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Report Highlights:

Post expects a continued decline in livestock numbers in 2026 due to general inefficiencies in Ukraine's beef sector. A significant decrease in milk prices in the second half of 2025 resulted in the least efficient dairy farms and households exiting the market. Post expects swine inventory and pork production to grow in 2026. African swine fever will remain a significant risk factor. Both the cattle and swine industries will continue to suffer from war-related difficulties.

Executive Summary

Cattle
In line with the industry’s long-term trend, Post estimates the number of cattle will decrease further in 2026. Meat production will remain a function of dairy production and generate little or no profit. Industrial farms will limit their involvement in meat production by selling young calves to private households for low-cost feeding. A major drop in raw milk prices occurred in the second half of 2025, forcing many less efficient farms and a large number of households to exit the market. This also resulted in a smaller end of year inventory. The milk price remained low during the 2026 winter months, continuing the trend of decreased production.

Beef
Post expects beef production to decrease in 2026, following the animal inventory trajectory. Production costs will remain high, and even notable domestic market beef price growth will not make beef production profitable. The role of households will remain strong, with low-cost grazing as the primary production method. Domestic consumers will remain price sensitive, preferring other meats to beef due to significant price differences. Beef exports will continue as Post expects demand from the Middle East and North Africa to be strong.

Swine
Strong pork prices throughout the last three quarters of 2025 and the first two months of 2026 resulted in increased animal inventory in 2025 and a positive 2026 outlook. The construction of new facilities continued in 2025, and many new farms will become operational in 2026. There was a clear trend toward industry relocation to western Ukraine, farther from the front lines. African swine fever (ASF) remains the industry’s major risk. Lack of commercial or state-subsidized insurance discourages production and limits export opportunities.

Pork
Post estimates increased animal numbers will lead to higher pork production in 2026. However, war-related risks will limit production growth. Domestic industry will continue to rely on the domestic market due to war-related logistical difficulties and ASF-related export restrictions. Ukrainian consumers prefer pork, with an almost $2/kilogram price advantage compared to beef. Post expects continued strong 2026 imports due to stable domestic prices and increased import quotas for EU pork producers.

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

Cattle

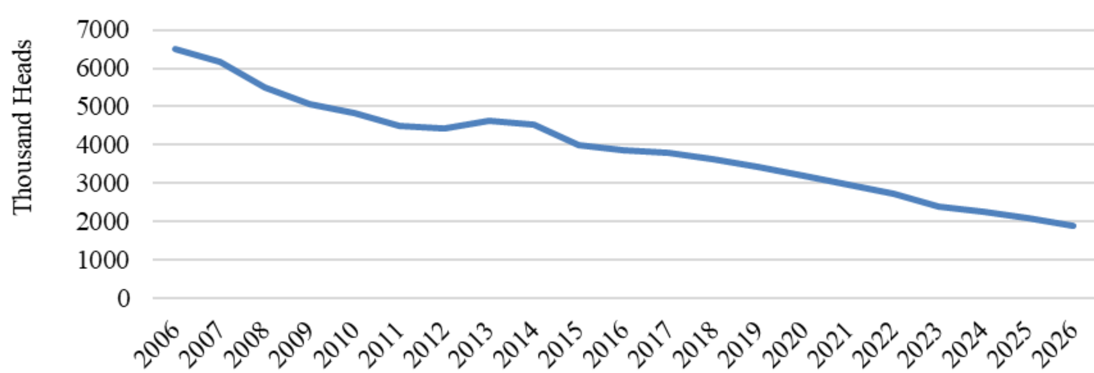
Table 1: Ukraine Animal Numbers, Cattle

Animal Numbers, Cattle	2024		2025		2026	
Market Begin Year	Jan 2024		Jan 2025		Jan 2026	
Ukraine, Thousand Head	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks	2250	2250	2094	2094	1940	1894
Dairy Cows Beg. Stocks	1310	1310	1202	1200	1140	1064
Beef Cows Beg. Stocks	18	18	19	19	18	18
Production (Calf Crop)	1316	1316	1163	1171	1110	1030
Total Imports	1	1	2	2	0	1
Total Supply	3567	3567	3259	3267	3050	2925
Total Exports	68	68	65	66	60	63
Cow Slaughter	0	0	0	0	0	0
Calf Slaughter	0	0	0	0	0	0
Other Slaughter	1380	1380	1230	1285	1148	1112
Total Slaughter	1380	1380	1230	1285	1148	1112
Loss	25	25	24	22	22	20
Ending Inventories	2094	2094	1940	1894	1820	1730
Total Distribution	3567	3567	3259	3267	3050	2925

Not Official USDA Data
This table includes indicators for Crimea.

