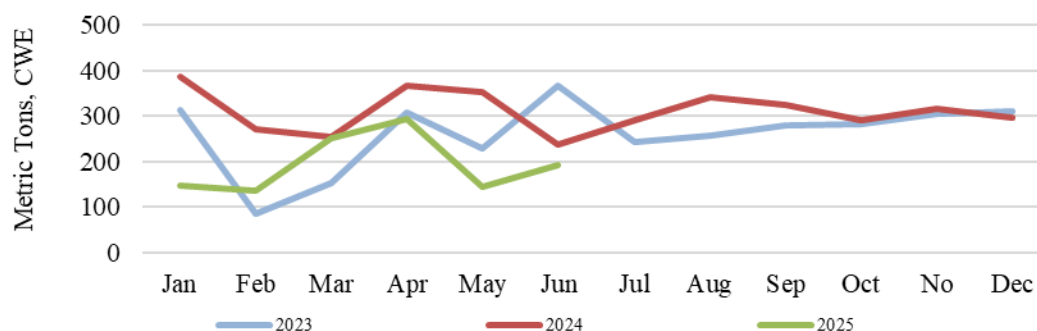
Ukraine does not export to the EU due to the lower quality of Ukrainian beef and high competition. Three Ukrainian-registered [processing facilities](#) can export selected meat products to the EU, provided the raw materials fit EU requirements. Post does not expect Ukraine to export any red meat to the EU in 2025 or 2026.

Imports

Post estimates Ukraine's beef imports to remain low, but stable, in both 2025 and 2026 (Figure 10). Ukraine will continue to import small volumes of premium-quality beef from the EU, Argentina (which replaced Brazil in 2024), and the United States. Lithuanian and German-established retail chains import cheaper beef cuts and offal. Lithuanian retailers are targeting middle-income consumers, while German retailers also focus on the hotel, restaurant, and catering business segment.

Demand for high-quality beef is limited to premium retail chains and high-end restaurants. Both sales channels experienced a major slowdown after the start of the full-scale Russian invasion in 2022. While there was purchasing power growth due to increased incomes among the upper-middle class, many affluent consumers left the country and the segment was unable to offset the loss.

Figure 10: Ukraine's Monthly Beef Imports



Source: Trade Data Monitor; FAS/Kyiv estimates

Swine

Production

Table 3: Ukraine Animal Numbers, Swine

Animal Numbers, Swine Market Begin Year Ukraine, Thousand Heads	2024		2025		2026
	Jan 24		Jan 25		Jan 26
	USDA Official	New Post	USDA Official	New Post	New Post
Total Beginning Stocks	5204	5204	4600	4631	4400
Sow Beginning Stocks	372	372	350	330	350
Production (Pig Crop)	8700	8400	8200	7550	8200
Total Imports	8	8	8	8	8
Total Supply	13912	13612	12808	12189	12608
Total Exports	0	0	0	0	0
Sow Slaughter	0	0	0	0	0
Other Slaughter	7812	7671	7158	6650	6925
Total Slaughter	7812	7671	7158	6650	6925
Loss and Residual	1500	1310	1200	1139	1133
Ending Inventories	4600	4631	4450	4400	4550
Total Distribution	13912	13612	12808	12189	12608

