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Report Highlights:

This report contains updated export estimates for marketing year (MY) 2025/26 for wheat, barley, and rye. Corn harvest is still underway, with over 92 percent harvested. The pace of grain exports at the beginning of MY2025/26 is slower compared to the previous MY and might translate to higher ending stocks. Actual MY2025/26 export volumes for all grains will depend on the intensity and scale of Russian attacks on Ukraine's ports, energy grid, and in-land logistics infrastructure.

Abbreviations:

MEEA – Ministry of Economy, Environment, and Agriculture

FSI – Food, Seed, and Industrial

ha – Hectare

MY – Marketing Year

MT – Metric Ton

MMT – Million Metric Ton

NDVI – Normalized Difference Vegetation Index

PSD – Production, Supply, and Distribution

TRQ – Tariff Rate Quota

SSSU – State Statistics Service of Ukraine

This report focuses on production and export forecasts for marketing year (MY) 2025/26, which runs from July 2025 to June 2026 for wheat, barley, and rye and from October 2025 to September 2026 for corn. For detailed information on estimates and a general overview of Ukraine's agriculture sector, see the [2025 Ukraine Grain and Feed Annual Report \(UP2025-0010\)](#).

Production

The State Statistics Service of Ukraine (SSSU) published the following MY2025/26 production numbers:

- Wheat – 23.5 million metric tons (MMT), a 4 percent increase against MY2024/25
- Barley – 5.3 MMT, similar to MY2024/25
- Rye – 211,000 MT, a 4 percent decrease against MY2024/25

Post accepts these as MY2025/26 production volume estimates in bunker weight for government-controlled areas of Ukraine. Post's PSD tables are based on SSSU production volume estimates converted into final weights, including Post's estimates for the Crimean Peninsula.

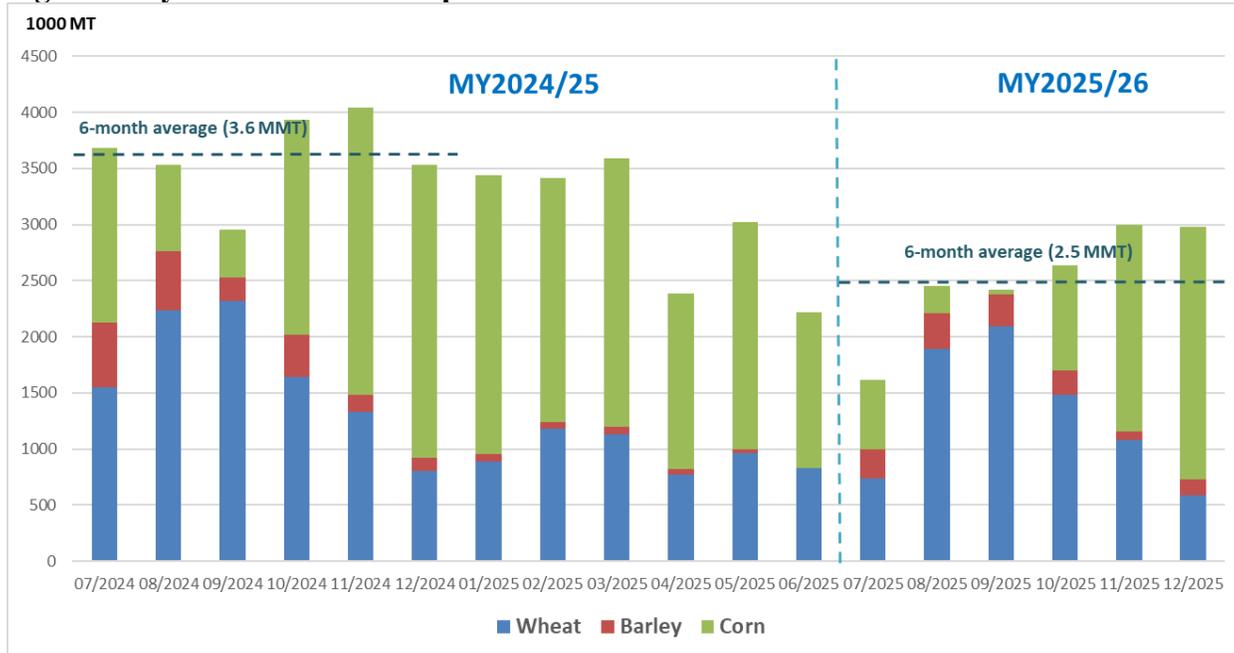
Ukraine's corn is still being harvested at the time of report writing. According to Ministry of Economy, Environment, and Agriculture (MEEA), as of January 15, 92 percent of the total area has been harvested, resulting in 28.9 MMT of corn. Post estimates the remaining area will produce slightly over 2.0 MMT of grain. This is based on actual yields in the 16 regions that are still harvesting at the time of the report writing.