Production
Post estimates the number of cattle will continue to decrease in 2026 (Figure 1). The Ukrainian livestock population has been on a three-decade-long downward production trend. The major raw milk price drop that started in the second half of 2025 led to an abrupt decline in dairy enterprise efficiency and increased slaughter in the second half of 2025 and early 2026.

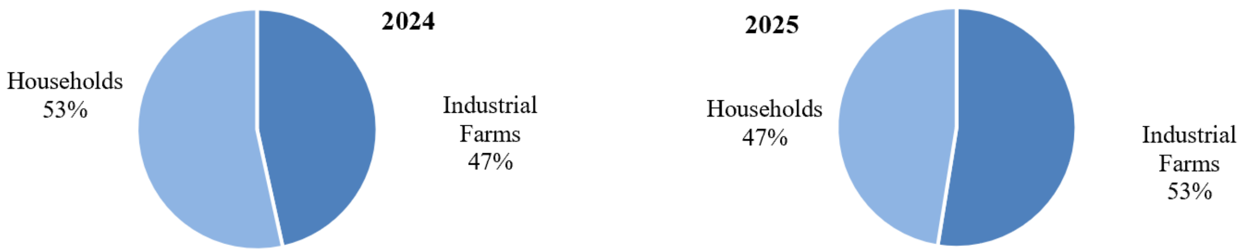
Figure 1: Number of Cattle in Ukraine (Farms of All Types as of Jan. 1 of each Year)



Source: State Statistics Service of Ukraine

The raw milk crisis devastated predominantly less efficient, small dairy farms, reducing animal availability for beef producers in 2025. According to industry reports, the majority of large industrial dairy farms remained profitable or were able to break even; however, households suffered, losing 6 percentage points of their market share in just half a year. For the first time in recent history, Ukraine's industrial farms took the lead over households (Figure 2).

Figure 2: Ukraine's Cattle Inventory Composition in 2024

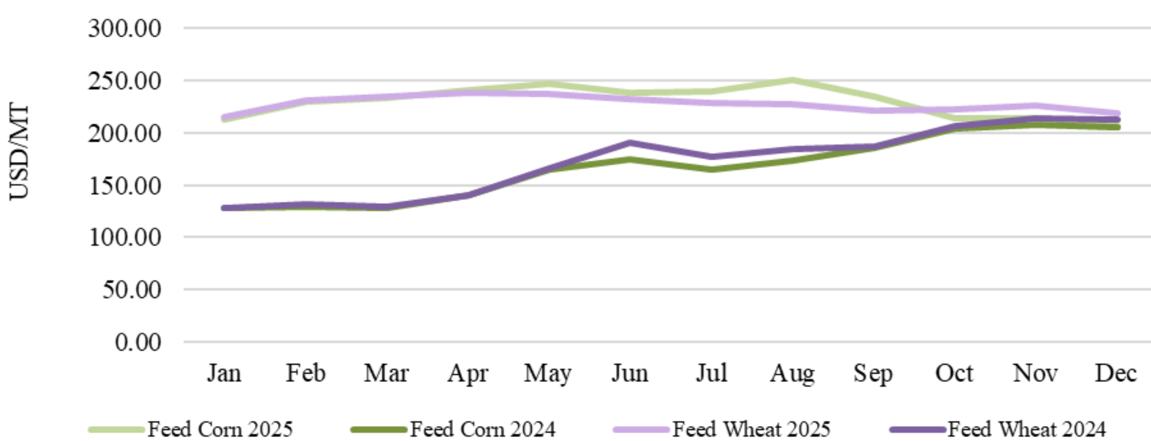


Source: State Statistics Service of Ukraine; FAS/Kyiv estimates

Still, livestock producers of all types and sizes faced growing production costs in 2025 and early 2026 as the costs of many inputs rose due to war-related factors. The share of energy costs in total production costs grew significantly, as many dairy farms relied on expensive backup generators during longer blackouts, incurring diesel fuel and maintenance costs. Industry reported a shortage of qualified staff and increased need to retrain newly acquired staff. They also reported a growing share of women and older employees, who are less likely to be drafted, and a significant salary increase for the remaining employees. The Ukrainian government allows for temporary conscription waivers for some workers, but industry reported ongoing staff turnover created issues.

