

# Ukraine and the EU –agricultural trade partners of competitors?

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UNIVERSITY Agricultural Economics

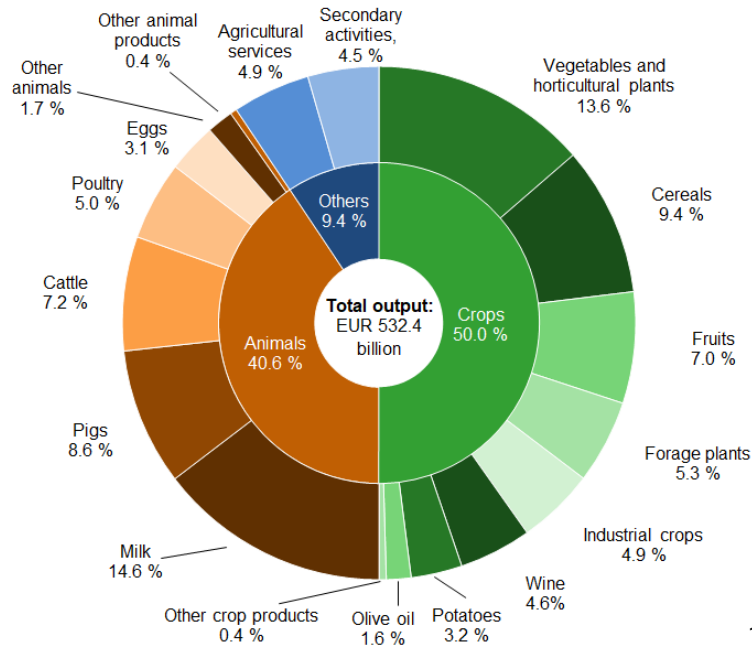
## OUTLINE:

- Crop production in the EU
- The EU agricultural trade
- Evolution of grain and oilseed trade of Ukraine with the EU
- Ukraine's grain and oilseed production and trade in 2025/26: updates

\* *Dynamics of grain and oilseed prices*



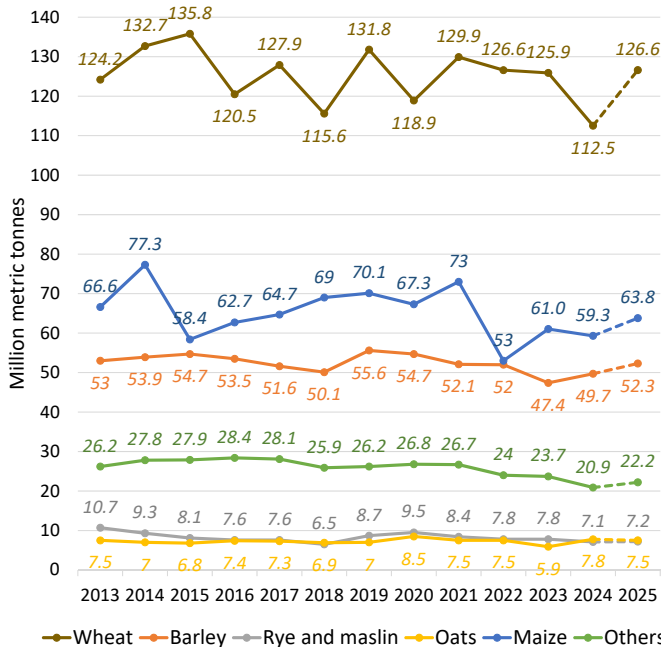
OUTPUT OF THE EU AGRICULTURAL INDUSTRY IN 2024



1 Euro = 1.15 US Dollar

Source: Eurostat

CEREAL CROP PRODUCTION IN THE EU-27

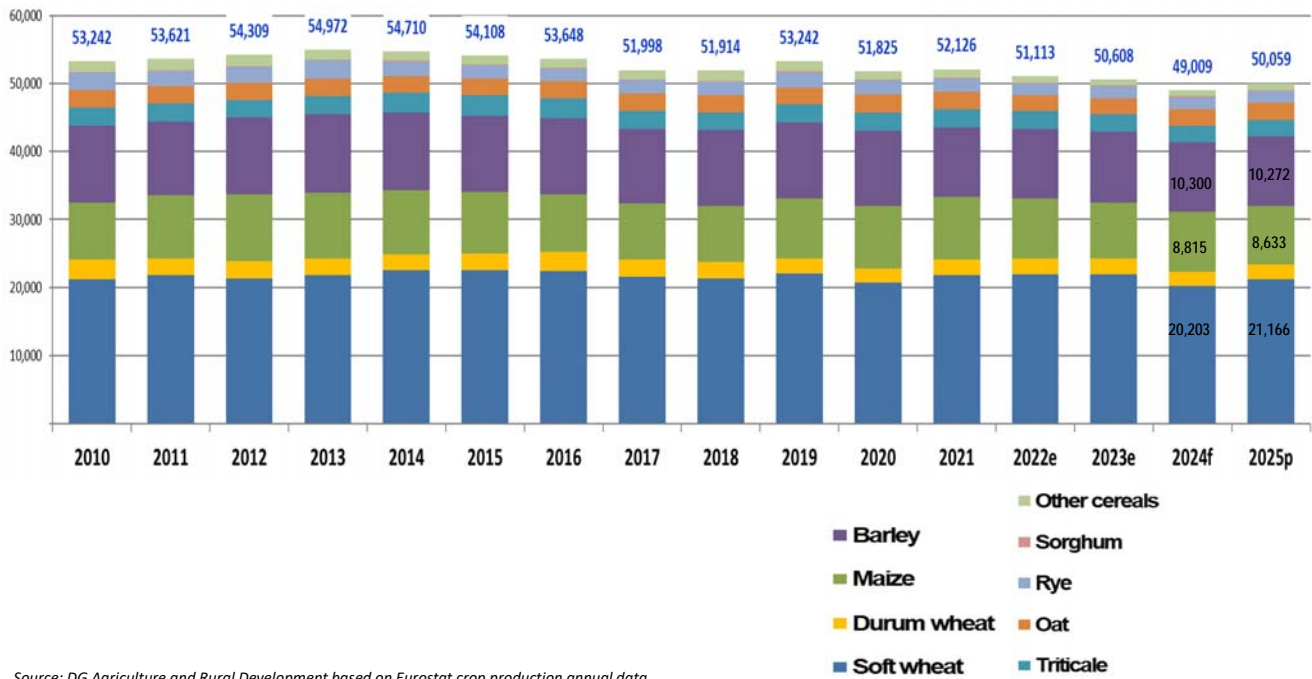


Crops	5-yr Avg (2020-2024) (1000 Tons)	2024/25 (1000 Tons)	Forecast 2025/26 (1000 Tons)	% Change 2025-26 to Avg
Wheat	131,431	122,123	136,550	4 %
Corn	62,550	59,312	60,000	-4 %
Barley	51,272	50,328	53,300	3 %
Sorghum	842	1,089	975	16 %
Rice	1,563	1,595	1,770	13 %

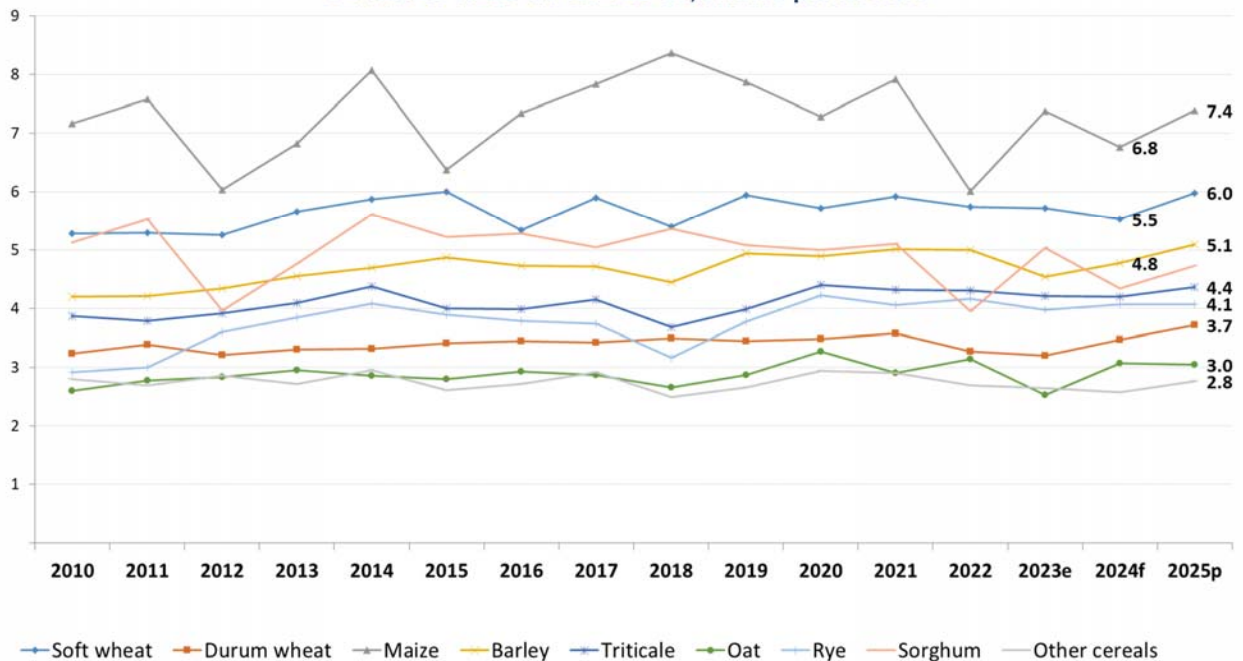
Source: USDA-FAS

Source: Eurostat

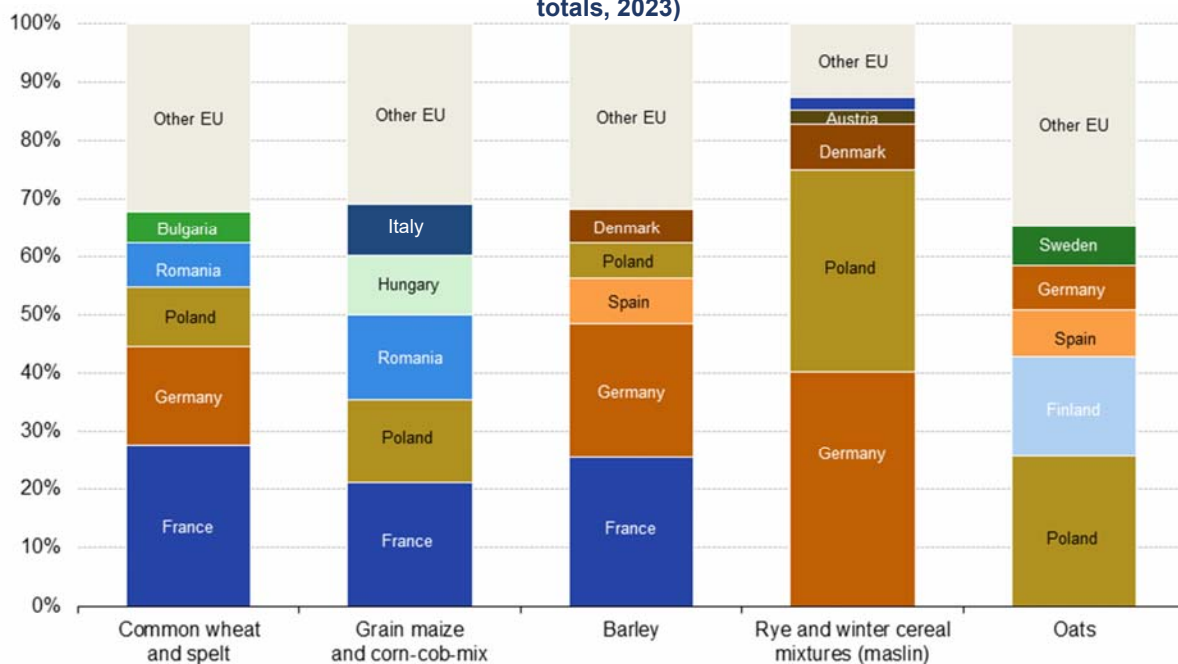
**CEREALS AREA IN THE EU-27, thousand hectares**



**CEREALS YIELD IN THE EU-27, tonnes per hectare**

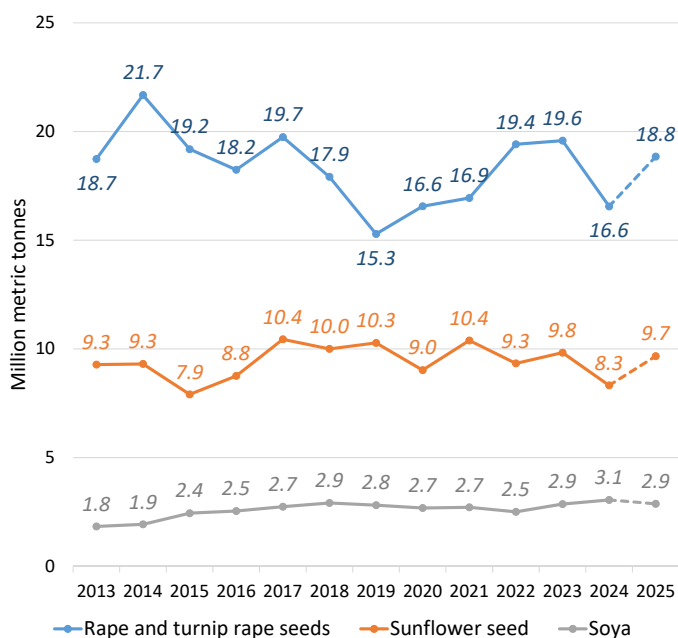


### PRODUCTION OF CEREALS BY MAIN PRODUCING MEMBER STATES (% of EU totals, 2023)



Source: Eurostat

### OILSEEDS PRODUCTION IN THE EU-27

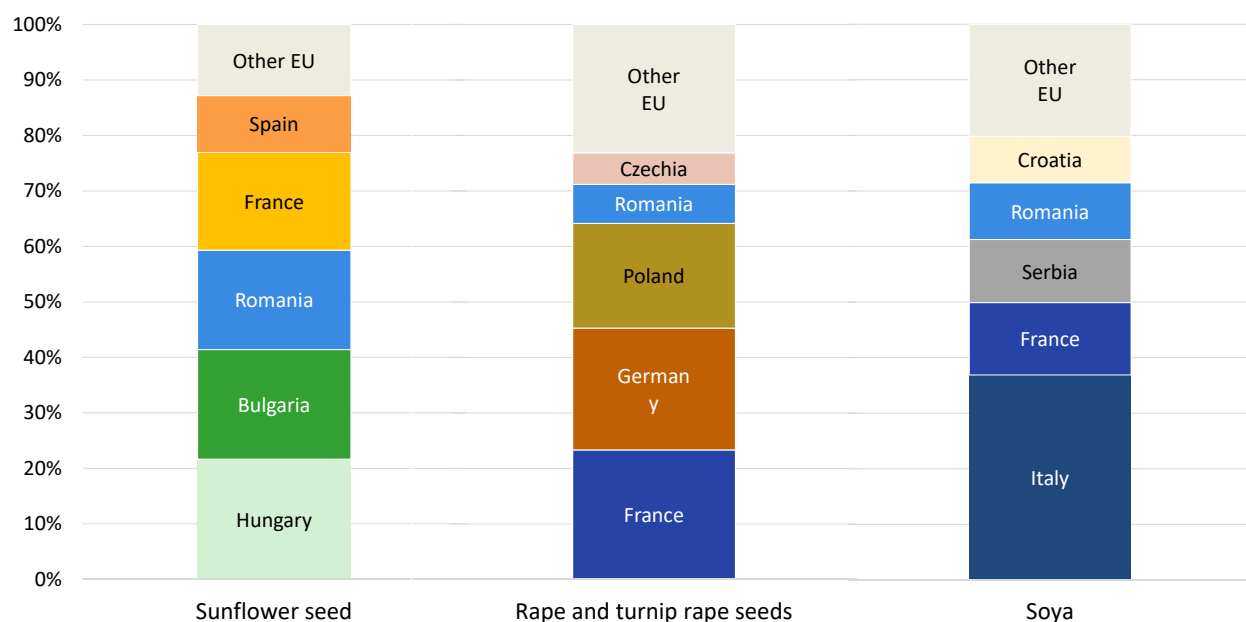


Source: Eurostat

Crops	5-yr Avg (2020-2024) (1000 Tons)	2024/25 (1000 Tons)	Forecast 2025/26 (1000 Tons)	% Change 2025-26 to Avg
Sunflower seed	9,445	8,532	10,000	6 %
Soybean	2,754	2,921	2,950	7 %
Rapeseed	18,205	16,861	19,350	6 %

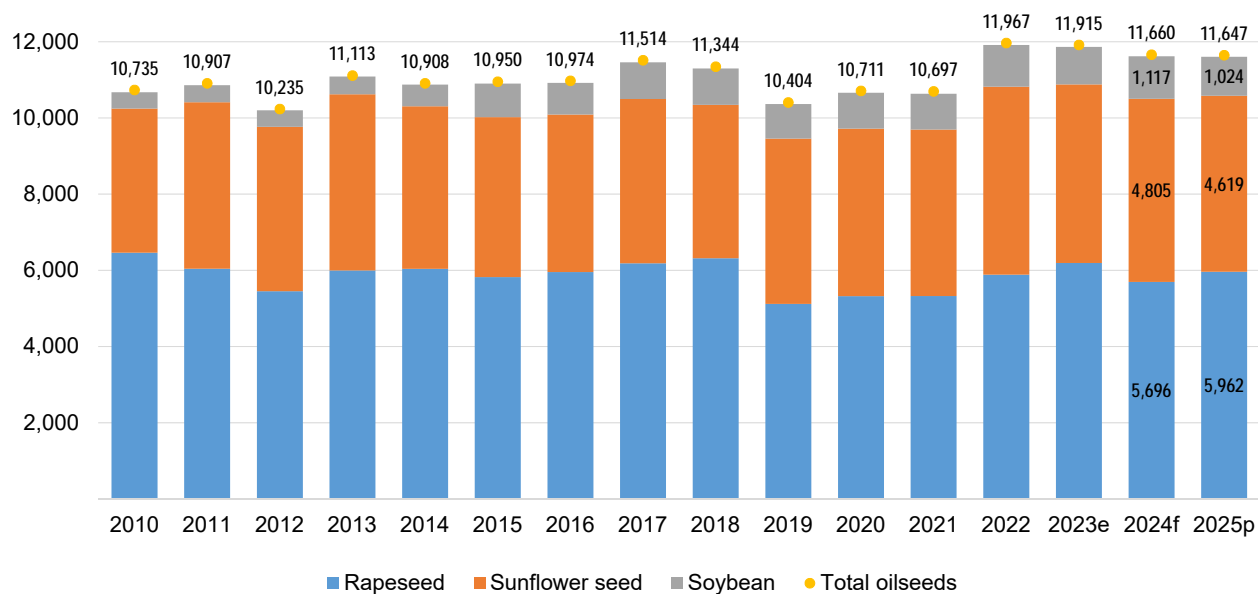
Source: USDA-FAS

### PRODUCTION OF OILSEEDS BY MAIN PRODUCING MEMBER STATES (% of EU totals, 2024)



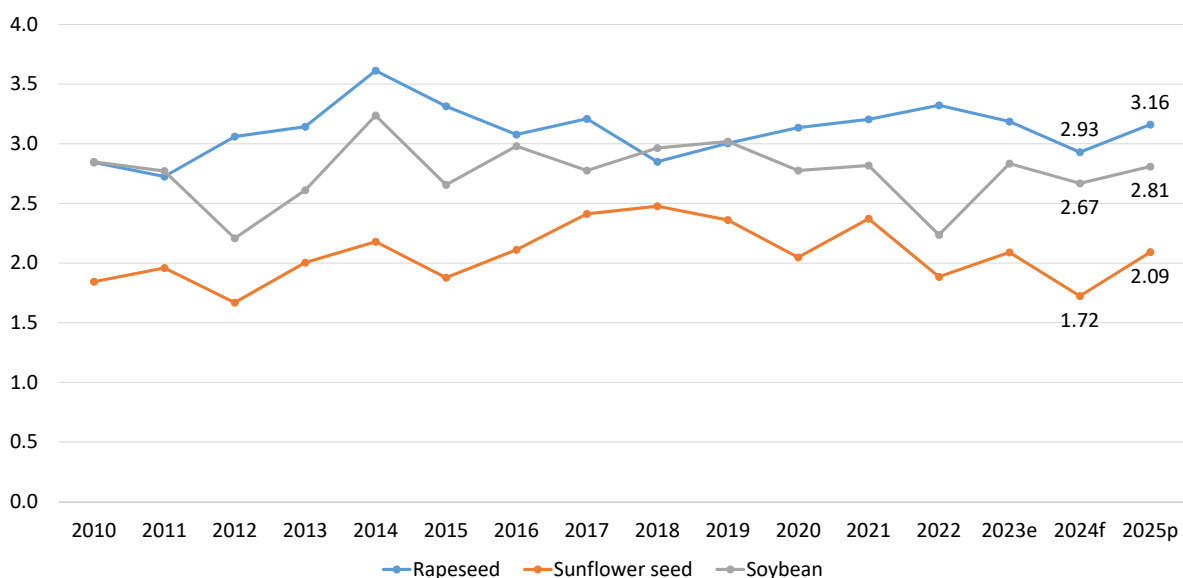
Source: Eurostat

### OILSEADS AREA IN THE EU-27, thousand hectares



Source: DG Agriculture and Rural Development based on Eurostat crop production annual data

### OILSEEDS YIELD IN THE EU-27, tonnes per hectare



Source: DG Agriculture and Rural Development based on Eurostat crop production annual data

