

**Required Report:** Required - Public Distribution

**Date:** August 13, 2024

**Report Number:** UP2024-0016

**Report Name:** Grain and Feed Quarterly

**Country:** Ukraine

**Post:** Kyiv

**Report Category:** Grain and Feed

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**Report Highlights:**

Ukraine's marketing year (MY)2023/24 has concluded for wheat, barley, and rye, but is still ongoing for corn. Ukraine established a stable export corridor in the Black Sea, allowing its major marine ports (Odesa, Chornomorsk, and Pivdenny) to keep grain exports flowing at rates slightly higher than in MY2022/23. This translated into a drawdown of MY2023/24 ending stocks to the current low levels. The European Union remains major destination for all grains, at the same time, Ukrainian exporters continue to expand their footprint by reclaiming traditional markets previously lost due to Russia's full-scale invasion.

## Abbreviations

MAPFU – the Ministry of Agrarian Policy and Food of Ukraine

CY – Calendar Year

FSI – Food, Seed, and Industrial

ha – Hectare

MY – Marketing Year

MT – Metric Ton

MMT – Million Metric Ton

PSD – Production, Supply, and Distribution

SSSU – State Statistics Service of Ukraine

This Ukraine Grain and Feed Update concentrates on revised production and export forecasts for marketing year (MY) 2023/24 for wheat, barley, and rye (July 2023 to June 2024) and corn (October 2023 to September 2024). Based on currently available planting area and climatic conditions data, Post also revised production and export forecasts for MY2024/25. For detailed information on all estimates and general information about Ukraine's agriculture sector, see FAS/Kyiv's [2024 Ukraine Grain and Feed Annual Report](#).

## Production

Post updated its MY2023/24 production and area estimates based on official data from the State Statistics Service of Ukraine (SSSU) for Ukraine-controlled territory and FAS/Kyiv's estimates for Crimea:

- Barley – 6.1 MMT, similar to Post's MY2022/23 estimate
- Corn – 31.0 MMT, an 18 percent increase
- Wheat – 23.0 MMT, a 4 percent increase
- Rye – 231,000 MT, a 28 percent decrease

The total MY2023/24 production volume for all major grains reached 60.1 MMT, a 10 percent increase compared to Post's previous MY estimate, predominantly due to a spike in corn production.

Ukraine is currently harvesting winter grains. According to Ministry of Agrarian Policy and Food of Ukraine (MAPFU) data, as of August 1, 2024, farmers harvested 4.5 million ha of wheat (92 percent of total area), resulting in 19.4 MMT of grain and 1.3 million ha of barley (93 percent of total area), resulting in 4.8 MMT of grain.