According to the Ministry of Economy, Environment, and Agriculture of Ukraine, feed costs account for 80 percent of the total cost of beef production. Feed prices remained high throughout 2025 and the first two months of 2026, resulting in additional pressure on livestock producers (Figure 3).

Figure 3: Ukraine's Corn and Feed Wheat Prices

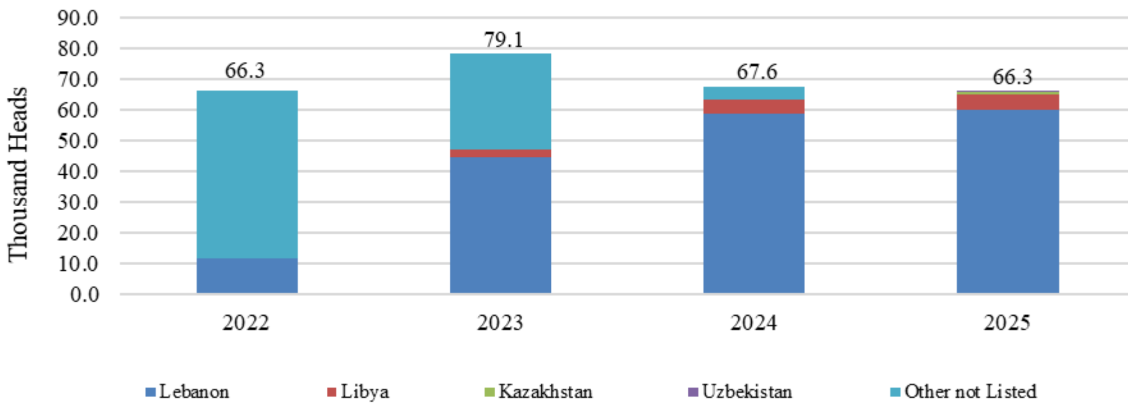


Source: APK-Inform agency; FAS/Kyiv estimates

Trade

Post estimates lower 2026 live animal exports due to a smaller livestock herd, though demand for Ukrainian cattle from Middle Eastern buyers remained strong in the early months of 2026. In recent years, Ukraine supplied live cattle to several foreign markets, including Egypt, Jordan, Libya, Georgia, and Central Asian markets, with Lebanon dominating as the primary export destination in 2025 (Figure 4). Historically, Ukraine's export markets have remained relatively stable despite war-related challenges.

Figure 4: Ukraine Cattle Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Beef

Table 2: Meat, Beef, and Veal

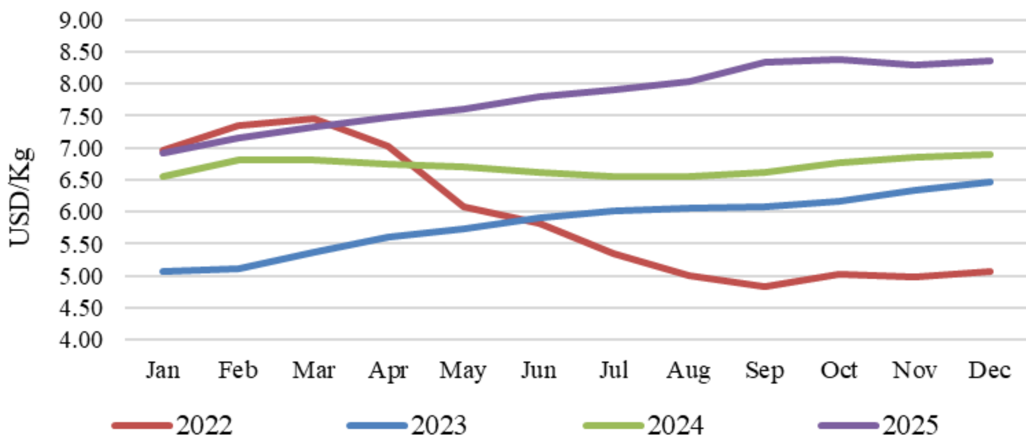
Meat, Beef, and Veal	2024		2025		2026	
Market Begin Year	Jan-24		Jan-25		Jan-26	
Ukraine, Thousand Metric Tons	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1380	1380	1230	1285	1148	1112
Beginning Stocks	0	0	0	0	0	0
Production	250	252	225	228	210	200
Total Imports	4	4	2	2	3	1
Total Supply	254	256	227	230	213	201
Total Exports	25	25	24	25	20	20
Human Dom. Consumption	229	231	203	205	193	181
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	229	231	203	205	193	181
Ending Stocks	0	0	0	0	0	0
Total Distribution	254	256	227	230	213	201

Not Official USDA Data
This table includes indicators for Crimea.