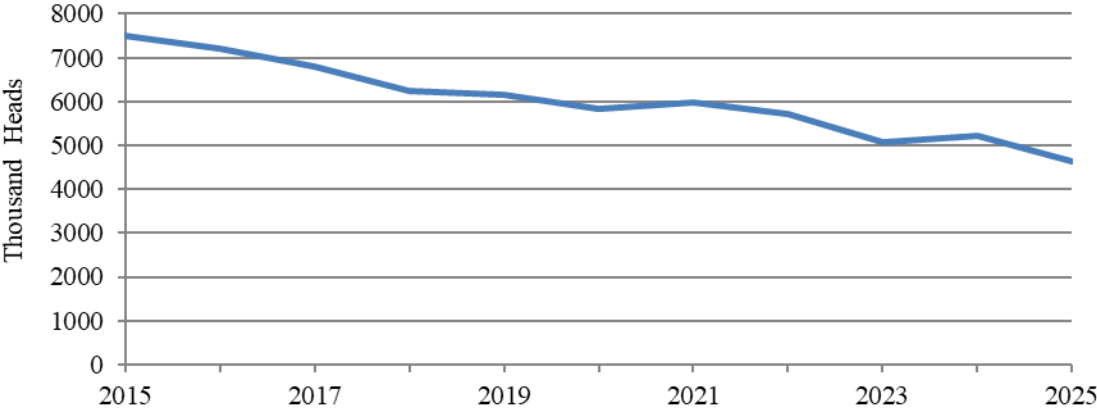
*Not Official USDA Data

This table includes indicators for Crimea.

Following the pork price drop in the second half of 2024, swine inventory continued its down trend in the first quarter of 2025 (Figure 11). However, the subsequent price increase resulted in a production rebound in the second quarter of 2025. According to industry sources, recovery is slow, and swine inventory numbers are unlikely to return to levels seen of January 2025 by the end of the calendar year. Post expects the industry rebound to become obvious in 2026, when the number of animals grows.

The Association of Swine Breeders conducted a survey, published in June 2025, covering over 75 percent of industrial production. The survey shows modest industry optimism about developments in 2025 and 2026. Half of the respondents predict the industry will return to growth in 2025, with a quarter planning to invest in production expansion. Producers view increasing feed costs as the major impediment to growth. In the first quarter of 2025, feeding cost rose to \$1.29/kilogram live weight, but contacts expect this to increase further to \$1.33-\$1.45 in the second half of the year. Industry is concerned this growth will reduce profits.

Figure 11: Number of Pigs (Farms of All Types as of January 1 of Each Year), Ukraine

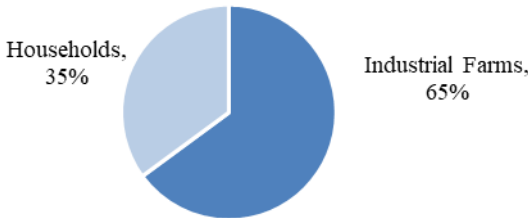


Source: State Statistics Service of Ukraine; FAS/Kyiv calculations

Ukraine’s pork producers also faced increased uncertainty due to the Russia-Ukraine war. In both 2024 and 2025, there were public reports about bombings, shelling, and drone attacks against pig farms in eastern Ukraine. On January 1, 2025, Ukraine’s largest pork producer, APK Invest, announced the loss of control over several production facilities now situated in occupied territories. The industry continues to suffer from complex logistics, the mobilization of workers, increased taxation, including a new war tax, an unstable macroeconomic environment, currency fluctuations, market losses due to population outflows, electricity shortages, and other war-related factors. Industry noted employee conscription and the animal disease situation are the main production risk factors in 2025. The war has shifted the geographical growth of the swine industry to central and western Ukraine.

Household production remains an integral part of the industry, but inefficiencies have led to a decline in the total inventory share (Figure 12). In 2025, households lost another percentage point, constituting only 35 percent of total production. Historically, household animal inventory and production trends have closely followed those of the industrial sector.

