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Report Highlights:

Ukraine's wheat, barley, and rye harvest for marketing year (MY) 2024/25 has concluded. MY2024/25 corn production is smaller due to lower yields. Post estimates MY2024/25 beginning stocks for grains at minimal levels, as Ukraine was able to maintain an independent export corridor out of its Odesa region ports for most of MY2023/24. Domestic grain prices are on the rise, prompting farmers to delay their selling decisions. Regarding export market structure, Ukraine cut its exports to transit destinations and started selling directly to immediate consumers, which was the modus operandi before the full-scale Russian invasion.

Abbreviations:

MAPFU – 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 Tons

PSD – Production, Supply, and Distribution

SSSU – State Statistics Service of Ukraine

This Ukraine Grain and Feed Update Report concentrates on production and export forecasts for marketing year (MY) 2024/25. For wheat, barley, and rye, MY2024/25 runs from July 2024 to June 2025. For corn, the MY is from October 2024 to September 2025. Post revised export and consumption estimates for MY2023/24 based on currently available data. For detailed information about all estimates and a general profile of Ukraine's agricultural sector, see the [USDA/Foreign Agricultural Service Ukraine Grain and Feed Annual Report for 2024](#).

Production

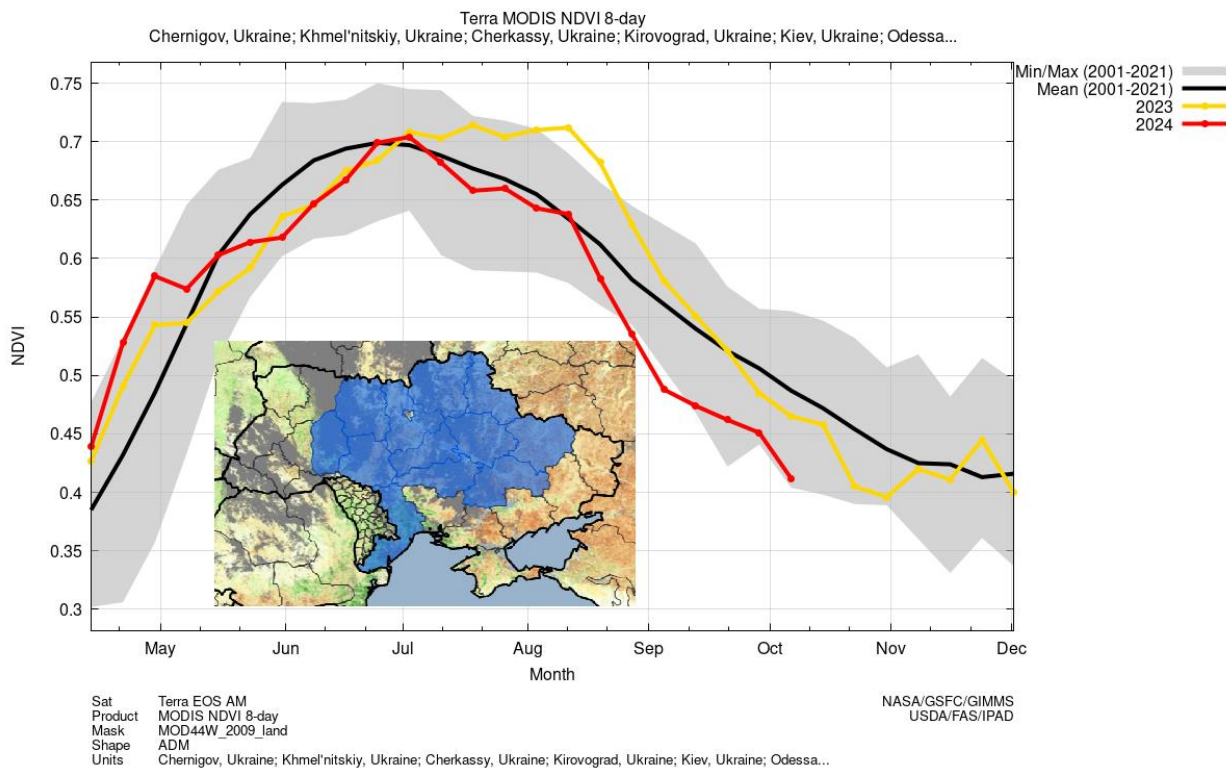
Post updated MY2024/25 production area estimates on recent SSSU numbers for Ukraine-controlled territories:

- Wheat – 4.9 million ha
- Corn – 4 million ha
- Barley – 1.4 million ha
- Rye – 72 thousand ha

According to MAPFU data at the time of report writing, harvesting of wheat and barley has concluded. The wheat harvest was 22.3 MMT, similar to MY2023/24, while barley was 5.5 MMT, a 5 percent decrease in gross weight compared to MY2023/24. Post accepts these as the initial MY2024/25 production volume estimates for Ukraine-controlled territories.