Production

Post expects beef production to continue its decline in 2026, following the reduction in cattle inventory. Beef production will be inherently unprofitable and unattractive for large dairy and livestock farms. Industrial farms will continue to sell young animals for further low-cost feeding by private households. Households will remain responsible for the largest share of beef production, despite having less inventory than industrial farms. A significant share of household-produced beef enters official sales channels. After the beef price collapse in 2022, beef prices gradually trended upward in 2023, 2024, and 2025; however, growth in domestic beef prices is insufficient to make beef production profitable and will not change the overall production trend (Figure 5).

Figure 5: Beef Retail* Price in Ukraine

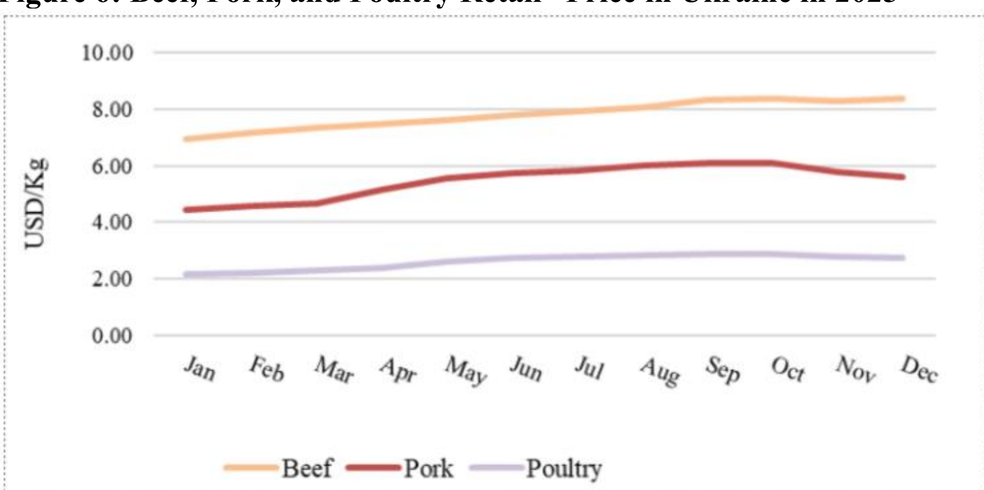


Source: State Statistics Service of Ukraine
*Ukraine has stopped the official publication of producer prices for the duration of the Russia-Ukraine war

Consumption

Growing beef prices will also disadvantage beef consumption compared to pork and poultry. Both proteins became comparatively cheaper by 2026, attracting more consumers (Figure 6). Therefore, FAS/Kyiv expects beef consumption to decrease in 2026. Relatively low incomes among internally displaced people, and to a lesser extent, shrinking consumer numbers, will enforce the trend. Poultry producers will remain the main beneficiaries of the shift.

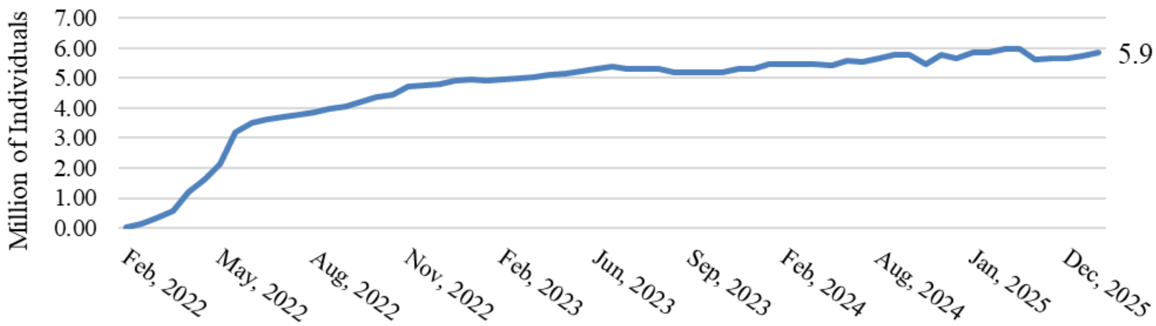
Figure 6: Beef, Pork, and Poultry Retail* Price in Ukraine in 2025