Figure 12: Ukraine Swine Inventory Composition 2024

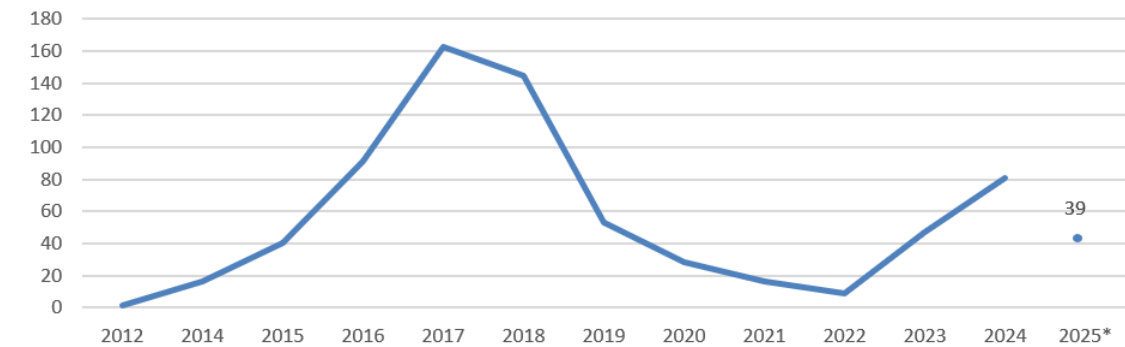


Source: State Statistics Service of Ukraine; FAS/Kyiv calculations

African Swine Fever

The number of ASF cases has been growing since the start of the Russia-Ukraine war in 2022. It is not clear where the war catalyzed the spread, as there is no information on the disease situation in the occupied territories and the frontline areas. The number of registered cases grew in 2024 and continued to grow in the first half of 2025 (Figure 13). However, industry sources noted that the incidence rate in industrial farms is lower compared to 2024 due to improved biosecurity measures. While on crop travel in early 2025, FAS/Kyiv staff observed depopulated pig farms in central Ukraine.

Figure 13: 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
*39 cases were registered by June 2025

Most officially recorded ASF cases were registered in wild areas of central and western Ukraine, which are less affected by the Russia-Ukraine war.

Pork

Table 4: Meat, Swine

Meat, Swine Market Begin Year Ukraine, Thousand Metric Tons	2024		2025		2026
	Jan-24		Jan-25		Jan-26
	USDA Official	New Post	USDA Official	New Post	New Post
Slaughter (Reference)	7812	7671	7158	6650	6925
Beginning Stocks	0	0	0	0	0
Production	690	693	645	610	640
Total Imports	5	5	35	30	25
Total Supply	695	698	680	640	665
Total Exports	4	4	5	5	4
Human Dom. Consumption	691	694	675	635	661
Other Use, Losses	0	0	0	0	0
Total Dom. Consumption	691	694	675	635	661
Ending Stocks	0	0	0	0	0
Total Distribution	695	698	680	640	665

*Not Official USDA Data

This table includes indicators for Crimea

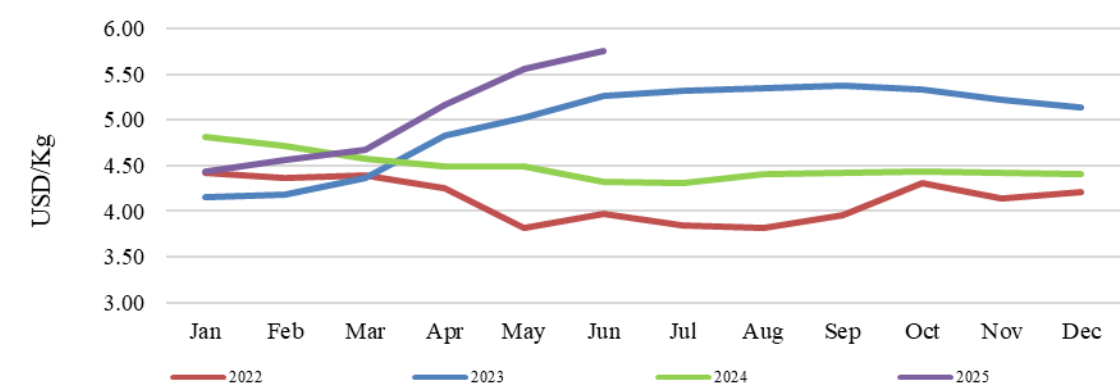
After a sharp increase in slaughter in 2024, Post expects a decline in slaughter and pork production in 2025, followed by a slight rebound in 2026. Industry reports satisfaction with hog sale prices, but expects the 2025 pork supply to be insufficient, prompting imports.