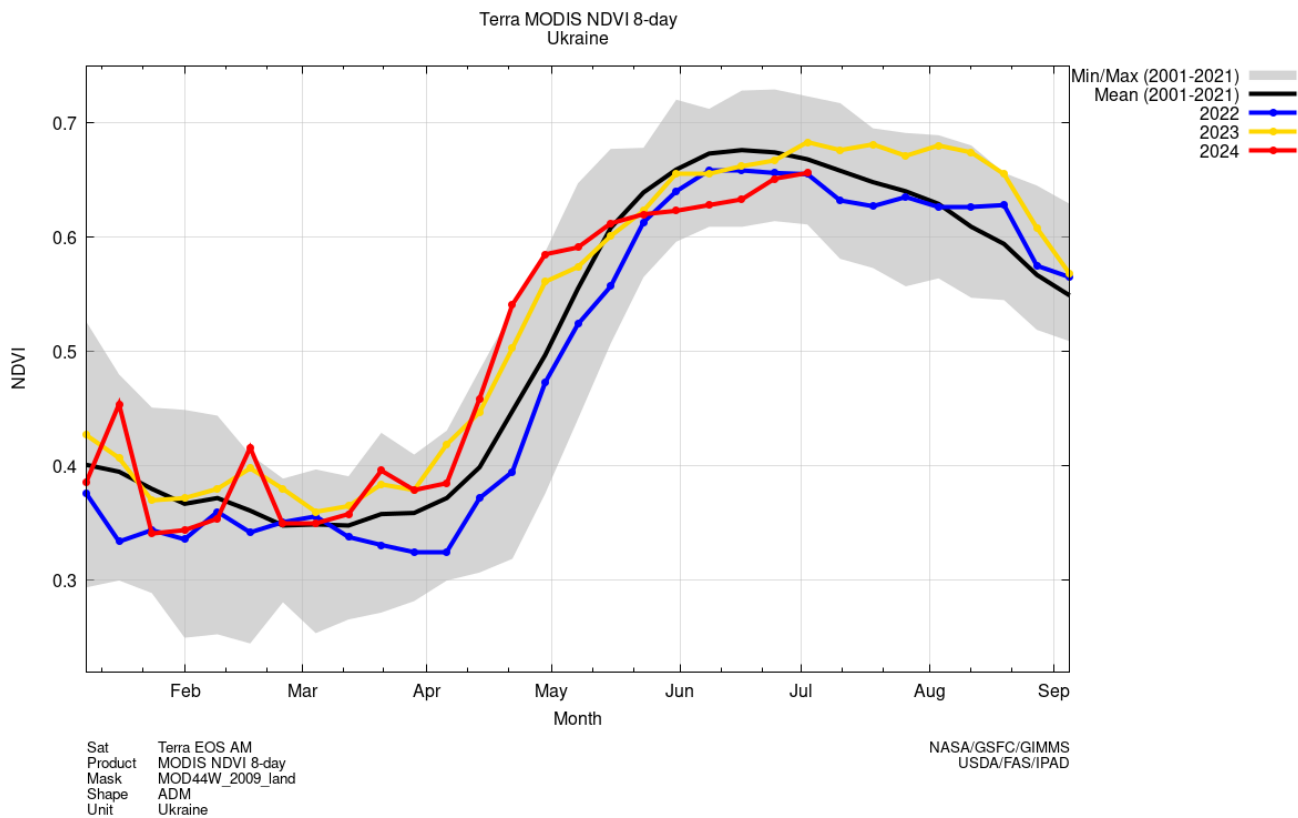
The MY2024/25 production area forecast is based on the recent SSSU production area update and FAS/Kyiv's forecasts for Crimea:

- Barley – 1.5 million ha, a 9 percent decrease against Post's MY2023/24 estimate
- Corn – 4.0 million ha, similar to Post's previous estimate
- Wheat – 5.1 million ha, a 2 percent increase
- Rye – 72,000 ha, a 9 percent decrease

The normalized difference vegetation index (NDVI) (Figure 1) suggests that MY2024/25 growing conditions for winter crops were slightly less favorable as compared to the previous MY. This aligns with MAPFU’s estimate (in Ukrainian) that CY2024 yields for winter crops (wheat, rye, and barley) will be 5 to 7 percent lower than in CY2023.

Note that NDVI is a standardized measure of healthy vegetation. High values indicate healthier vegetation, while low values indicate low or no vegetation.

**Figure 1: NDVI for Ukraine**



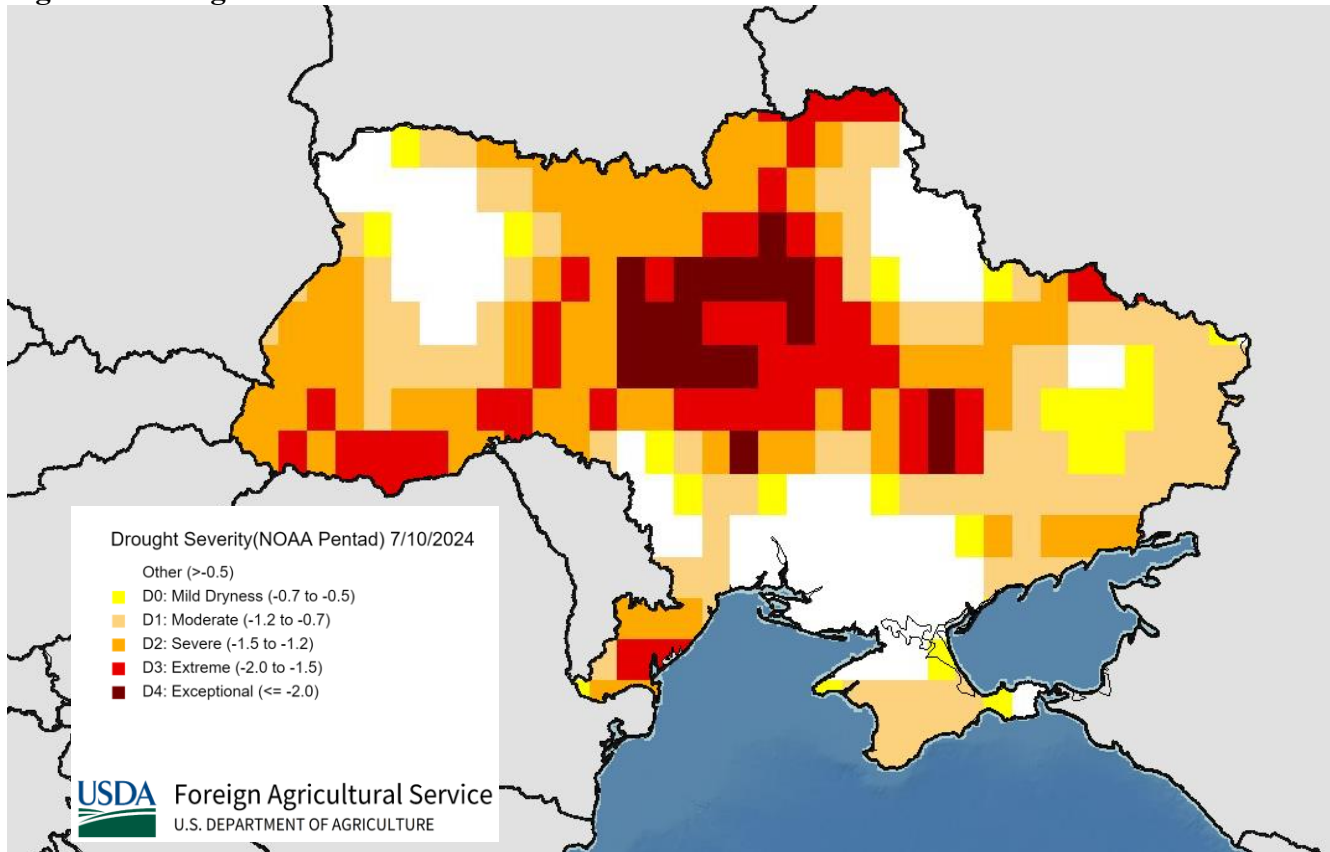
Based on the abovementioned data, FAS/Kyiv decreased its MY2024/25 yield forecasts for all winter grains (wheat, barley, and rye).

Baseline yield forecasts for spring grains (corn and barley) are based on NDVI dynamics for CY2024. FAS/Kyiv further downgraded its corn forecast due to a drought that stretched from the end of June to mid-July 2024. The drought hit plants in the flowering stage, affecting yields (Figure 2).

According to Post’s estimates, drought impacted crops in 11 regions, including Vinnytska, Dnipropetrovska, Ivano-Frankivska, Kyivska, Odeska, Poltavska, Khmelnytska, Cherkaska, Chernivetska, and Chernihivska. However, the actual impact of the drought varied significantly within each region based on a number of factors, including but not limited to, previously available amounts of

soil moisture, planted seed varieties, farming techniques, and the application of fertilizers and agrochemicals.

**Figure 2: Drought Index for Ukraine – Peak Value**



Source: USDA/FAS Global Agricultural & Disaster Assessment System

FAS/Kyiv’s MY2024/25 production forecast is based on a combination of the MAPFU-reported actual crop harvest and FAS/Kyiv’s forecast for spring crops (predominantly corn):

- Barley – 5.7 MMT, a 7 percent decrease against Post’s MY2023/24 estimate
- Corn – 26.2 MMT, a 16 percent decrease
- Wheat – 22.3 MMT, a 3 percent decrease
- Rye – 200,000 MT, a 13 percent decrease

Note that MY2023/24 had record-breaking yields.

## Exports

FAS/Kyiv updated its final export estimates for MY2023/24 based on MAPFU data ([in Ukrainian](#)):

- Barley – 2.5 MMT, a 9 percent decrease compared to Post’s MY2022/23 estimate
- Wheat – 18.1 MMT, a 6 percent increase

For October 2023 to June 2024, MAPFU-reported actual corn exports were 26 MMT, a 7 percent increase compared to the same period in the previous year. FAS/Kyiv estimates MY2023/24 corn exports at 28.0 MMT, a 3 percent increase over Post's MY2022/23 estimate. This estimate is based both on the rate of exports and the availability of stocks on the market.

FAS/Kyiv estimates MY2023/24 rye exports at 3,000 MT, an 83 percent decrease compared to Post's previous MY estimate on the pace of exports through April 2024.

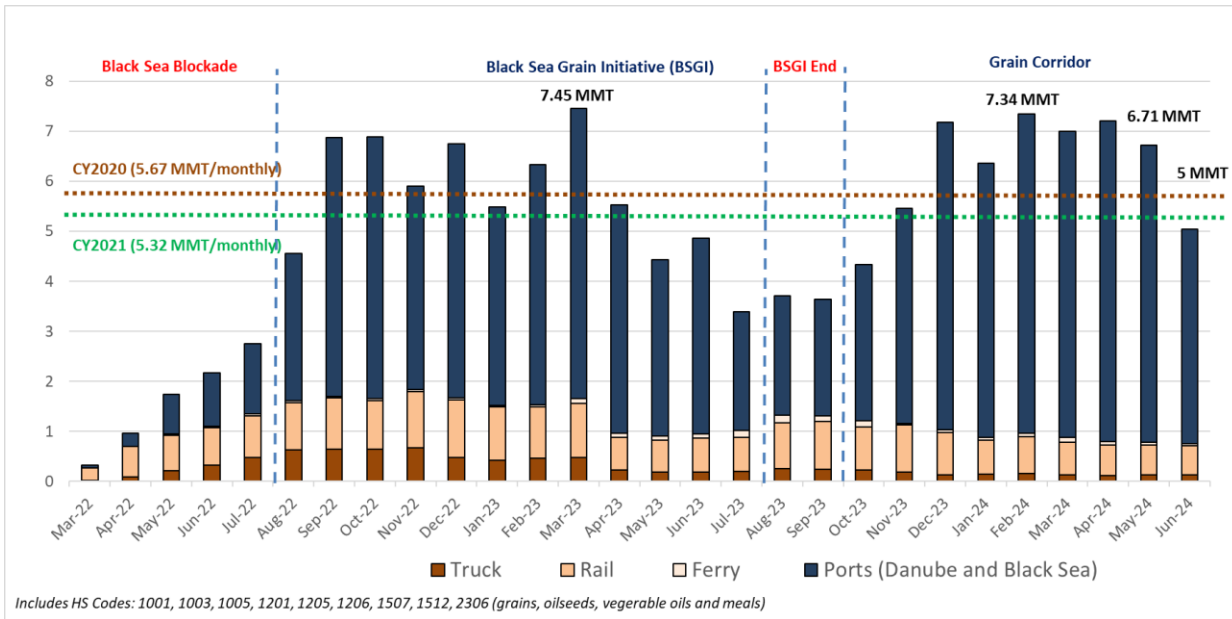
The EU remains the major destination for all grains for MY2023/24, based on export data through April 2024.

Notable MY2023/24 export developments include:

- Barley
  - Exports to China rebounded to 29 percent of total exports, up from 10 percent in MY2022/23.
  - Saudi Arabia, a traditional pre-war market, is back on the buyers list.
  - Exports to the EU fell.
- Corn
  - Exports to Egypt and Türkiye each grew by over 250 percent.
  - Small batches (176,000 MT in total) started going to India.
  - Shipments to the EU and China fell.
- Wheat
  - Exports to two major destinations, the EU and Egypt, grew by 12 percent and 260 percent, respectively.
  - There was a spike in shipments to several smaller destinations (2.5 MMT in total), including Vietnam, Algeria, Lebanon, Israel, Tunisia, and South Korea.
  - Pakistan became a new destination, importing 814,000 MT.
  - This expansion became possible predominantly due to a large drop in exports to Türkiye, from 3.1 MMT to 1.1 MMT.

These strong exports are the result of Ukraine reestablishing an export corridor in the Black Sea following the collapse of Black Sea Grain Initiative (Figure 3).

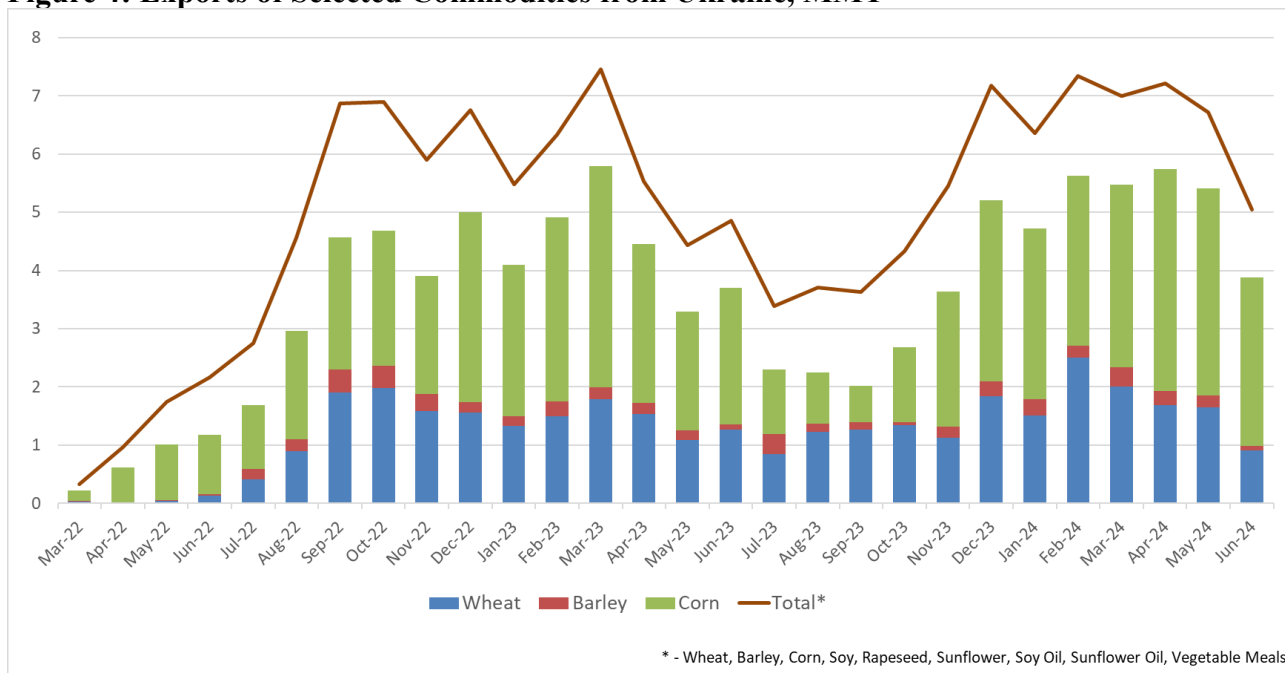
**Figure 3: Exports of Agricultural Commodities by Logistics Channels**



Source: MAPFU

Grains comprise the bulk of agricultural exports. Port shipments offer the most cost-effective export option, as compared to inland transport (railroad and truck). Rebounding port activity enabled Ukraine to draw down its accumulated grain stocks which were built up from MY2021/22, which led to decreasing export volumes between April and June 2024 (Figure 4). In July 2024, the new crop harvest started. Export volumes should begin rebound, with Ukraine returning to pre-full-scale invasion patterns.

**Figure 4: Exports of Selected Commodities from Ukraine, MMT**



Source: MAPFU

Due to the full-scale Russian invasion of Ukraine that began in February 2022, power outages and air strikes are affecting the rhythm, speed, and volume of agricultural exports through seaports. The need for the installation of power generators for inland silos is increasing prices for grain storage and transshipment. At the time of report writing, some elevators do not have a stable power supply, preventing them from executing shipments promptly.

Under the assumption of no large changes to the national energy grid and commercial port infrastructure, FAS/Kyiv’s MY2024/25 export forecasts are:

- Barley: 2.3 MMT, a 6 percent decrease compared to Post’s MY2023/24 estimate
- Corn: 21.8 MMT, a 22 percent decrease
- Wheat: 13.7 MMT, a 24 percent decrease
- Rye: 10,000 MT, a 333 percent increase

The MY2024/25 export forecast drop is the result of decreased production, due to lower areas and climatic conditions (see Production section), and the inability to dip into large stocks to compensate for decreased production (see Stocks section), which was the case in MY2022/23 and MY2023/24.

## Consumption

PSD numbers in this report are based on consumption estimates in the [2024 Ukraine Grain and Feed Annual](#). Please find the distribution of feed consumption numbers for individual crops in Table 1. The distribution of individual grains in total MY2023/24 feed consumption is based on the difference between production volume and exports for this MY. Total feed consumption for MY2024/25 is based on the assumption of continued gradual recovery of animal numbers, which have dropped 9 percent

since February 2022 due to Russia’s full-scale invasion. FAS/Kyiv will subsequently revise the distribution of individual crops in the total MY2024/25 feed ration based on actual exports for individual crops for that period.

**Table 1: Estimated Feed Consumption, thousand MT**

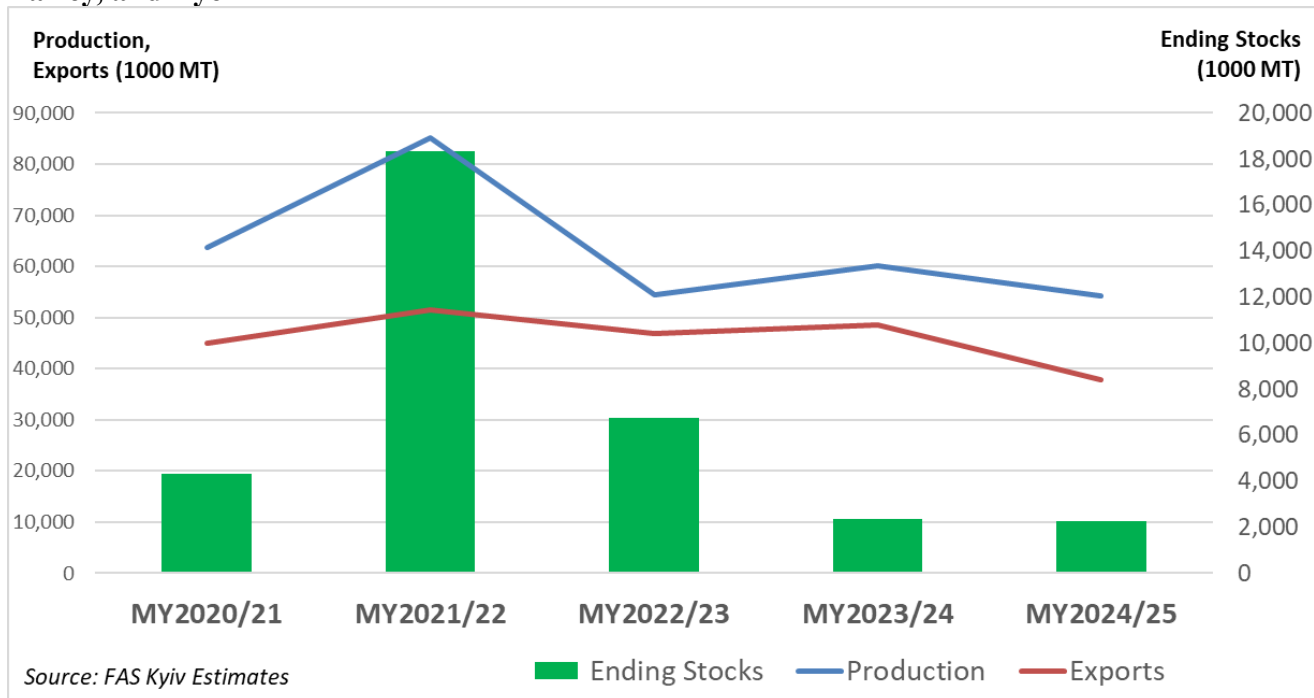
	MY2021/2022	MY2022/2023	MY2023/2024	MY2024/2025
Barley	2,700	2,500	2,400	2,700
Corn	4,000	3,200	4,200	3,500
Rye	2	2	2	2
Wheat	3,600	3,400	2,700	3,400
<b>Total</b>	<b>10,302</b>	<b>9,102</b>	<b>9,302</b>	<b>9,602</b>

Source: FAS/Kyiv estimates

**Stocks**

Post estimates MY2023/24 ending stocks for all grains at 2.4 MMT (Figure 5), a 64 percent decrease compared to Post’s estimate of 7.0 MMT in MY2022/23. The estimated lower MY2023/24 ending stocks are based on increased export estimates for this year. Post forecasts MY2024/25 ending stocks at 2.3 MMT under assumptions that Ukraine will be able to keep its trade routes in the Black Sea open.

**Figure 5: Stocks in Ukraine-Controlled Territory vs. Production and Exports for Wheat, Corn, Barley, and Rye**





## Policy

In May 2024, Ukraine adopted two new laws setting minimum export prices for some agricultural commodities, including all major grains (HS Codes 1001, 1003, 1005, and 1002). These have not been officially enacted at the time of report writing.

According to these laws, the State Customs Service of Ukraine (SCSU) will analyze all export prices from the previous month. Prices will be taken from customs declarations for export on various modes of transport. SCSU will send the lowest five percent of prices for the past month to MAPFU. MAPFU will publish the minimum export prices for each crop on its website based on modes of transport and allow for a 10 percent deviation from the published minimum prices. These minimum prices will be in effect for a month, until SCSU provides its next customs analysis. Exporters will not be able to export their products at prices lower than the minimum prices specified by MAPFU.

According to the notifications by the Government of Ukraine, minimum prices would become functional in August 2024. MAPFU has announced ([in Ukrainian](#)) that it is currently working on establishing administrative procedures.

## PSD Data Statistics

All PSD tables below sum estimated production numbers for Ukraine and Russian-occupied Crimea. The MY2022/23 and MY2023/24 estimates and MY2024/25 forecast do not include data for regions occupied by Russia after the full-scale invasion in February 2022, as data is unavailable for those areas.

**Table 2: Barley**

Barley Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	1950	1922	1680	1676	1500	1521
<b>Beginning Stocks</b> (1000 MT)	780	780	770	821	1122	1066
<b>Production</b> (1000 MT)	6100	6211	6350	6109	5000	5700
<b>MY Imports</b> (1000 MT)	2	2	2	1	2	1
<b>TY Imports</b> (1000 MT)	2	2	2	1	2	1
<b>TY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	6882	6993	7122	6931	6124	6767
<b>MY Exports</b> (1000 MT)	2712	2712	2500	2458	2200	2300
<b>TY Exports</b> (1000 MT)	2559	2559	2300	2458	2200	2300
<b>Feed and Residual</b> (1000 MT)	2400	2500	2500	2400	2300	2700
<b>FSI Consumption</b> (1000 MT)	1000	960	1000	1007	1000	1007
<b>Total Consumption</b> (1000 MT)	3400	3460	3500	3407	3300	3707
<b>Ending Stocks</b> (1000 MT)	770	821	1122	1066	624	760
<b>Total Distribution</b> (1000 MT)	6882	6993	7122	6931	6124	6767
<b>Yield</b> (MT/HA)	3.1282	3.2315	3.7798	3.645	3.3333	3.7475

(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 2024/2025 = October 2024 - September 2025

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

Post's MY2024/25 barley production forecast is 14 percent higher than USDA's official number on MAPFU production numbers.

Post's MY2024/25 barley feed and residual forecast is 17 percent higher than USDA's official number on distribution of individual crops in feeding diets.

Post's MY2024/25 barley ending stocks forecast is 22 percent higher than USDA's official number on increased production and lower export forecasts for MY2024/25.

**Table 3: Corn**

Corn Market Year Begins  Ukraine	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4050	4128	4000	3978	3900	4026
Beginning Stocks (1000 MT)	7796	7796	2795	2815	1510	750
Production (1000 MT)	27000	26200	31000	31043	27700	26200
MY Imports (1000 MT)	21	21	15	15	20	20
TY Imports (1000 MT)	21	21	15	15	20	20
TY Imp. from U.S. (1000 MT)	0	0	0	1	0	1
Total Supply (1000 MT)	34817	34017	33810	33873	29230	26970
MY Exports (1000 MT)	27122	27122	28000	28000	24500	21800
TY Exports (1000 MT)	27122	27122	28000	28000	24500	21800
Feed and Residual (1000 MT)	4000	3200	3300	4200	3100	3500
FSI Consumption (1000 MT)	900	880	1000	923	950	928
Total Consumption (1000 MT)	4900	4080	4300	5123	4050	4428
Ending Stocks (1000 MT)	2795	2815	1510	750	680	742
Total Distribution (1000 MT)	34817	34017	33810	33873	29230	26970
Yield (MT/HA)	6.6667	6.3469	7.75	7.8037	7.1026	6.5077
(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 2024/2025 = October 2024 - September 2025						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

Post's MY2024/25 corn beginning stocks forecast is 50 percent lower than USDA's official number on Post's increased MY2023/24 feed and residual estimate.