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

Due to the Russia-Ukraine war, the number of officially registered refugees fluctuates. After dropping to 5.7 million in the summer of 2025, the number of refugees increased to 5.9 million by February 2026 (Figure 7). A significant number of internally displaced people, who reached 3.7 million in December 2025, settled in central and western Ukraine. As noted above, these internally displaced people heavily rely on poultry and pork, as they are more affordable sources of animal protein.

Figure 7: Number of Refugees from Ukraine Recorded across the EU



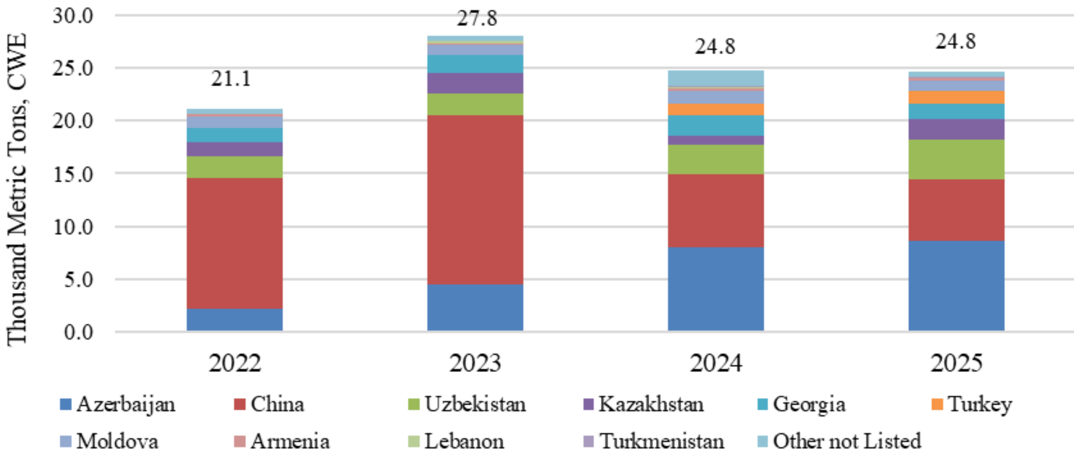
Source: United Nations Refugee Agency
* This graph does not include individual refugees (refugees who did not apply for temporary protection status)

After a major drop following the start of the Russian full-scale invasion in 2022, the Ukrainian economy has been slowly recovering, with the National Bank of Ukraine's preliminary GDP growth estimate 2.2 percent in 2025, with 1.8 percent forecast in 2026. Stable economic performance and gradual salary growth among the majority of consumers will support animal protein consumption in 2026. However, consumers remain price conscious.

Trade

Exports
Post estimates 2026 beef exports to decrease, driven by animal inventory contraction. Ukraine generally exports live animals to halal markets, while it exports beef to destinations in the Black Sea region, Central Asia, and East Asia (Figure 8). Once significant, beef exports to China continued to contract in 2025. Industry sources blame increased tariff barriers and war-related increases in logistics costs. Post does not expect significant exports to the EU due to unattractive prices in that market and high regulatory hurdles. Although some Ukrainian processing facilities are cleared for export to the EU, procurement of EU-compliant raw materials and exports from EU-approved establishments remain highly problematic.

Figure 8: Ukraine's Beef Exports



Source: Trade Data Monitor; FAS/Kyiv estimates

Imports

Ukraine imports small volumes of premium-quality beef from Ireland, Lithuania, Brazil, and the United States. Upscale Ukrainian restaurants and supermarkets are the leading importers. Both subsectors are depressed due to the Russia-Ukraine war. Due to the closure of air and sea routes, transshipments of U.S. beef through the EU are limited to EU-approved establishments, making imports more expensive.

