

Required Report: Required - Public Distribution

Date: April 20, 2026

Report Number: UP2026-0012

Report Name: Grain and Feed Annual

Country: Ukraine

Post: Kyiv

Report Category: Grain and Feed

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Report Highlights:

Post forecasts lower marketing year (MY) 2026/27 corn areas, which are partially offset by increased spring barley areas. Post forecasts higher than average yields, based on favorable weather conditions in spring 2026. MY2025/26 grain export estimates are lower compared to the previous MY. The European Union imposed new import quotas, which will reduce Ukrainian exports to the market.

Abbreviations:

CY – Calendar Year

DDGS - Distillers Dried Grains with Solubles

ha - Hectare

MEEA – Ministry of Economics, Environment, and Agriculture of Ukraine

MMT – Million Metric Tons

MT – Metric Ton

MY – Marketing Year

NDVI – Normalized Difference Vegetation Index

PSD – Production, Supply, and Distribution

SSSU – State Statistics Service of Ukraine

Data included in this report is not official USDA data. Official USDA data is available at <https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

Disclaimer: *Due to the Russia-Ukraine war, there have been delays in publishing State Statistics Service of Ukraine (SSSU) information on the status of Ukrainian agriculture in Ukrainian government-controlled areas. Ministry of Economics, Environment, and Agriculture of Ukraine (MEEA) data was used, as referenced. FAS/Kyiv cannot provide production estimates for Russian-occupied territories, except for the Crimean Peninsula, due to the need for more credible and verifiable information. Because of the rapidly changing situation, this report provides a snapshot of the situation accompanied by assumptions and estimates that were valid at the time of report writing.*

Production

According to SSSU data, marketing year (MY) 2025/26 production volumes for Ukrainian government-controlled areas are:

- Barley – 5.2 million metric tons (MMT), similar to Post’s previous MY estimate
- Corn – 30.7 MMT, a 14 percent increase
- Wheat – 23.3 MMT, a 3 percent increase
- Rye – 208,000 MT, a 5 percent decrease

Post’s MY2025/26 production estimates for the Crimean Peninsula are 736,000 MT of wheat and 329,000 MT of barley.

Post accepts these as the initial MY2025/26 production estimates in the relevant PSD tables.

MEEA reported actual planted areas for MY2026/27 winter crops, and Post combined these with its spring crop estimate (Table 1). The total estimated production area of 10.3 million hectares (ha) is around 8 percent lower than Post’s previous MY estimate. Decreased winter wheat area is the major contributor. Post forecasts MY2026/27 corn area 8 percent lower than the previous MY based on the following:

- A hike in domestic fuel and fertilizer prices could push farmers into more profitable crops (i.e. sunflower) or less input-intensive ones. The latter is Post’s justification for a 3 percent area increase for barley.
- The slow pace of exports might translate into larger corn stocks at the end of MY2025/26. This might disincentivize farmers who are already expecting higher-than-expected production costs at the beginning of the planting season, as they might also expect possible lower domestic prices for new crop corn entering the market in October 2026.

Table 1: Area Forecasts for MY2026/27

Areas	Total MY2025/26*	Winter**	Spring (Post Est.)	Total (Post Est.)	%
Barley	1,390	540	900	1,440	3.6%
Corn	4,580	0	4,200	4,200	-8.3%
Wheat	5,210	4,510	150	4,660	-10.6%
Rye	60	70	0	70	16.7%
Total	11,240	5,120	5,250	10,370	-7.7%

Source: * SSSU; ** MEEA

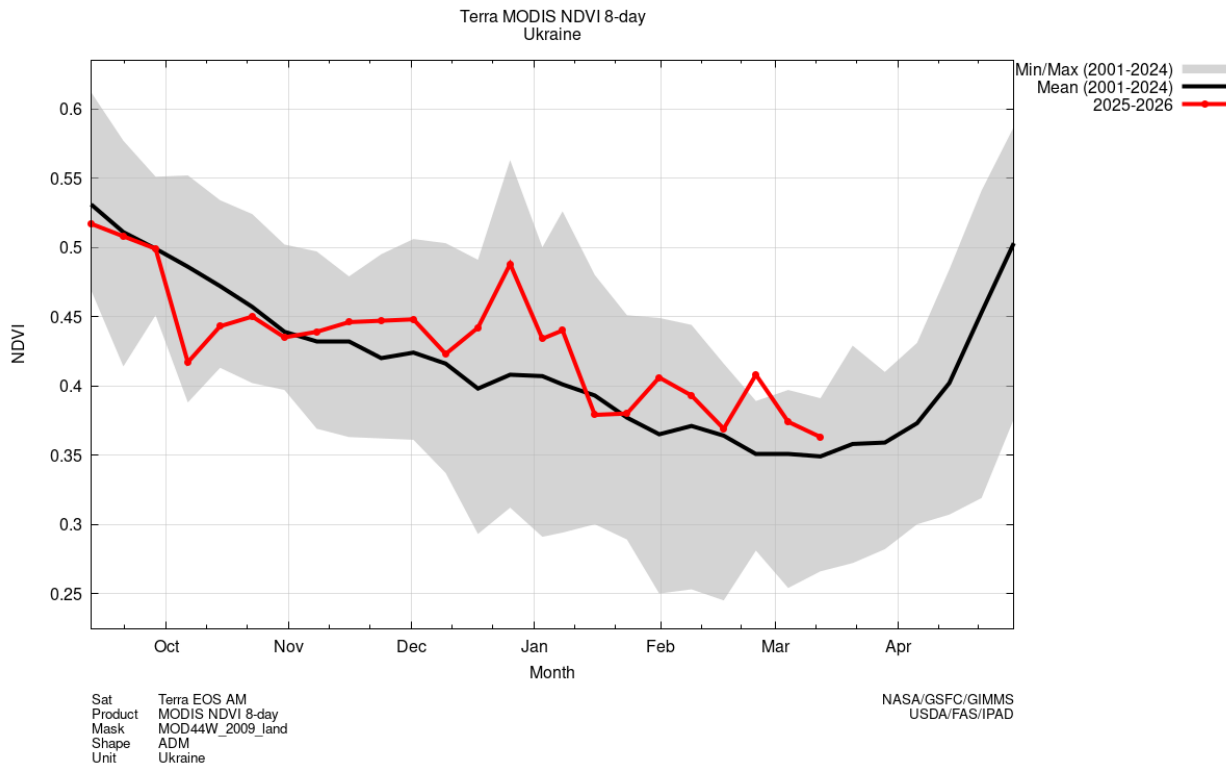
According to MEEA, spring planting started in Ukraine mid-March. As of April 6, the following was planted:

- Wheat – 111,000 ha, 60 percent of MEEA’s anticipated planting area
- Barley – 421,000 ha, 56 percent of anticipated planting area

The Russia-Ukraine war caused labor shortages due to mobilization of the male population in rural areas. Farmers are trying to offset it by investing in new machinery that requires fewer operators and by recruiting female machinery operators.

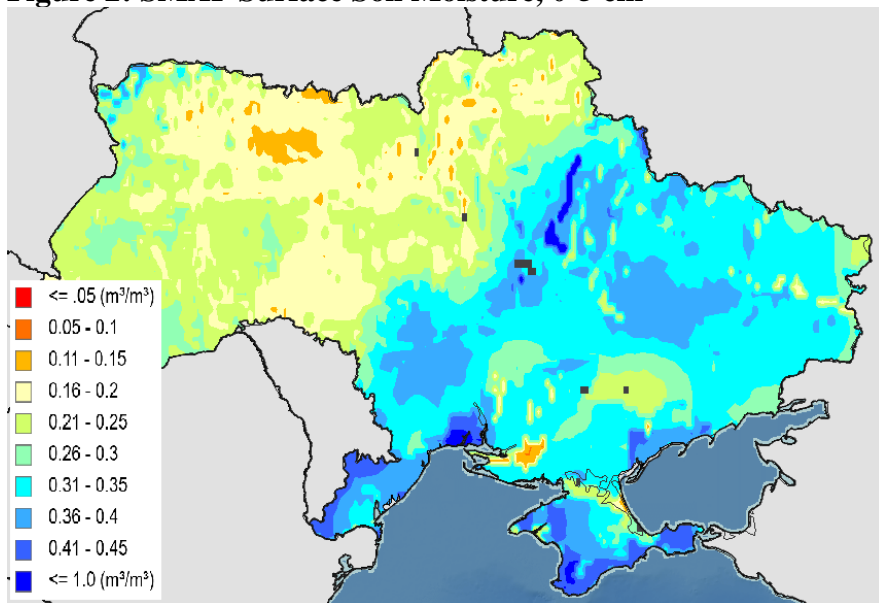
At the time of report writing, the normalized difference vegetation index (NDVI) was close to the long-term average (Figure 1). This indicates there are no significant issues for winter crops (barley and wheat). Note that NDVI is a standardized measure of vegetation. High values indicate healthier vegetation, while low values indicate low or no vegetation.

Figure 1: NDVI for Ukraine



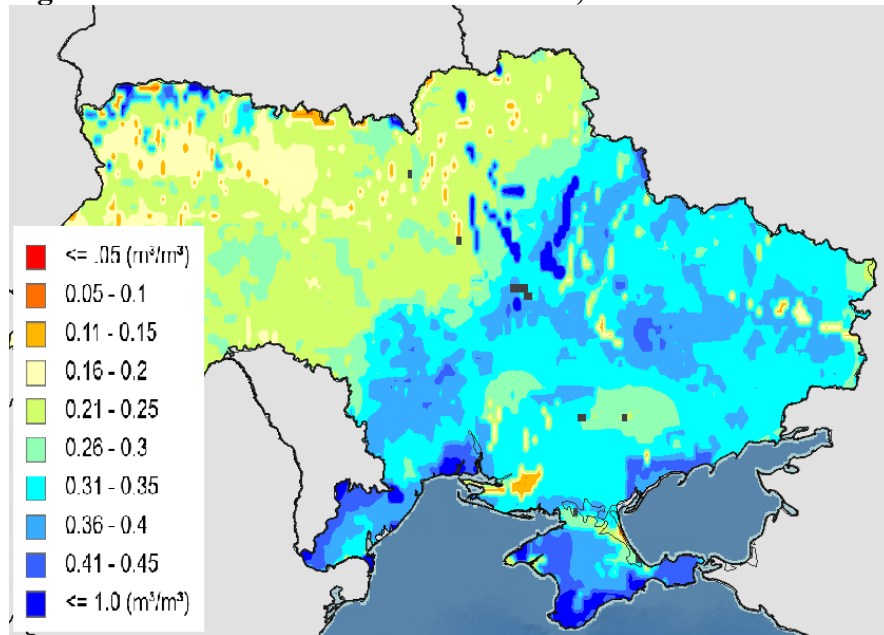
The beginning of planting season featured sufficient amounts of both surface and sub-surface moisture according to [soil moisture active passive data](#) (SMAP) (Figures 2 and 3). This implies plants will have a good start immediately after planting and a sufficient amount of moisture after germination.

Figure 2: SMAP Surface Soil Moisture, 0-5 cm



Source: Global Agricultural and Disaster Assessment System (GADAS)

Figure 3: SMAP Root Zone Soil Moisture, 0-100 cm

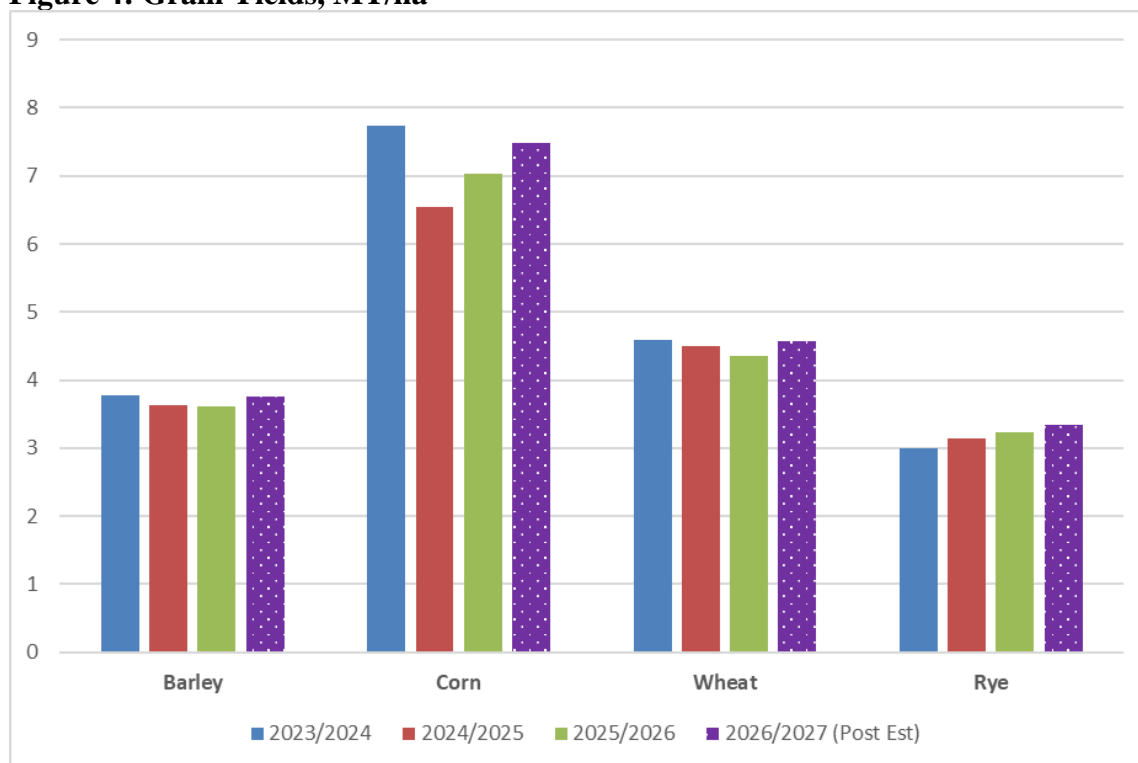


Source: GADAS

At the time of report writing, there was a sufficient amount of imported fertilizers and agrochemicals for spring 2026; therefore, Post does not estimate a drop in yields due to this factor.

Based on moisture availability, FAS/Kyiv forecasts MY2026/27 grain yields higher than the three-year average for all grains (Figure 4).

Figure 4: Grain Yields, MT/ha



Source: USDA Official

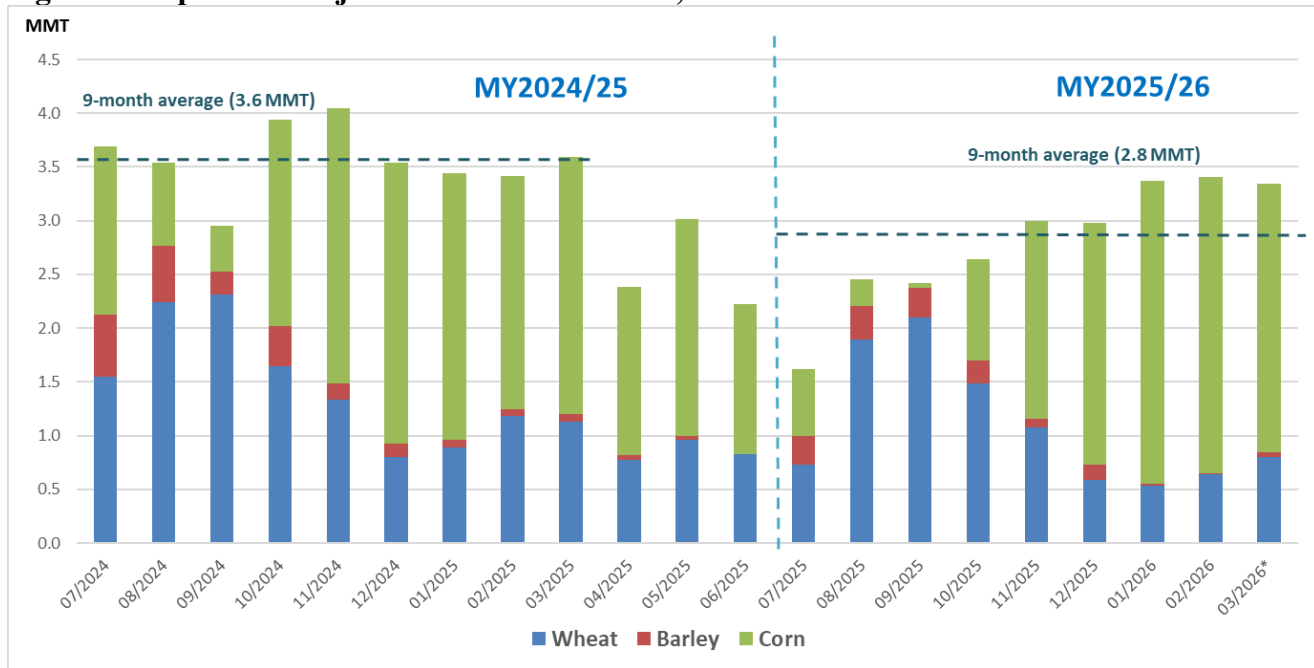
FAS/Kyiv's MY2026/27 production forecast is:

- Barley – 6.1 MMT, a 9 percent increase against Post's MY2025/26 estimate
- Corn – 31.5 MMT, a 3 percent increase
- Wheat – 22.7 MMT, a 5 percent decrease
- Rye – 240,000 MT, a 14 percent increase

Trade

Ukraine is a net exporter of bulk agricultural commodities, including all major grains and oilseeds. It is critically dependent on access to its ports and marine routes to ensure cost-efficient logistics for large volumes of grains. The trade data indicates average monthly exports of wheat, barley, and corn from July 2025 to March 2026 were 22 percent lower compared to the same period in the previous year (Figure 5).

Figure 5: Exports of Major Grains from Ukraine, MMT

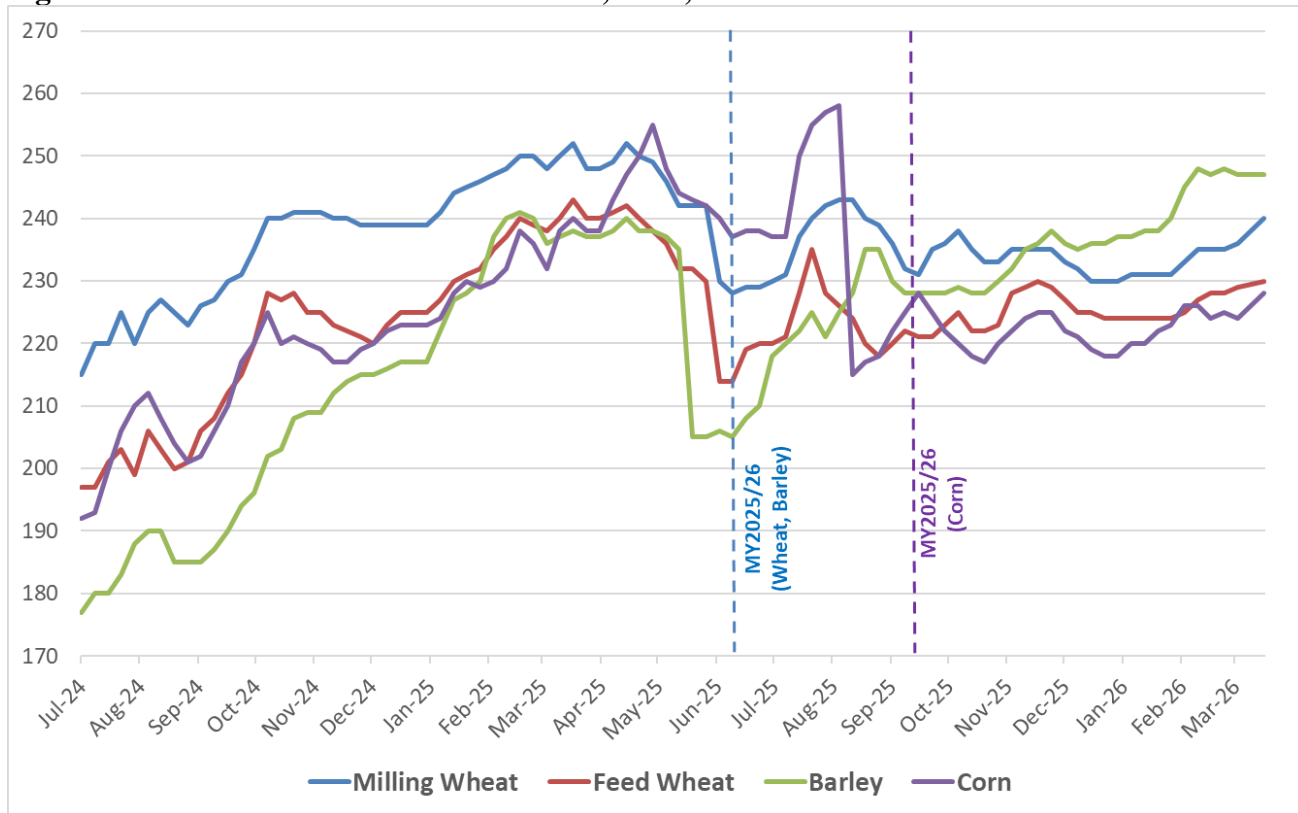


Source: Trade Data Monitor LLC (TDM); *MEEA data for March 2026 only

This situation is likely the result of an interconnected set of factors:

- Russian attacks on Ukrainian infrastructure, including transport infrastructure (railways and ports) and the energy grid, resulted in decreased transport capacity from field to export terminal over certain time periods.
- Since the beginning of MY2025/26 (July 2025 for wheat and barley and October 2025 for corn), grain prices were lower as compared to the previous MY (Figure 6). This might be associated with higher USDA-estimated global grain production and higher ending stocks for MY2025/26. In addition, industry suggested Ukrainian farmers built sufficient on-farm storage capacity since the start of the full-scale Russian invasion. A combination of low prices and the ability to keep stocks close in expectation of a “better price” prompted farmers to pause actively selling grains.
- EU import quotas forced exporters to return to a number of traditional markets, which translated into lower farm-gate prices.

Figure 6: Domestic Grain Prices in Ukraine, FOB, USD/MT

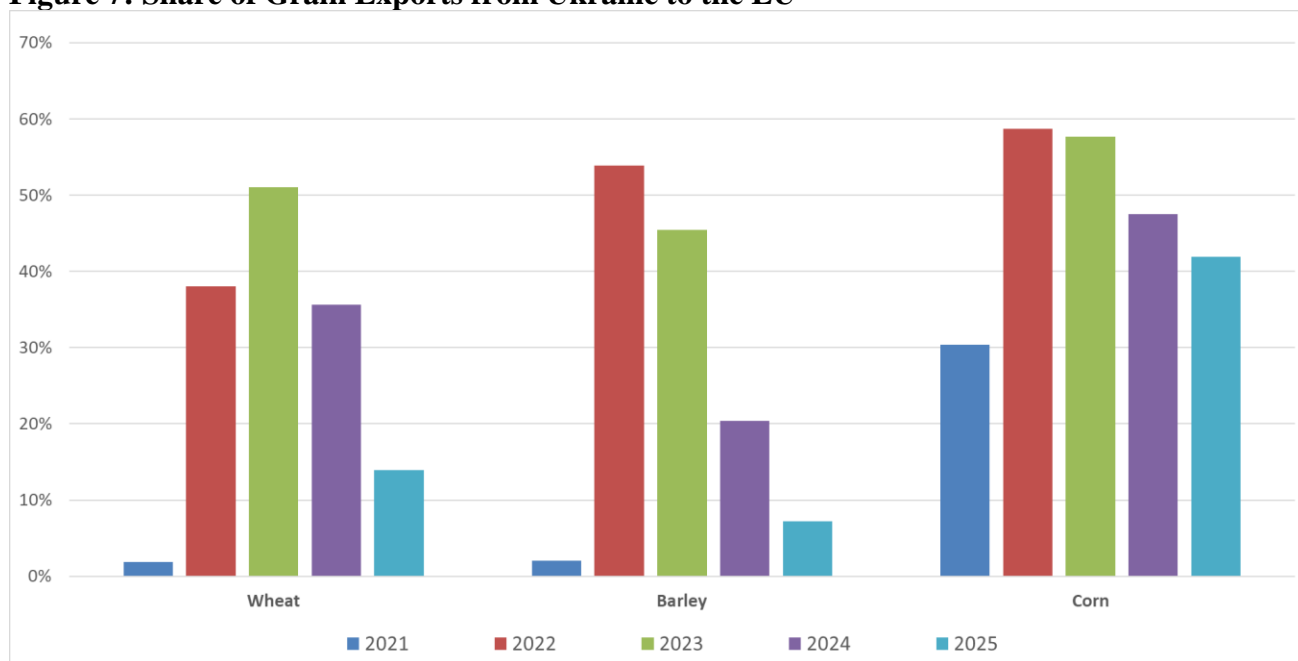


Source: APK-Inform

The EU is losing its position as Ukraine’s principal destination market, importing 29 percent of Ukraine’s total grain export volume in CY2025, compared to 41 percent in CY2024 (Figure 7). The drop was most significant for wheat and barley, due to the EU’s introduction of import quotas for agricultural products from Ukraine in October 2025. Corn was less affected due to features of the import duty mechanism. See GAIN Report [UP2025-0034](#) for more details.

Ukraine maintains export licenses for wheat and corn to Bulgaria, Romania, Slovakia, Hungary, and Poland, as there are one-sided export limitations imposed by these individual countries. For more details, see Annex 4 of Resolution #1795 ([in Ukrainian](#)).

Figure 7: Share of Grain Exports from Ukraine to the EU



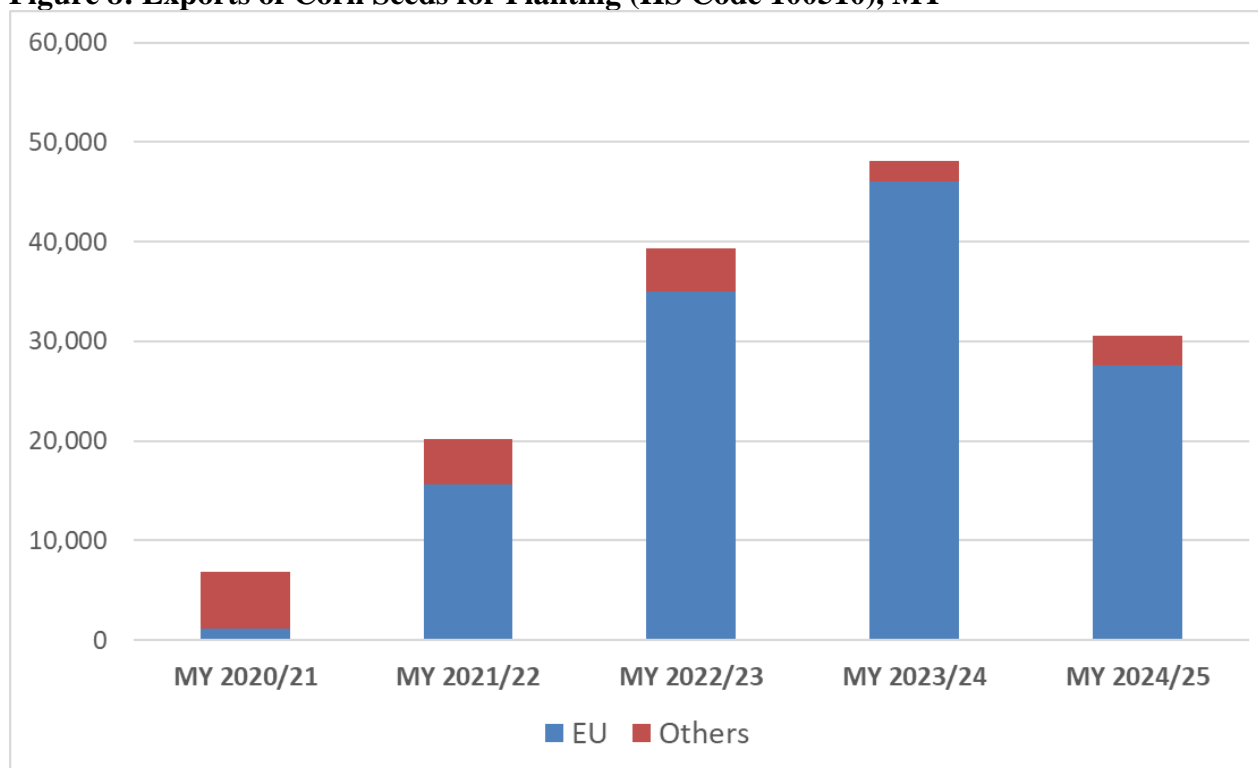
Source: TDM

As mentioned above, EU import quotas prompted Ukraine to return to its traditional markets for barley and wheat. Total barley exports from July 2025 to February 2026 were 1.3 MMT, a 36 percent decrease compared to the same period in 2024. Eighty percent of this volume was exported to four markets: China (490,000 MT); Türkiye (300,000 MT); Libya (138,000 MT); and Saudi Arabia (121,000 MT).

Wheat exports from July 2025 to February 2026 were 9.0 MMT, a 24 percent decrease compared to the same period in 2024. Sixty percent of total exports headed to three destinations: Egypt (2.4 MMT); Algeria (1.6 MMT); and Indonesia (1.4 MMT).

Corn exports from October 2025 to February 2026 were 10.6 MMT, a 10 percent decrease compared to same period in 2024. The EU retained its status as the single largest destination, importing 4.8 MMT through ports in Spain, Italy, and the Netherlands. Türkiye continues to be the second largest destination (2.9 MMT), followed by Egypt, Tunisia, and Israel (1.6 MMT combined). Ukraine has supplied seed corn for planting to the EU since 2020, when Ukrainian seeds were granted equivalency (see [GAIN Report UP2020-0054](#)) (Figure 8).

Figure 8: Exports of Corn Seeds for Planting (HS Code 100510), MT



Source: TDM

Wheat flour and pasta exports from July 2025 to February 2026 were 57,000 MT, a 3 percent decrease compared to the same period in 2024. Approximately half of this volume (26,000 MT) was exported to the EU, followed by neighboring Moldova (15,000 MT), and the Gaza Strip and West Bank (8,000 MT). Some of these volumes are likely food aid.

Ukraine also imported around 37,000 MT of wheat flour and pasta products from July 2025 to February 2026, a 14 percent increase compared to the same period in 2024. Ukraine imports largely processed products; 72 percent of the total volume is pasta, predominantly from the EU, and 15 percent are bulgur and couscous, predominantly from Türkiye.

From July 2025 to February 2026, Ukraine imported around 4,000 MT of rye, mostly from neighboring Poland. This was the first substantial import volume since MY2021/22. Rye became a niche crop among Ukrainian farmers, while consumers retained their preference for brown bread. Imports are now regularly bridging the gap between dwindling domestic production and stable food demand.

According to MEEA data, from the beginning of MY2025/26 (July 2025-March 2026 for barley and wheat and October 2025-March 2026 for corn), Ukraine exported:

- Wheat – 9.7 MMT, a 23 percent decrease compared to the same period in 2024
- Barley – 1.4 MMT, a 34 percent decrease
- Corn – 13.2 MMT, a 4 percent decrease

Based on the production estimates and the slow pace of exports, FAS/Kyiv estimates MY2025/26 exports at:

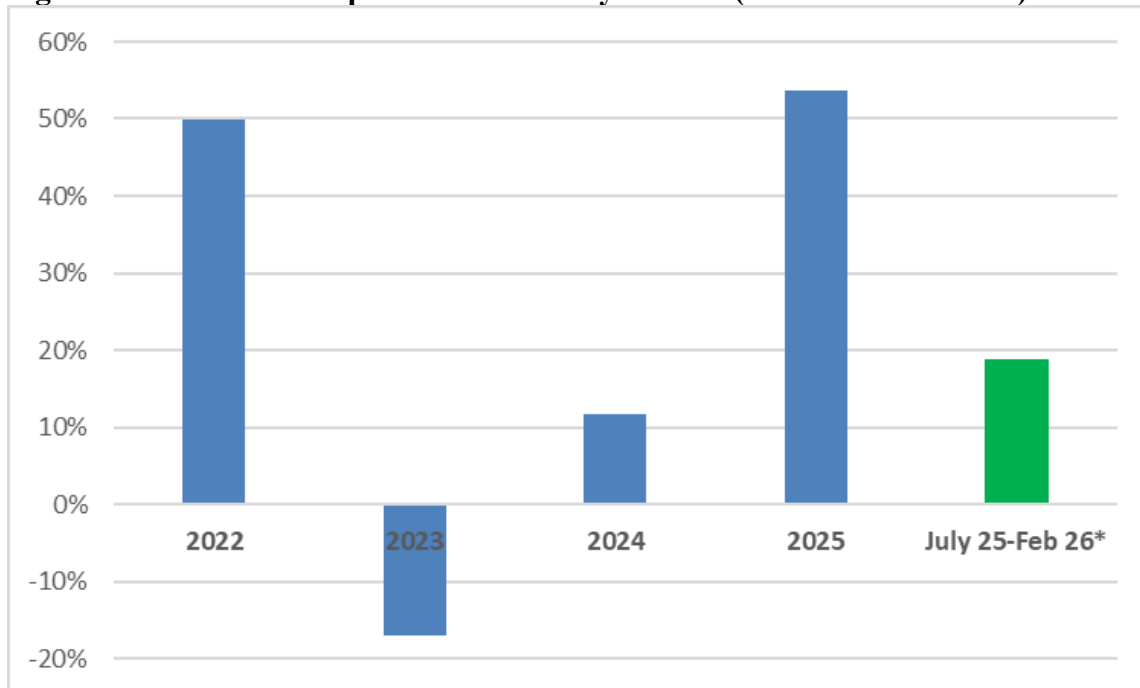
- Barley – 1.8 MMT, a 20 percent decrease compared to Post’s MY2024/25 estimate
- Corn – 20.6 MMT, a 3 percent increase
- Wheat – 13.0 MMT, an 18 percent decrease
- Rye – 10,000 MT, a 9 percent decrease

Based on Post’s grain production forecast, FAS/Kyiv’s forecast for MY2026/27 exports is:

- Barley – 4.2 MMT, a 133 percent increase compared to Post’s MY2025/26 estimate
- Corn – 26.0 MMT, a 26 percent increase
- Wheat – 15.5 MMT, a 19 percent increase
- Rye – 5,000 MT, a 50 percent decrease

Ukraine has an industrialized agricultural sector, where yields correlate with input availability, including fertilizers and agrochemicals. While there is domestic production of nitrogen fertilizers and generic agrochemicals, Ukraine is reliant on imports (Figure 9). FAS/Kyiv used CY2021 as the base year for comparisons because it was the last “normal,” pre-war year. Note the increase in CY2022 imports was due to temporary shutdowns of local nitrogen fertilizer production facilities at the beginning of the full-scale Russian invasion and the need for additional volumes to replace lost and destroyed stocks.

Figure 9: Fertilizer Imports to Ukraine by Volume (MY2021 as baseline)**



Source: TDM

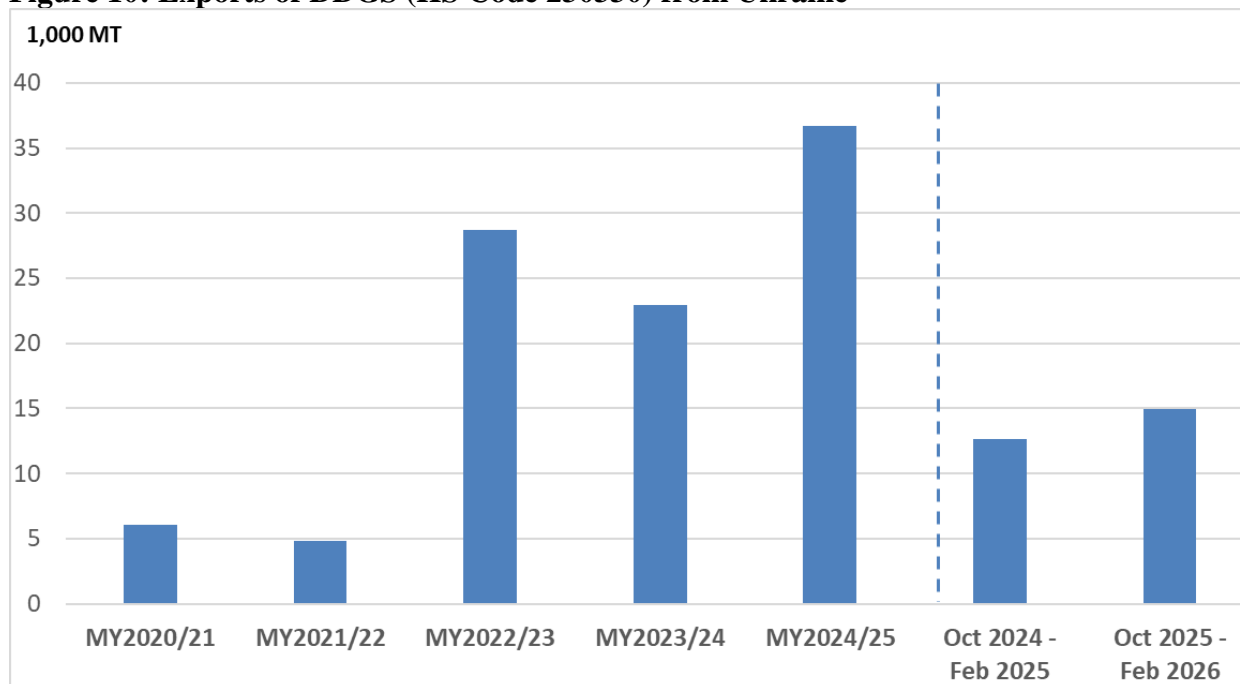
* compared to July 2024-February 2025

** HS Codes: 310100, 310210, 310221, 310229, 310230, 310240, 310250, 310260, 310280, 310290, 310310, 310390, 310410, 310420, 310430, 310490, 310510, 310520, 310530, 310540, 310551, 310559, 310560, 310590

Ukraine started exporting meaningful volumes of distillers dried grains with solubles (DDGS) in MY2022/23 (Figure 10). In the absence of official data for industrial products in Ukraine, Post accepts the increasing DDGS export dynamics as evidence of growing grain processing, predominantly corn, into bioethanol. According to industry sources, bioethanol production is on the rise due to a combination of factors:

- The Government of Ukraine liberalized the alcohol production sector, allowing private investment, and established a separate license for bioethanol producers in 2019
- The EU abolished export quotas for Ukrainian agricultural products from June 2022-June 2025 and set the current ethanol import quota at 125,000 MT, equivalent to 400,000 MT of corn.
- Ukrainian producers began supplying consolidated batches of bioethanol, which is a precondition for attracting EU consumers

Figure 10: Exports of DDGS (HS Code 230330) from Ukraine



Source: TDM

Consumption

Post estimates MY2025/26 feed consumption estimates up 1 percent from its previous MY estimate. This estimate is based on animal and production numbers from poultry ([UP2026-0004](#)) and livestock ([UP2026-0007](#)). Post forecasts total feed consumption will remain static for MY2026/27 (Table 2).

Table 2: Total Feed Consumption in Ukraine

	MY2024/25	MY2025/26	MY2026/27
Barley	1,400	900	1,000
Corn	5,400	4,900	5,000
Rye	0	0	0
Wheat	2,700	3,800	3,600
Total	9,500	9,600	9,600

Source: FAS/Kyiv estimate

The consumption of individual grains in animal feed depends on domestic price spreads and the availability of specific crops. At the time of report writing, due to the slow pace of grain exports, prices for all grains were lower compared to MY2024/25. Corn is the most affordable and widely available ingredient for animal diets, followed closely by wheat. FAS/Kyiv estimates these crops will make up the majority of feed consumption in MY2025/26. MY2026/27 feed consumption of individual crops is based on Post's production forecasts.

Post estimates food consumption for individual grains based on the number of refugees who have left Ukraine, per the [United Nations High Commissioner for Refugees](#). The number of registered refugees dropped from its peak of 8.1 million in MY2022/23 to 7.0 million in MY2025/26, with a slight increase to the current 7.1 million, which is Post's benchmark for MY2026/27. Therefore, Post's MY2026/27 FSI forecasts for both wheat and rye are lower compared to MY2025/26.

MY2025/26 FSI for corn is higher compared to the previous MY on the dynamics of DDGS exports from October 2025 to February 2026, as well as high grain ending stocks. Post assumes bioethanol production will continue to grow.

FSI for corn includes its processing into starch. In the absence of SSSU data, Post relies on industry estimates indicating domestic starch production at around 100,000 MT. According to trade data, Ukraine exported over 27,000 MT of corn starch (HS Code 1108 12) in CY2025.

Ukraine maintains import tariffs for all commodities listed in this report (Table 3).

Table 3: Import Tariffs for Select Grains and Products of Processing thereof by Ukraine, %

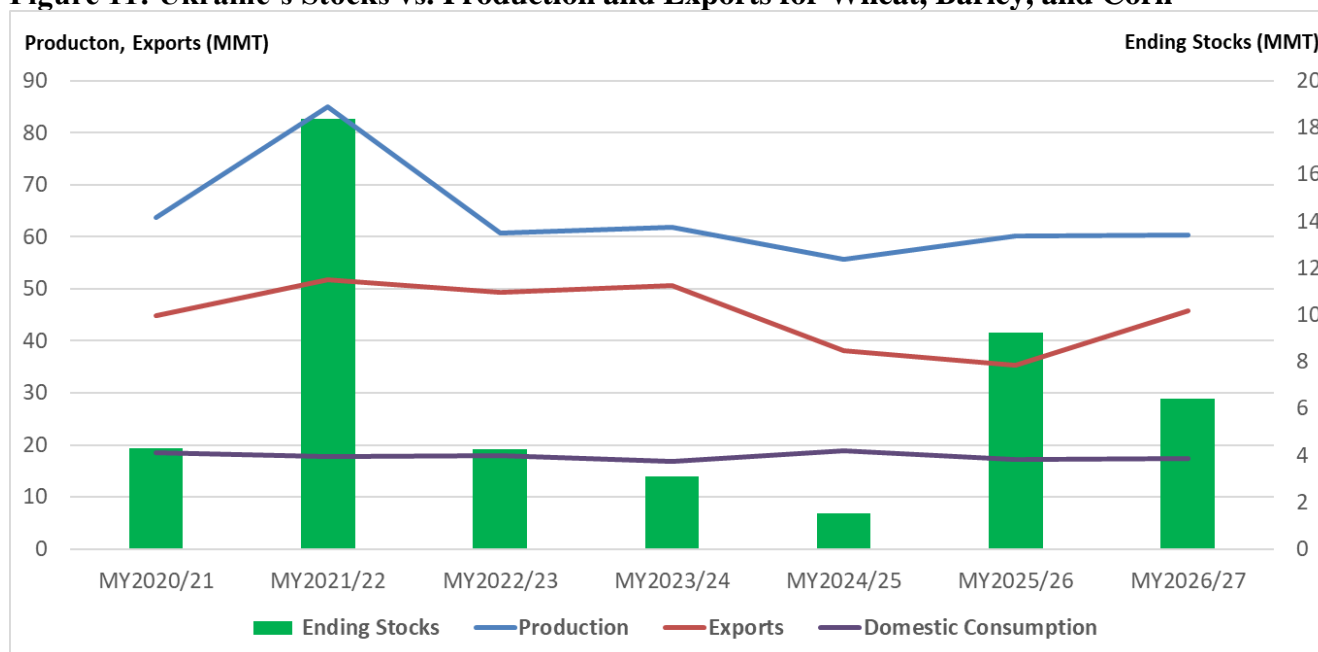
HS Code	Commodity	Applied Tariff	Most Favored Nation
1001	Wheat (except for 1001 91 20 00 and 1001 11 00 00)	10	10
1001 11 00 00	Durum Wheat (Seed)	0	0
1001 91 20 00	Common Wheat and Meslin (Seed)		
1002	Rye	20	20
1003	Barley	5	5
1005 90 00 00	Corn	10	10
1005 10 (15,18,90)	Corn (Seed)	0	0
1101	Wheat Four	15	15
1902 19	Uncooked Pasta	15	15
1902 30	Other Pasta	10	10
1902 40	Couscous	20	20
1904 30	Bulgur	10	10
2303 30	DDGS	20	20

Source: Law of Ukraine on Customs Tariff

Stocks

Post increased MY2025/26 ending stocks on sluggish export dynamics for all major grains (Figure 11). Post forecasts high MY2026/27 ending stocks on the combination of limited export capacity, higher production forecasts, and high beginning stocks.

Figure 11: Ukraine’s Stocks vs. Production and Exports for Wheat, Barley, and Corn



Source: FAS/Kyiv estimates

Production, Supply and Distribution Data

Barley

Barley Market Year Begins Ukraine	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1600	1556	1550	1520	0	1440
Beginning Stocks (1000 MT)	689	689	433	305	0	1946
Production (1000 MT)	5800	5472	5600	5540	0	6060
MY Imports (1000 MT)	0	0	1	1	0	1
TY Imports (1000 MT)	0	0	1	1	0	1
Total Supply (1000 MT)	6489	6161	6034	5846	0	8007
MY Exports (1000 MT)	2256	2256	2400	1800	0	4200
TY Exports (1000 MT)	1805	2256	2500	1800	0	4200
Feed and Residual (1000 MT)	2700	2400	1900	900	0	1000
FSI Consumption (1000 MT)	1100	1200	1000	1200	0	1200
Total Consumption (1000 MT)	3800	3600	2900	2100	0	2200
Ending Stocks (1000 MT)	433	305	734	1946	0	1607
Total Distribution (1000 MT)	6489	6161	6034	5846	0	8007
Yield (MT/HA)	3.625	3.5167	3.6129	3.6447	0	4.2083
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

FAS/Kyiv's MY2025/26 barley export estimate is 25 percent lower than USDA's official number based on current export dynamics.

FAS/Kyiv's MY2025/26 barley feed and residual consumption estimate is 53 percent lower than USDA's official number based on higher feed usage of wheat and corn.

FAS/Kyiv's MY2025/26 barley ending stocks estimate is 165 percent higher than USDA's official number due to sluggish exports.

Corn

Corn Market Year Begins Ukraine	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4100	4071	4370	4370	0	4200
Beginning Stocks (1000 MT)	542	542	838	606	0	4301
Production (1000 MT)	26800	26867	30700	30680	0	31470
MY Imports (1000 MT)	15	15	10	15	0	14
TY Imports (1000 MT)	15	15	10	15	0	14
Total Supply (1000 MT)	27357	27424	31548	31301	0	35785
MY Exports (1000 MT)	20019	20018	22000	20600	0	26000
TY Exports (1000 MT)	20019	20018	22000	20600	0	26000
Feed and Residual (1000 MT)	5400	5400	5400	4900	0	5000
FSI Consumption (1000 MT)	1100	1400	1200	1500	0	1700
Total Consumption (1000 MT)	6500	6800	6600	6400	0	6700
Ending Stocks (1000 MT)	838	606	2948	4301	0	3085
Total Distribution (1000 MT)	27357	27424	31548	31301	0	35785
Yield (MT/HA)	6.5366	6.5996	7.0252	7.0206	0	7.4929
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

FAS/Kyiv's MY2025/26 corn FSI consumption estimate is 25 percent higher than USDA's official number on growing bioethanol production in Ukraine.

FAS/Kyiv's MY2025/26 corn ending stocks estimate is 46 percent higher than USDA's official number due to sluggish exports.

Wheat

Wheat Market Year Begins	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5200	5182	5500	5400	0	4660
Beginning Stocks (1000 MT)	1506	1506	926	629	0	2969
Production (1000 MT)	23400	23373	24000	24010	0	22720
MY Imports (1000 MT)	71	71	100	80	0	80
TY Imports (1000 MT)	71	71	100	80	0	80
Total Supply (1000 MT)	24977	24950	25026	24719	0	25769
MY Exports (1000 MT)	15751	15751	13500	13000	0	15500
TY Exports (1000 MT)	15751	15751	13500	13000	0	15500
Feed and Residual (1000 MT)	3600	3600	3500	3800	0	3600
FSI Consumption (1000 MT)	4700	4970	4900	4950	0	4930
Total Consumption (1000 MT)	8300	8570	8400	8750	0	8530
Ending Stocks (1000 MT)	926	629	3126	2969	0	1739
Total Distribution (1000 MT)	24977	24950	25026	24719	0	25769
Yield (MT/HA)	4.5	4.5104	4.3636	4.4463	0	4.8755
(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 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note that in the Wheat PSD table, both export and import volumes for flour and wheat products (HS Codes 1101, 190219, 190230, 190240, 190430) are converted to wheat grain equivalent by multiplying the product weight by 1.368 and added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of wheat trade by Ukraine.

FAS/Kyiv's MY2025/26 wheat feed and residual consumption estimate is 9 percent higher than USDA's official number based on the wide availability of wheat.

Rye

Rye Market Year Begins	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Area Harvested (1000 HA)	70	70	65	70	0	70
Beginning Stocks (1000 MT)	155	155	93	90	0	22
Production (1000 MT)	220	218	210	210	0	240
MY Imports (1000 MT)	1	0	1	4	0	0
TY Imports (1000 MT)	2	0	1	4	0	0
Total Supply (1000 MT)	376	373	304	304	0	262
MY Exports (1000 MT)	11	11	10	10	0	5
TY Exports (1000 MT)	3	11	10	10	0	5
Feed and Residual (1000 MT)	2	2	2	2	0	1
FSI Consumption (1000 MT)	270	270	250	270	0	240
Total Consumption (1000 MT)	272	272	252	272	0	241
Ending Stocks (1000 MT)	93	90	42	22	0	16
Total Distribution (1000 MT)	376	373	304	304	0	262
Yield (MT/HA)	3.1429	3.1143	3.2308	3	0	3.4286
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

FAS/Kyiv's MY2025/26 rye import estimate is 300 percent higher than USDA's official number based on available trade data.

Attachments:

No Attachments