### BALANCE OF SUPPLY AND DEMAND OF GRAINS IN THE EU, thousand metric tonnes (forecast as of June, 2025)

#### TOTAL CEREALS

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	51,075	43,895	37,036	-15.6 %
Gross harvest	267,841	255,220	279,620	9.6 %
Import	33,570	31,579	25,586	-19.0 %
<b>Total supply</b>	<b>352,486</b>	<b>330,693</b>	<b>342,243</b>	<b>3.5 %</b>
<b>Domestic use:</b>	<b>256,965</b>	<b>257,040</b>	<b>257,333</b>	<b>0.1 %</b>
food	59,216	59,367	59,466	0.2 %
fodder	156,850	156,850	156,898	0.0 %
Export	51,626	36,617	45,396	24.0 %
Ending stocks	43,895	37,036	39,514	6.7 %

#### BARLEY

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	5,663	3,644	2,989	-18.0 %
Gross harvest	47,047	49,135	52,334	6.5 %
Import	1,966	1,300	1,505	15.8 %
<b>Total supply</b>	<b>54,676</b>	<b>54,079</b>	<b>56,828</b>	<b>5.1 %</b>
<b>Domestic use:</b>	<b>41,077</b>	<b>42,090</b>	<b>42,110</b>	<b>0.0 %</b>
food	364	365	365	0.2 %
fodder	31,500	32,500	32,500	=
Export	9,955	9,000	10,112	12.4 %
Ending stocks	3,644	2,989	4,606	54.1 %

#### WHEAT

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	19,708	17,212	11,055	-35.8 %
Gross harvest	125,185	111,678	126,565	13.3 %
Import	9,603	7,800	3,000	-61.5 %
<b>Total supply</b>	<b>154,496</b>	<b>136,690</b>	<b>140,620</b>	<b>2.9 %</b>
<b>Domestic use:</b>	<b>101,910</b>	<b>101,635</b>	<b>101,793</b>	<b>0.2 %</b>
food	41,559	41,665	41,734	0.2 %
fodder	45,800	45,500	45,500	=
Export	35,374	24,000	29,780	24.1 %
Ending stocks	17,212	11,055	9,046	-18.2 %

#### CORN

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	20,207	19,214	19,686	2.5 %
Gross harvest	61,225	59,583	63,782	7.0 %
Import	19,028	19,500	18,260	-6.4 %
<b>Total supply</b>	<b>100,460</b>	<b>98,297</b>	<b>101,728</b>	<b>3.5 %</b>
<b>Domestic use:</b>	<b>76,409</b>	<b>76,111</b>	<b>76,944</b>	<b>1.1 %</b>
food	4,739	4,751	4,759	0.2 %
fodder	58,900	58,600	59,400	1.4 %
Export	4,837	2,500	4,227	69.1 %
Ending stocks	19,214	19,686	20,558	4.4 %

Source: European Commission

# **BALANCE OF SUPPLY AND DEMAND OF OILSEEDS IN THE EU, thousand metric tonnes** *(forecast as of June, 2025)*

## **RAPESEED**

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	500	833	833	=
Gross harvest	19,737	16,688	18,849	-12.9 %
Import	5,457	6,478	5,778	-10.8 %
<b>Total supply</b>	<b>25,694</b>	<b>24,000</b>	<b>25,461</b>	<b>6.1 %</b>
Domestic use:	24,326	22,778	24,188	6.2 %
crushing	23,659	22,295	23,667	6.2 %
Export	224	389	439	12.8 %
Ending stocks	1,300	833	833	=

## **SOYA BEANS**

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	1,200	1,300	1,300	=
Gross harvest	2,792	2,982	2,876	-3.6 %
Import	13,242	14,831	14,231	-4.0 %
<b>Total supply</b>	<b>17,234</b>	<b>19,113</b>	<b>18,406</b>	<b>-3.7 %</b>
Domestic use:	15,710	17,419	16,872	-3.1 %
crushing	13,615	15,183	14,669	-3.4 %
Export	224	394	234	-40.6 %
Ending stocks	1,300	1,300	1,300	=

## **SUNFLOWER**

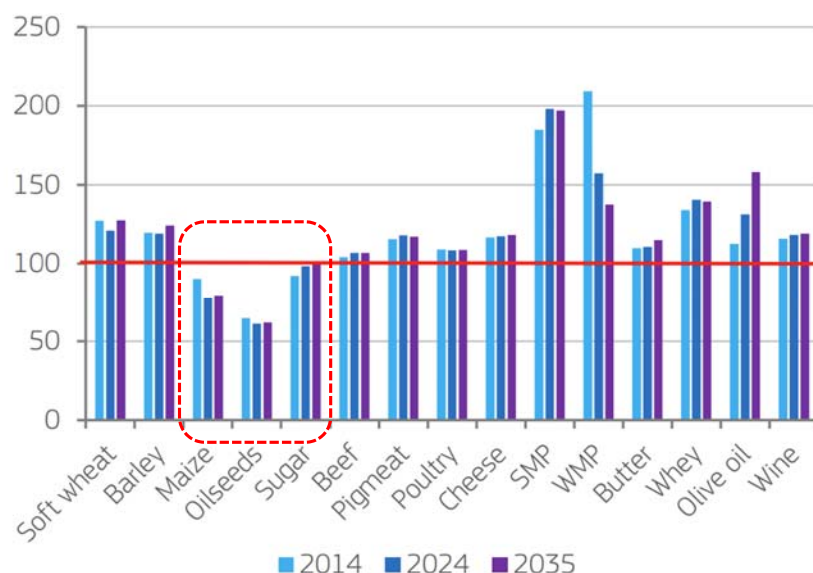
	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	867	878	878	=
Gross harvest	9,799	8,286	9,666	16.7 %
Import	765	679	979	44.2 %
<b>Total supply</b>	<b>11,431</b>	<b>9,843</b>	<b>11,523</b>	<b>17.1 %</b>
Domestic use:	10,080	8,449	10,109	19.6 %
crushing	8,910	7,378	8,893	20.5 %
Export	474	516	536	3.9 %
Ending stocks	878	878	878	=

## **SUNFLOWER OIL**

	2023/24	2024/25	2025/26*	2025/26* to 2024/25
Initial stocks	271	271	271	=
Production	3,742	3,099	3,735	20.5 %
Import	2,965	2,125	2,117	-0.4 %
<b>Total supply</b>	<b>6,979</b>	<b>5,494</b>	<b>6,123</b>	<b>11.5 %</b>
Domestic use:	5,637	4,520	4,979	10.2 %
Export	1,071	703	873	24.2 %
Ending stocks	271	271	271	=

Source: European Commission

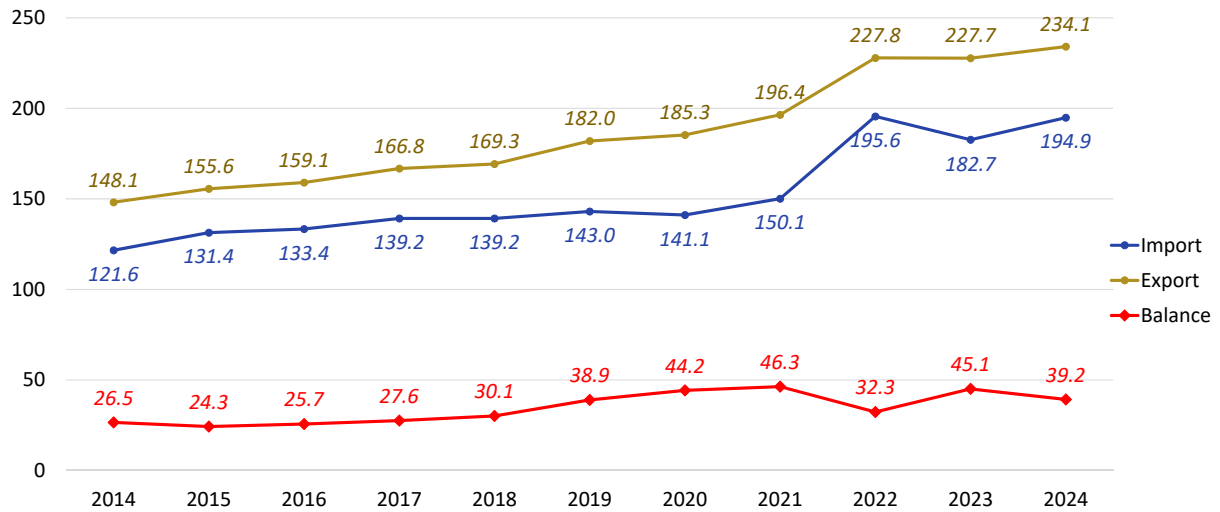
# **EU SELF-SUFFICIENCY RATES FOR SELECTED AGRICULTURAL COMMODITIES (%)**



Note: Self-sufficiency rates are calculated as production/consumption. A value above 100 indicates the capacity to export  
SMP - Skim Milk Powder; WMP - Whole Milk Powder

Source: European Commission

## EU TRADE IN AGRICULTURAL PRODUCTS WITH THE REST OF THE WORLD, € billion



**Share of agri-food trade in the EU27 total trade in 2024:**

- Exports – 9.1%
- Imports – 7.1%

Source: Eurostat

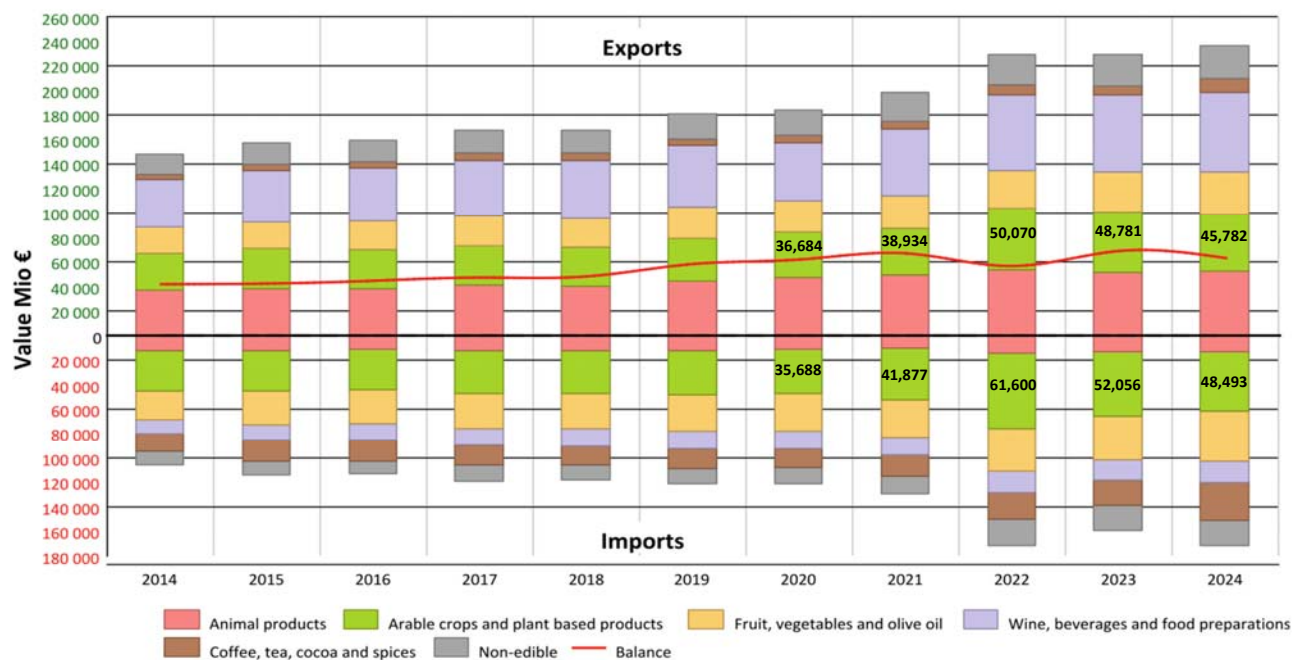
## RANKING OF EU MAIN AGRI-FOOD TRADE PARTNERS AND UKRAINE

Top Destinations: 2024				Top Origins: 2024			
		Value, mln €	% Share Extra-EU			Value, mln €	% Share Extra-EU
1	United Kingdom	53 944	22.9 %	1	Brazil	17 426	10.1 %
2	United States	30 534	13.0 %	2	United Kingdom	15 391	9.0 %
3	China	13 242	5.6 %	3	Ukraine	13 094	7.6 %
4	Switzerland	12 272	5.2 %	4	United States	11 947	7.0 %
5	Japan	8 334	3.5 %	5	China	9 154	5.3 %
6	Norway	6 037	2.6 %	6	Türkiye	7 314	4.3 %
7	Russia	6 010	2.6 %	7	Ivory Coast	6 760	3.9 %
8	Türkiye	5 166	2.2 %	8	Argentina	5 558	3.2 %
9	Canada	4 809	2.0 %	9	Indonesia	5 266	3.1 %
10	Saudi Arabia	4 622	2.0 %	10	Switzerland	5 048	2.9 %
11	South Korea	4 271	1.8 %	11	India	3 974	2.3 %
12	Australia	4 170	1.8 %	12	Vietnam	3 836	2.2 %
13	Ukraine	3 634	1.5 %	13	Peru	3 766	2.2 %
14	Morocco	3 605	1.5 %	14	Morocco	3 447	2.0 %
15	United Arab Emirates	3 361	1.4 %	15	Malaysia	3 279	1.9 %
16	Israel	2 903	1.2 %	16	South Africa	2 791	1.6 %
17	Algeria	2 824	1.2 %	17	Ecuador	2 764	1.6 %
18	Brazil	2 812	1.2 %	18	Canada	2 539	1.5 %
19	Serbia	2 698	1.1 %	19	Colombia	2 527	1.5 %
20	Mexico	2 668	1.1 %	20	Serbia	2 312	1.3 %
Rest of the World		57 491	24.0 %	Rest of the World		43 692	25.1 %

