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Report Name: A Closer Look at Direct and Indirect Agricultural Exports from the United States to Ukraine

Country: Ukraine

Post: Kyiv

Report Category: Agricultural Situation, Fishery Products, Planting Seeds, Tree Nuts, Beverages

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Report Highlights:

According to U.S. Census Bureau data, U.S. suppliers exported \$63 million of U.S. food, beverages, and agricultural products to Ukraine in 2024; however, when including indirect shipments, the total number rises to \$283 million. Directly following Russia's 2022 full-scale invasion, the share of U.S. products destined for Ukraine but transshipped through the European Union increased substantially, which resulted in significant underreporting of the size of the Ukrainian market. FAS/Kyiv estimates up to 80 percent of U.S. exports were underreported in 2024, with the largest discrepancies for sunflower seeds, hake, fish roe, and whiskey. Data also indicates U.S. exports to Ukraine have rebounded to pre-war levels, presenting opportunities for U.S. exporters.

Overview

Ukraine remains a large and growing market for U.S. agricultural products despite the drop in trade directly following Russia’s 2022 full-scale invasion. U.S. products are generally transshipped to Ukraine through European Union (EU) ports of entry, though some bulk and intermediate products are exported directly.

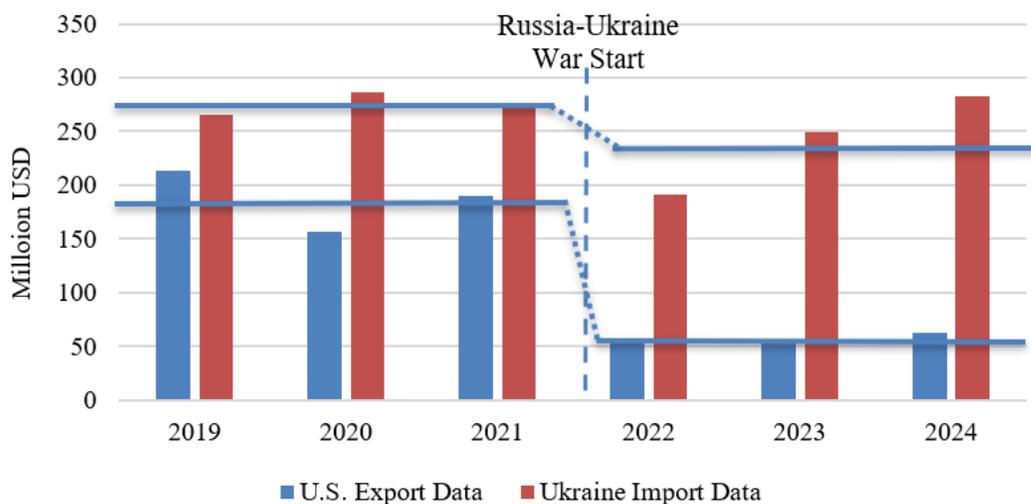
Because U.S. Census Bureau export data generally reflects direct U.S. trade with Ukraine, it does not include significant volumes of U.S. products routed through the EU. As a result, FAS/Kyiv views State Statistics Service of Ukraine data (SSSU), which includes both direct and indirect trade, as a more accurate reflection of Ukrainian demand for U.S. food and agricultural products. SSSU sources import data from the State Customs Service (SCS). The SCS collects duties and taxes, which are an important source of Ukraine’s state budget revenue. Therefore, imports are carefully controlled, and every contract is subject to scrutiny.

FAS/Kyiv encourages USDA cooperators and other U.S. food and agricultural exporters and stakeholders to look beyond U.S. Customs Bureau data and review different data sources when considering resource allocation and market development strategies for Ukraine. FAS/Kyiv is always ready to assist.

Indirect U.S. Agricultural Exports to Ukraine

In 2019, U.S. trade data correctly reflected 81 percent of U.S. exports. In 2024, official U.S. data captured only 21 percent of agricultural and food exports. There has always been a discrepancy between officially published U.S. Census Bureau export numbers and SSSU data for imports from the United States due to the aforementioned differences in data collection. In addition, U.S. data does not include insurance and freight and Ukrainian data does. However, this data discrepancy widened at the start of Russia’s 2022 full-scale invasion of Ukraine due to increased transshipments through the EU (Figure 1).

Figure 1: Imports of Agricultural and Related Products to Ukraine



Source: Trade Data Monitor (TDM)

In the early months of the war, the majority of direct trade routes through Ukraine’s Black Sea ports were blocked, Ukraine’s airspace was closed, and all container flows were rerouted through EU ports. As the war progressed, Ukraine was able to renew some bulk shipments from its seaports, while the return of container trade has been very limited and the country’s airspace remains closed.