Intensive rains delayed harvest, as machinery could not get into some fields. At the same time, farmers prioritized harvesting their oilseeds over corn. Wet weather also resulted in excessive moisture in corn ears harvested during this period. According to industry, some batches of corn had 32-35 percent moisture, which is significantly higher than the normal moisture of 20-22 percent. This caused export delays, as producers had to run these batches through driers before they could be dispatched to ports. Some farmers reported leaving their corn in fields to reduce its initial moisture, as both temperature and humidity plummeted.

Exports

According to State Customs Service of Ukraine data, 7.8 MMT of wheat and 1.3 MMT of barley were exported in the first half of MY2025/26 (July-December 2025). Average grain exports from Ukraine were 30 percent slower over this time period, compared to the same period in MY2024/25 (Figure 1).

Figure 1: Dynamics of Grain Exports from Ukraine



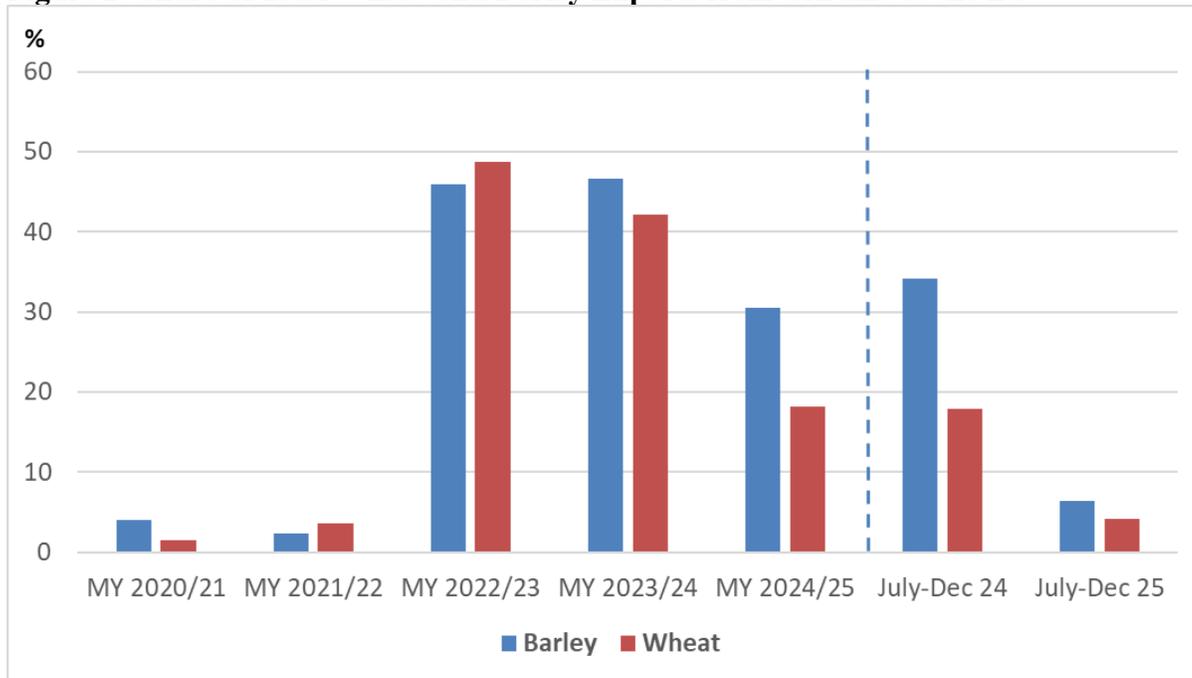
Source:

Trade Data Monitor, LLC (TDM)

Russian attacks on Ukraine's energy grid, rail and port infrastructure, and vessels, both docked in ports and in the Black Sea, have constrained Ukraine's CY2025 exports.

The EU's introduction of tariff rate quotas also contributed to the slump in wheat exports. See GAIN report [European Union Revises Import Quotas for Agricultural Products from Ukraine](#) for more details. July to December 2025 export shares for wheat and barley to the EU decreased roughly to pre-war levels (Figure 2).