Swine

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	USDA Official	New Post
Total Beginning Stocks	5204	5204	4631	4621	4400	4742
Sow Beginning Stocks	372	372	330	350	350	365
Production (Pig Crop)	8400	8390	7550	7900	8200	8250
Total Imports	8	8	8	8	8	9
Total Supply	13612	13602	12189	12529	12608	13001
Total Exports	0	0	0	0	0	0
Sow Slaughter	0	0	0	0	0	0
Other Slaughter	7671	7671	6650	6648	6925	7028
Total Slaughter	7671	7671	6650	6648	6925	7028
Loss and Residual	1310	1310	1139	1139	1133	1133
Ending Inventories	4631	4621	4400	4742	4550	4840
Total Distribution	13612	13602	12189	12529	12608	13001

Not Official USDA Data
This table includes indicators for Crimea.

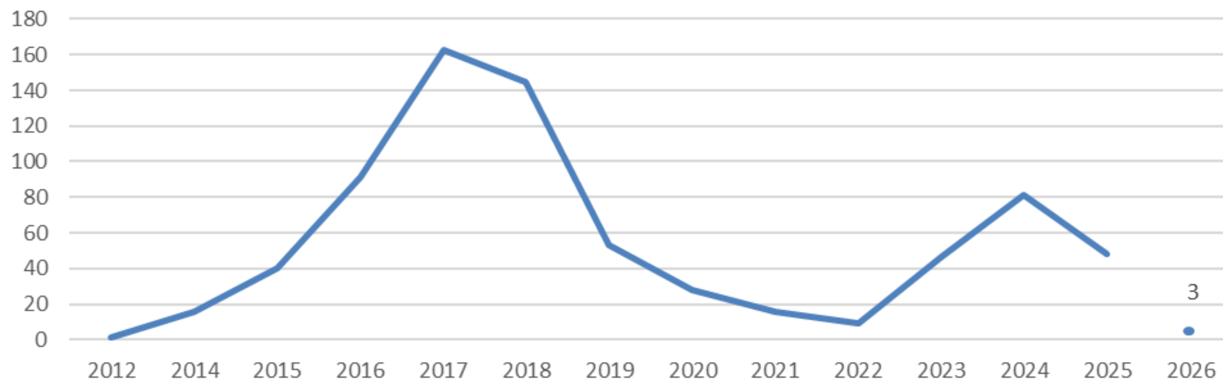
Production

Post expects the Ukrainian swine industry to grow in 2026. Investments in new production facilities and the upgrading of existing facilities that took place in the second half of 2025, when pork prices were high, are driving this growth. Many of these projects will mature in early 2026, increasing production. A stable live hog farmgate price of $1.99/kilogram, value added tax included, facilitates this forecast. This recovery will follow the industry downturn observed in late 2024 through the first half of 2025. Pork prices were low during that period, leading to a drop in 2025 production and animal inventory. The pork industry continues to react to changing hog prices with a six-month lag.

The Ukrainian pork industry remains optimistic about its 2026 performance despite multiple war-related production issues. According to an industry association survey of 50 industrial farms responsible for over 60 percent of industrial pork production, 44 percent of producers plan to expand their production facilities in 2026, 38 percent plan to increase the efficiency of existing farms, and 18 percent expect to operate at 2025 levels. No producers noted plans for animal number reductions. Industry sources also mentioned a notable production shift to western Ukraine, where war-related risks are lower.

ASF remains the biggest risk factor. Although only three cases were registered in early 2026, all three were in western Ukraine (Figure 9). Sporadic registered ASF outbreaks in proximity to large industrial producers create risk factors beyond those producers' control. Due to a lack of financing and the ongoing Russia-Ukraine war, Ukrainian industrial farms are not eligible for compensation for lost animals. Commercial pig insurance is also unavailable due to the high risk; therefore, farm owners must absorb losses caused by outbreaks.

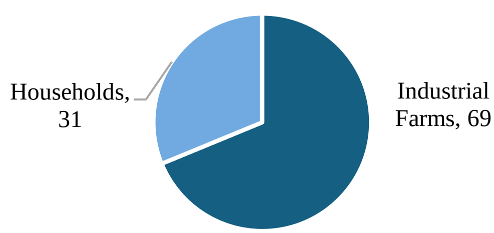
Figure 9: Number of Officially Registered ASF Cases*



Source: http://www.asf.vet.ua, State Service of Ukraine for Food Safety and Consumer Protection, Institute for Laboratory Diagnostics and Veterinary-Sanitary Expertise
*Three cases were registered in January-February 2026

Turbulent 2024-2025 pork prices led to the exit of inefficient farms from the market. Industrial farms are responsible for the majority of Ukraine's pork production (Figure 10).

Figure 10: Ukraine Swine Inventory Composition in 2025, percent

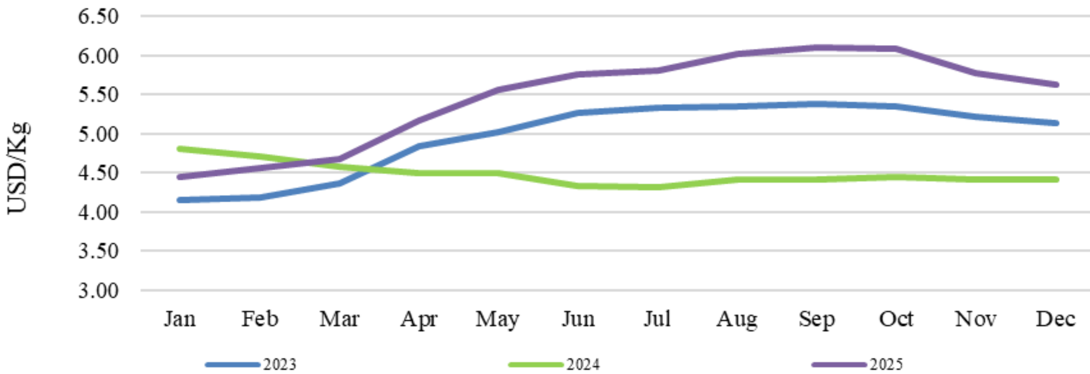


Source: State Statistics Service of Ukraine; FAS/Kyiv calculations

In light of the changing labor market, meat processors reported a shortage of qualified staff and an increased need to retrain newly acquired staff. They also reported a growing share of women and older employees, who are less likely to be drafted, and a significant salary increase for the remaining employees. The Ukrainian government allows for temporary conscription waivers for some workers, but ongoing staff turnover creates issues.

Increased Russian attacks on energy infrastructure in the 2025-2026 winter resulted in prolonged electricity outages. The share of energy costs in total production rose significantly as producers relied on backup generators, incurring diesel fuel and maintenance costs. Pork producers had to pass additional costs on to buyers; therefore, rising production costs led to higher pork prices (Figure 11).

Figure 11: Pork Retail Price*



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

Pork

Table 4: Meat, Swine

Meat, Swine	2024		2025		2026	
Market Begin Year	Jan-24		Jan-25		Jan-26	
Ukraine, Thousand Metric Tons	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	7671	7671	6650	6648	6925	7028
Beginning Stocks	0	0	0	0	0	0
Production	693	692	610	605	640	635
Total Imports	5	5	40	40	35	40
Total Supply	698	697	650	645	675	675
Total Exports	4	4	3	3	4	4
Human Dom. Consumption	694	693	647	642	671	671
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	694	693	647	642	671	671
Ending Stocks	0	0	0	0	0	0
Total Distribution	698	697	650	645	675	675

*Not Official USDA Data
This table includes indicators for Crimea

Production
FAS/Kyiv expects pork production to recover in 2026, following increases in animal numbers and slaughter. Industry sources are optimistic about 2026 pork production, expecting moderate growth, while noting it is unlikely to reach 2024 levels. They also expect increased competition from imports and production issues stemming from the Russia-Ukraine war.

Consumption
Post expects pork consumption to increase in 2026. Pork consumption will face the same set of positive and negative factors as those listed in the *Beef Consumption* section. Namely, the shrinking number of consumers due to refugee outflows will be more than offset by higher incomes, stable economic performance, and the growing price spread with beef. Although incomes of internally displaced people remain below pre-war levels, as incomes rise, people revert to consumption patterns that favor pork.