For corn, the normalized difference vegetation index (NDVI) dynamics suggest that MY2024/25 growing conditions in 13 regions, which incorporate over 88 percent of Ukraine's corn areas, were less favorable than in the previous MY (Figure 1). Post estimates corn production at 23.3 MMT, a 25 percent decrease compared to the previous MY. Note that MY2023/24 was a bumper crop featuring the second-highest yield for corn over the last decade.

Figure 1: NDVI Dynamics for Major Corn Producing Regions



Official rye production volumes are currently unavailable. Post estimates these at over 200 thousand MT based on State Statistics Service of Ukraine (SSSU) area data and our own yield estimates.

Exports

The final export numbers for MY2023/24 are:

- Barley – 2.5 MMT, an 8 percent decrease compared to Post’s MY2022/23 estimate
- Wheat – 18.4 MMT, a 9 percent increase
- Rye – 1,600 MT, a 91 percent decrease

Weak barley exports for MY2023/24 were mostly the result of a combined 1 MMT drop in exports to two likely transit destinations, Türkiye and Romania. The drop was not offset by an increase in exports, amounting 0.8 MMT against the previous MY, to several end-use consumers, including China, Cyprus, Tunisia, Saudi Arabia, Israel, and Jordan. The resulting barley stocks remaining on the domestic market as the result of slow exports had a downward pull on domestic prices; therefore, Post rebalanced domestic feed consumption for MY2023/24 (see Consumption section).

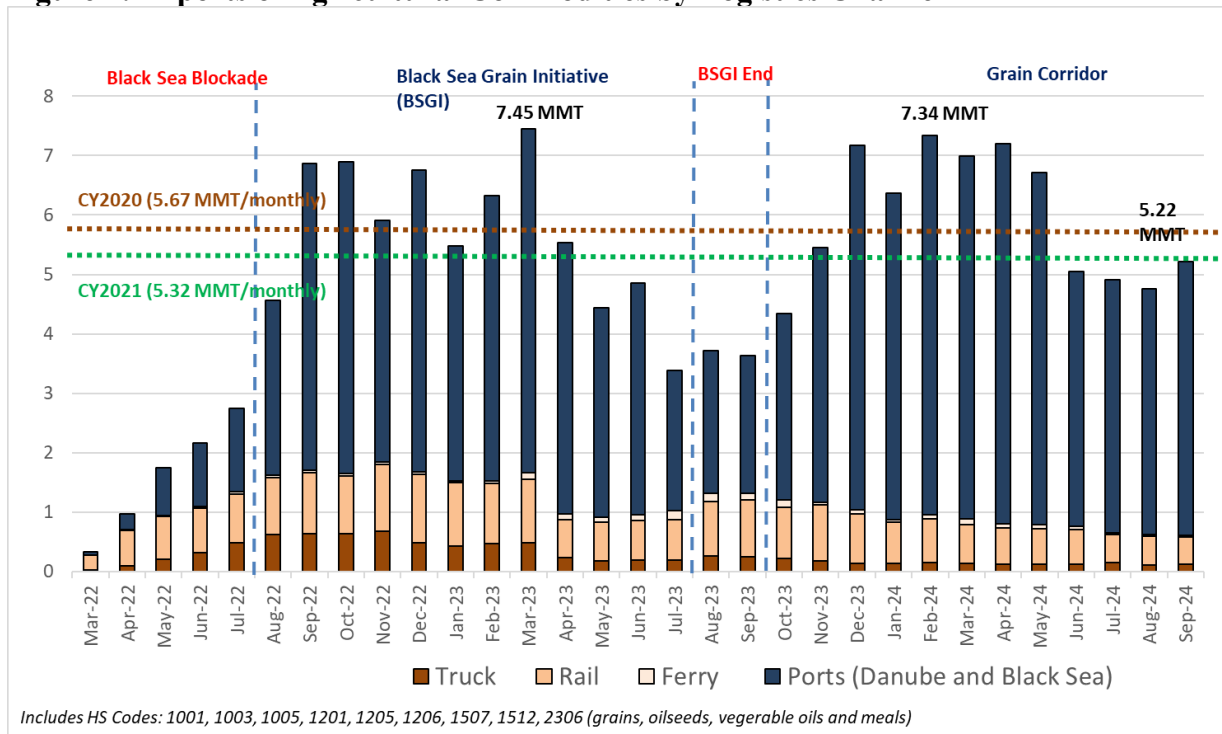
The dynamics of MY2023/24 wheat exports are opposite to that of barley. The 5.3 MMT increase in exports to three major markets, Spain, Egypt, and Indonesia, compensated for a 4.2 MMT drop against the previous MY to two likely transit destinations, Türkiye and Romania. Spain became the single largest destination for Ukrainian wheat, importing 5.9 MMT, comprising 32 percent of total wheat exports.