Figure 2: Share of Total Wheat and Barley Exports from Ukraine to the EU



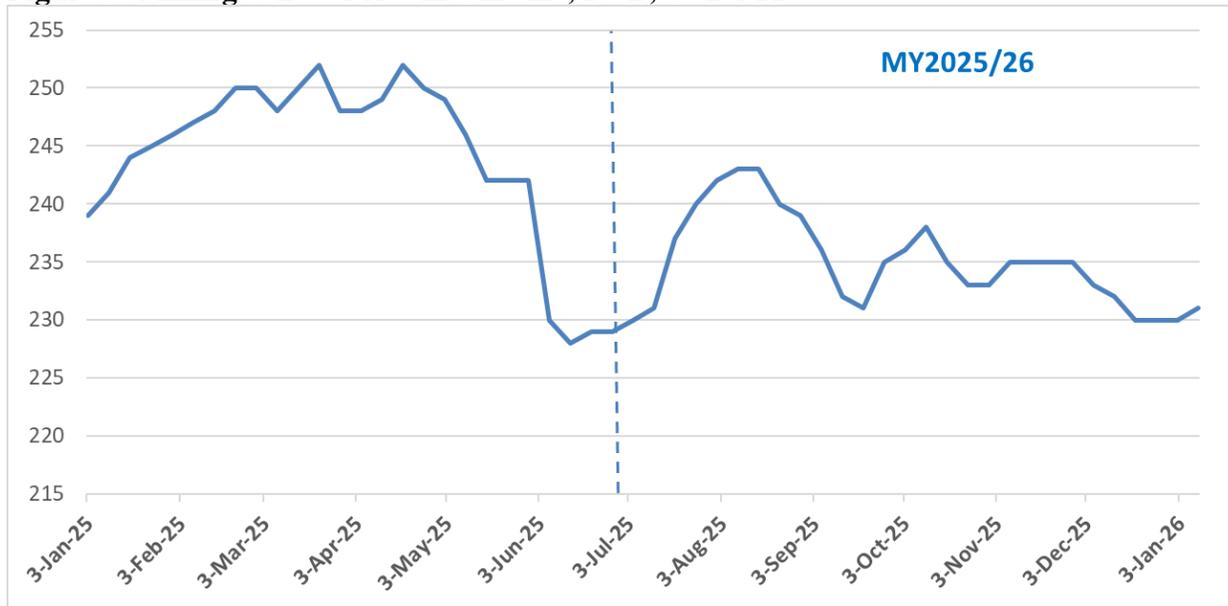
Source: TDM

Wheat exports in the first half of MY2025/26 (July-December 2025) were 7.9 MMT, a 20 percent decrease compared to the same period of 2024. Exports to the EU fell to 2.9 MMT. This drop was not compensated by the 1.9 MMT growth in shipments to a number of other major destinations, including:

- Egypt – 2.0 MMT against 800,000 MT for July-December 2024
- Algeria – 1.2 MMT against 748,000 MT
- Yemen – 593,000 MT against 297,000 MT
- Lebanon – 298,000 MT against 183,000 MT

According to FAS/Kyiv’s estimates, Ukraine shipped approximately half of its estimated MY2025/26 exportable wheat volume from July to December 2025. Based on price dynamics, at the beginning of MY2025/26, it appeared farmers were selling their feed wheat while holding their milling wheat. Milling wheat can be easily stored in hopes of high demand and better prices in the second half of the year (Figure 3). Post assumes MY2025/26 wheat exports will follow the same dynamics as the previous MY, with farmers selling the remainder of their wheat stocks—predominantly milling wheat—gradually over the second half of the MY.

Figure 3: Milling Wheat Price in Ukraine, FOB, USD/MT



Source: Information Agency “APK Inform”

Barley exports for the first half of MY2025/26 (July-December 2025) were 1.3 MMT, a 34 percent decrease compared to the same period in 2024. Shipments to all traditional destinations decreased, including the EU, China, and Libya. This drop was not compensated by import growth to Saudi Arabia, Lebanon, and Türkiye, which is most likely a transit destination.

At the beginning of MY2025/26 (October – December 2025), corn exports were 5.0 MMT, a 29 percent decrease compared to previous MY. Exports fell 41 percent to the EU and 18 percent to Türkiye. According to industry, at the beginning of the current MY, farmers were predominantly selling corn that was problematic for long-term storage due to quality concerns.

Based on current production estimates and actual exports, Post’s MY2025/26 export estimates are:

- Barley – 3.1 MMT
- Wheat – 14.3 MMT
- Corn – 23.2 MMT
- Rye – 10,000 MT

The above-mentioned export estimates are made under the assumption that Black Sea ports will remain operational and rail logistics will be able to transport grain from in-land silos to ports. The intensity and scale of Russian attacks on Ukraine’s ports, energy grid, and in-land logistics could translate to higher ending stocks at the end of MY2025/26. According to contacts, Ukraine does not have a shortage of farmer-owned in-land silos; therefore, a possible slump in exports would not necessarily lead to damage, and subsequent discarding, of grains due to improper storage conditions.