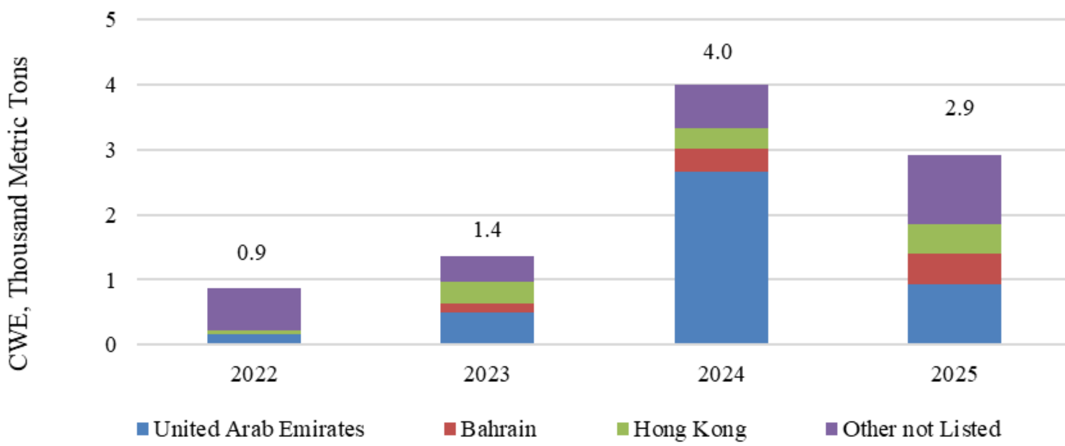
Growing pork prices were the primary negative factor affecting consumption in 2025. However, in early 2026, they stabilized. Stable EU imports and expected production growth should prevent further price growth in 2026.

Trade

Exports
In 2026, Post estimates pork exports will remain limited. Export restrictions due to ASF and war-related restrictions on facility inspections will keep Ukrainian pork from reaching most markets.

Some Ukrainian pork producers developed small export markets for frozen pork in countries where the risk of ASF is minimal. A significant portion of Ukrainian 2025 pork exports went to the Middle East, with the shipments destined for the country's non-Muslim populations (Figure 12). Export logistics remain an impediment, as all exports are conducted through the EU.

Figure 12: Ukraine's Pork Export Destinations



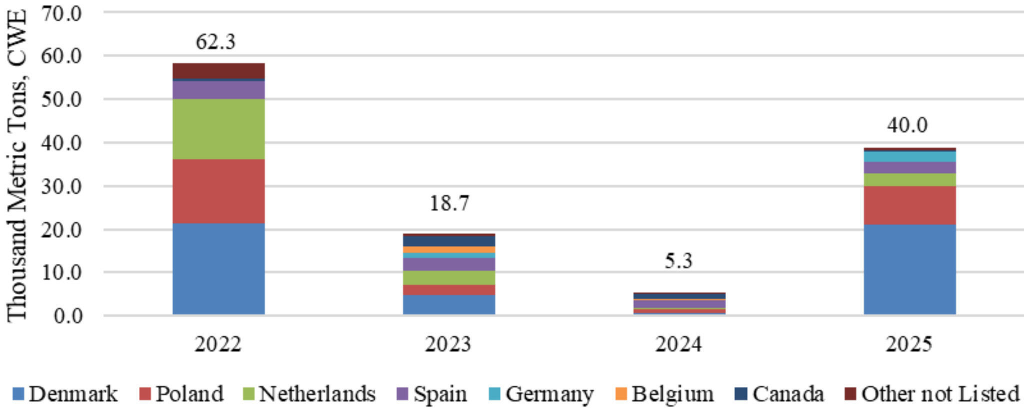
Source: Trade Data Monitor

Imports
In 2026, Post expects stable pork imports similar to 2025 levels. Improved market access for European pork producers will be balanced by increased domestic production. Non-EU countries will not be able to supply significant volumes due to fierce competition with zero import duty European imports, as well as complicated and expensive wartime logistics.

New Trade Agreements with the EU
The EU and Ukraine finalized new, higher reciprocal zero tariff rate quotas (TRQs) in late October 2025, including a new Ukrainian import TRQ for pork products. Compared with the Deep and Comprehensive Free Trade Agreement, the pork import TRQ increased from 20,000 metric tons (MT) to 45,000 MT. The calendar year 2025 TRQ was applied proportionally from June 6 to December 31, 2025, to the amount of 7/12 of the annual TRQ volume.

Ukraine's import duties range from 10 percent for frozen to 12 percent for chilled for most pork categories. This has resulted in significant over-quota imports in years when EU producers were price competitive. During low-price periods, such as 2024, import TRQ remained unfulfilled (Figure 13). Although the new import quota provides better market access to EU pork exporters, pork imports must compete with domestic production.

Figure 13: Ukraine's Pork Imports by Country



Source: Trade Data Monitor; FAS/Kyiv estimates

Attachments:

No Attachments