Source: European Commission

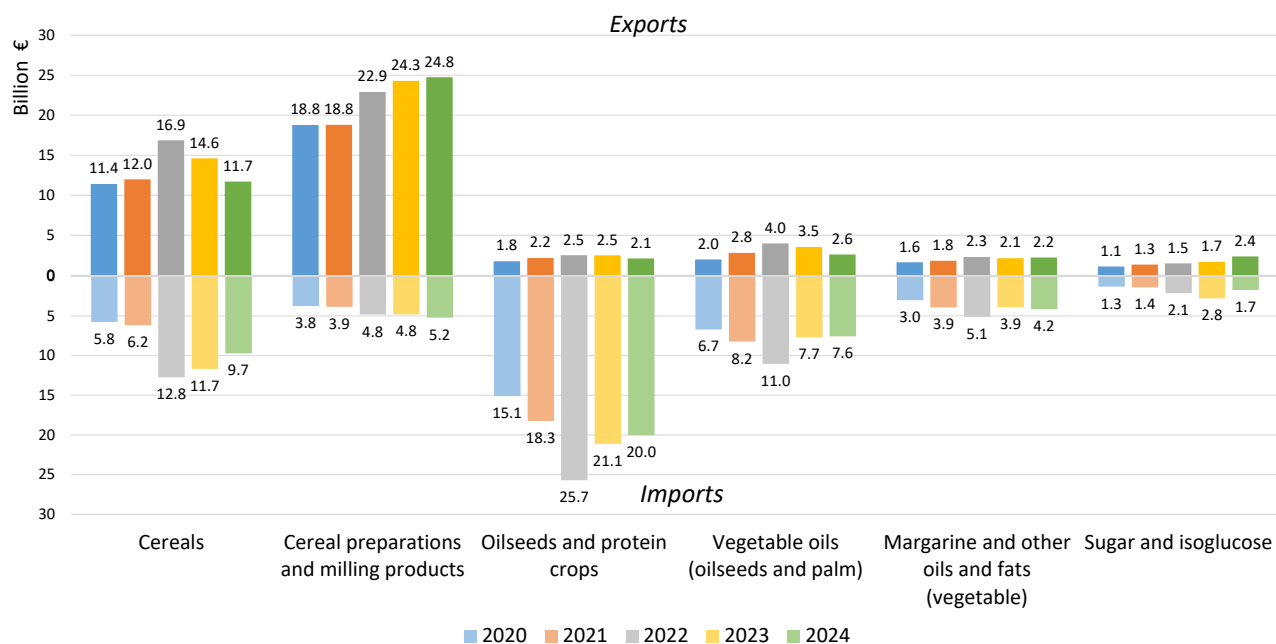


## STRUCTURE OF EU AGRI-FOOD TRADE WITH THE REST OF THE WORLD, 2014 - 2024



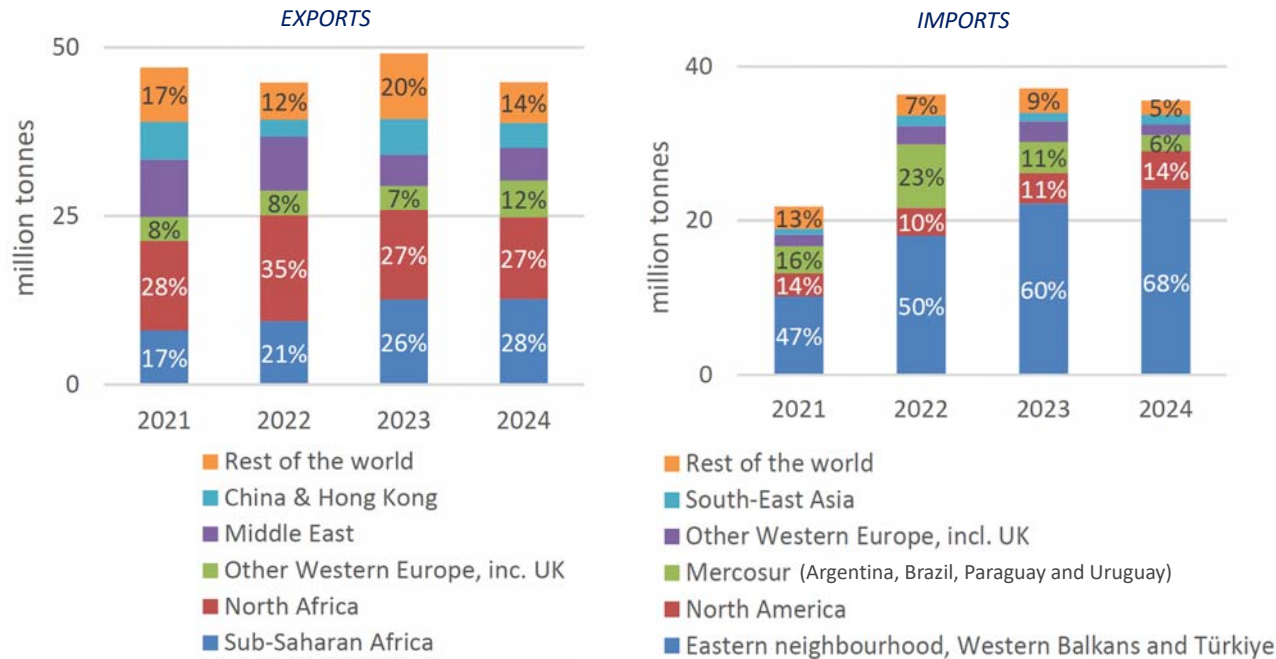
Source: European Commission

## ARABLE CROPS AND PLANT-BASED PRODUCTS : EU TRADE WITH THE REST OF THE WORLD, 2020 – 2024, billion €

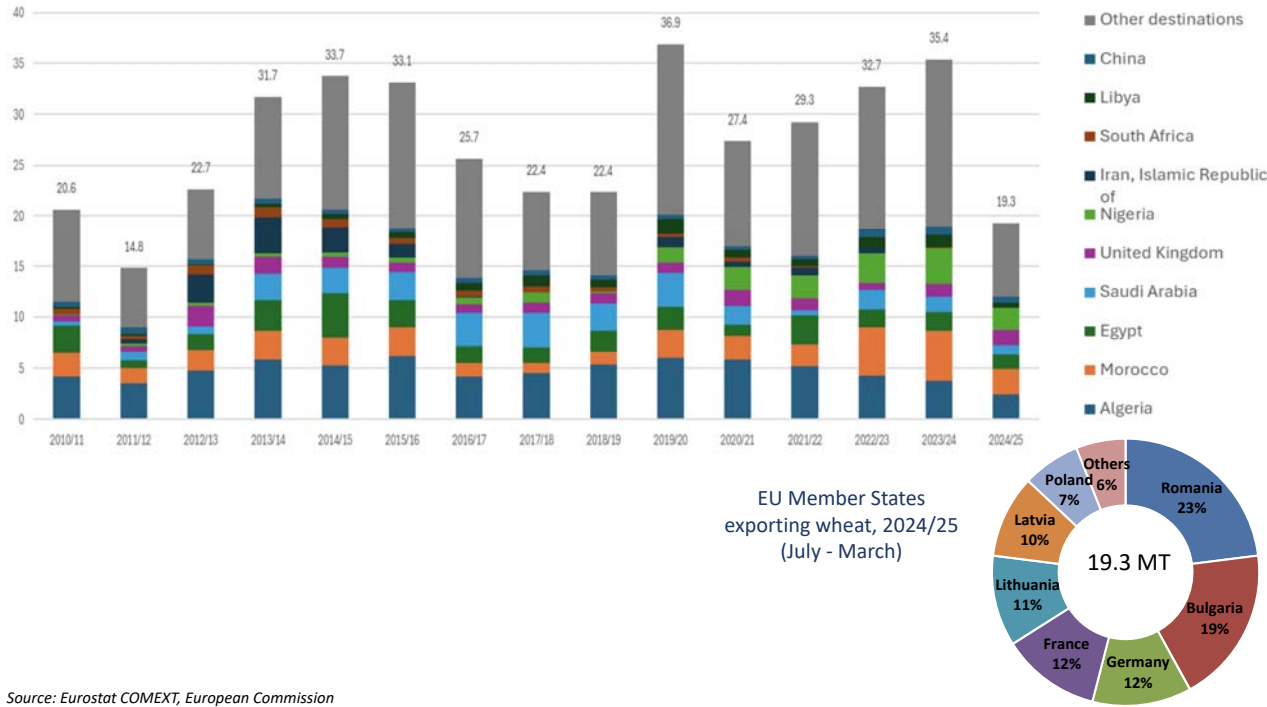


Source: COMEXT-EUROSTAT

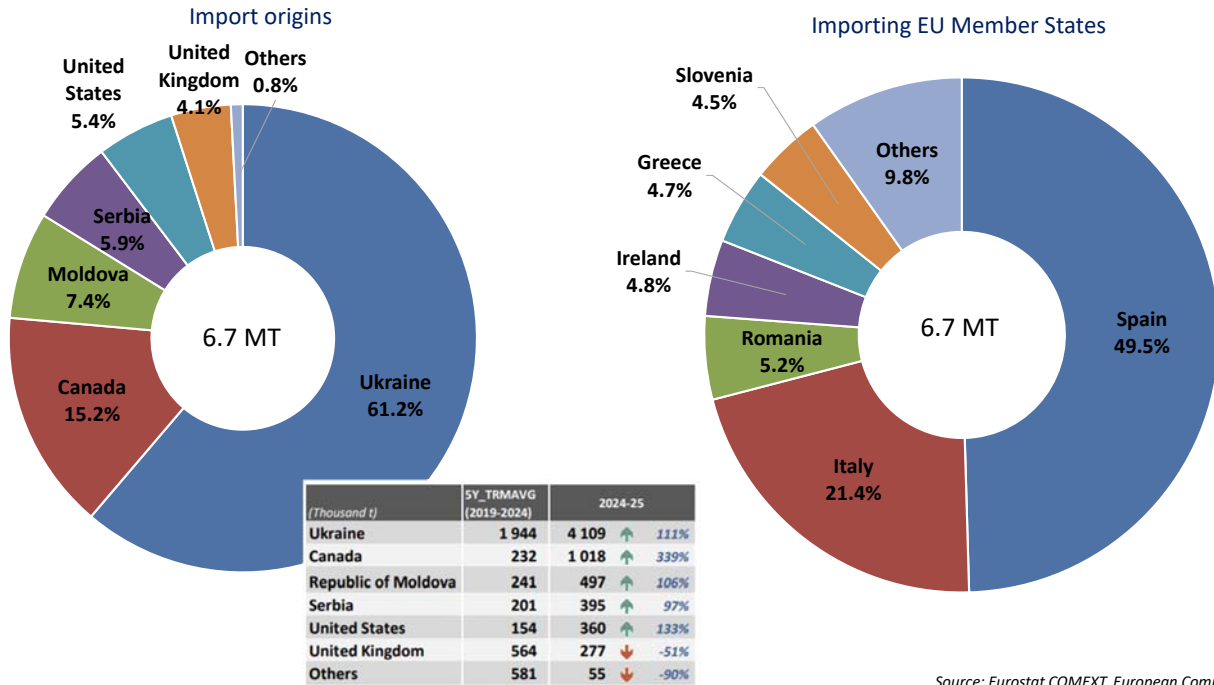
EU CEREALS EXPORTS AND IMPORTS BY DESTINATION REGION IN VOLUME, million metric tonnes



EU27 EXPORTS OF WHEAT, million metric tonnes

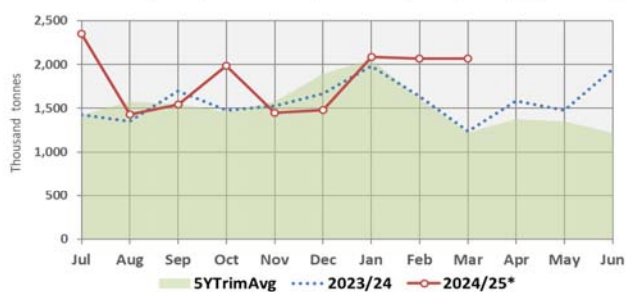


## EU27 IMPORTS OF WHEAT IN JULY-MARCH OF 2024/25 MY, million metric tonnes



## EU27 EXPORTS AND IMPORTS OF MAIZE (including processing products), million metric tonnes

EU: Maize (Incl. processed products) - Import (by month)



EU: Maize (Incl. processed products) - Export (by month)



EU: Maize (Incl. processed products) - Import (cumulative)

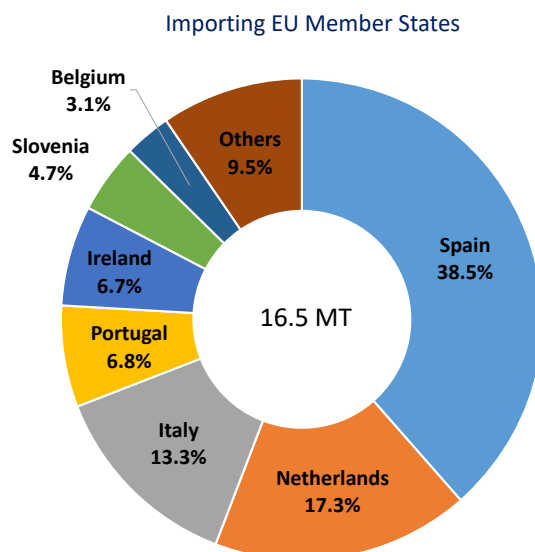
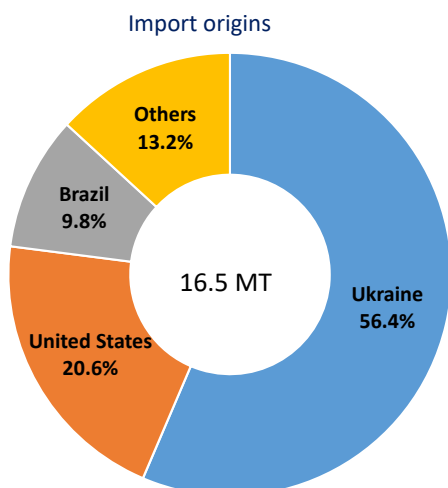


EU: Maize (Incl. processed products) - Export (cumulative)



Source: Eurostat COMEXT, European Commission

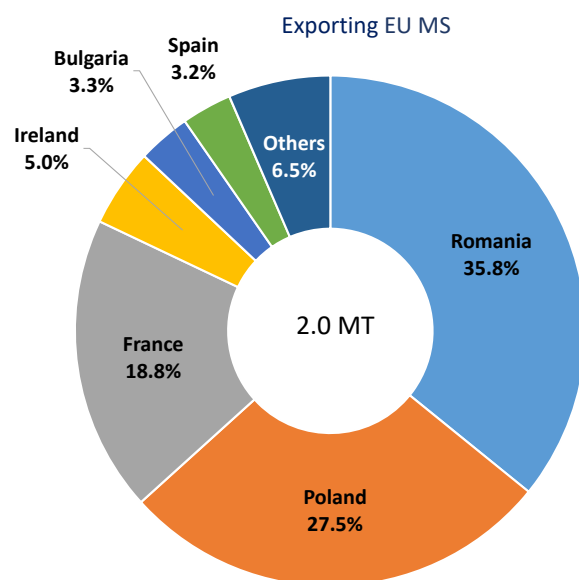
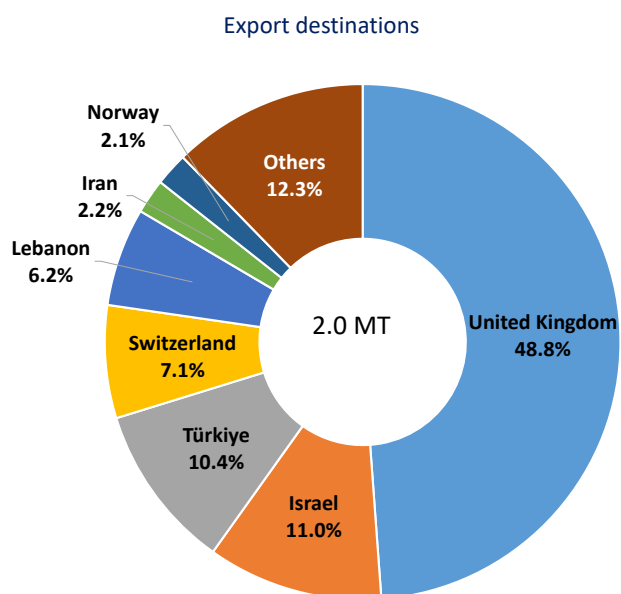
### EU27 IMPORTS OF MAIZE IN JULY-MARCH OF 2024/25 MY, million metric tonnes



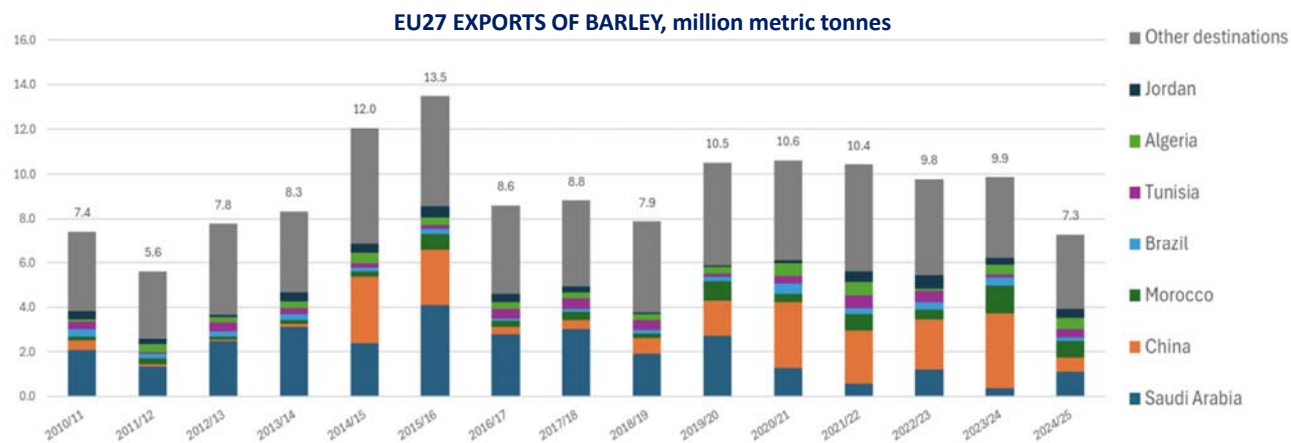
(Thousand t)	5Y_TRMAVG (2019-2024)	2024-25	
Ukraine	8 209	9 290	↑ 13%
United States	33	3 392	↑ 10091%
Brazil	4 057	1 613	↓ -60%
Others	1 540	2 169	↑ 41%

Source: Eurostat COMEXT, European Commission

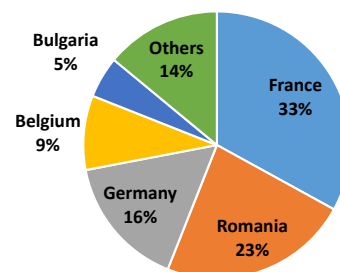
### EU27 EXPORTS OF MAIZE IN JULY-MARCH OF 2024/25 MY, million metric tonnes



Source: Eurostat COMEXT, European Commission

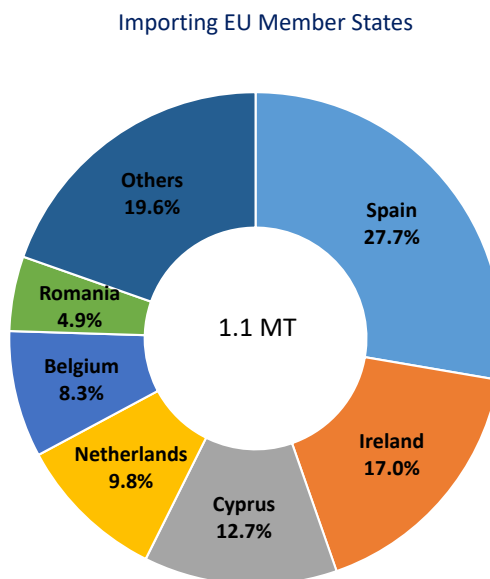
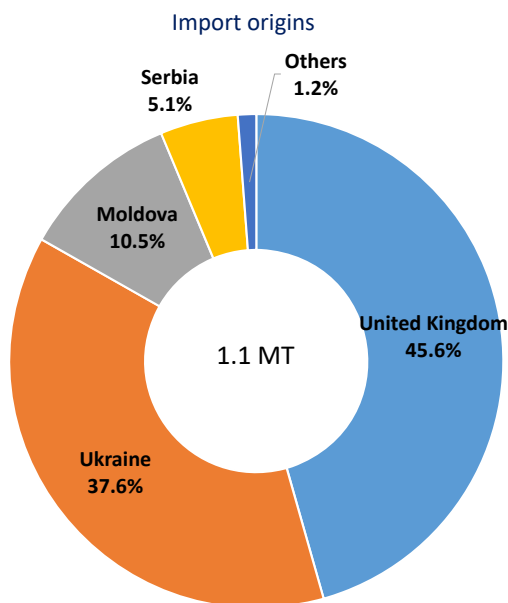


EU Member States  
exporting common wheat,  
2024/25 (July - March)



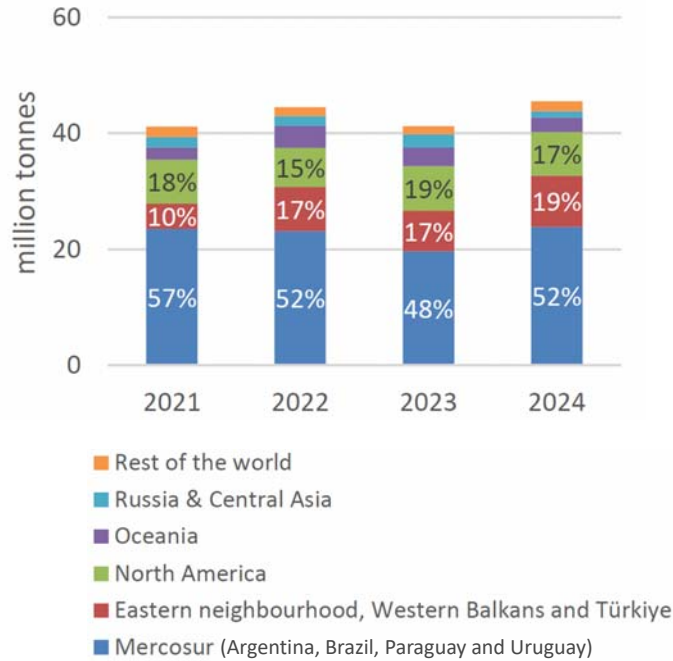
Source: Eurostat COMEXT, European Commission

**EU27 IMPORTS OF BARLEY IN JULY-APRIL OF 2024/25 MY, million metric tonnes**



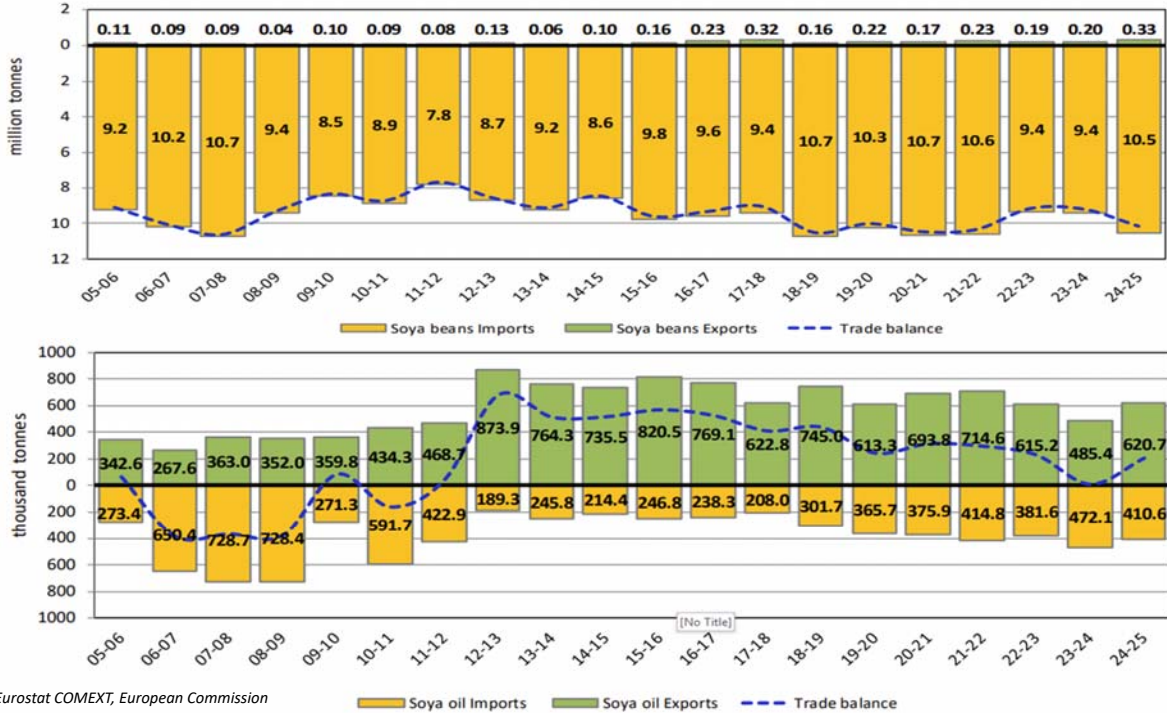
Source: Eurostat COMEXT, European Commission

EU OILSEEDS AND BY-PRODUCTS IMPORTS BY ORIGIN REGION IN VOLUME, million metric tonnes



Source: European Commission

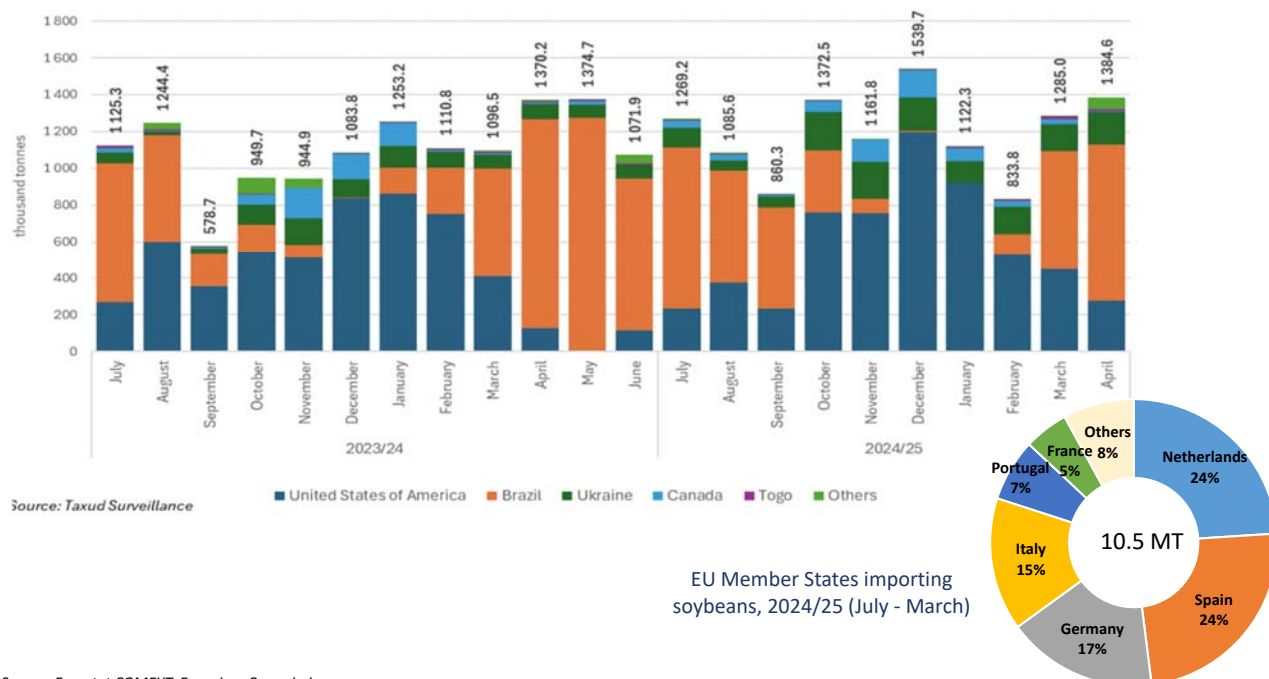
EU27 EXPORTS AND IMPORTS OF SOYBEANS AND SOYA OIL (JULY-MARCH), million metric tonnes



Source: Eurostat COMEXT, European Commission

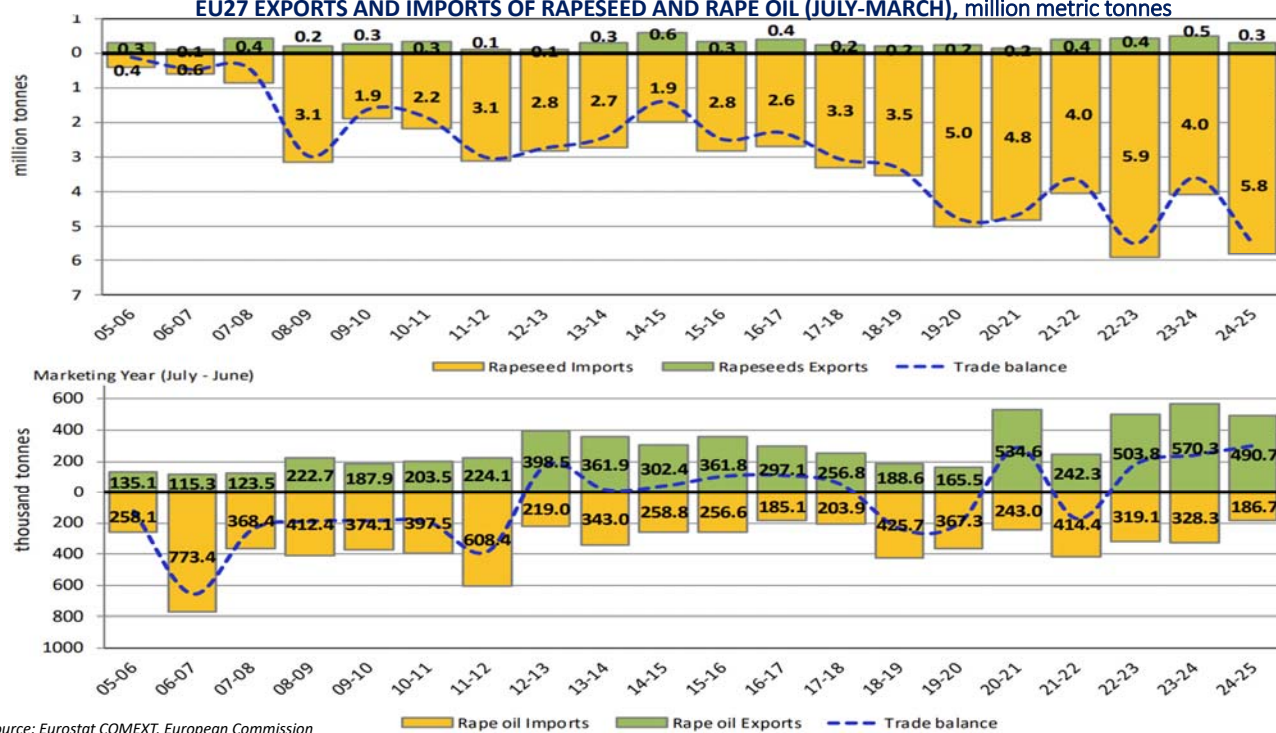


## EU27 IMPORTS OF SOYBEANS IN JULY-APRIL OF 2024/25 MY, million metric tonnes



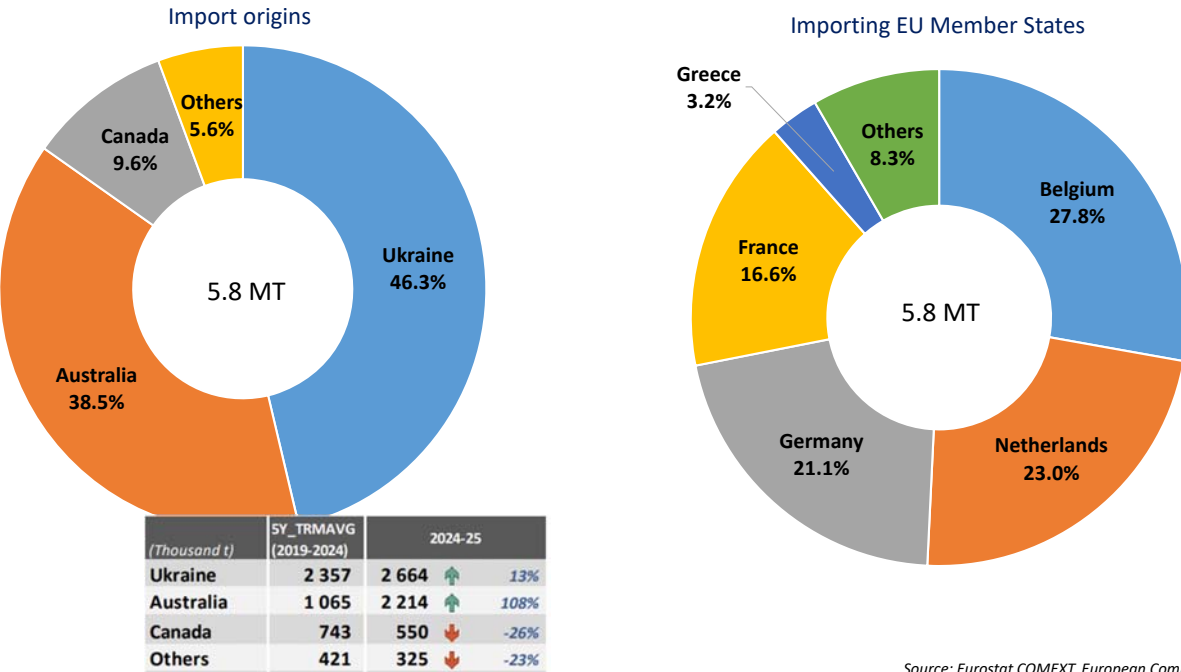
Source: Eurostat COMEXT, European Commission

## EU27 EXPORTS AND IMPORTS OF RAPESEED AND RAPE OIL (JULY-MARCH), million metric tonnes



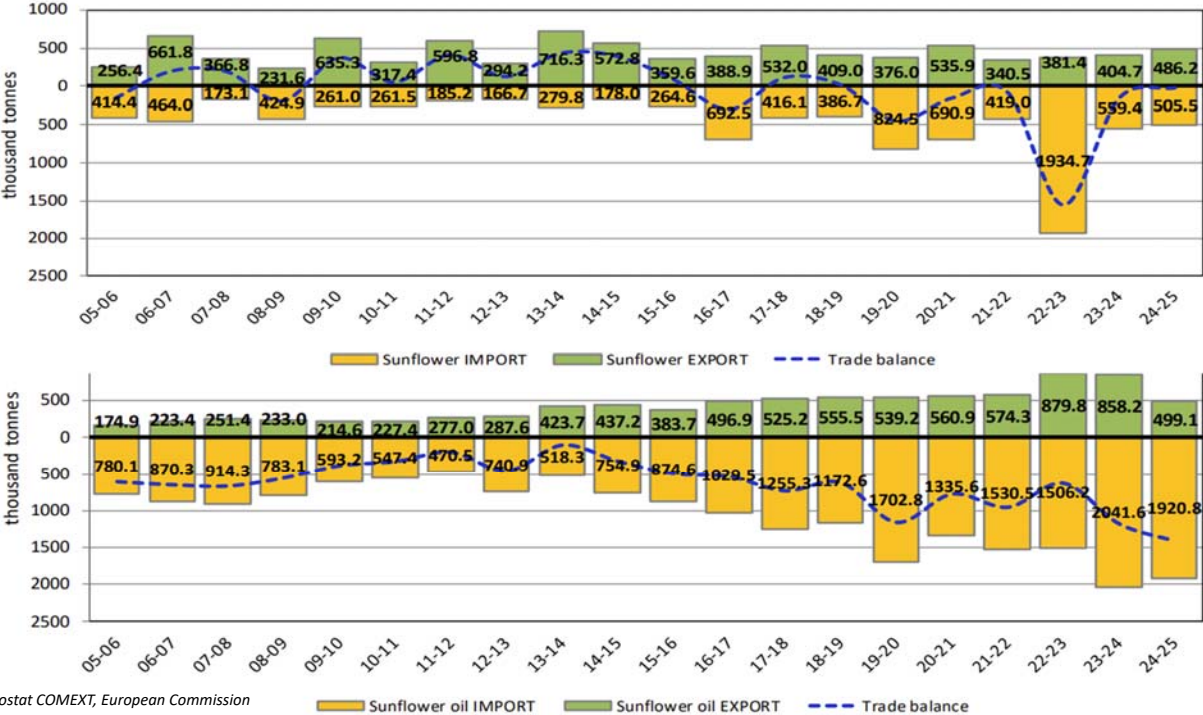
Source: Eurostat COMEXT, European Commission

EU27 IMPORTS OF RAPESEED IN JULY-MARCH OF 2024/25 MY, million metric tonnes



Source: Eurostat COMEXT, European Commission

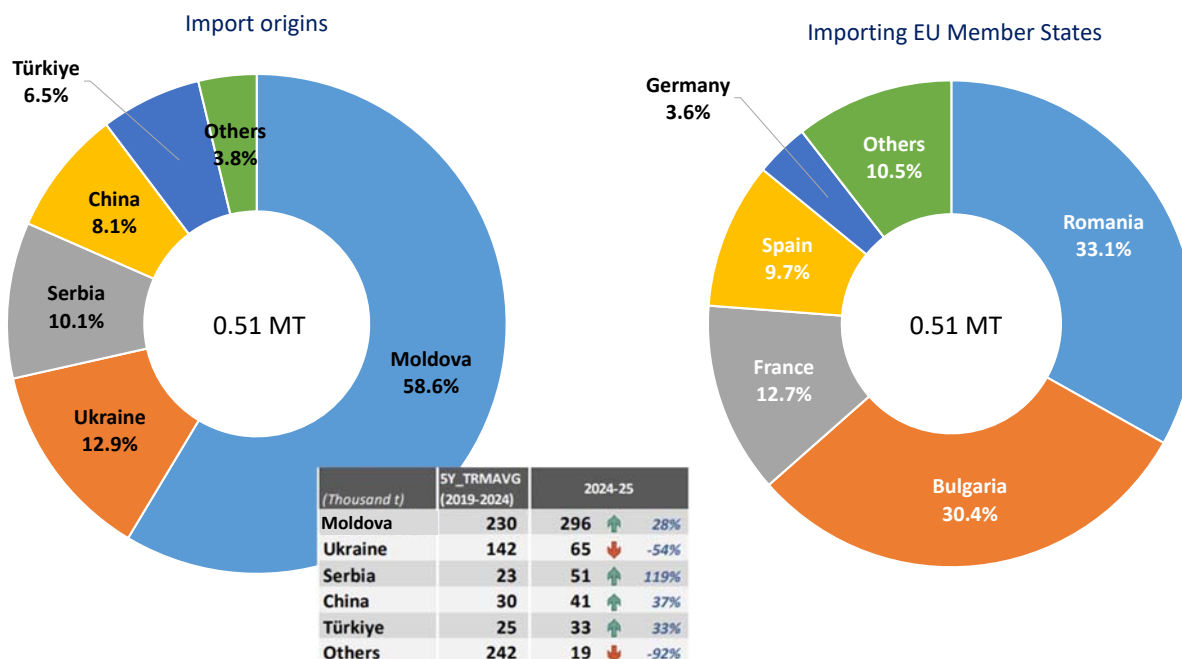
EU27 EXPORTS AND IMPORTS OF SUNFLOWER SEED AND SUN OIL (JULY-MARCH), million metric tonnes



Source: Eurostat COMEXT, European Commission

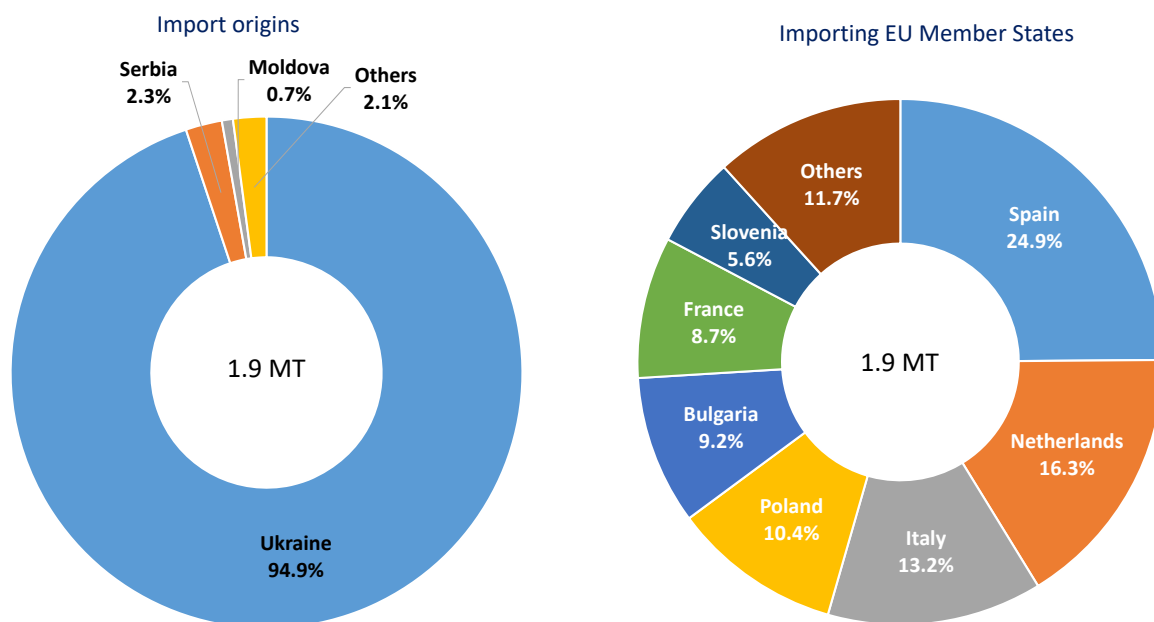


### EU27 IMPORTS OF SUNFLOWER SEEDS IN JULY-MARCH OF 2024/25 MY, million metric tonnes



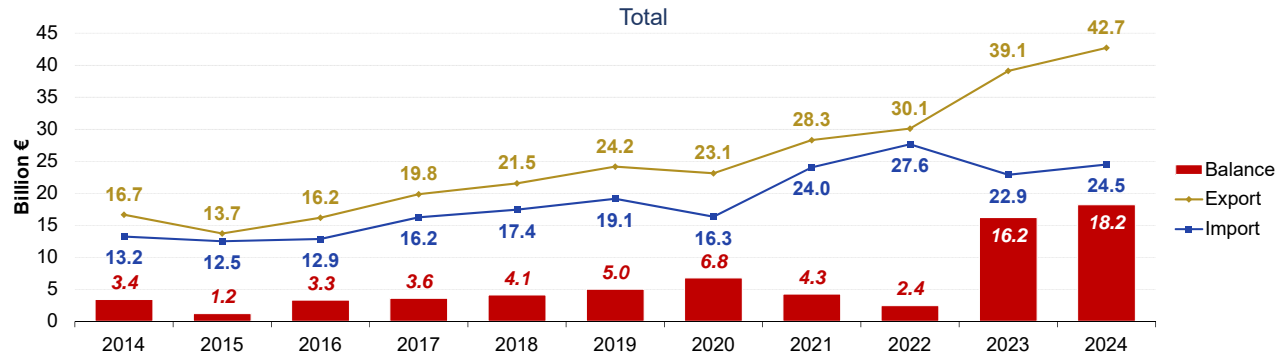
Source: Eurostat COMEXT, European Commission

### EU27 IMPORTS OF SUNFLOWER OIL IN JULY-MARCH OF 2024/25 MY, million metric tonnes



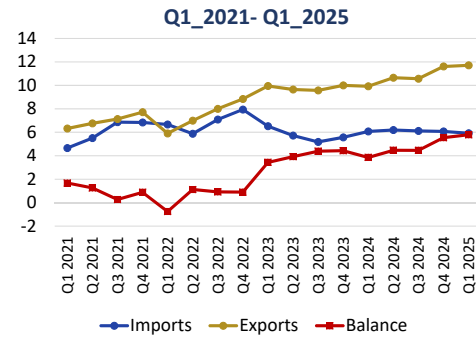
Source: Eurostat COMEXT, European Commission

## EU TRADE IN GOODS WITH UKRAINE



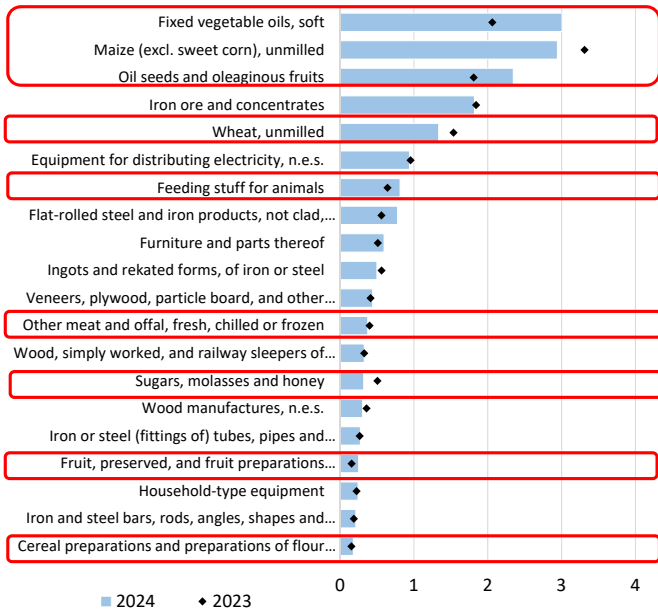
### Share of Ukraine in EU27 total trade in 2024:

- Exports – 1.7%
- Imports – 1.0%

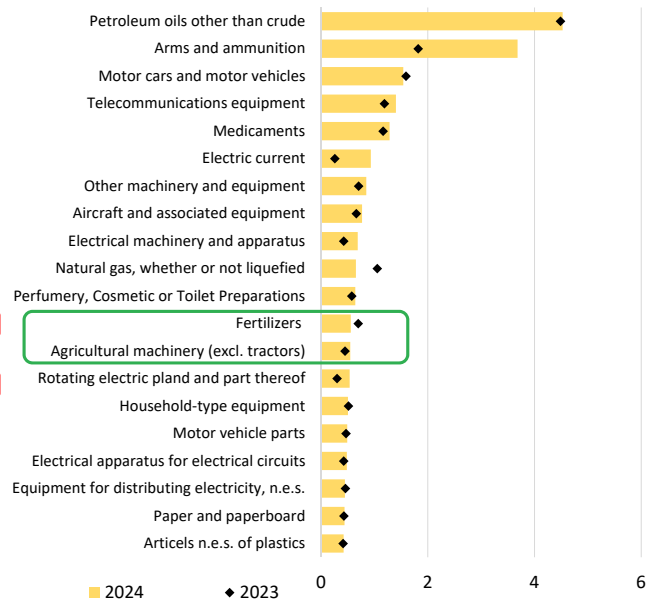


Source: Eurostat

### EU MOST IMPORTED GOODS FROM UKRAINE, € billion



### EU MOST EXPORTED GOODS TO UKRAINE, € billion



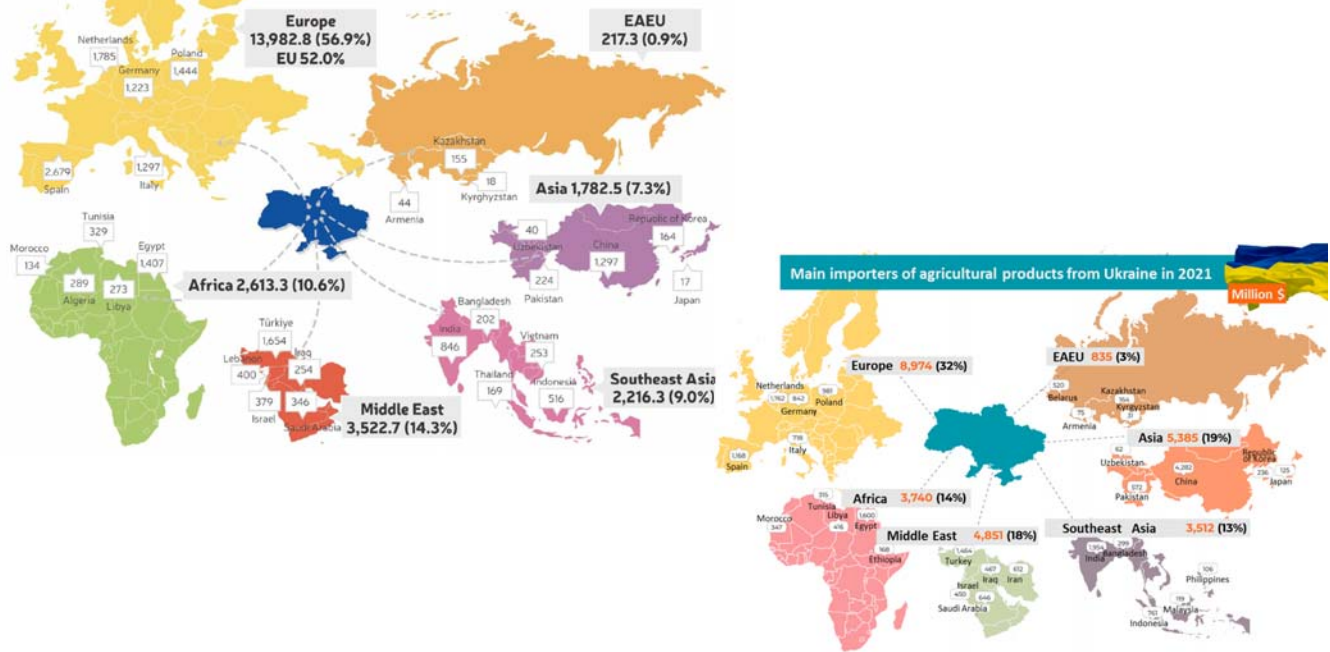
### Share of agri-food in the EU27 total trade with Ukraine in 2024:

- Imports – 53.5%

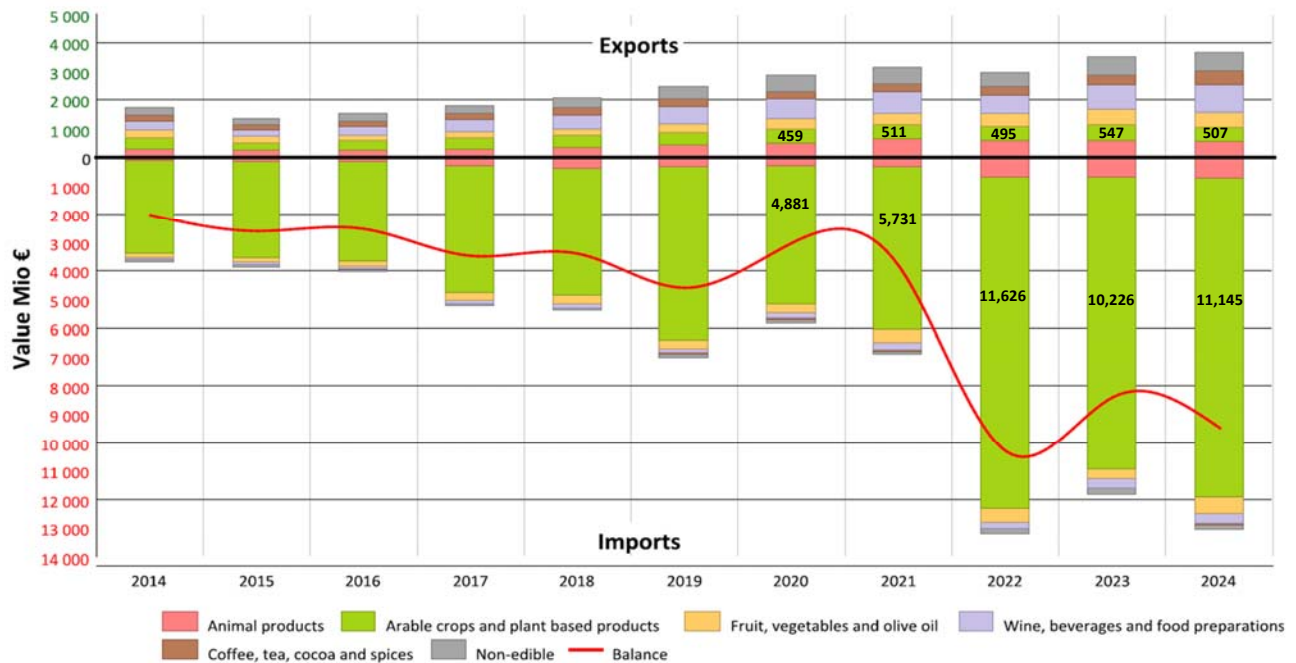
- Exports – 8.5%

Source: European Commission

## MAJOR IMPORTERS OF UKRAINIAN AGRICULTURAL PRODUCTS IN 2024, mln \$

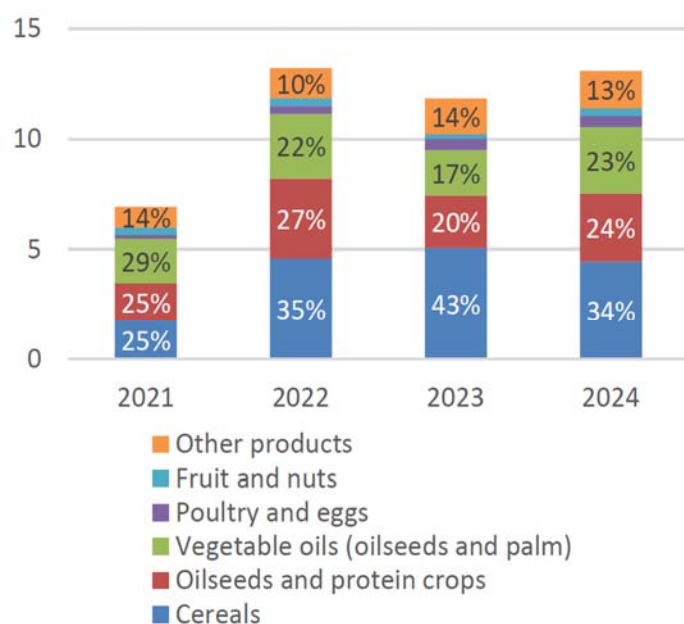


## STRUCTURE OF EU AGRI-FOOD TRADE WITH UKRAINE, 2014 - 2024

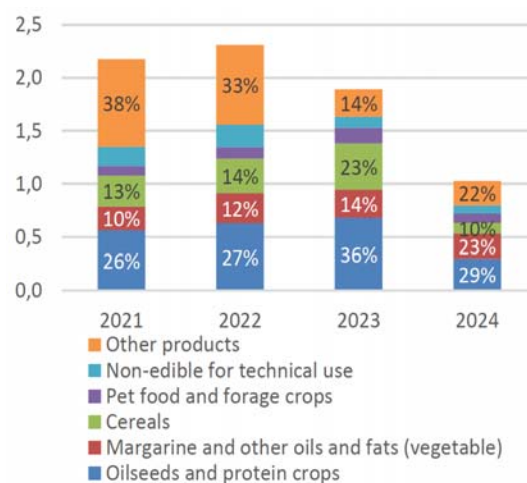


Source: European Commission

EU AGRI-FOOD IMPORTS FROM UKRAINE, billion €

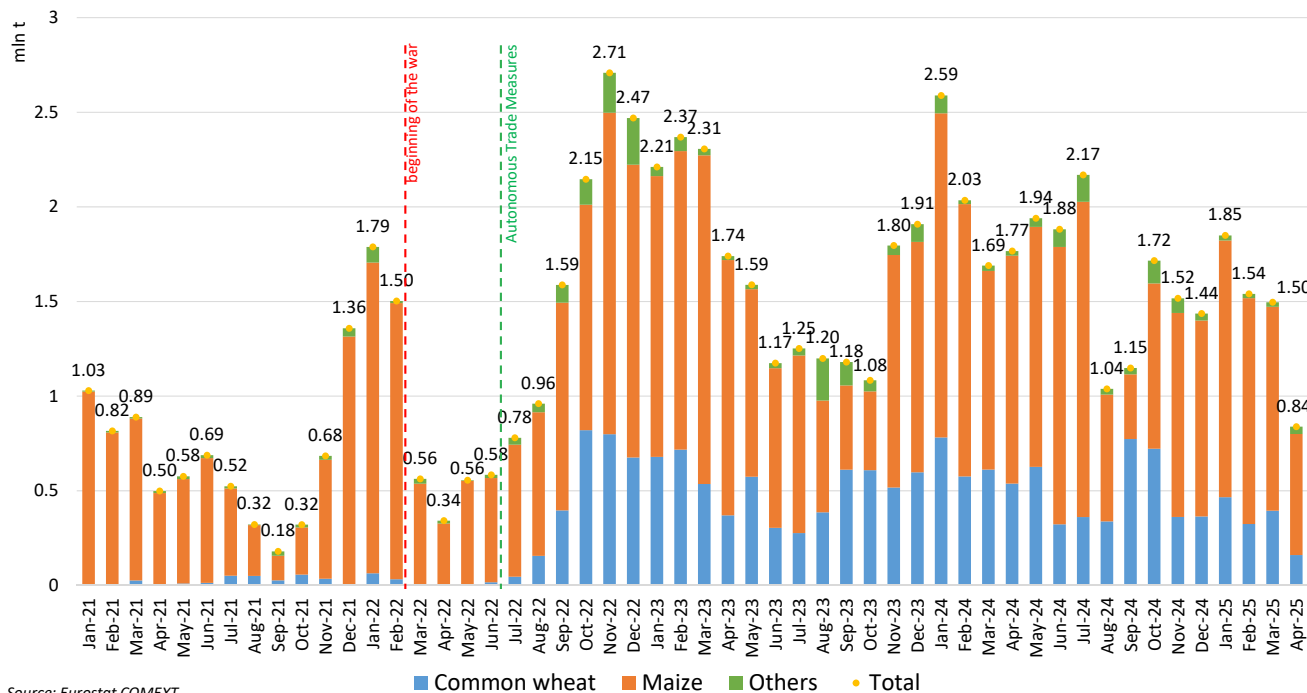


EU AGRI-FOOD IMPORTS FROM RUSSIA, billion €



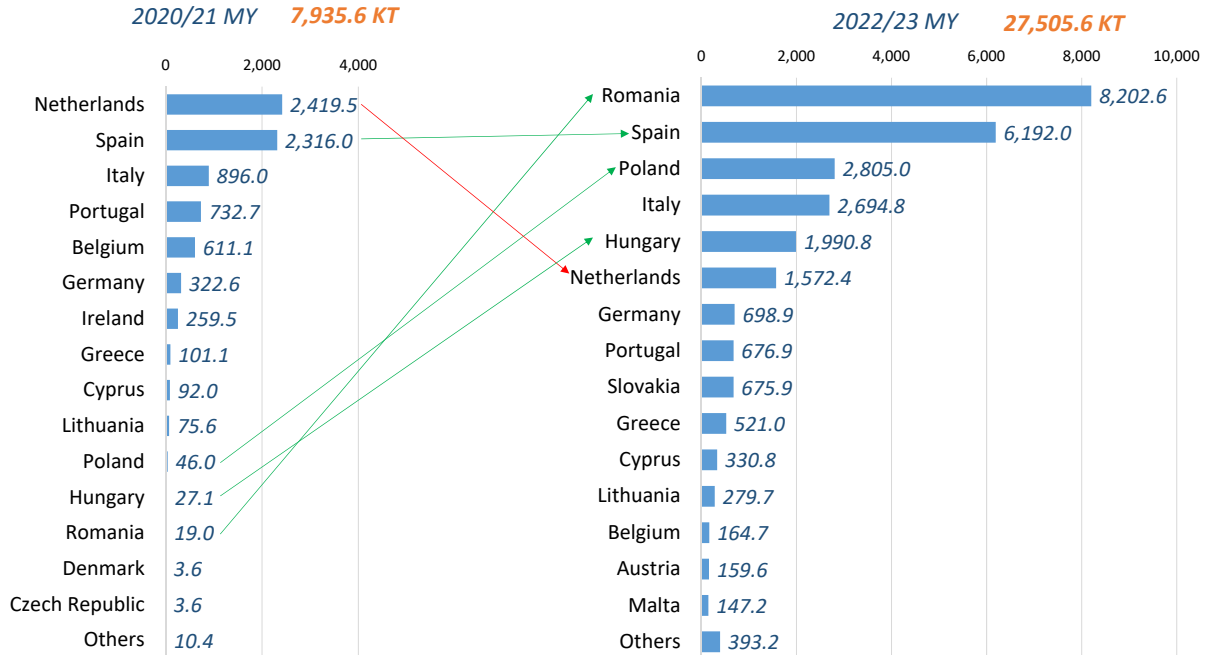
Source: European Commission, Eurostat COMEXT

EU MONTHLY CEREALS IMPORTS FROM UKRAINE SINCE JANUARY 2021, million metric tonnes



Source: Eurostat COMEXT

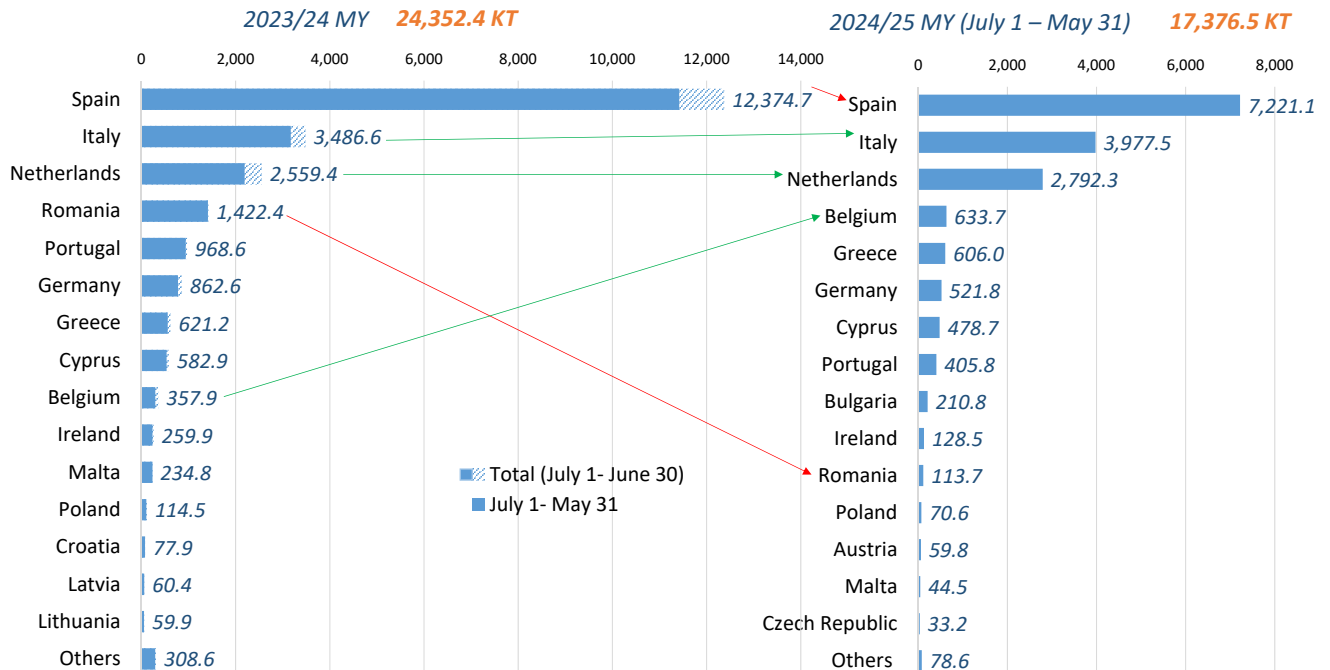
### GEOGRAPHY OF GRAIN EXPORT FROM UKRAINE TO THE EU, thousand metric tonnes



Note: MY July 1 – June 30

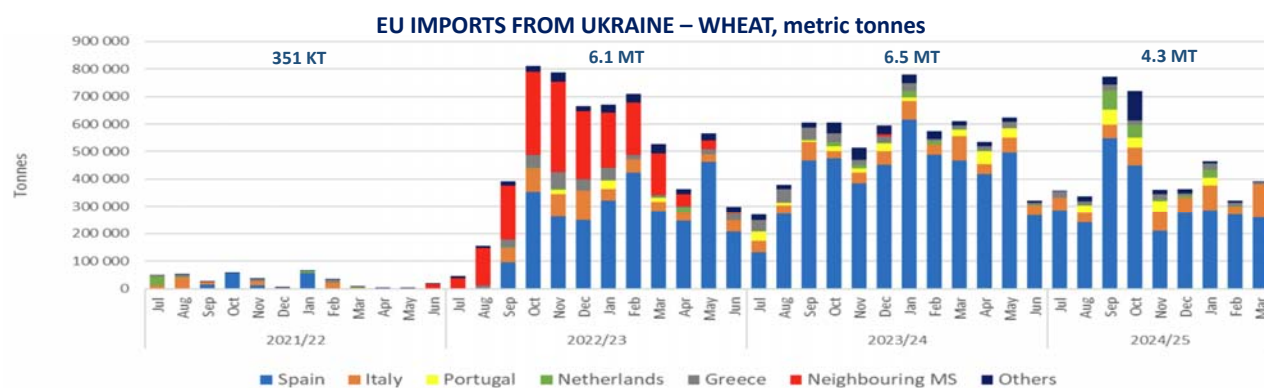
Source: based on data of the State Customs Service of Ukraine

### GEOGRAPHY OF GRAIN EXPORT FROM UKRAINE TO THE EU, thousand metric tonnes

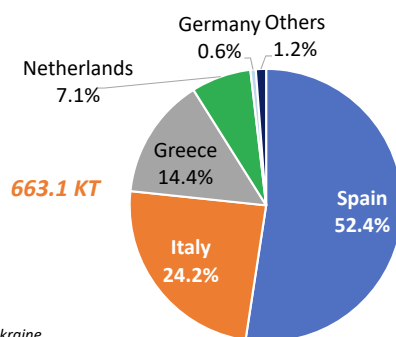


Note: MY July 1 – June 30

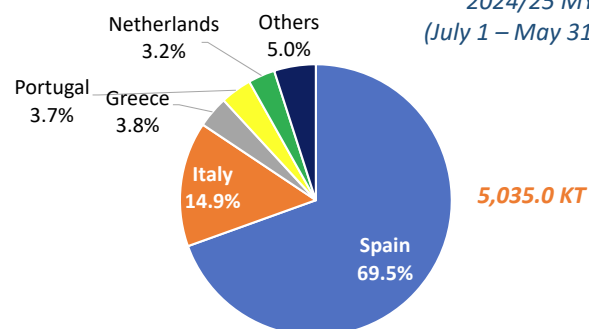
Source: based on data of the State Customs Service of Ukraine



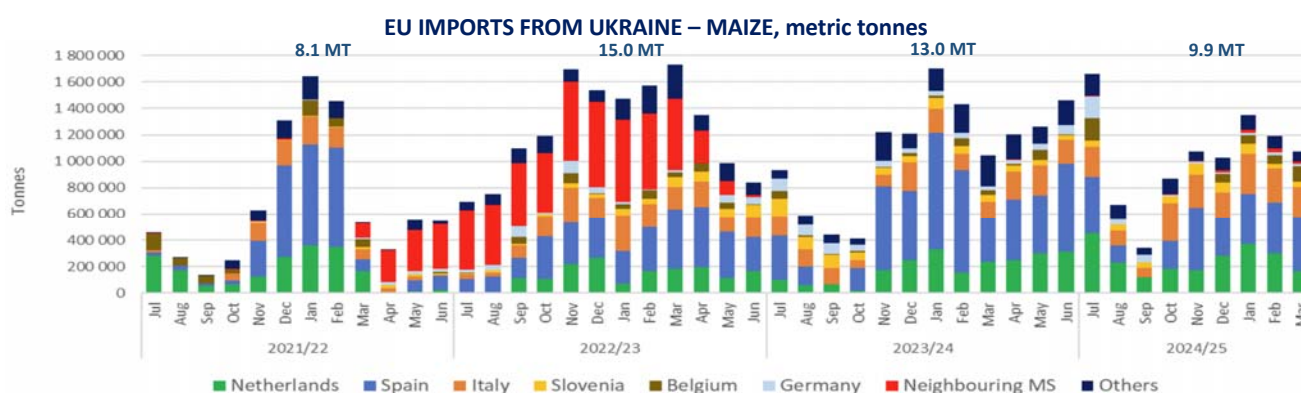
2020/21 MY



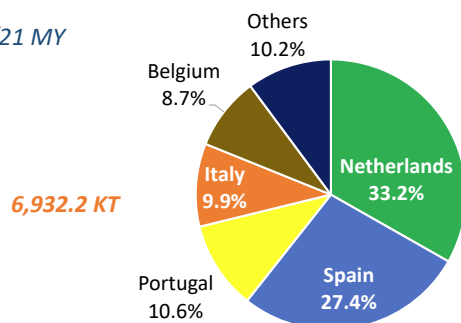
2024/25 MY  
(July 1 – May 31)



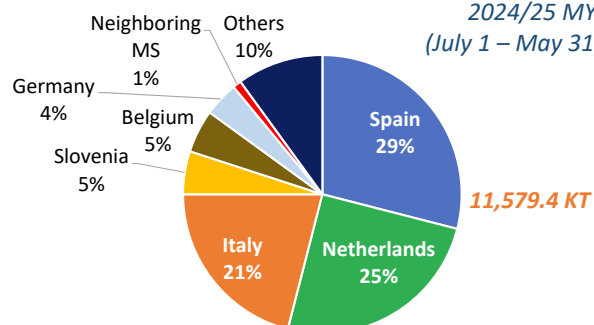
Source: Eurostat COMEXT and  
the State Customs Service of Ukraine



2020/21 MY

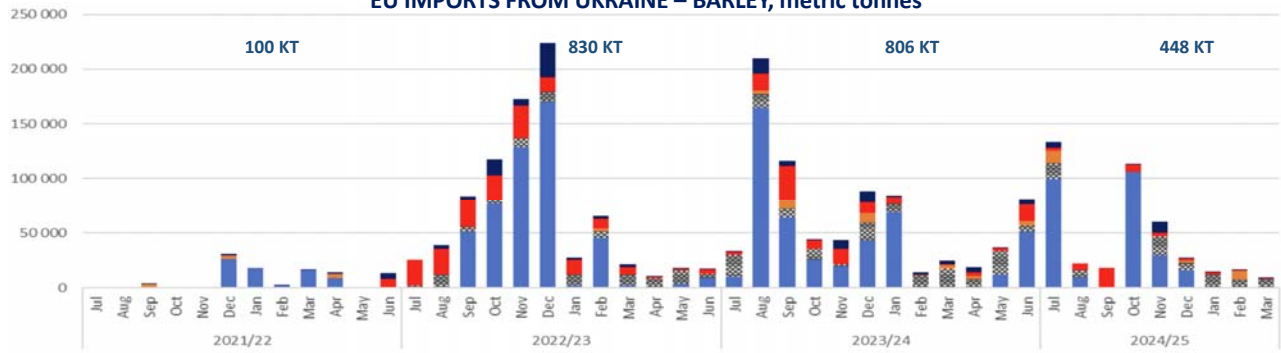


2024/25 MY  
(July 1 – May 31)

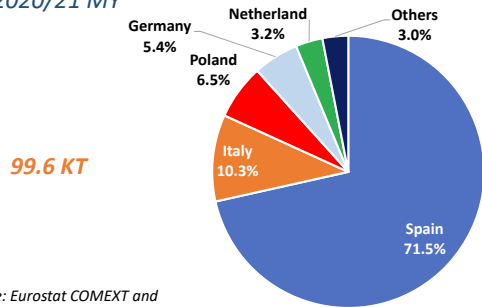


Source: Eurostat COMEXT and  
the State Customs Service of Ukraine

### EU IMPORTS FROM UKRAINE – BARLEY, metric tonnes



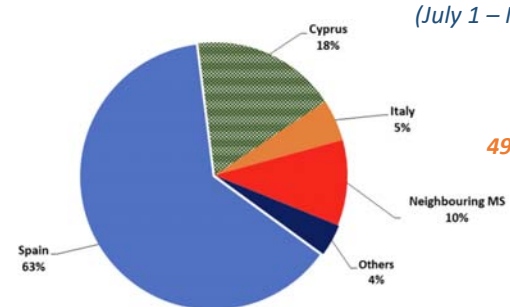
2020/21 MY



99.6 KT

Source: Eurostat COMEXT and the State Customs Service of Ukraine

2024/25 MY  
(July 1 – May 31)

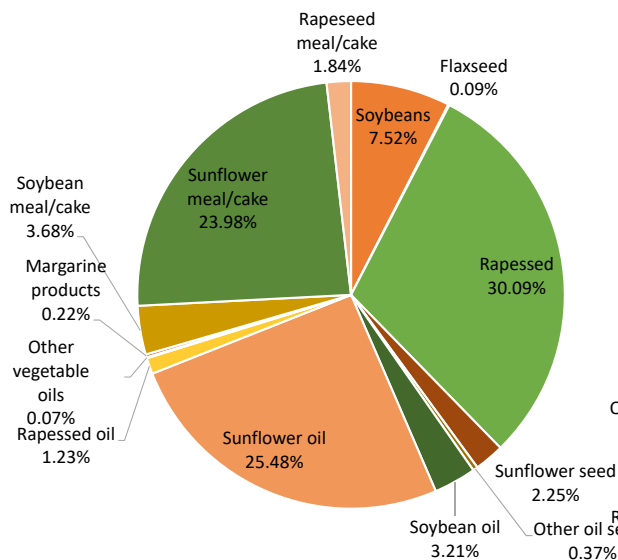


491.2 KT

### STRUCTURE OF OILSEEDS AND BY-PRODUCTS EXPORTS FROM UKRAINE TO THE EU, thousand metric tonnes

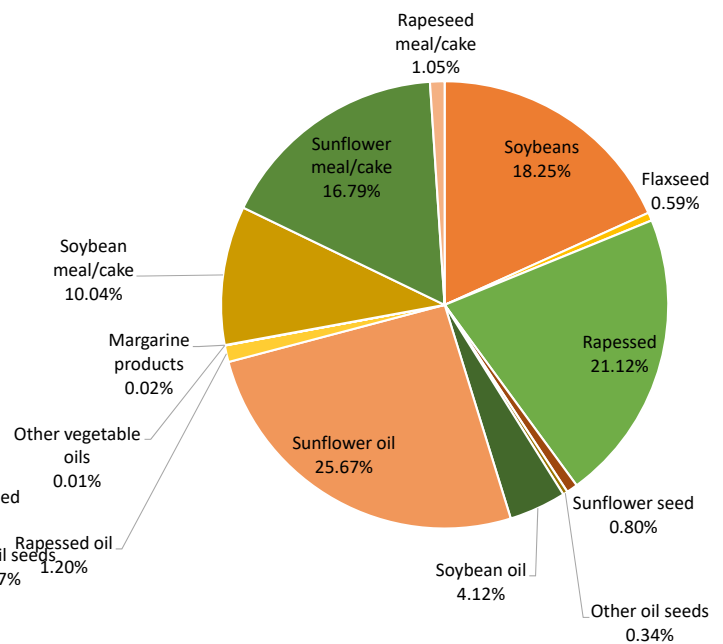
2020/21 MY

5,504.2 KT



2024/25 MY (Sept 1 – May 31)

7,785.1 KT



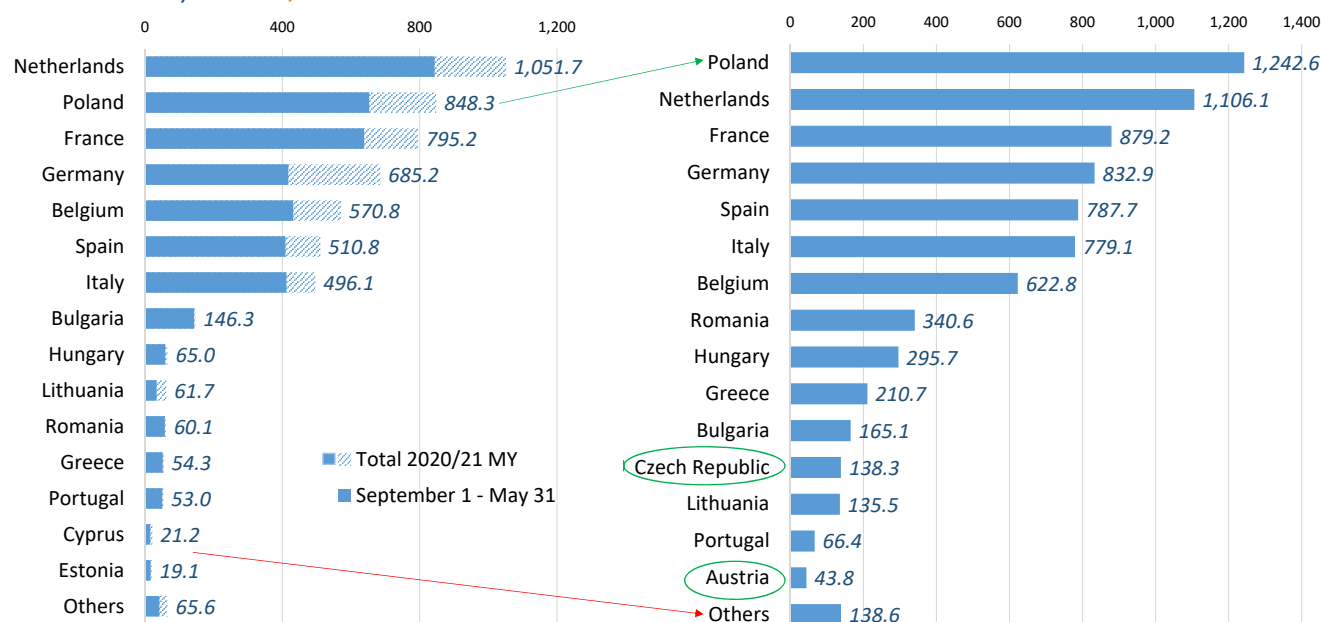
Source: based on data of the State Customs Service of Ukraine



**EXPORT GEOGRAPHY OF OILSEEDS AND BY-PRODUCTS FROM UKRAINE TO THE EU, thousand metric tonnes**  
(soybeans, rapeseed, sunflower)

2020/21 MY **5,504.2 KT**

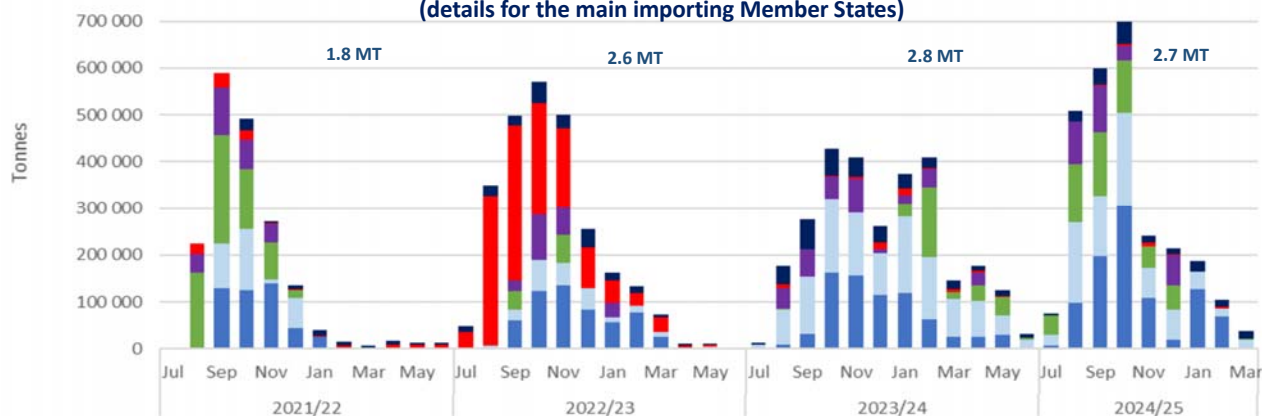
2024/25 MY (Sept 1 – May 31) **7,785.1 KT**



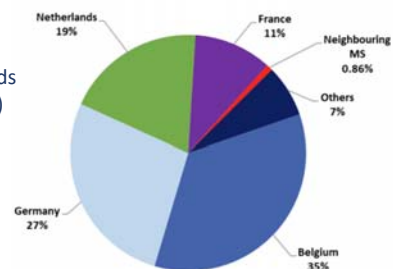
Note: MY September 1 – August 31

Source: based on data of the State Customs Service of Ukraine

**EU IMPORTS FROM UKRAINE – RAPESEED, metric tonnes**  
(details for the main importing Member States)

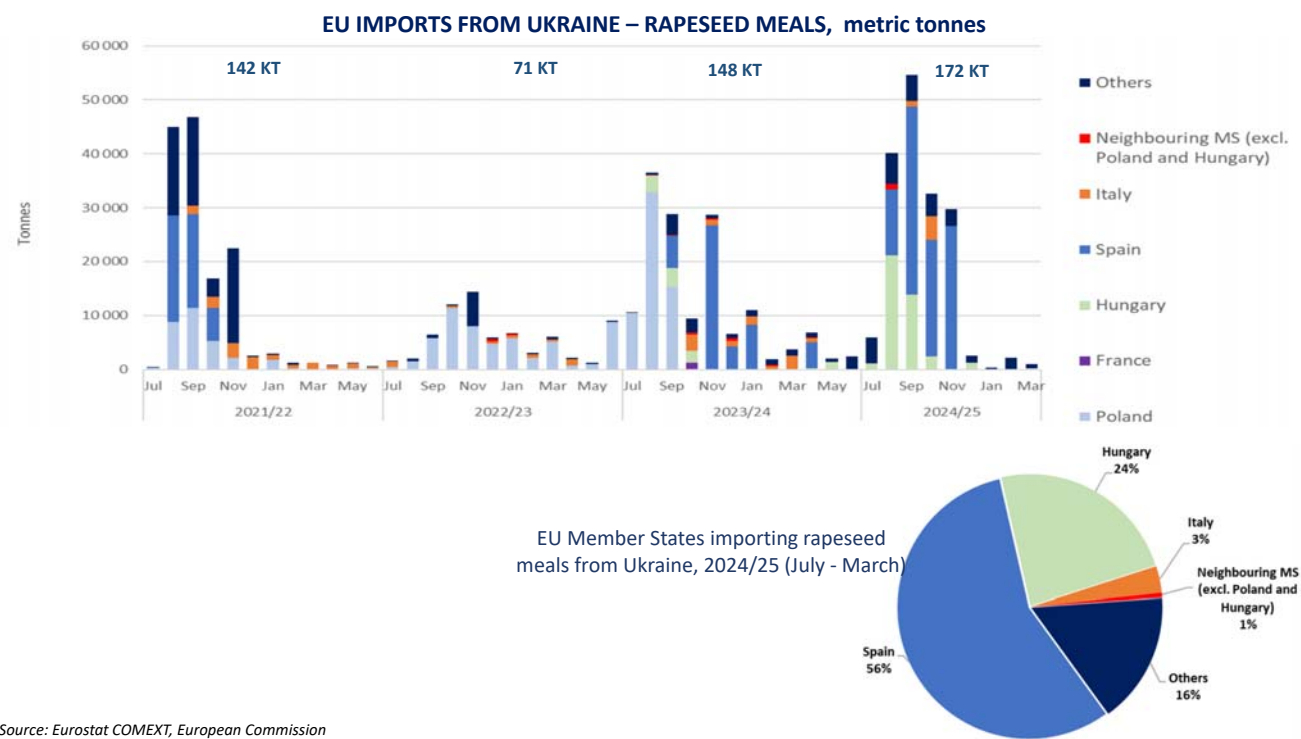
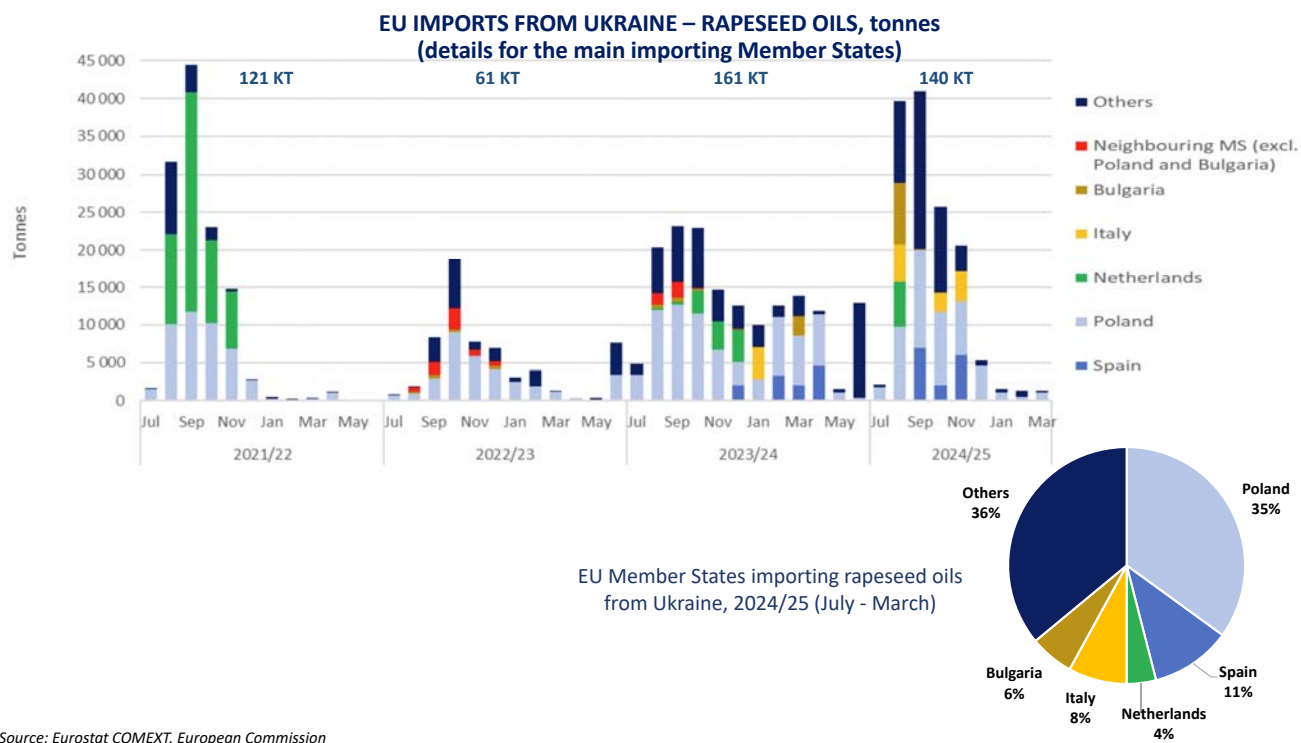


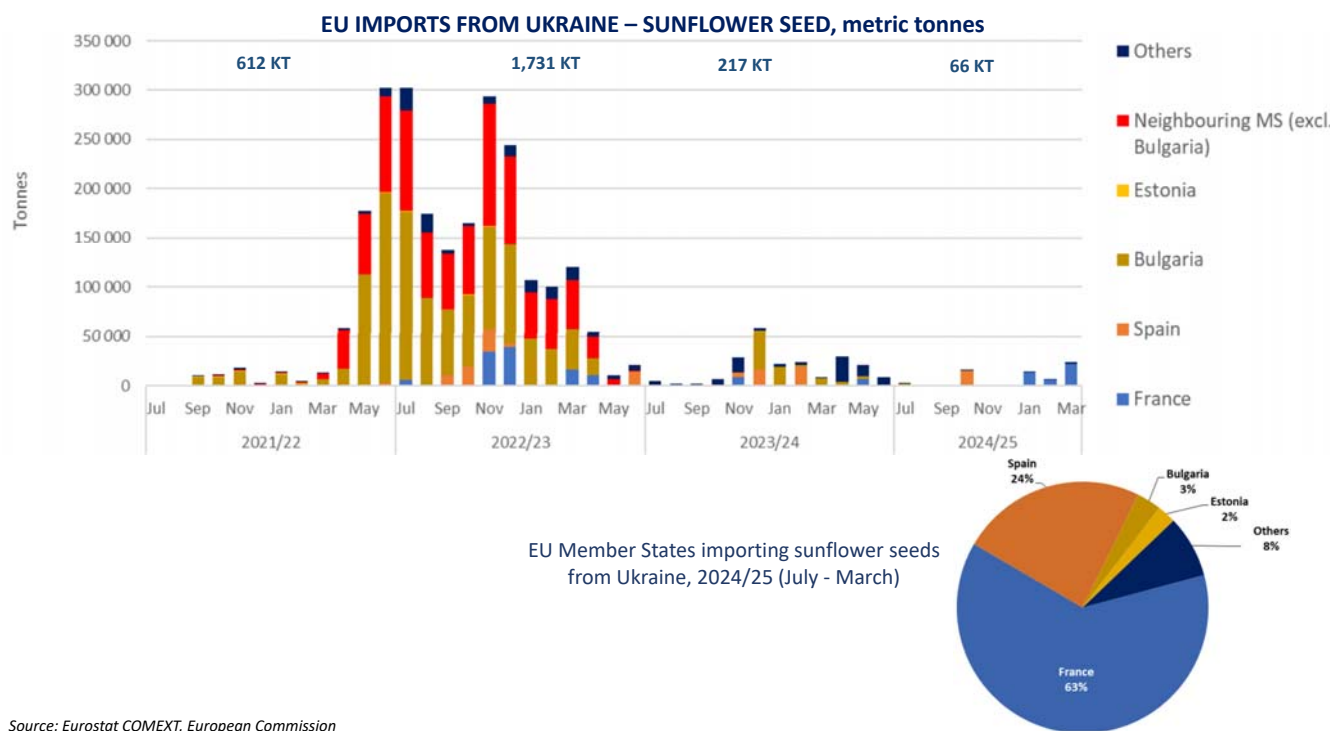
EU Member States importing rapeseeds from Ukraine, 2024/25 (July - March)



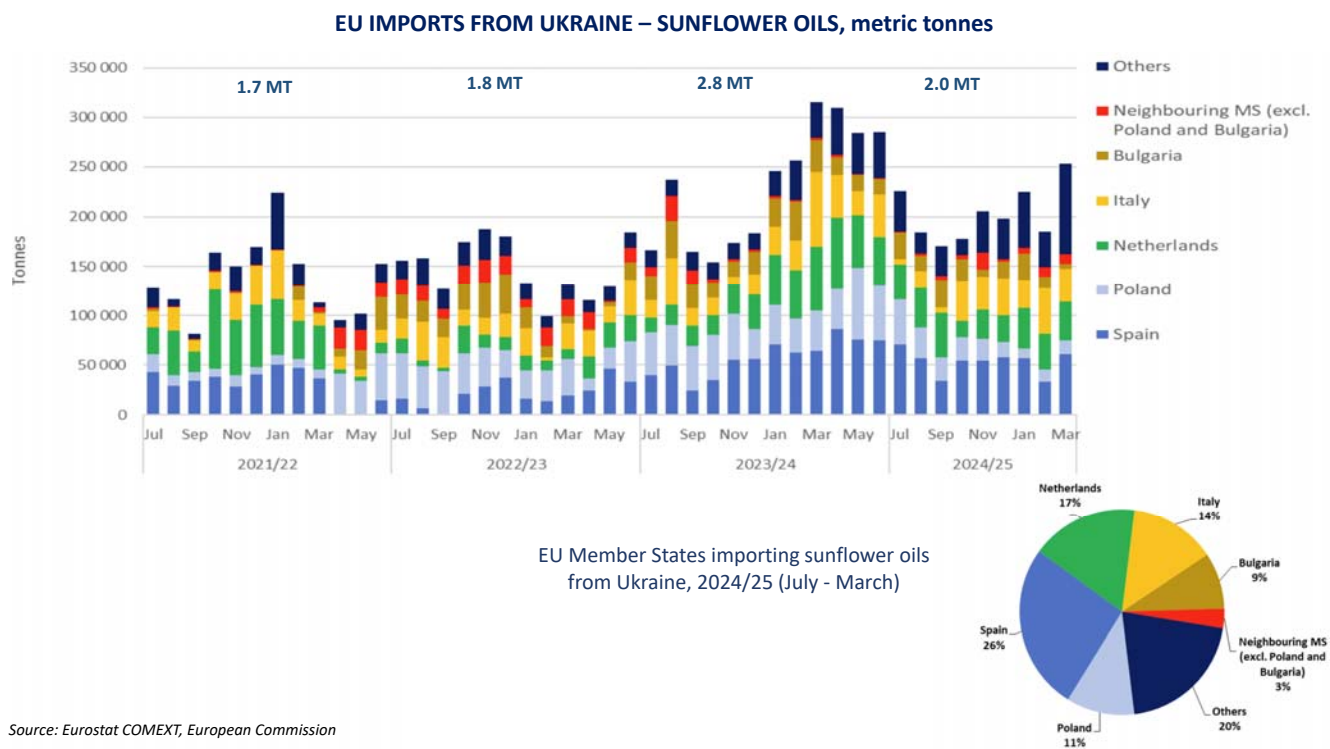
Source: Eurostat COMEXT, European Commission