To confirm the discrepancy, FAS/Kyiv did a volume analysis for major export products. As an example, frozen hake is one of the largest imports from the United States, making up 15 percent of total imports by value in 2024. Demand for this affordable protein has been stable, which is reflected in stable Ukrainian import volumes; however, U.S.-reported export volumes show a clear trend divergence after the start of the full-scale Russian invasion in 2022 (Figure 2).

Figure 2: Imports of Frozen Hake (HS Code 030366)



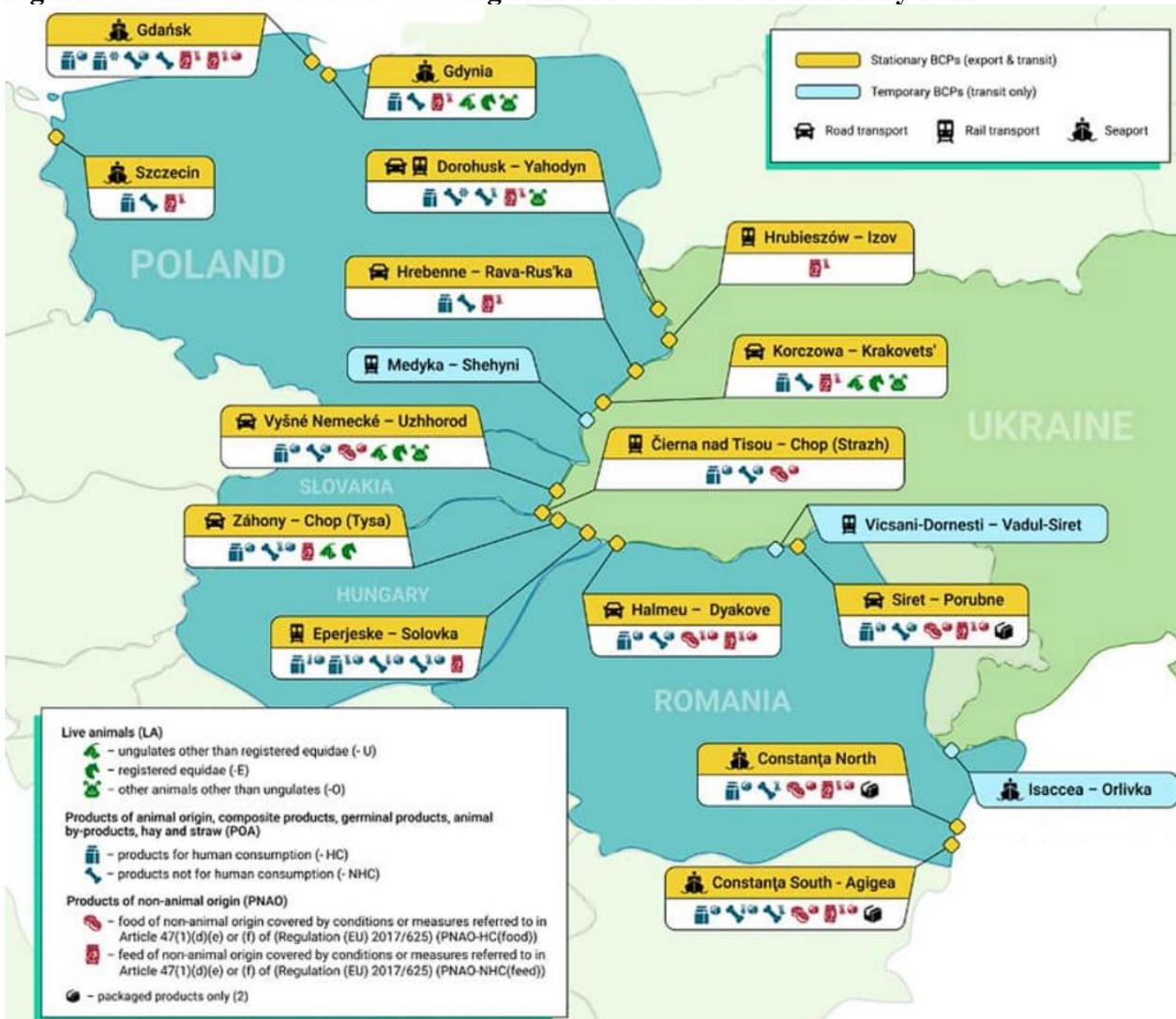
Source: TDM

The majority of U.S. food exports, including seafood and food ingredients, continue to transit through the 13 existing border crossing points with the EU (Figure 3). Nine Ukraine-EU crossing points can handle animal products for human consumption and combined products, and four can handle other food products. A more detailed list is available [here](#).

The return of other product flows to Ukrainian seaports will depend on the security situation, freight costs, and transit infrastructure availability. The slow return of direct shipments to Ukraine will likely decrease the data discrepancy over time.