Consumption

Several factors influencing beef consumption have also impacted pork consumption. The overall market volume continued to decline due to population outflows. Although disposable incomes grew in 2024 and 2025, Ukraine's GDP and GDP per capita (purchasing power parity) remained below pre-war levels.

Retail pork prices reached an all-time high in 2025, depressing consumption (Figure 14). Pork also became comparatively more expensive vis-à-vis beef and poultry; however, prices of all three proteins grew significantly, which favored poultry. Reduced consumption is likely to continue among less affluent consumers.

Figure 14: Pork Retail Price*



Source: State Statistics Service of Ukraine
*Ukraine stopped the official publication of producer prices for the duration of the war

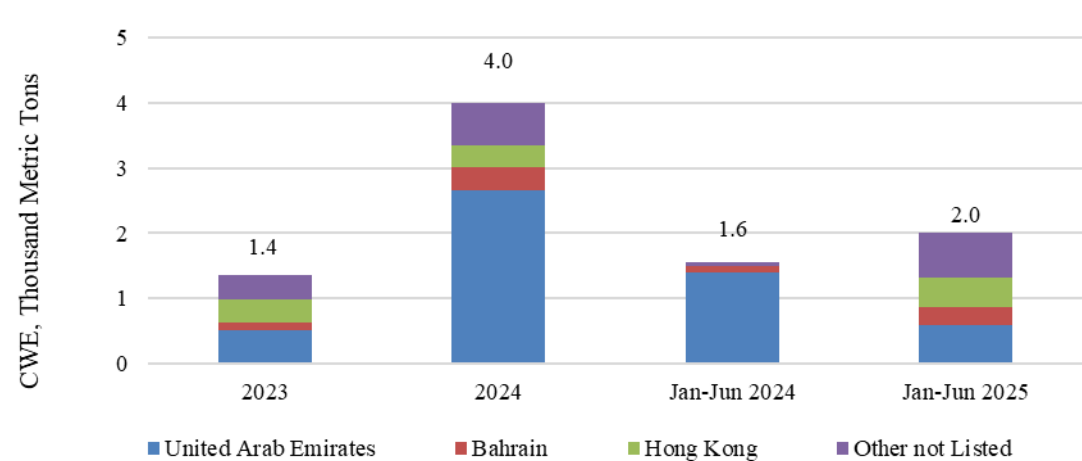
Trade

Exports

Ukraine’s pork export possibilities remain severely limited due to the increasing number of ASF outbreaks and the ongoing war. In addition, logistics to many traditional markets in the FSU remain complicated, with trade dropping to negligible levels.

A small number of countries are ready to accept Ukrainian pork and pork products (Figure 15). Most do not have their own pork production or wild fauna susceptible to ASF. The United Arab Emirates remained the leading importer of Ukrainian pork, where it is bound for migrant workers. Bahrain's demand is similar.