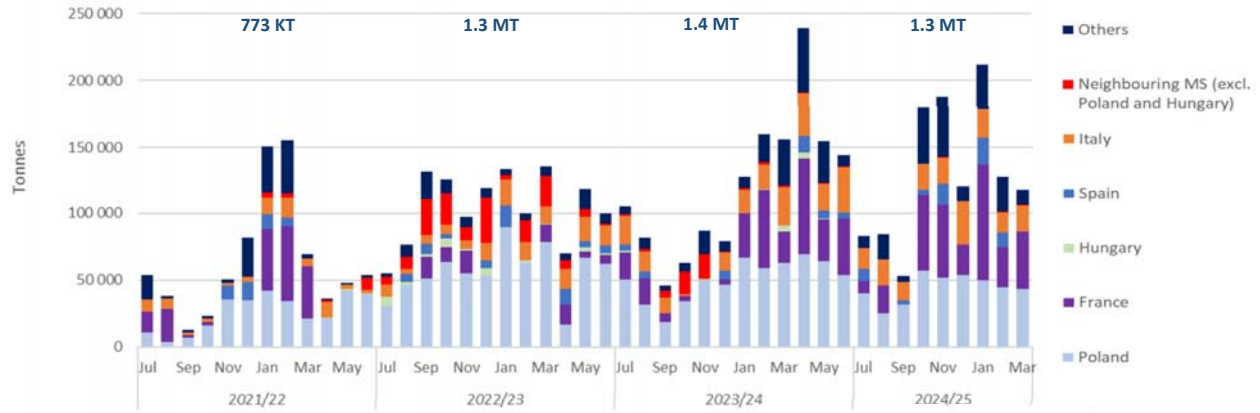


Source: Eurostat COMEXT, European Commission

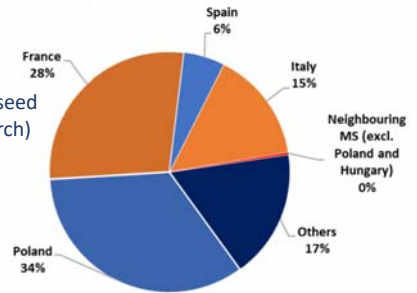


Source: Eurostat COMEXT, European Commission

### EU IMPORTS FROM UKRAINE – SUNFLOWER SEED MEALS, in tonnes

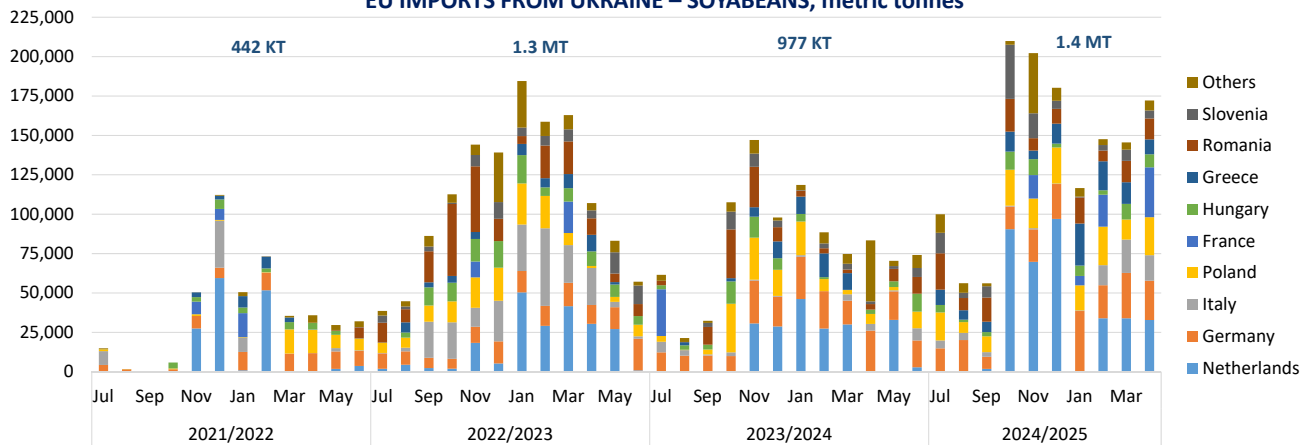


EU Member States importing sunflower seed meals from Ukraine, 2024/25 (July - March)

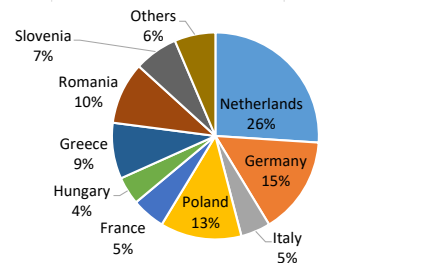


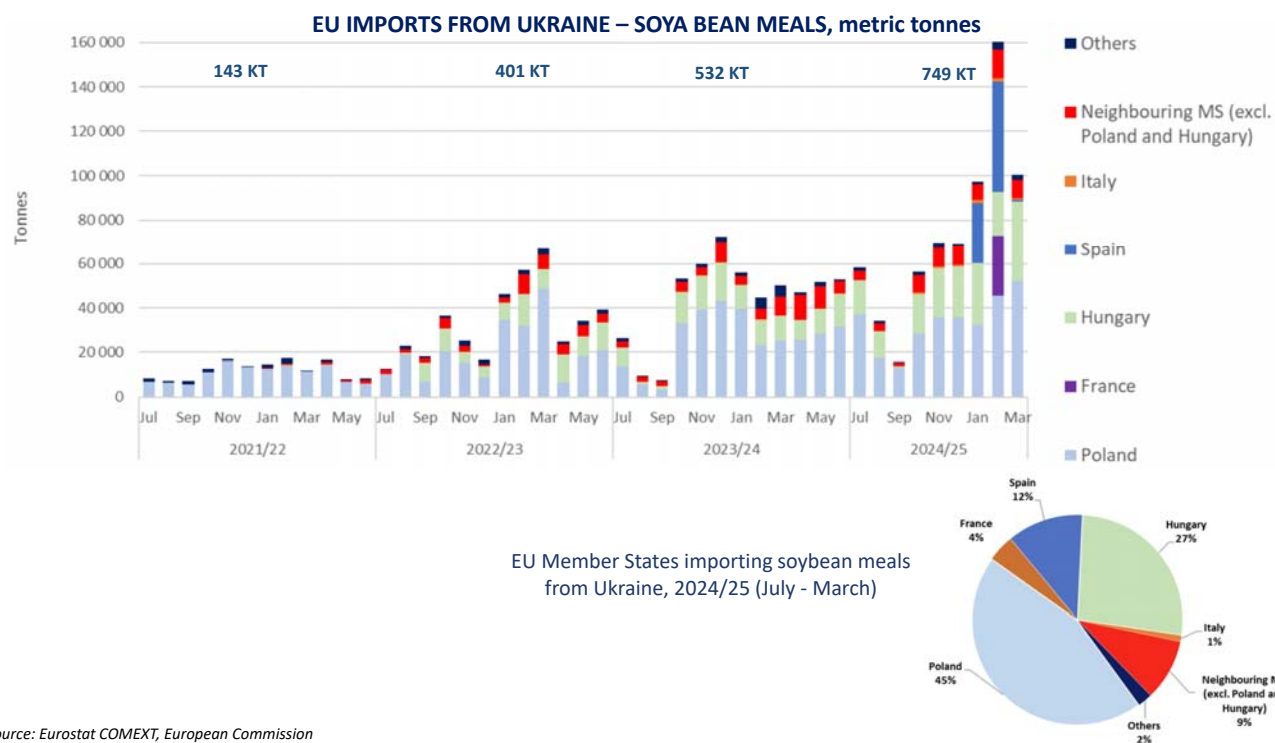
Source: Eurostat COMEXT, European Commission

### EU IMPORTS FROM UKRAINE – SOYABEANS, metric tonnes

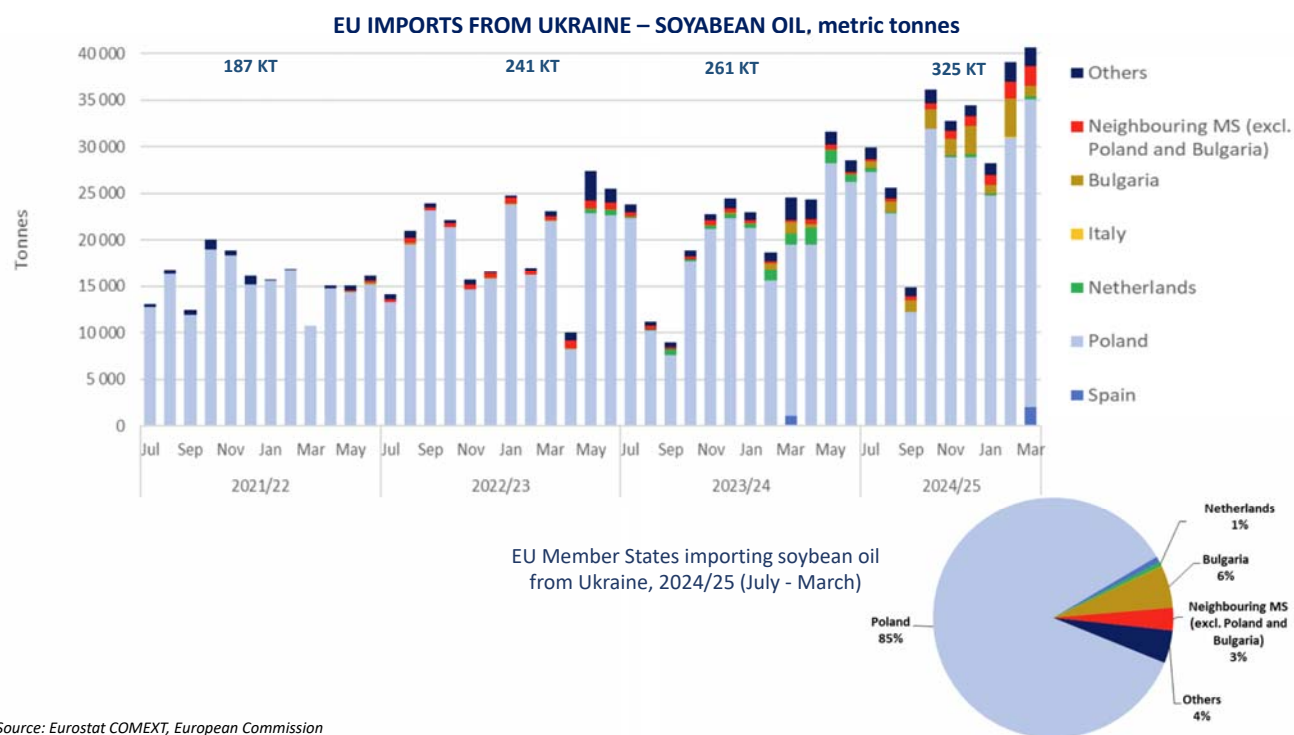


EU Member States importing soybeans from Ukraine, 2024/25 (July - April)



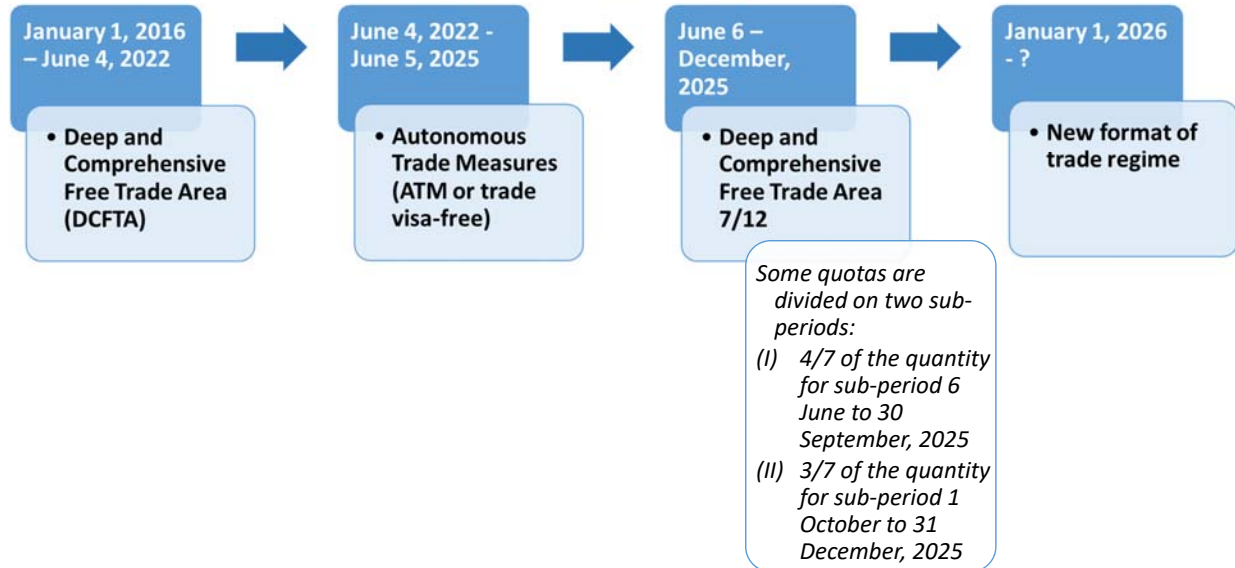


Source: Eurostat COMEXT, European Commission



Source: Eurostat COMEXT, European Commission

### UKRAINE AND THE EU TRADE REGIMES SINCE 2016



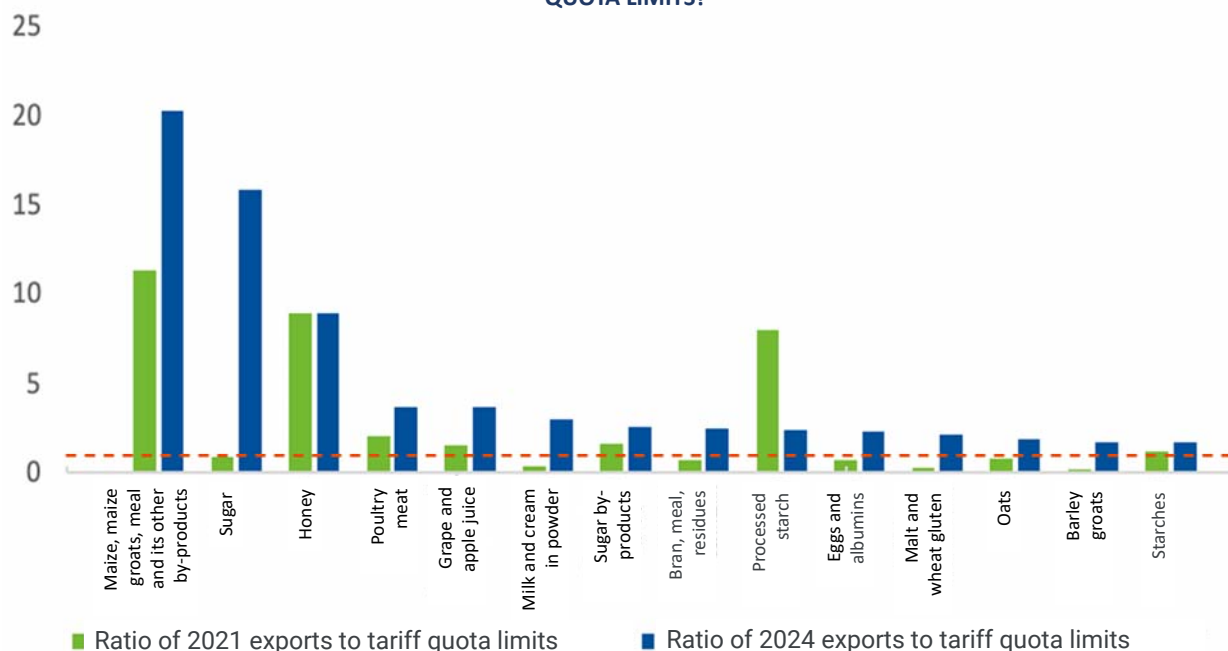
- Quotas apply to over 30 groups of goods from Ukraine
- The quotas are set at zero duty.
- Distribution is carried out using the "first come, first served" principle.

### QUOTAS FOR DIFFERENT TRADE REGIMES OF UKRAINE AND THE EU, metric tonnes (EUR 0 custom duties)

Type of the products	Deep and Comprehensive Free Trade Area	Autonomous Trade Measures (trade visa-free) with some limits in 2024	Deep and Comprehensive Free Trade Area 7/12	New format of trade regime
Eggs and albumins	6,000	23,189	3,500 (2,000 (I) and 1,500 (II))	The quotas will be determined based on the results of negotiations between the Cabinet of Ministers of Ukraine and the European Commission
Honey	6,000	44,417	3,500	
Maize, maize groats, meal and its other by-products	650,000	11,155,449	379,167	
Sugar	20,070	262,653	11,708	
Poultry meat	90,000	137,042	52,511 (30,000 (I) and 22,511 (II))	
Wheat and meslin, flour, groats and their other by-products	1,000,000	No limits	583,333	
Barley and its by-products	350,000	No limits	20,167	
Milk and cream (not in powder)	10,000	No limits	5,833	
Milk and cream in powder	5,000	No limits	2,917	
Butter and dairy spreads	3,000	No limits	1,750	
Tomatoes and by-products	10,000	No limits	5,833	
Beef and veal (fresh, chilled or frozen)	12,000	No limits	7,000 (4,000 (I) and 3,000 (II))	
Pork (fresh, chilled or frozen)	20,000	No limits	11,667 (6,666.7 (I) and 5,000 (II))	

Source: European Commission implementing regulation (EU) 2025/1132 of June 3, 2025

### HOW MANY TIMES DOES UKRAINIAN AGRICULTURAL EXPORT TO THE EU EXCEED THE CURRENT TARIFF QUOTA LIMITS?



### EXPORT OF GRAIN, LEGUMES AND OILSEEDS FROM UKRAINE with products of their processing, thousand metric tonnes

	2020/21 MY Total	2021/22 MY Total	2022/23 MY Total	2023/24 MY		2024/25 MY	
				Total	as of June 28, 2024	Total, as of June 23, 2025	June 2025
<b>Grain and legumes, total</b>	<b>43,939</b>	<b>48,508</b>	<b>49,236</b>	<b>50,826</b>	<b>3,621</b>	<b>40,226</b>	<b>1,854</b>
• wheat	16,413	18,741	16,894	18,402	863	15,636	739
• barley	4,210	5,752	2,712	2,491	91	2,318	6
• rye	15.8	161.9	18.0	1.6	0	10.8	0
• corn	22,596	23,535	29,228	29,389	2,653	21,678	1,102
Wheat flour	123.7	69.4	147.7	92.8	5.2	64.5	3.9
Other flour	1.1	1.5	6.2	5.4	0.2	4.5	0.1
Total flour	124.8	70.9	153.9	98.6	5.4	69.0	4.0
<b>Total grain &amp; flour export</b>	<b>44,105</b>	<b>48,579</b>	<b>49,390</b>	<b>50,925</b>	<b>3,626</b>	<b>40,295</b>	<b>1,854</b>
				<b>Total</b>	<b>May 2024</b>	<b>Total, as of May 31, 2025</b>	<b>May 2025</b>
Sunflower seeds	192	1,652	1,864	313	13	65	0.3
Sunflower oil	5,277	4,494	5,647	6,248	624	2,857	461
Soybeans	1,468	1,396	3,109	3,257	107	2,717	270
Rapeseeds	2,397	2,713	3,605	3,902	76	1,855	34

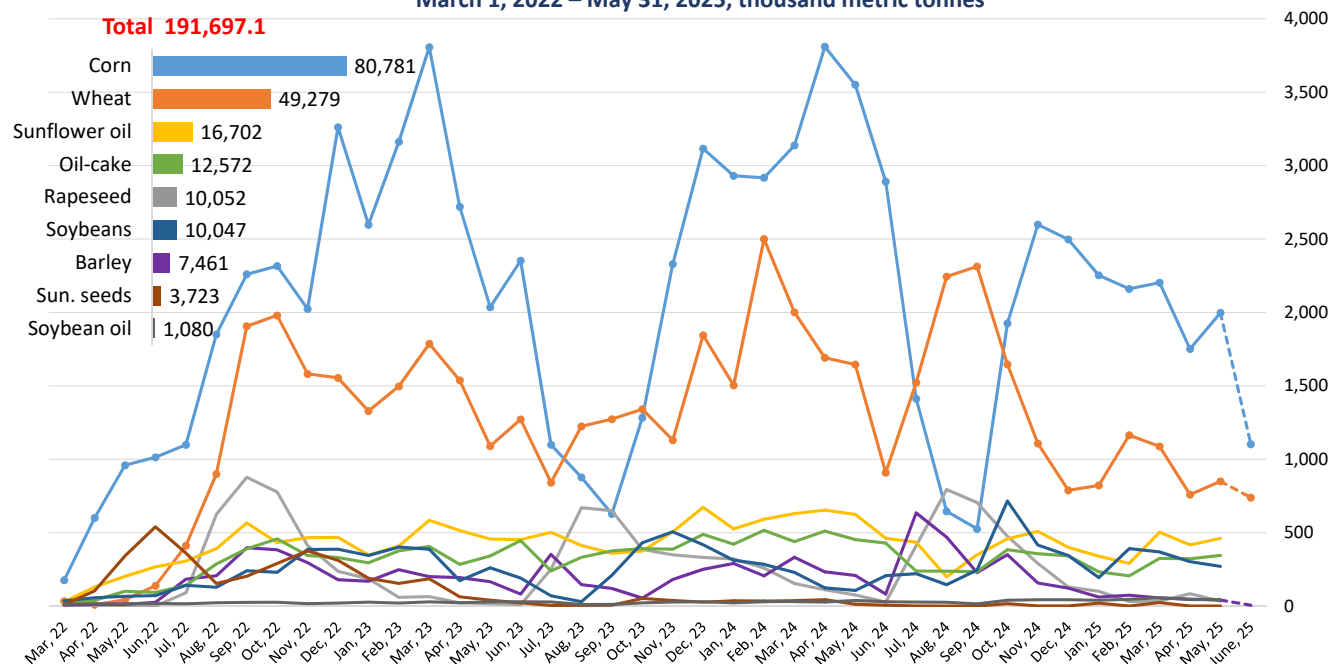
Note: MY (marketing year):