Rye remains a niche crop. Only three major markets, Poland, Germany, and Romania, imported substantial volumes.

MY2023/24 corn exports concluded at 28.6 MMT, a 6 percent increase compared to the previous MY, according to MAPFU. Major markets included Spain, China, Egypt, the Netherlands, Italy, and Türkiye.

Ukraine’s ability to independently operate its Odesa region ports, which are handling the vast majority of agricultural exports, is the major driving force behind improved export dynamics. The volume of total agricultural exports grew by 10 percent under the Ukrainian Grain Corridor (October 2023 - September 2024), as compared to the same period in the previous year when shipments were predominantly happening under the auspices of the Black Sea Grain Initiative (Figure 2).

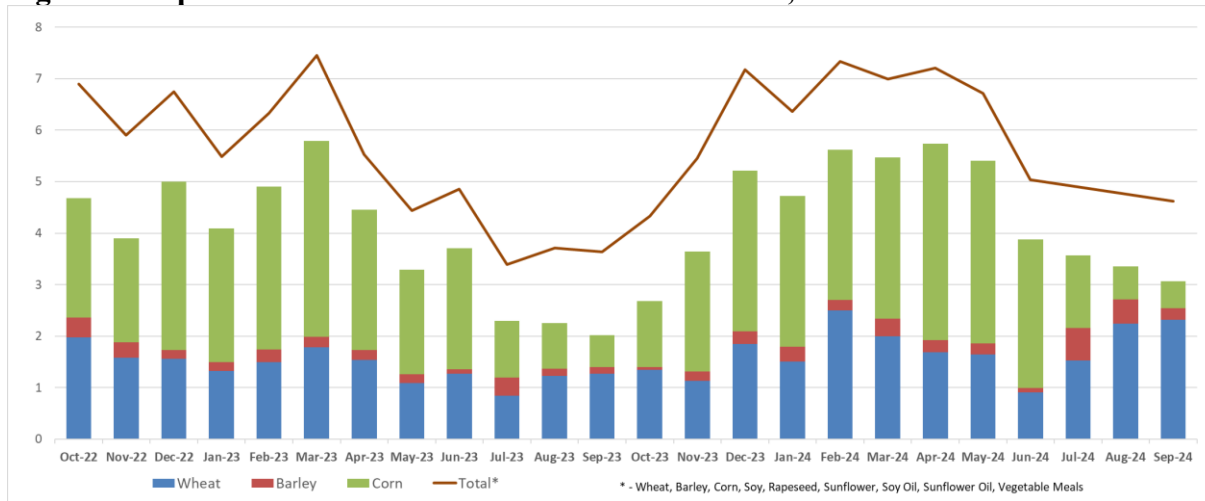
Figure 2: Exports of Agricultural Commodities by Logistics Channel



Source: MAPFU

Grains comprise the bulk of Ukraine’s agricultural exports. Black Sea port shipments offer the most cost-effective option, compared to inland transport (railroad and truck). With Odesa region ports back in business, Ukraine has already drawn down its accumulated grain stocks that had been looming since MY2021/22 (see Stocks section). The lack of stocks is a main factor behind the prolonged slide of grain export volumes from July to September 2024 (Figure 3). High domestic prices (see Consumption Section) are another factor contributing to the slower-than-expected pace of exports since July 2024.

Figure 3: 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 have been affecting the rhythm, speed, and volume of agricultural exports through seaports. At the time of report writing, Ukraine experienced a series of missile strikes on its Odesa region port facilities.