Many U.S. products, most significantly seafood, were imported through the EU before 2022, as well, due to the availability of cold storage facilities, proximity to major sealines and feeder services, and affordable tariffs.

Figure 3: Commercial Border Crossing Points Available after February 2022



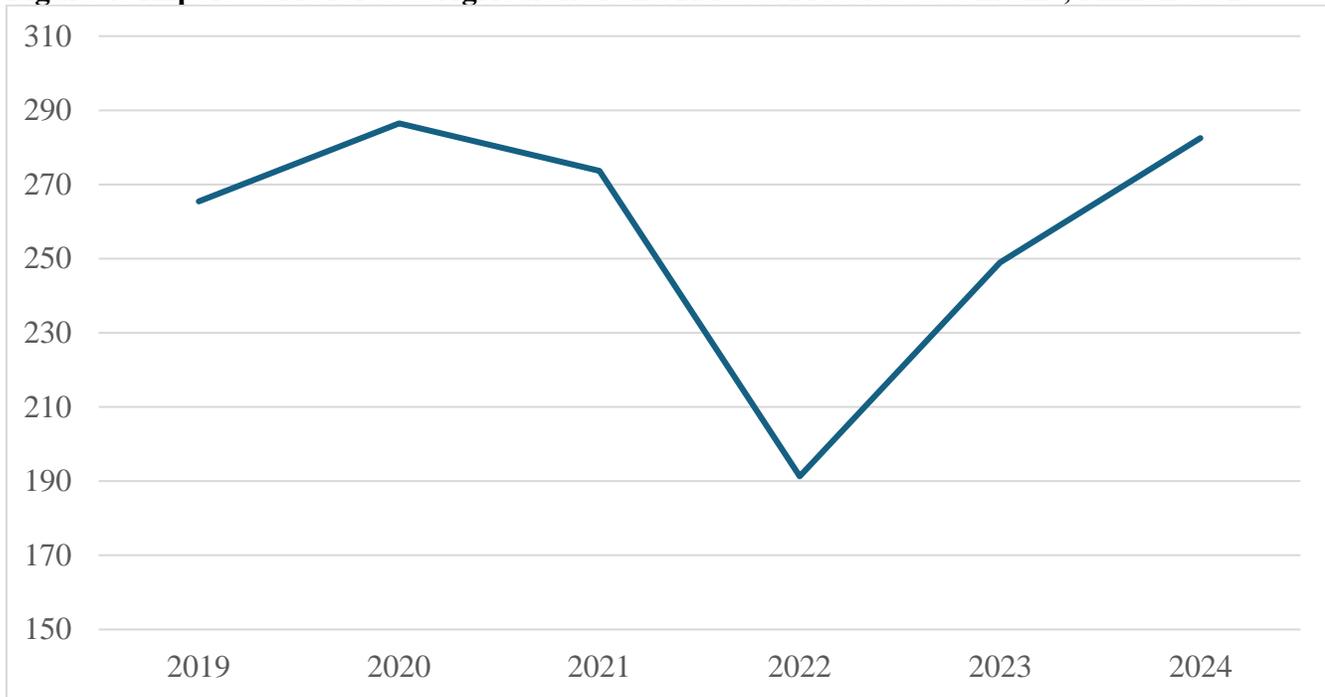
Source: EU 4 Safer Food Project; State Service of Ukraine for Food Safety and Consumer Protection; FAS/Kyiv

Note: Map does not include the greater Odesa Ports (Odesa, Chornomorsk, Pivdennyi)

U.S. Exports to Ukraine Rebound to Pre-War Levels

U.S. Census Bureau data also fails to reflect export growth. After the initial shock following Russia’s 2022 full-scale invasion of Ukraine, Ukraine resumed imports of U.S. agricultural products at pre-war levels, with 2024 exports only slightly below the 2020 record high. According to SSSU data, Ukrainian importers sourced \$283 million of U.S. food, beverages, and agricultural products in 2024, 13 percent higher than in 2023 (Figure 4).

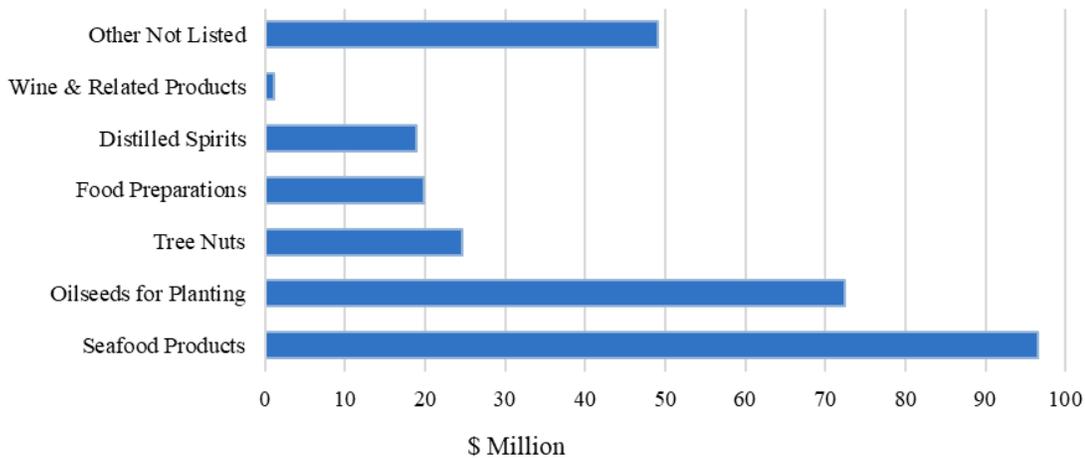
Figure 4: Import Value for U.S. Agricultural and Related Products to Ukraine, Million USD