Figure 15: Ukraine's Pork Export Destinations

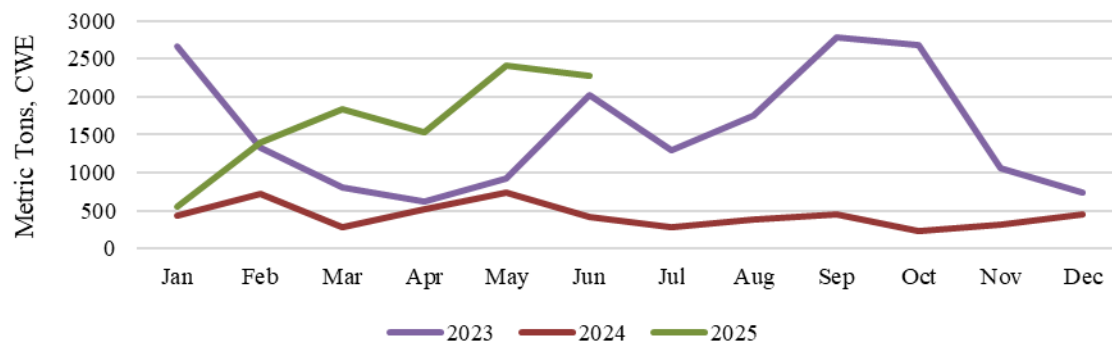


Source: Trade Data Monitor

Imports

Due to a drop in pork production and record-high domestic prices, imports strongly rebounded in the first half of 2025, and Post expects them to exceed 2023 levels (Figure 16).

Figure 16: Monthly Pork Imports



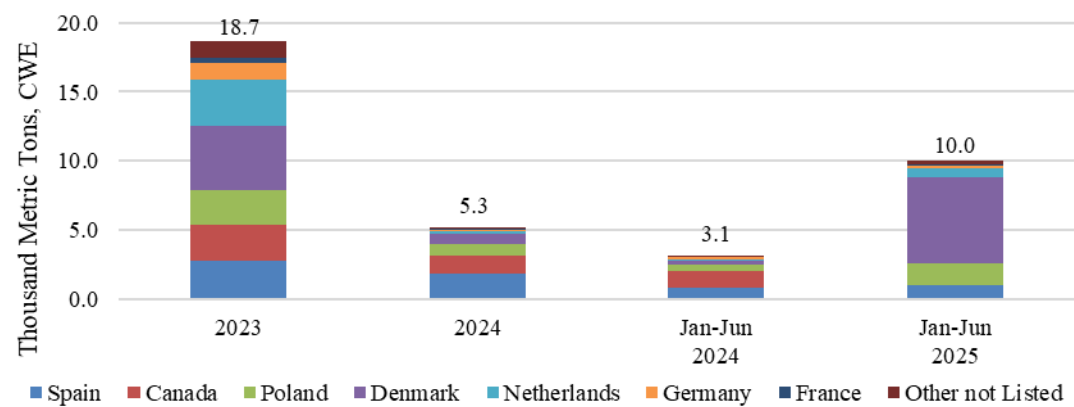
Source: Trade Data Monitor

The EU will remain Ukraine's major pork supplier (Figure 17). Wide product availability, geographical proximity, and the absence of technical trade barriers are the primary reasons. Other suppliers, such as the United States and Canada, will have to transship their products through the EU and comply with the EU's transit requirements.

Additionally, EU producers benefit from a 20,000 MT zero import duty pork tariff quota (TRQ). The current TRQs were established under the [Deep and Comprehensive Free Trade Area](#) (now a part of the Association Agreement) and cover several pork-related HS Codes. According to the European Commission's [official proposal](#), from 2025 on, Ukraine's import quota may increase to 45,000 MT [22,500 MT/year expressed in net weight plus an additional 22,500 MT/year expressed in net weight for HS codes 0203 11 (10), 0203 12 (19), 0203 19 (11-15-59), 0203 21 (10), 0203 22 (19), 0203 29 (11-15-59)]. Should this new TRQ be implemented, FAS/Kyiv will provide a separate update.

The [Canada-Ukraine Free Trade Agreement](#) (CUFTA - 2023 version) provides a 20,000 MT TRQ to Canadian pork exporters. Due to high shipping costs and the EU's transit requirements, the share of Canadian pork on the Ukrainian market remains limited. Although existing EU and Canadian TRQs provide preferential treatment, the majority of Ukraine's pork tariff lines envisage 10-12 percent import tariffs. Most years, EU imports exceed the TRQ level.

Figure 17: Ukraine's Pork Imports by Country



Source: Trade Data Monitor; FAS/Kyiv estimates

Attachments:

No Attachments