Under the assumption of no large changes to the national energy grid and commercial port infrastructure, Post’s MY2024/25 export estimates for individual commodities are:

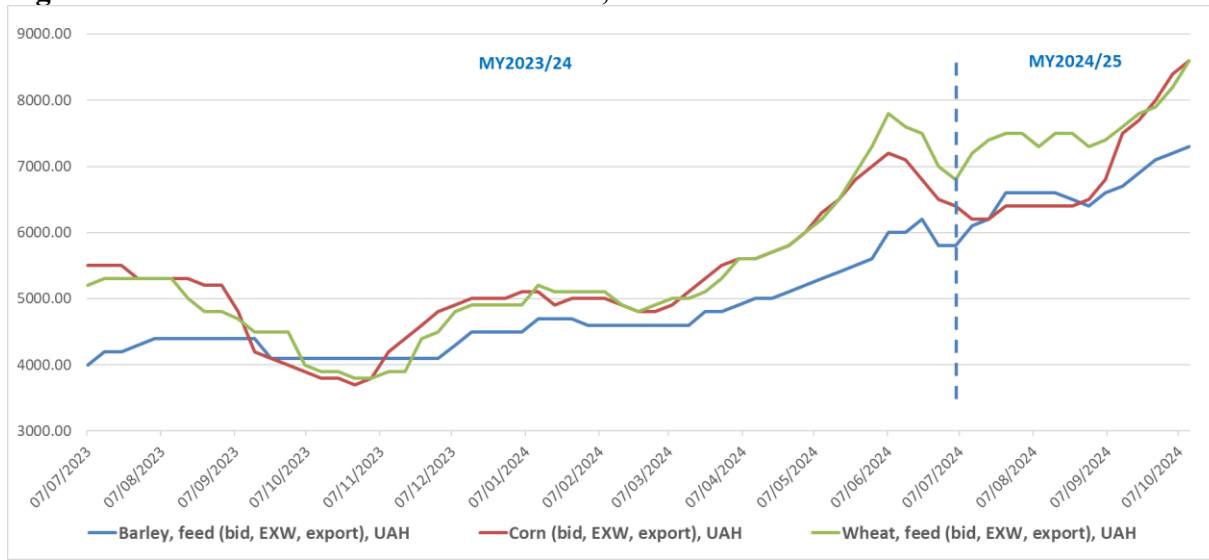
- Corn: 17.8 MMT, a 38 percent decrease compared to Post’s MY2023/24 estimate
- Wheat: 15.2 MMT, an 18 percent decrease
- Barley: 2.0 MMT, a 19 percent decrease
- Rye: 10,000 MT, a 400 percent increase

Consumption

[GAIN Report UP2024-0008](#) outlines the general logic behind consumption numbers in this report. Post’s revised total feed consumption estimates for MY2023/24 and MY2024/25 are based on animal number dynamics derived from GAIN Reports [UP2024-0005](#) (poultry) and [UP2024-0015](#) (beef and swine).

Post estimates MY2023/24 distribution of feed consumption numbers for individual crops on domestic price ratios (Figure 4).

Figure 4: Domestic Grain Prices in Ukraine, UAH/MT



Source: Information Agency APK-Inform

Barley was the cheapest available feed ingredient on the market due to slow exports (see Export section). Therefore, Post increased the share of barley consumption for MY2023/24 against the previous MY (Table 1). The trend of relatively low barley prices is continuing into MY2024/25, and Post held its barley consumption estimate for MY2024/25 steady.

Table 1: Estimated Feed Consumption, thousand MT

	MY2021/22	MY2022/23	MY2023/24	MY2024/25
Barley	2,693	2,600	2,800	2,800
Corn	3,808	3,200	4,200	4,100
Rye	2	0	0	0
Wheat	3,065	3,400	2,300	2,300
Total	9,568	9,200	9,300	9,200