Rapeseeds - June,

for oilseeds - September-August

Source: based on data of State Customs Service of Ukraine and Ministry of Agrarian Policy and Food of Ukraine

**EXPORT SHIPMENTS FROM UKRAINE DURING THE WAR TIME BY TYPES OF AGRICULTURAL COMMODITIES,  
March 1, 2022 – May 31, 2025, thousand metric tonnes**



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**SOWN AREA OF SPRING CROPS IN UKRAINE, thousand hectares,  
as of June 12, 2025**

Crops	2021	2022	2023	2024	2025			2025 planted	
					forecast	planted	% planted to forecast	to 2024	to 2021
<b>Total (selected crops)</b>	<b>15,604.2</b>	<b>12,823.7</b>	<b>12,860.3</b>	<b>13,268.8</b>	<b>13,127.2</b>	<b>12,932.0*</b>	<b>98.5 %*</b>	<b>-2.5 %*</b>	<b>-17.1%*</b>
<b>Spring cereals and legumes</b>	<b>7,639.9</b>	<b>5,947.4</b>	<b>5,749.4</b>	<b>5,629.5</b>	<b>5,570.0</b>	<b>5,527.9</b>	<b>99.2 %</b>	<b>-1.8 %</b>	<b>-27.6 %</b>
including:									
• spring wheat	187.6	217.9	192.9	173.6	227.5	221.2	97.2 %	+27.4 %	+17.9 %
• spring barley	1,336.6	946.7	881.8	839.3	776.1	753.2	97.0 %	-10.3 %	-43.6 %
• oats	178.1	154.0	165.0	173.1	161.3	158.9	98.2 %	-8.2 %	-10.8 %
• peas	242.8	131.3	150.3	212.1	217.4	212.7	97.8 %	+0.3 %	-12.4 %
• corn	5,522.4	4,325.3	4,122.7	4,049.7	4,022.8	4,030.5	100.2 %	-0.5 %	-27.0 %
• buckwheat	89.5	121.3	147.6	89.1	88.6	79.6	89.8 %	-10.7 %	-11.1 %
• millet	82.9	50.9	89.1	92.6	76.3	71.7	94 %	-22.6 %	-13.5 %
Spring rapeseed	31.5	24.6	48.7	36.4	84.1	n/a	n/a	n/a	n/a
Soybeans	1,310.8	1,558.9	1,842.1	2,655.5	2,410.5	2,387.3	99.0 %	-10.1 %	+82.1 %
Sunflower	6,622.0	5,292.8	5,220.1	4,947.4	5,062.6	5,016.9	99.1 %	+1.4 %	-24.2 %

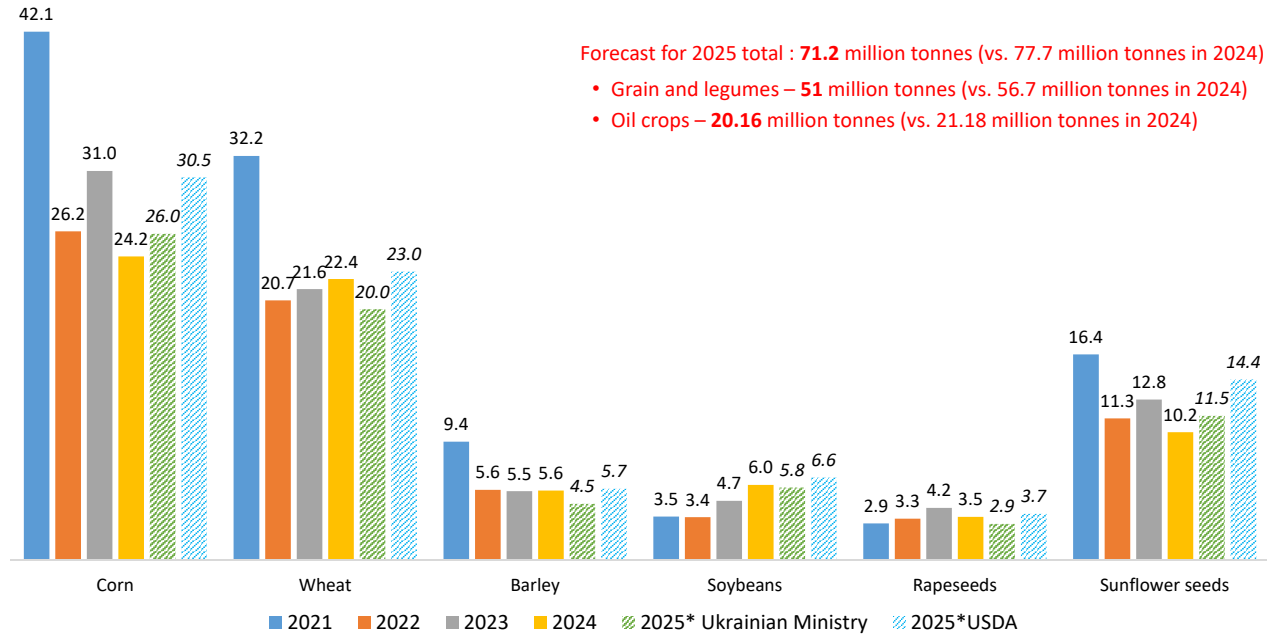
Note: includes data from territories under Ukrainian control as of the reporting date and can be updated

\* Without spring rapeseed

Source: based on the updated data of the State Statistic Service of Ukraine and Ministry of Agrarian Policy and Food of Ukraine

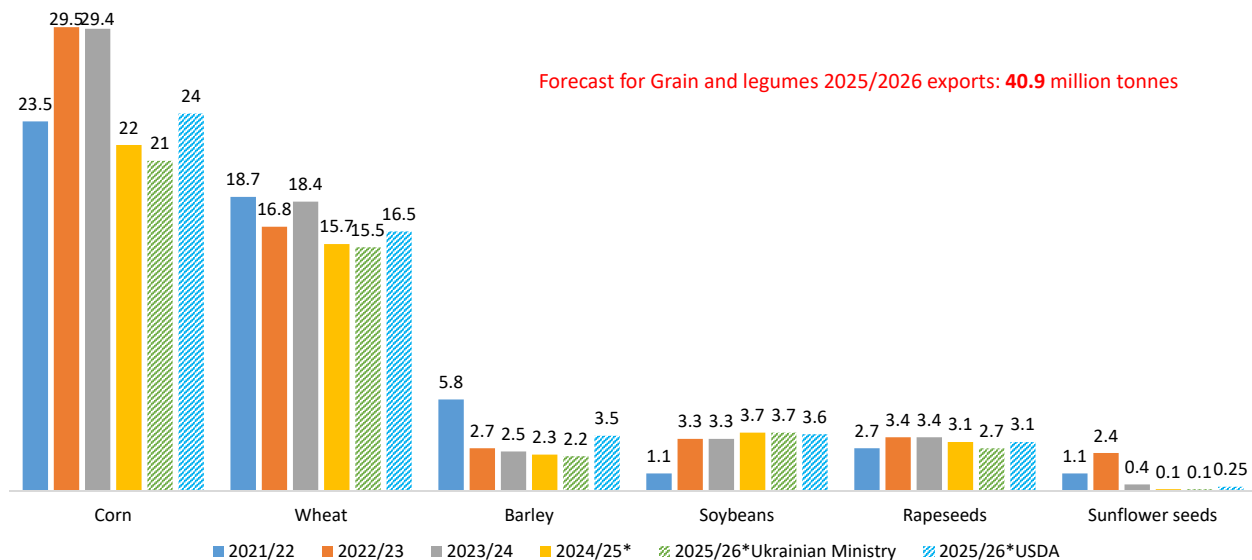


### HARVEST OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE, million metric tonnes



Source: based on data of Ministry of Agrarian Policy and Food of Ukraine and USDA, as of June, 2

### EXPORT OF GRAIN, LEGUMES AND OIL CROPS FROM UKRAINE, million metric tonnes



Source: based on data of Ministry of Agrarian Policy and Food of Ukraine and USDA, as of June,



### BALANCE OF SUPPLY AND DEMAND OF GRAIN IN UKRAINE

*\*forecast as of June 6, 2025*

	2021/22	2022/23	2023/24	2024/25*	2025/26**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25* to 2023/24	2025/26** to 2024/25*
Initial stocks	4,817	16,270	8,158	3,790	5,068	-53.5 %	+33.7 %
Sown area, thousand hectares	15,995	12,171	10,985	11,139	11,019	+1.4 %	-1.1 %
Harvested area, thousand hectares	15,948	11,773	10,836	10,106	10,745	+2.5 %	-3.3 %
Yield, tonnes / hectare	5.39	4.58	5.52	5.06	4.92	-8.3 %	-2.7 %
Gross harvest	86,010	53,864	59,772	56,246	52,888	-5.9 %	-6.0 %
Import	125	152	98	107	100	+9.1 %	-7.2 %
<b>Total supply</b>	<b>90,952</b>	<b>70,286</b>	<b>68,029</b>	<b>60,143</b>	<b>58,056</b>	<b>-11.6 %</b>	<b>-3.5 %</b>
Domestic consumption:	25,396	14,888	13,567	14,801	14,869	+9.1 %	+0.5 %
food	4,611	4,230	3,834	3,940	3,860	+2.8 %	-2.0 %
fodder	13,325	6,625	5,840	7,095	7,525	+21.5 %	+6.1 %
seeds	1,666	1,441	1,495	1,486	1,502	-0.6 %	+1.1 %
losses	4,812	1,777	1,677	1,456	1,127	-13.2 %	-22.6 %
other (alcohol, malt, starch, etc.)	982	815	721	824	855	+14.3 %	+3.8 %
Export	49,286	47,240	50,672	40,274	38,543	-20.5 %	-4.3 %
<b>Total distribution (demand)</b>	<b>74,682</b>	<b>62,128</b>	<b>64,239</b>	<b>55,075</b>	<b>53,412</b>	<b>-14.3 %</b>	<b>-3.0 %</b>
Ending stocks	16,270	8,158	3,790	5,068	4,644	+33.7 %	-8.4 %
Ratio of ending stocks to distribution	21 %	13 %	6 %	9 %	9 %		

Source: based on "APK-Inform", the State Statistic Service of Ukraine and the State Customs Service of Ukraine

### BALANCE OF SUPPLY AND DEMAND OF OILSEEDS IN UKRAINE (sunflower, soybeans and rapeseeds)

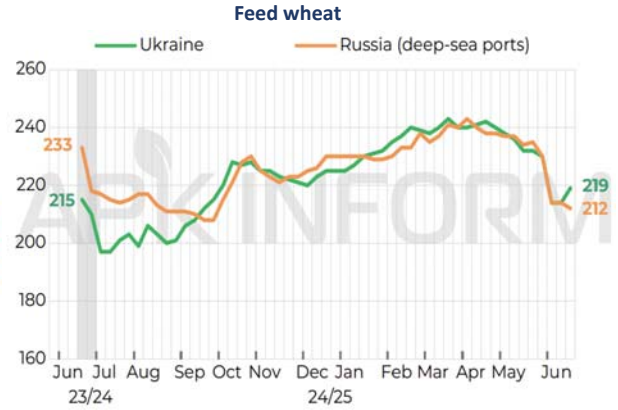
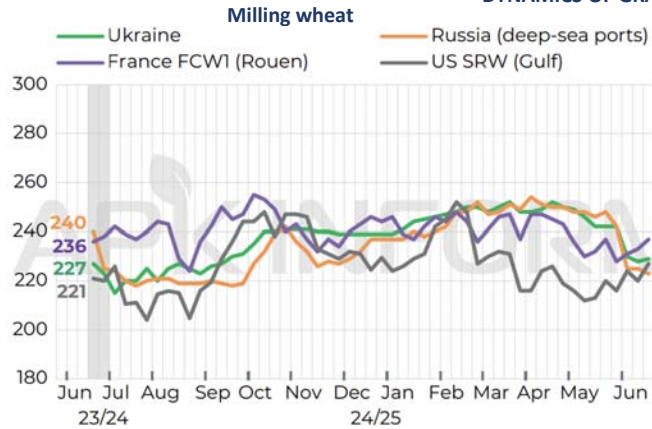
*\*forecast as of June 11, 2025*

	2022/23	2023/24	2024/25*	2025/26**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25* to 2023/24	2025/26** to 2024/25*
Initial stocks	4,695.9	711.5	178.1	353.2	- 75.0 %	+ 98.3 %
Sown area, thousand hectares	8,561.5	9,480.0	9,819.0	9,890.0	+ 3.5 %	+ 0.7 %
Harvested area, thousand hectares	8,236.0	9,394.5	9,646.4	9,567.3	+ 2.7 %	- 0.8 %
Yield, tonnes / hectare	2.50	2.70	2.41	2.50	- 10.4 %	+ 3.6 %
Gross harvest	20,628.2	25,328.3	23,293.9	23,942.0	- 8.0 %	+ 2.8 %
Import	72.6	28.6	29.5	32.4	+ 3.1 %	+ 9.8 %
<b>Total supply</b>	<b>25,396.7</b>	<b>26,068.3</b>	<b>23,501.5</b>	<b>24,327.6</b>	<b>- 9.8 %</b>	<b>+ 3.5 %</b>
Domestic consumption:	16,278.2	18,621.9	16,263.3	17,582.3	- 12.7 %	+ 8.1 %
processing for oil	15,792.5	18,066.3	15,760.0	17,100.0	- 12.8 %	+ 8.5 %
seeds	242.6	312.7	281.6	282.6	- 9.9 %	+ 0.4 %
other	51.0	48.5	45.0	14.6	- 7.3 %	- 67.4 %
losses	192.1	194.4	176.8	185.1	- 9.1 %	+ 4.7 %
Export	8,407.0	7,268.4	6,885.0	6,447.0	- 5.3 %	- 6.4 %
<b>Total distribution (demand)</b>	<b>24,685.3</b>	<b>25,890.3</b>	<b>23,148.3</b>	<b>24,029.3</b>	<b>- 10.6 %</b>	<b>+ 3.8 %</b>
Ending stocks	711.5	178.1	353.2	298.3	+ 98.3 %	- 15.5 %
Ratio of ending stocks to distribution	2.9%	0.7%	1.5%	1.2%		

Note: MY September-August

Source: based on "APK-Inform", the State Statistic Service of Ukraine and the State Customs Service of Ukraine

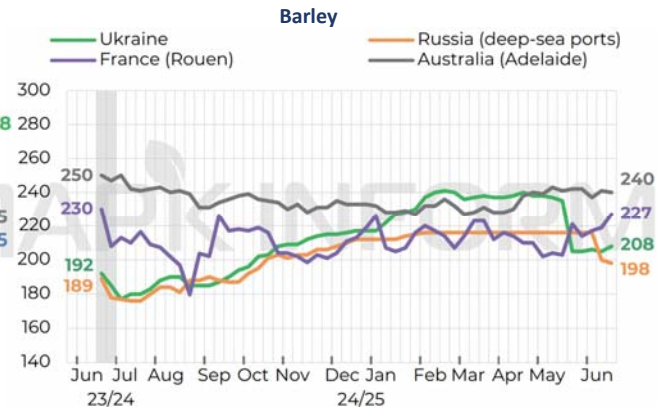
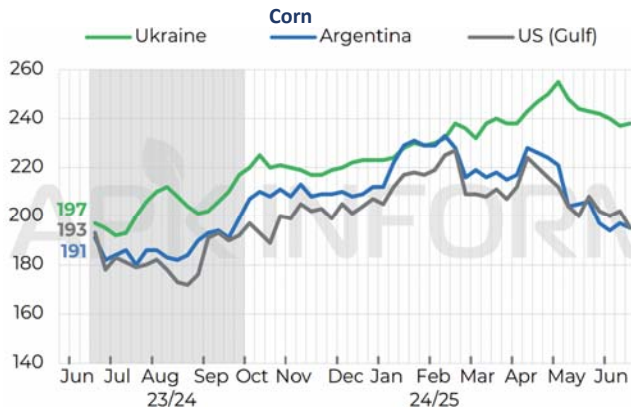
# DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	June 20	June 13	June 6	May 30	May 23	Last weekly change	
Futures market										
Wheat	CBOT, July	USA	EXW	208.6	199.7	203.8	196.2	199.3	+ 8.9	+ 4.4 %
Milling wheat	Euronext, Sep	France	CPT Rouen	238.7	234.4	234.1	227.1	233.4	+ 4.3	+ 1.8 %
Wheat	LIFFE, July	EU	EXW	196.6	215.3	215.8	211.8	218.7	- 18.7	- 8.7 %
Wheat	BCA, July	Argentina	EXW	203.5	203.0	205.5	204.0	206.0	+ 0.5	+ 0.2 %
Cash market										
Wheat SRW	June	USA	CPT Gulf of Am.	227.0	220.0	224.0	216.4	219.5	+ 7.0	+ 3.2 %
Wheat hard	June	Argentina	FOB	236.0	237.0	233.0	231.0	235.0	- 1.0	- 0.4 %
Milling wheat	July	France	FOB	237.0	233.0	231.0	228.0	237.0	+ 4.0	+ 1.7 %

Source: APK-inform

# DYNAMICS OF GRAIN PRICES, USD/t

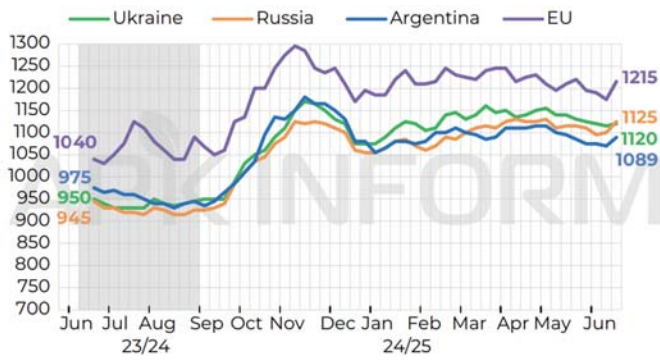


	Stock / month	Country of origin	Terms of delivery	June 20	June 13	June 6	May 30	May 23	Last weekly change	
									USD/t	%
Futures market										
Corn yellow	CBOT, July	USA	EXW	168.7	175.0	174.2	174.8	180.9	- 6.3	- 3.6 %
Corn	Euronext, Aug	France	FOB	228.1	217.1	219.5	217.2	228.0	+ 11.0	+ 5.1 %
Corn hard	BCA, July	Argentina	EXW	172.0	174.4	173.0	174.0	177.0	- 2.4	- 1.4 %
Cash market										
Corn yellow	June	USA	CPT Gulf of Am.	195.2	201.8	199.8	202.0	207.7	- 6.6	- 3.3 %
Corn	June	France	FOB	230.0	217.6	213.2	222.8	237.9	+ 12.4	+ 5.7 %
Corn	June	Argentina	FOB	195.0	197.0	194.0	197.0	206.0	- 2.0	- 1.0 %
Fodder barley	June	France	FOB	226.7	219.4	216.5	214.1	220.7	+ 7.3	+ 3.3 %

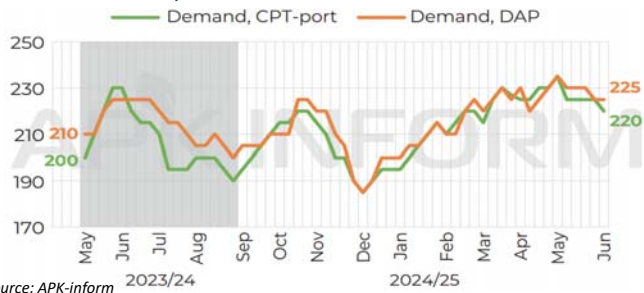
Source: APK-inform

# PRICES DYNAMICS OF OILSEEDS AND BY-PRODUCTS, USD/t

Sunflower oil (offer, FOB)

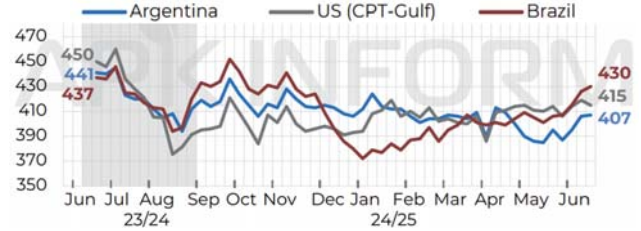


Sunflower meal, Ukraine

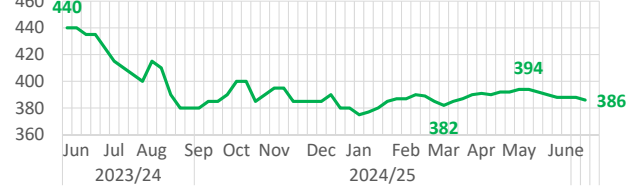


Source: APK-inform

Soybeans (offer, FOB)



Soybeans (CPT-port), USD, Ukraine



Export prices for oil crops and by-products in Russia

	min	weekly change	max	weekly change	average	weekly change
Offer, FOB, USD/t (June-Aug)						
Crude SFO	1100	35	1130	25	1125	15
Sunflower meal	225	5	235	5	230	5
Bid, FOB, USD/t (Oct-Nov)						
Crude SFO	1020	45	1030	40	1025	40
Bid, FOB, USD/t (June-Aug)						
Crude SFO	1090	25	1105	25	1100	25
Sunflower meal	215	5	225	5	220	5

Thank you!

Questions?

KANSAS STATE  
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Agricultural Economics