Source: TDM, based on SSSU data

The leading categories of U.S. agricultural imports to Ukraine in 2024 were seafood products, oilseeds for planting, tree nuts, and food preparations (Figure 5). This data includes both direct and indirect trade.

Figure 5: Top U.S. Agricultural and Related Products Exports to Ukraine in 2024



Source: TDM, based on SSSU data

Product-Specific Trade Underestimates

U.S. Census Bureau data particularly undercounts exports of whiskey, food preparations, and specific seafood products, capturing less than 20 percent of total trade (Table 1).

Table 1: Direct and Indirect U.S. Food and Agricultural Trade for Selected Commodities to Ukraine for 2024, Million USD

HS Code	Description	Ukraine Import Data	U.S. Export Data	Difference	% Difference between Data (Transshipments)
	Total – Agricultural and Related Products	282.5	63.0	219.5	77.7%
120600	Sunflower seeds, whether or not broken	72.5	0.0	72.5	100.0%
030366	Hake (merluccius spp., urophycis spp.), frozen	42.6	19.4	23.2	54.4%
030391	Fish roe, frozen	20.1	3.5	16.6	82.7%
210690	Food preparations, nesoi	19.8	13.6	6.1	31.0%
220830	Whiskies	16.2	0.7	15.8	97.8%
080212	Almonds, fresh or dried, shelled	13.9	2.4	11.6	83.0%
160432	Caviar prepared from fish eggs	11.9	0.0	11.9	100.0%
230990	Animal feed preparations (mixed feeds, etc.), other than dog or cat food put up for retail sale	11.7	0.2	11.5	98.4%
030367	Alaska pollock (theragra chalcogramma)	8.9	5.2	3.6	41.1%
200819	Nuts (other than peanuts (ground-nuts)), and other seeds, including mixtures, prepared or preserved, nesoi	8.2	0.2	7.9	97.1%
030312	Pacific salmon (oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), frozen, nesoi	6.1	0.6	5.6	90.8%
120991	Vegetable seeds for sowing	4.8	0.0	4.7	99.2%
051110	Bovine semen	3.7	3.2	0.5	12.3%
240120	Tobacco, partly or wholly stemmed/stripped	3.1	0.0	3.1	100.0%
120242	Peanuts, shelled, whether or	2.6	0.0	2.6	98.7%

HS Code	Description	Ukraine Import Data	U.S. Export Data	Difference	% Difference between Data (Transshipments)
	not broken other than seed				
030389	Fish, frozen, nesoi	2.6	0.4	2.2	84.9%
030339	Flat fish, nesoi, excluding fillets, livers and roes, frozen	2.3	0.6	1.7	72.8%
080211	Almonds, fresh or dried, in shell	1.9	0.0	1.9	100.0%
220210	Waters, including mineral waters and aerated waters, sweetened or flavored	1.7	0.0	1.7	100.0%
330210	Mixtures of odoriferous substances and mixtures (including alcoholic solutions) with a basis of these substances used in the food or drink industries	1.5	1.6	-0.1	-3.4%
071290	Vegetables, nesoi, dried and vegetable mixtures, dried (whole, cut, sliced, etc.), but not further prepared	1.2	0.6	0.7	52.4%
220870	Liqueurs and cordials	1.2	0.01	1.2	99.5%
220421	Wine of fresh grapes (other than sparkling wine) and grape must with fermentation prevented, etc. by adding alcohol, containers of not over 2 liters	1.1	0.0	1.1	96.1%
130213	Vegetable saps and extracts of hops	1.0	0.1	1.0	92.9%

Source: Trade Data Monitor

FAS/Kyiv's Marketing Support for U.S. Agricultural and Food Exports

One of FAS/Kyiv's core missions is to promote and expand exports of U.S. agricultural products in Ukraine. Please see the [Ukraine Exporter Guide](#) for more information on market opportunities and contact our office at agkyiv@usda.gov for more information.

Attachments:

No Attachments.