Post's MY2024/25 corn export forecast is 11 percent lower than USDA's official number on decreased production.

Post's MY2024/25 corn feed and residual forecast is 13 percent higher than USDA's official number on distribution of individual crops in feeding diets.

**Table 4: Wheat**

Wheat Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Ukraine	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5600	5631	5010	5007	4700	5121
Beginning Stocks (1000 MT)	6265	6265	2902	3102	1082	559
Production (1000 MT)	21500	22075	23000	22970	19500	22300
MY Imports (1000 MT)	59	83	80	63	80	80
TY Imports (1000 MT)	59	83	80	63	80	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	27824	28423	25982	26135	20662	22939
MY Exports (1000 MT)	17122	17122	18100	18076	13000	13700
TY Exports (1000 MT)	17122	17122	18100	18076	13000	13700
Feed and Residual (1000 MT)	3000	3400	2000	2700	2000	3400
FSI Consumption (1000 MT)	4800	4799	4800	4800	4700	5061
Total Consumption (1000 MT)	7800	8199	6800	7500	6700	8461
Ending Stocks (1000 MT)	2902	3102	1082	559	962	778
Total Distribution (1000 MT)	27824	28423	25982	26135	20662	22939
Yield (MT/HA)	3.8393	3.9203	4.5908	4.5876	4.1489	4.3546

(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 2024/2025 = July 2024 - June 2025

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

Note: In Table 4, 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 added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of wheat trade by Ukraine.

Post's MY2024/25 wheat beginning stocks forecast is 48 percent lower than USDA's official number on Post's higher MY2023/24 feed and residual estimate.

Post's MY2024/25 wheat production forecast is 14 percent higher than USDA's official number on MAPFU production numbers.

Post's MY2024/25 wheat feed and residual forecast is 70 percent higher than USDA's official number on the distribution of individual crops in feeding diets.

Post's MY2024/25 wheat ending stocks forecast is 19 percent lower than USDA's official number on lower MY2024/25 beginning stocks.

**Table 5: Rye**

Rye Market Year Begins  Ukraine	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	100	106	80	78	80	72
<b>Beginning Stocks</b> (1000 MT)	164	164	184	202	67	151
<b>Production</b> (1000 MT)	315	322	240	231	230	200
<b>MY Imports</b> (1000 MT)	0	0	0	0	0	0
<b>TY Imports</b> (1000 MT)	0	0	0	0	0	0
<b>TY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	479	486	424	433	297	351
<b>MY Exports</b> (1000 MT)	18	18	5	3	10	10
<b>TY Exports</b> (1000 MT)	14	14	5	3	10	10
<b>Feed and Residual</b> (1000 MT)	2	2	2	2	2	2
<b>FSI Consumption</b> (1000 MT)	275	264	350	277	240	278
<b>Total Consumption</b> (1000 MT)	277	266	352	279	242	280
<b>Ending Stocks</b> (1000 MT)	184	202	67	151	45	61
<b>Total Distribution</b> (1000 MT)	479	486	424	433	297	351
<b>Yield</b> (MT/HA)	3.15	3.0377	3	2.9615	2.875	2.7778
(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 2024/2025 = October 2024 - September 2025						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

Post's MY2024/25 rye beginning stocks forecast is 225 percent higher than USDA's official number on higher production and lower export estimates for MY2023/24.

Post's MY2024/25 rye production forecast is 13 percent lower than USDA's official number on lower forecasted area and yield.

Post's MY2024/25 rye FSI forecast is 16 percent higher than USDA's official number on the assumption that refugees will continue to return to Ukraine.

Post's MY2024/25 rye ending stocks forecast is 36 percent higher than USDA's official number on lower production and increased domestic consumption for MY2024/25.

**Attachments:**

No Attachments