PSD Tables

All PSD tables below sum the estimated production numbers for government-controlled areas and Russian-occupied Crimea. The MY2023/24, MY2024/25, and MY2025/26 estimates do not include data for regions currently occupied by Russia, as production figures and data are unavailable for those areas.

Table 1: Barley

Barley Market Year Begins	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1680	1676	1600	1556	1600	1500
Beginning Stocks (1000 MT)	720	720	689	683	433	399
Production (1000 MT)	6350	6350	5800	5472	5900	5500
MY Imports (1000 MT)	1	1	0	0	1	1
TY Imports (1000 MT)	0	0	0	0	1	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	7071	7071	6489	6155	6334	5900
MY Exports (1000 MT)	2482	2481	2256	2256	2400	3100
TY Exports (1000 MT)	3176	3176	1805	2256	2700	3100
Feed and Residual (1000 MT)	2900	2900	2700	2400	2500	900
FSI Consumption (1000 MT)	1000	1007	1100	1100	1000	1000
Total Consumption (1000 MT)	3900	3907	3800	3500	3500	1900
Ending Stocks (1000 MT)	689	683	433	399	434	900
Total Distribution (1000 MT)	7071	7071	6489	6155	6334	5900
Yield (MT/HA)	3.7798	3.7888	3.625	3.5167	3.6875	3.6667

(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 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Table 2: Corn

Corn Market Year Begins Ukraine	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4200	4128	4100	4071	4200	4300
Beginning Stocks (1000 MT)	2995	2995	542	537	838	801
Production (1000 MT)	32500	32500	26800	26867	29000	30000
MY Imports (1000 MT)	10	10	15	15	10	14
TY Imports (1000 MT)	10	10	15	15	10	14
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	35505	35505	27357	27419	29848	30815
MY Exports (1000 MT)	29488	29488	20019	20018	23000	23200
TY Exports (1000 MT)	29488	29488	20019	20018	23000	23200
Feed and Residual (1000 MT)	4600	4600	5400	5500	4800	4900
FSI Consumption (1000 MT)	875	880	1100	1100	1200	1200
Total Consumption (1000 MT)	5475	5480	6500	6600	6000	6100
Ending Stocks (1000 MT)	542	537	838	801	848	1515
Total Distribution (1000 MT)	35505	35505	27357	27419	29848	30815
Yield (MT/HA)	7.7381	7.8731	6.5366	6.5996	6.9048	6.9767
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table 3: Wheat

Wheat Market Year Begins	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5010	5007	5200	5182	5500	5400
Beginning Stocks (1000 MT)	2926	2926	1406	1806	926	929
Production (1000 MT)	23000	23000	23400	23373	23000	23500
MY Imports (1000 MT)	57	57	71	71	100	80
TY Imports (1000 MT)	57	57	71	71	100	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	25983	25983	24877	25250	24026	24509
MY Exports (1000 MT)	18577	18577	15751	15751	14000	14300
TY Exports (1000 MT)	18577	18577	15751	15751	14000	14300
Feed and Residual (1000 MT)	1500	1600	3600	3600	3500	3800
FSI Consumption (1000 MT)	4500	4000	4600	4970	4600	4990
Total Consumption (1000 MT)	6000	5600	8200	8570	8100	8790
Ending Stocks (1000 MT)	1406	1806	926	929	1926	1419
Total Distribution (1000 MT)	25983	25983	24877	25250	24026	24509
Yield (MT/HA)	4.5908	4.5936	4.5	4.5104	4.1818	4.3519
(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 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note in the Wheat PSD, 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 are added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of Ukrainian wheat trade

Table 4: Rye

Rye Market Year Begins Ukraine	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	80	78	70	70	65	65
Beginning Stocks (1000 MT)	199	199	155	146	93	91
Production (1000 MT)	240	231	220	218	205	200
MY Imports (1000 MT)	0	0	1	0	1	0
TY Imports (1000 MT)	0	0	2	0	1	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	439	430	376	364	299	291
MY Exports (1000 MT)	2	2	11	11	10	10
TY Exports (1000 MT)	8	8	3	11	10	10
Feed and Residual (1000 MT)	2	2	2	2	2	2
FSI Consumption (1000 MT)	280	280	270	260	250	250
Total Consumption (1000 MT)	282	282	272	262	252	252
Ending Stocks (1000 MT)	155	146	93	91	37	29
Total Distribution (1000 MT)	439	430	376	364	299	291
Yield (MT/HA)	3	2.9615	3.1429	3.1143	3.1538	3.0769
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments