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Report Name: Dairy and Products Annual

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Report Highlights:

Dairy cow inventory is expected to decrease significantly in 2022. The decrease is driven by a war-related economic downturn, direct animal losses in war-affected areas and a historic reduction in less-efficient animals. Fluid milk and dairy product outputs are expected to drop notably in 2022. The decline will continue in 2023 due to the reduced animal number and continued war-related economic downturn. Consumption in 2022 is expected to decline drastically, driven by the ongoing refugee crisis and lower disposable incomes. Exports of dairy products in 2022 will grow as a drop in domestic consumption creates an excess of raw milk, despite the milk production reduction. Dairy product imports are expected to decrease in 2022 due to plummeting incomes, currency devaluation, and import logistics problems.

Data included in this report is not official USDA Data. Official USDA data is available at <http://www.fas.usda.gov/psd> Data for the Autonomous Republic of Crimea is included in the PSD tables wherever possible.

Executive Summary:

From January to mid-February of 2022, the Ukrainian dairy cow populations remained on a typical historic slight downward slope. Private households remained responsible for the largest share of milk production, while industrial farms struggled to increase their efficiency. After Russia's invasion started on February 24th, 2022, Ukraine's dairy industry incurred significant losses. Pockets of Ukrainian dairy production in the northern and densely populated eastern parts of the country were occupied by Russians in February-March. Operations of the large dairy processors in southern and eastern Ukraine were interrupted. Raw milk procurement in war-affected areas stopped. Throughout the country, livestock farms came under direct fire; losing animals, facilities, feed, and machinery. A limited number of farms resumed operations as Russian forces left the northern and northeastern areas, and more recently in the eastern parts of Ukraine.

The war's indirect impact on the dairy industry was also enormous. Dairy products trade routes through the Ukrainian border with EU countries and Moldova became problematic due to traffic congestion caused by the closure of Ukraine's territorial waters in the Black Seas. Curfews were introduced in most regions, limiting the operation hours of livestock farms and imposing restrictions on milk truck movement. Ukraine started a military conscription campaign, stripping dairy farms of a qualified labor force. The National Bank of Ukraine established the fixed currency exchange rate at 1 USD = 29.25 UAH (increased to 1 USD = 36.6 UAH in August 2022, where it remains at the time of this report) to prevent abrupt domestic currency devaluation, which completely stopped the securities market and introduced several limitations aimed at foreign currency outflow prevention. The fixed exchange rate created trade imbalances for both domestic and foreign trade.

On February 24th, 2022, the Cabinet of Ministers of Ukraine (CMU) established a positive Harmonized Trade System (HS) list of critical war imports, which originally did not include any dairy products. However, dairy products listed under HS 0401, 0402, 0405, and 0406 were added to the list on February 28th. This four-day-long import ban did not impact trade flows much. However, on March 21st, 2022, CMU excluded fermented dairy products listed under HS 0402 from the list. Ukrainian domestic processors publicly lobbied for this exclusion. Overall the list of critical war imports was amended 21 times before its complete cancellation in late July 2022. The list was very restrictive leaving dairy producers without many inputs. All these measures, combined with the Russian armed forces' advance on three fronts, population relocation, and a refugee crisis created an extremely hostile and unpredictable market environment. As of October of 2022, Ukraine has not imposed any official restrictions on the export of dairy products.

Broken logistics chains in the early days of war made farmers unable to deliver their products or get needed inputs. Industrial dairy farms were very vulnerable, as many farms relied on uninterrupted cash flow from raw milk sales. Some producers reacted by opening old on-farm processing facilities, and some had to donate milk to the population or disposed it. In areas directly impacted by war, some farmers were unable to take care of the animals due to shelling and just opened the farm gates and released the cows. Households were much more resilient, as they predominately rely on locally procured

inputs and local sales: household milk got consumed by families, offered to neighbors, or sold in nearby towns and cities.

The dairy market started to stabilize in the early summer of 2022 when major Russian armed forces advances stalled. Some farms in liberated areas were able to resume milk production, while others sustained significant damages and were unable to return to business. Trade recovered significantly as Great Britain (from April 26th, 2022) and the EU (from June 4th, 2022) abolished their import duties for all Ukrainian products (including dairy) to support Ukraine's economy and simplified transshipment procedures. According to industry producer groups, cow loss due to the war probably exceeded 50,000 animals and will grow further as the war continues.

The reduction in milk production for 2022 is expected to exceed 15 percent and be followed by a corresponding loss in dairy product output. Despite decreased production, the export of Ukrainian dairy products in 2022 may be unexpectedly significant. The Ukrainian dairy industry was able to overcome initial war shocks, and domestic demand remains all-time low due to significant population outflow and lower disposable incomes of the remaining Ukrainians. These factors resulted in a raw milk price decrease, which made Ukrainian dairy commodities more attractive on the world market. Drastic demand drop led to raw milk excess supply situation despite some production contraction. The 2022 summer and fall dairy exports significantly exceeded those of 2020 and 2021.

The 2023 forecast is extremely fragile and is based on the existing military *status quo*. In absence of Russian advances, domestic demand is expected to recover slightly. The number of cows will remain low, and a further decrease is possible due to increased production costs and unfavorable raw milk prices. Ukraine's 2023 exports are expected to decline compared to 2022. More imports are expected to cover domestic needs in cheese and butter as the domestic processing industry will be facing a raw milk shortage.

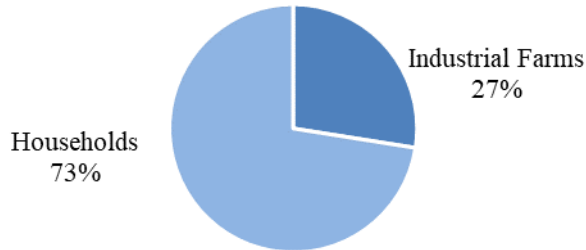
Production:

Raw Milk

Prior to the war's start, Ukrainian raw milk production remained on its 30-year-long gradual downward trend. Overall industry efficiency and profitability has remained low. Almost three-quarters of Ukrainian milk was produced by private households. Milk yields in the private sector have remained low, but inefficiency was partially compensated by a lower production cost model. Many households view milk production as a safety net that is necessary to provide families with food in case of a major crisis. Although the economic crisis was viewed as the most likely threat to rural incomes, this low-cost self-sufficient production model has proven to be critically important and resilient throughout the war.

Ukrainian industrial production is dominated by two production models: old-style shrinking dairy farms, and new modern farms that are changing their production practices and growing in size. Old-style farms have their roots in Soviet-era collective farm-based production systems. The farm owners often concentrate on more profitable grains and oilseeds, while the old dairy farms existed as social rural-employment projects supported by local communities and regional governments. A small share of western-style profitable dairy enterprises is growing but it remains insignificant. Old-style farms vastly outnumber the new ones, so overall industrial animal inventory (and milk production) is decreasing.

**Figure 1. Dairy Cow Inventory Composition
(as of January 1st) 2022**

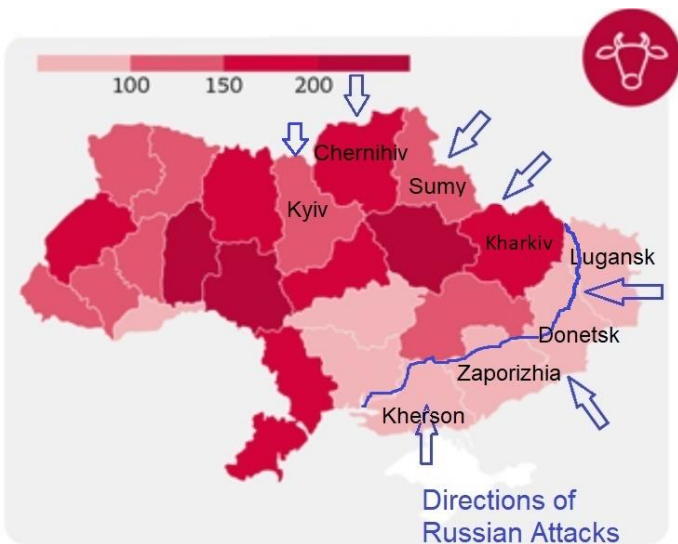


Source: Ukraine's State Statistics Service

The war has impacted Ukrainian dairy production significantly, as the three major milk-producing regions – Kyiv, Chernihiv, and Kharkiv - came under attack by the Russian army. However, large milk-producing pockets in central and western Ukraine were not impacted. Many farms in the east and south were occupied in the first month of the war. Those farms stopped commercial milk sales completely while management struggled to maintain minimal farm operations (in most cases animal feeding and milking only) under immense pressure and often in life-threatening situations. Due to broken logistics, raw milk was usually donated to farm workers and nearby villages or disposed of. A shortage of fuel was the most critical problem during those weeks. The dairy industry heavily relies on uninterrupted cash flow from raw milk sales, so long-term operations on those farms were impossible.

Figure 2. The Population of Ukrainian Cattle by Region, Thousand Heads

Figure 3. Ukrainian Dairy Farmers are Using a Zipline to Deliver a Flask of Milk over the Destroyed Bridge in Northern Ukraine in March of 2022



Sources: State Statistics Service of Ukraine, Baker Tilly, FAS Kyiv;

The front line is subject to daily change.

Source: Belsat News Agency

After Russian forces withdrew from Ukraine’s Northern and North-Eastern regions, many farms were able to resume production. However, some industrial livestock farms situated close to combat operations or captured by Russians have sustained significant damage or have been destroyed completely. Some farm managers simply opened the farm gates and released the cows to prevent the animals’ slaughter. Eventually, some of those cows returned to farms or were captured in nearby fields and forests. However, in most cases, those animals were no longer suitable for industrial milk production and had to be culled.

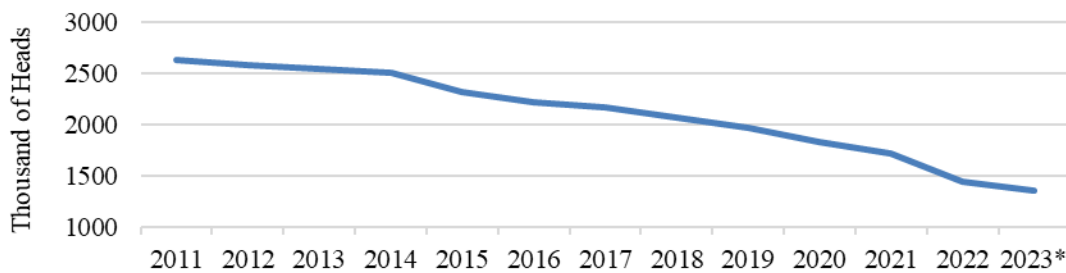
Figure 4. Photos of a Missile Attack on a Dairy Farm in Eastern Ukraine



Source: Association of Ukrainian Dairy Producers

Ukraine’s Statistics Service stopped the publication of animal inventory and dairy processing numbers, so no accurate 2022 indicators are available to Post. Industry sources remain the only reliable source of statistics. The number of direct losses of cows in heifers from war-related causes on industrial farms is expected to exceed 50,000 and maybe reach 70,000 by the yearend.

**Figure 5. Number of Cows
(Farms of All Types as of January 1st)**



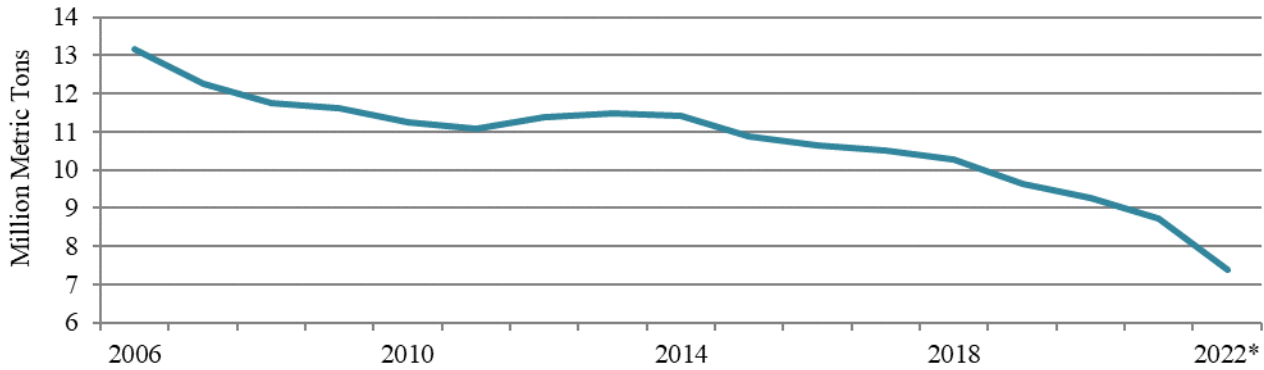
* Forecast

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

This decrease will add to the traditional animal inventory decline observed in Ukraine in the past decades, leading to an estimated 15 percent cow inventory decrease in 2022 with an additional seven to eight percent decrease in 2023. In turn, this will result in the most significant raw milk production drop

in recent Ukrainian history. It is expected to exceed 15 percent with some further decrease in 2023 due to reduced animal inventory, continuing war, and the stalled momentum of the dairy industry.

Figure 6. Ukraine's Fluid Milk Production

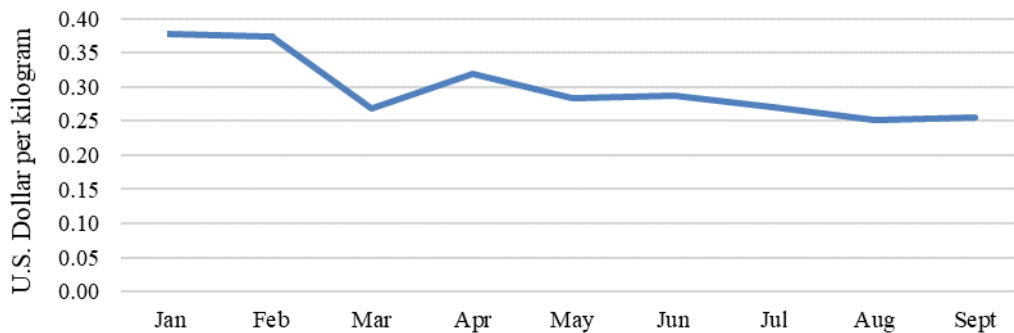


* Forecast

Source: Ukraine's State Statistics Service, FAS Kyiv

Although the number of cows decreased greatly, there are factors contributing to the better performance of the remaining animals. Unlike many European countries, Ukraine did not experience a severe drought in the summer of 2022 making animal feeds cheaper and more abundant. Logistical problems with the export of Ukrainian grains made concentrated feeds cheaper. Many smaller and less efficient agricultural companies turned to their dairy enterprises to ensure much-needed cash flow.

Figure 7. Average Raw Milk Procurement Price in 2022



Source: Association of Ukrainian Dairy Producers

Pre-war February price and approximate March price are provided

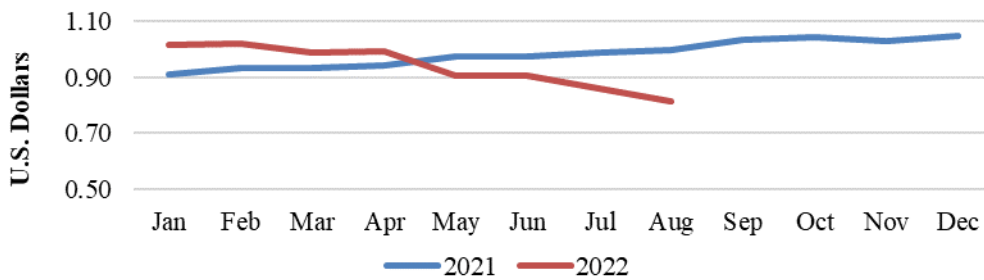
Although Ukraine's Statistical Service stopped publishing raw milk prices, some data remains available from industry sources. The weak local currency led to a significant real milk price decline, making Ukrainian milk almost one-third cheaper in comparison with neighboring EU markets. Due to rather high milk production seasonality, the raw milk price is expected to remain low till late fall, providing Ukrainian processors with a price advantage on export markets.

Pasteurized Fluid Milk

Due to war-time data publication restrictions, official statistics on milk production in 2022 are not publicly available.

Plummeting domestic demand resulted in a drop in pasteurized milk production and prices. The major population outflow to neighboring countries with women and children constituting the majority of refugees resulted in an excess milk supply and a price drop.

Figure 8. Pasteurized Milk with Fat Content at and Above 2.6 Percent (1 kilogram)

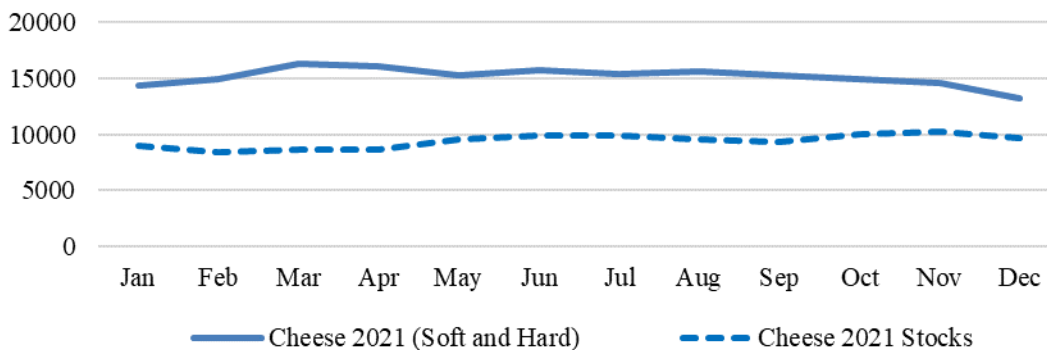


Source: Ukraine's State Statistics Service, FAS/Kyiv calculations

Cheese (Hard and Soft)

Due to war-time data publication restrictions, official statistics on cheese production in 2022 are not publicly available.

Figure 9. Cheese Production (Hard and Soft) and Stocks, MT



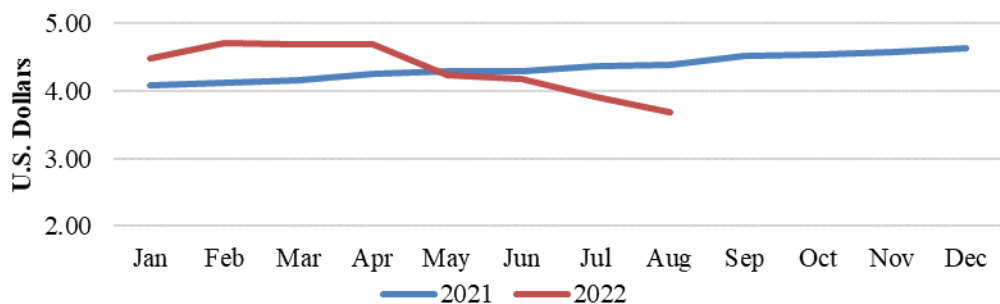
Source: Ukraine's State Statistics Service

PSD cheese production number for 2021 was brought in line with Ukraine's official number. Officially reported industry stocks number were used for 2021. The volume of stocks for 2021 was unusually high. PSD stock estimates for 2022 and 2023 were decreased from 10,000 to 7,000 metric tons due to the unavailability of official data.

A smaller raw milk supply is expected to negatively impact both soft and hard cheese production in 2022. Between 2019-2021, Ukrainian consumers got used to many European hard cheese brands. Local production was pushed into lower and middle market segments and struggled to compete. Cheese production is expected to drop in 2022 due to decreased demand and pressure from imported products. The industry will be facing even lower fluid milk availability in 2023, thus lower soft and hard cheese production.

Only the domestic soft cheese retail price is officially available due to war-related restrictions. Real retail (U.S. dollar-denominated) soft cheese prices exhibited a downward trend shortly after the war started and population outflow began. Domestic production is not expected to cover the demand, especially in mainstream and premium segments.

Figure 10. Cottage Cheese Retail Price (for 1 kilogram)

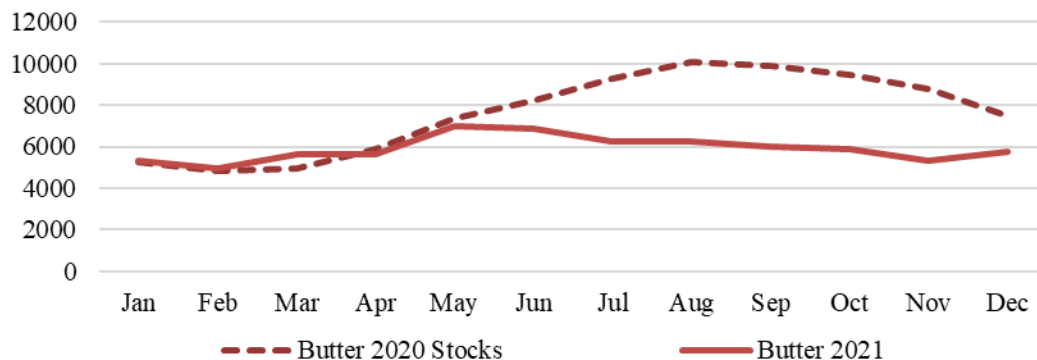


Source: Ukraine’s State Statistics Service, FAS/Kyiv calculations

Butter

Due to war-time data publication restrictions, official statistics on butter production in 2022 are not publicly available.

Figure 11. Butter Monthly Output and Stocks, MT

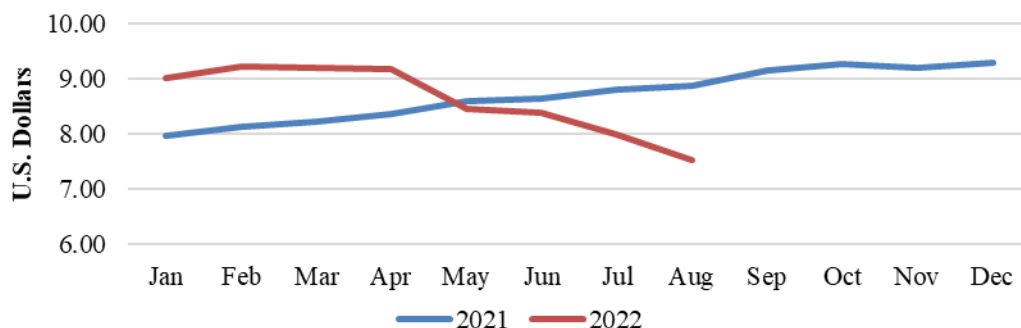


Source: Ukraine’s State Statistics Service

PSD butter production number for 2021 was brought in line with Ukraine’s official number. Officially reported industry stocks number were used for 2021. The volume of stocks was fixed for 2022 and 2023 due to the unavailability of official data.

In the pre-war period, Ukrainian domestic butter production was covering the domestic market needs. Foreign competition was limited and concentrated in the upper segment. Limited raw milk availability combined with generally lower disposable incomes, resulted in growing margarine and spreads production that competed with butter in the lower market segment. Similarly to other products, butter production is expected to contract in 2022 and stay even lower in 2023 if the war continues. Production of butter in 2022 is expected to be sufficient to cover most of the remaining domestic demand.

Figure 12. Butter Retail Price (for 1 kilogram)

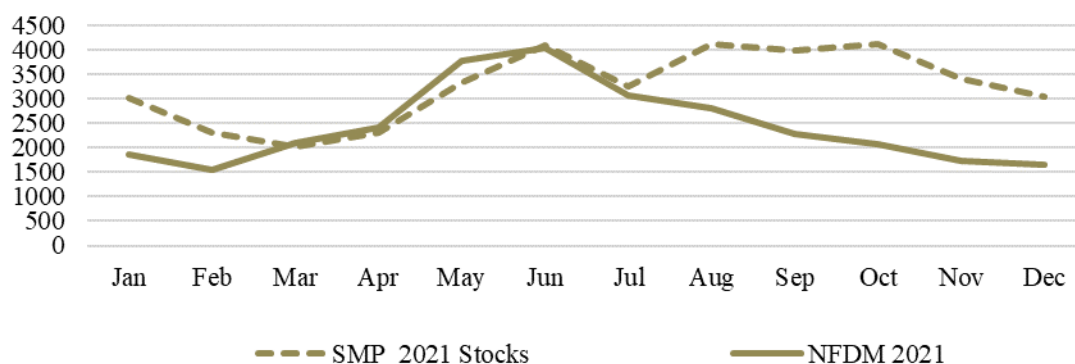


Source: Ukraine’s State Statistics Service, FAS/Kyiv calculations

Skim Milk Powder (SMP)

Due to war-time data publication restrictions, official statistics on SMP production in 2022 are not publicly available. The product is not sold in retail, so no price information is available.

Figure 13. Skim Milk Powder Monthly Output and Stocks, MT



Source: Ukraine’s State Statistics Service

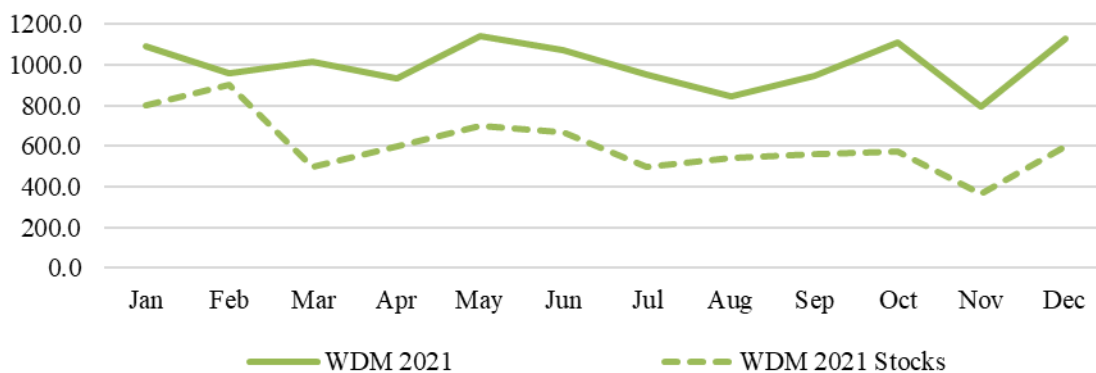
The Production Supply and Distribution (PSD) Skim Milk Powder (SMP) production number for 2021 was brought in line with Ukraine’s official number. Officially reported industry stocks number were used for 2021. The volume of stocks was fixed for 2022 and 2023 due to the unavailability of official data.

Facing the raw milk supply, SMP production will decrease in 2022 and even further in 2023. SMP production is tied to butter production. Domestic demand is expected to be fully covered as processing industry needs in SMP are expected to be lower due to decreased demand.

Whole Milk Powder (WMP)

Due to war-time data publication restrictions, official statistics on WMP production in 2022 are not publicly available. The product is not sold in retail, so no price information is available.

Figure 14. Whole Dry Milk Monthly Output and Stocks, MT



Source: Ukraine’s State Statistics Service

The Production Supply and Distribution (PSD) Whole Milk Powder (WMP) production numbers for 2021 are brought in line with Ukraine’s official numbers.

Ukrainian processors are expected to produce WMP mainly for export markets. Production of WMP is often less profitable in comparison to SMP and butter combo production. Local demand for WMP is limited and decreased further after the war began.

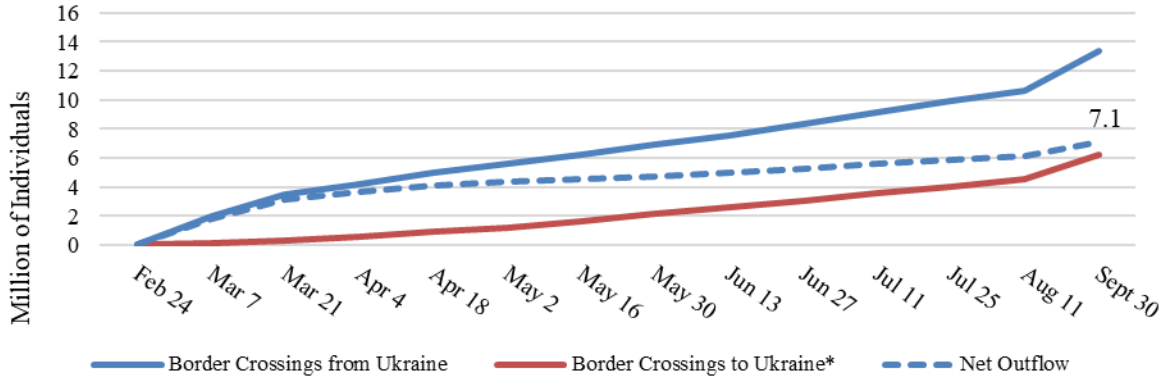
Consumption:

Consumption is expected to drop dramatically in 2022 due to population outflow resulting from war. Despite a raw milk production drop, the demand drop is expected to be more significant, creating a short-term raw milk excess supply (especially in the summer months, when Ukrainian production peaks). This consumption drop results in notable dairy product export growth. This development in a war-torn country seems unexpected, but it is already taking place. Consumption of dairy products that significantly relied on imported sources (such as cheese) decreased.

The war triggered one of the fastest-growing humanitarian and displacement emergencies in recent history. Within weeks after the war started, over one-quarter of the population had fled their homes to seek refuge abroad or in parts of Ukraine further from the military activities. With an official population of 41.1 million people as of February 1st, 2022, after Russia’s invasion 7.1 million people (17 percent of the population) were displaced to other countries by end of September 2022. Although the outflow trend stabilized and the number of people returning to their homes is growing, the trend is not expected to

reverse before the war ended. Moreover, surveys show that close to 15 percent of those abroad are not planning to return. This cuts the number of potential domestic dairy product consumers in 2022 and will impact consumption in 2023 and beyond.

Figure 15. Cummulative Border Crosings in 2022

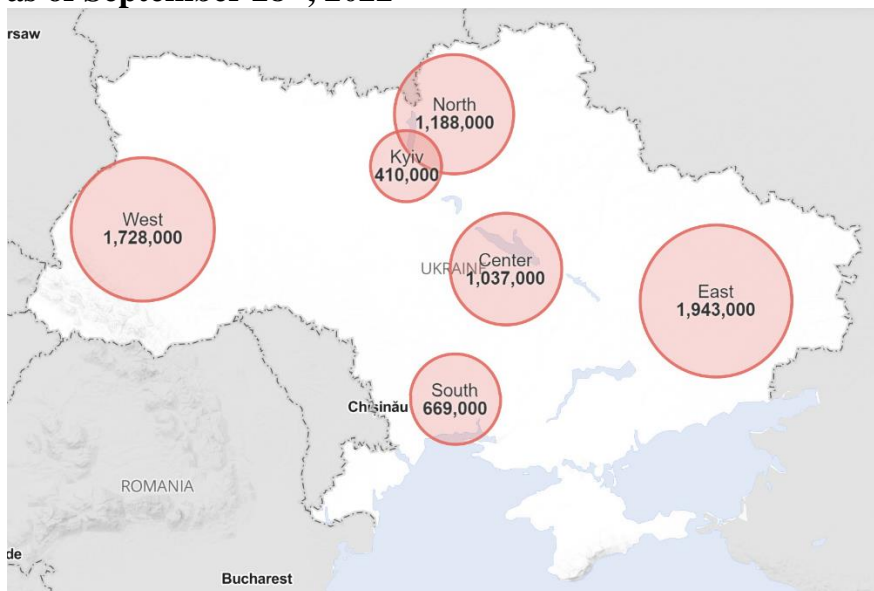


Source: UN Refugee Agency (<https://data.unhcr.org/>)

* No data from Russia is available

Another important factor influencing domestic consumption is the growing number of internally displaced persons (IDPs). This group includes people that left the occupied territories as well as those who fled Ukraine-controlled territories that are adjacent to military activity areas. The number of individuals remaining in occupied territories is not clear, as the situation changes daily. These people lost their sources of income and consume fewer dairy products.

Figure 16. Distribution of Internally Displaced Persons by Region as of September 28th, 2022



The Total number of Internally Displaced Individuals is 6,975,000

Source: UN Refugee Agency (<https://data.unhcr.org/>)

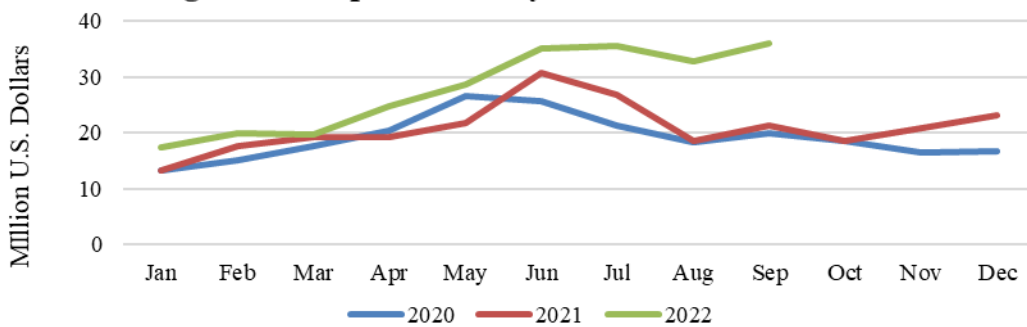
An additional factor contributing to the milk and dairy product consumption decrease is the drop in disposable income. Incomes have been undermined by war-related job loss, economic downturn, as well as growing inflation. The government of Ukraine expects the inflation rate to exceed 20 percent by the end of 2022. However, in August, year-to-year inflation already accelerated to 19.5 percent. Women and children, who constituted the largest part of refugees, were active dairy product consumers. Their immigration also played a role in the consumption drop.

Trade

Due to war-time data publication restrictions, official trade statistics from Ukraine’s State Statistical Service are not publicly available. Alternative sources and industry data are used.

The refugee crisis resulted in a demand drop. This contraction was significant and resulted in raw milk excess supply despite a notable milk production decrease. This excess milk supply became even more profound in the summer months when Ukrainian raw milk production peaked. Exports of butter and SMP are expected to exceed 2021, while exports of other dairy products are expected to be comparable to 2021 levels. Strong world market dairy prices continue to inspire additional exports and may lead to a 3-year record high export value in 2022.

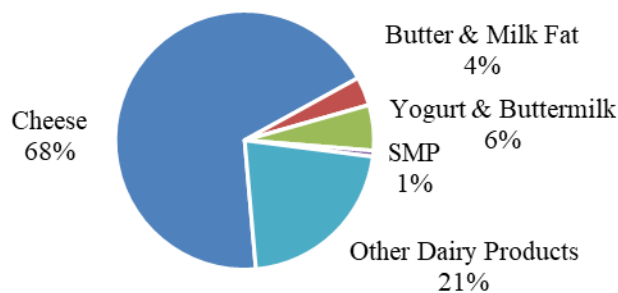
Figure 17. Export of Dairy Products from Ukraine



Source: Association of Dairy Producers of Ukraine, various industry sources

Despite greatly reduced demand and decreased imports of all dairy products, hard cheese will remain the major imported item in 2022, as the domestic industry is unable to cover demand in the middle and upper market segments. Imports of ice cream, butter, SMP, whole dairy products, and children’s dairy products are expected to drop significantly.

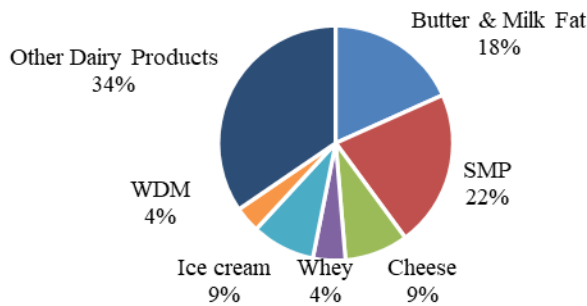
Figure 18. Ukraine's Dairy Imports in Jan-Jul 2022, Percent



Source: Trade Data Monitor, LLC

Exports of butter and SMP became the most attractive for the Ukrainian dairy processors. High global prices are incentivizing exports despite multiple logistical problems. Exporters complain about reefer container shortages and export delays due to long truck lines by Ukraine’s western border. Many insurers refuse to provide coverage for containers going to and out of Ukraine. In many cases, the exporters must deposit money as guarantees. Many truck drivers refuse to drive to Ukraine due to perceived or real risks to their lives. According to industry sources, container delivery costs (Ukraine to EU point to point) almost tripled from prior to the invasion, making industry profit margins slim.

Figure 19. Ukraine's Dairy Exports in 2022, Percent



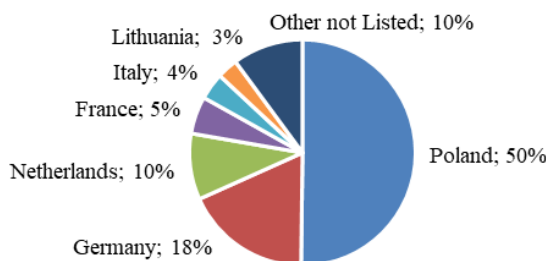
Source: Trade Data Monitor, LLC

Pasteurized milk became a major exportable commodity in 2022. The relocation of a significant number of Ukrainian refugees to Moldova created a dairy product shortage which was covered by Ukrainian processors. The trade flow followed the flow of consumers.

Cheese

Once a major exportable commodity for Ukraine, cheese has become one of Ukraine’s major imports. The domestic industry is not able to cover the demand in an upper and middle market segment, so imports (although decreased) of cheese continued in 2022. Similar to the pre-war situation, EU countries remained the major exporters with the majority of cheese arriving from Poland, Netherlands, France and Italy. Poland and the Netherlands dominated in the middle market segment, while France and Italy were supplying top-segment products.

Figure 20. Ukraine's Cheese Imports, Percent by Volume



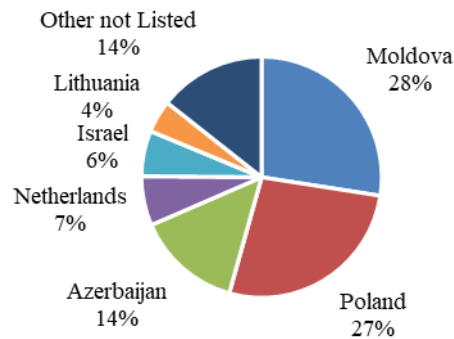
Source: Trade Data Monitor, LLC

Exports of cheese products are small and limited by traditional Ukrainian markets in Moldova and Kazakhstan.

Butter

A butter and SMP combo traditionally was one of the most profitable export commodities for Ukrainian processors during the summer period, when raw milk is abundant and domestic demand is the lowest. The 2022 situation is different because lower demand has lasted throughout nearly the entire year. Butter exports are expected to exceed those of 2021. Processors will build up exportable supplies, despite decreased raw milk supply and decreased overall butter production. The situation is expected to change a bit in the remaining months of 2022. Monthly exports will decline slightly driven by lower dairy yields, but the excess supply situation will remain. Due to the continued contraction of cow inventory, consecutive raw milk and butter production drop is expected to lead to a decrease in butter exports in 2023.

Figure 21. Ukraine's Butter Export in Jan-Jul 2022, Percent of Export Volume



Source: Trade Data Monitor, LLC

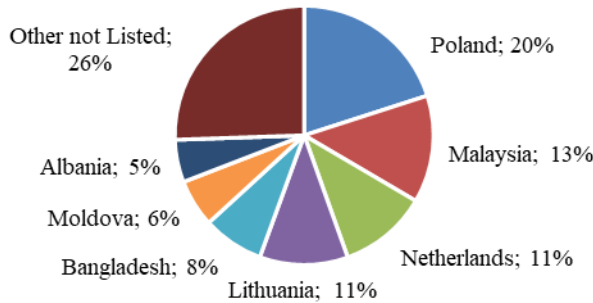
Although Moldova was able to retain its place as a major destination for Ukrainian butter, new EU-based buyers came to play in 2022. Altogether 39 Ukrainian dairy production facilities are [approved for EU](#) exports (with 11 new facilities accredited after the war began in 2022). After the EU's zeroing of import duties for all Ukrainian products in early June, exports of Ukrainian butter to the Netherlands, Poland, and Lithuania increased greatly. Due to significant logistical problems (transshipment of dairy products is possible only through Ukraine's western border and EU countries) exports to traditional buyers like Kazakhstan, Georgia, and Morocco declined. Azerbaijan remains among the top export destination, but the trade volume dropped significantly.

The import of butter in 2022 is insignificant. Imported butter occupies the top segment in a small number of top-end supermarkets. This niche market has shrunk and is not expected to grow during the war.

Skim Milk Powder

Ukraine’s exports of Skim Milk Powder (SMP) grew significantly in 2022 and will remain high during the remaining months of 2022. Similar to butter and milk fat, exports of SMP are expected to exceed the 2021 number despite lower domestic production. Ukraine’s traditional SMP export markets are situated in Southeast Asia, North Africa, and the Middle East.

Figure 22. Ukraine's SMP Exports, Jan-Jul 2022, Percent of Export Volume



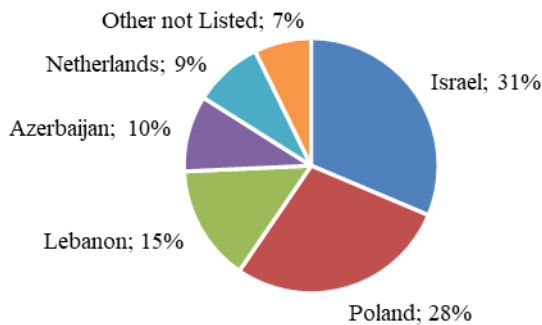
Source: Trade Data Monitor, LLC

The 2022 export geography changed. Large volumes of SMP were imported by European traders based in Poland, the Netherlands, and Lithuania. Ukraine’s SMP export routes are limited to Ukraine’s western borders, which made the trade with EU preferred. The elimination of the EU’s import duties on Ukrainian products and the greatly increased number of Ukrainian processors which can export to the EU contributed to this trade shift.

Whole Milk Powder

Traditionally, WMP production in Ukraine has been insignificant, as the SMP and butter combo provided Ukrainian processors with better margins. The situation did not change in 2022. Exports are not expected to surpass the 2021 pre-war level.

Figure 23. Ukraine's Dry Whole Milk Powder Exports Jan-Jul 2022, Percent of Export Volume



Source: Trade Data Monitor, LLC

Similar to other dairy products, export destination patterns changed in 2022, with EU dairy traders from Poland and the Netherlands occupying a larger market share. Driven by lower milk yields, exports are expected to remain low in 2023.

Annex 1. Dairy Products Production, Supply, and Distribution Tables

Table 1. Fluid Milk Production, Supply, and Distribution*

Dairy, Milk, Fluid Ukraine	2021		2022		2023
	Market Year Begin: Jan 2021		Market Year Begin: Jan 2022		Market Year Begin: Jan 2023
	USDA Official	New Post	USDA Official	New Post	New Post
Cows In Milk	1 722	1 722	1 550	1 450	1 360
Cows Milk Production	8 800	8 710	7 800	7 300	6 800
Other Milk Production	200	200	190	180	180
Total Production	9 000	8 910	7 990	7 480	6 980
Other Imports	13	14	13	14	14
Total Imports	13	14	13	14	14
Total Supply	9 013	8 924	8 003	7 494	6 994
Other Exports	13	15	10	25	15
Total Exports	13	15	10	25	15
Fluid Use Dom. Consum.	4 960	4 814	4 543	4 149	3 829
Factory Use Consum.	3 150	3 270	2 600	2 600	2 500
Feed Use Dom. Consum.	890	825	850	720	650
Total Dom. Consumption	9 000	8 909	7 993	7 469	6 979
Total Distribution	9 013	8 924	8 003	7 494	6 994

**These are not official USDA numbers
Crimea numbers are included*

Table 2. Hard and Soft Cheese Production, Supply and Distribution*

Dairy, Cheese Ukraine	2021		2022		2023
	Market Year Begin: Jan 2021		Market Year Begin: Jan 2022		Market Year Begin: Jan 2023
	USDA Official	New Post	USDA Official	New Post	New Post
Beginning Stocks	7	7	7	10	7
Production	182	187	145	150	145
Other Imports	55	55	30	38	50
Total Imports	55	55	30	38	50
Total Supply	244	249	182	198	202
Other Exports	7	7	5	6	6
Total Exports	7	7	5	6	6
Human Dom. Consumption	230	232	172	185	189
Other Use, Losses	0	0	0	0	0
Total Dom. Consumption	230	232	172	185	189
Total Use	237	239	177	191	195
Ending Stocks	7	10	5	7	7
Total Distribution	244	249	182	198	202

*These are not official USDA numbers
Crimea numbers are included

Table 3. Butter Production, Supply, and Distribution*

Dairy, Butter Ukraine	2021		2022		2023
	Market Year Begin: Jan 2021		Market Year Begin: Jan 2022		Market Year Begin: Jan 2023
	USDA Official	New Post	USDA Official	New Post	New Post
Beginning Stocks	13	13	14	6	6
Production	72	72	60	60	55
Other Imports	10	9	5	1	8
Total Imports	10	9	5	1	8
Total Supply	95	94	79	67	69
Other Exports	9	9	5	10	8
Total Exports	9	9	5	10	8
Domestic Consumption	72	79	70	51	55
Total Use	81	88	75	61	63
Ending Stocks	14	6	4	6	6
Total Distribution	95	94	79	67	69

*These are not official USDA numbers
Crimea numbers are included

Table 4. Skim Milk Powder Production, Supply, and Distribution*

Dairy, Milk, Nonfat Dry Ukraine	2021		2022		2023
	Market Year Begin: Jan 2021		Market Year Begin: Jan 2022		Market Year Begin: Jan 2023
	USDA Official	New Post	USDA Official	New Post	New Post
Beginning Stocks	4	4	3	3	3
Production	28	29	22	23	22
Other Imports	5	5	2	1	2
Total Imports	5	5	2	1	2
Total Supply	37	38	27	27	27
Other Exports	13	13	15	15	11
Total Exports	13	13	15	15	11
Human Dom. Consumption	21	22	9	9	13
Other Use, Losses	0	0	0	0	0
Total Dom. Consumption	21	22	9	9	13
Total Use	34	35	24	24	24
Ending Stocks	3	3	3	3	3
Total Distribution	37	38	27	27	27

**These are not official USDA numbers
Crimea numbers are included*

Table 5. Whole Milk Powder Production, Supply, and Distribution *

Dairy, Dry Whole Milk Powder Ukraine	2021		2022		2023
	Market Year Begin: Jan 2021		Market Year Begin: Jan 2022		Market Year Begin: Jan 2023
	USDA Official	New Post	USDA Official	New Post	New Post
Beginning Stocks	0	0	0	1	0
Production	12	12	10	9	8
Other Imports	1	1	0	0	0
Total Imports	1	1	0	0	0
Total Supply	13	13	10	10	8
Other Exports	4	4	1	2	2
Total Exports	4	4	1	2	2
Human Dom. Consumption	9	8	9	8	6
Other Use, Losses	0	0	0	0	0
Total Dom. Consumption	9	8	9	8	6
Total Use	13	12	10	10	8
Ending Stocks	0	1	0	0	0
Total Distribution	13	13	10	10	8

**These are not official USDA numbers
Crimea numbers are included.*

Attachments:

No Attachments