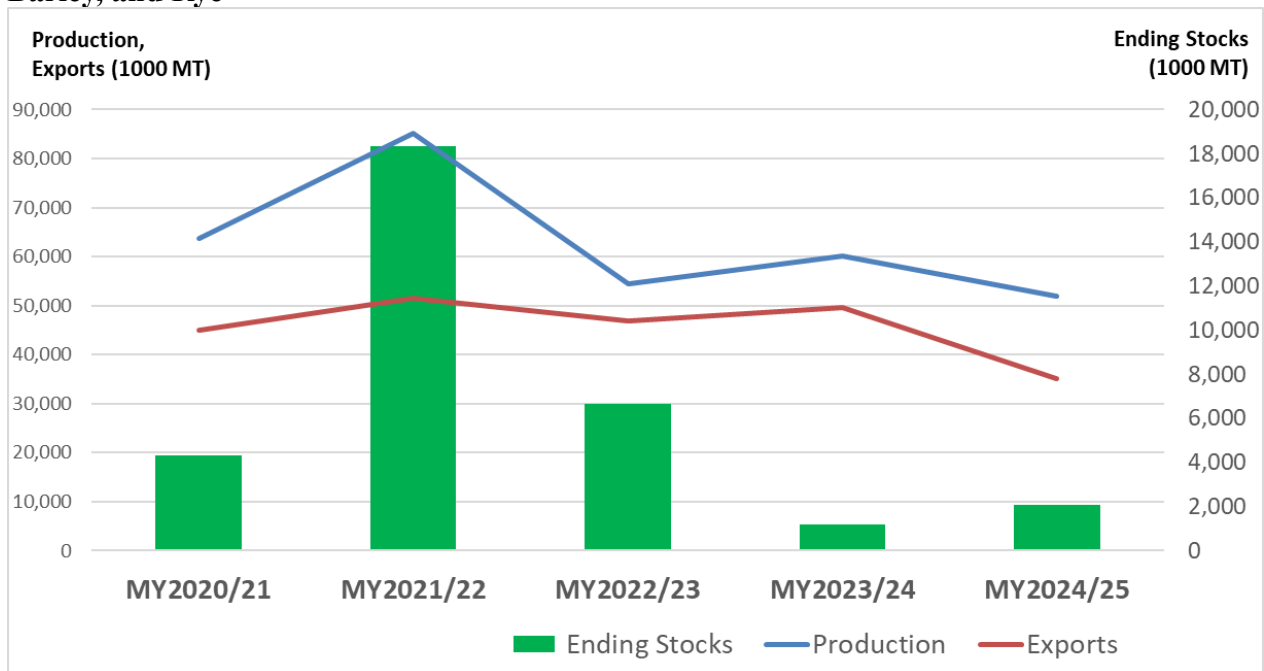
Source: FAS/Kyiv Estimates

Post bases food consumption for individual grains, predominantly wheat, on the current population, which is derived from the number of refugees who have left Ukraine, as per [UNHCR](#). The recorded number of refugees who have left Ukraine at the time of the report writing increased to 6.7 million, up from 6.5 million, which Post used as the estimate for MY2023/24.

Stocks

Post estimates MY2023/24 ending stocks for all grains at 1.2 MMT, an 82 percent decrease compared to 6.6 MMT in MY2022/23 (Figure 5). Post estimates MY2024/25 ending stocks at 2.1 MMT, on improved export dynamics through the Black Sea.

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



Source: FAS/Kyiv Estimates

Policy

In May 2024, Ukraine introduced procedures for the approval of minimum export prices for selected bulk commodities, including grains, oilseeds, vegetable oils and meals, walnuts, and honey. See GAIN Report [UP2024-0019](#) for more details.

MAPFU signed a memorandum of understanding (MOU) with Ukrainian trade and industry organizations on July 15, 2024. The MOU intended to establish a wheat export cap for local marketing year MY2024/25 (July 2024-June 2025). On September 3, 2024, MAPFU announced ([in Ukrainian](#)) that an addendum to MOU was signed establishing a 16.2 MMT export cap for wheat (HS Code 1001).

PSD Data Statistics

All PSD tables below sum the estimated production numbers for Ukraine and Russian-occupied Crimea. The MY2022/23, MY2023/24, and MY2024/25 estimates do not include data for regions occupied by Russia after the start of the full-scale invasion in February 2022, as production figures and data are currently 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
Area Harvested (1000 HA)	1950	1922	1680	1676	1500	1537
Beginning Stocks (1000 MT)	780	780	770	721	1139	543
Production (1000 MT)	6100	6211	6350	6109	5400	5800
MY Imports (1000 MT)	2	2	1	1	2	1
TY Imports (1000 MT)	2	2	1	1	2	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	6882	6993	7121	6831	6541	6344
MY Exports (1000 MT)	2712	2712	2482	2481	2400	2000
TY Exports (1000 MT)	2559	2559	3200	2481	2400	2000
Feed and Residual (1000 MT)	2400	2600	2500	2800	2500	2800
FSI Consumption (1000 MT)	1000	960	1000	1007	1000	1007
Total Consumption (1000 MT)	3400	3560	3500	3807	3500	3807
Ending Stocks (1000 MT)	770	721	1139	543	641	537
Total Distribution (1000 MT)	6882	6993	7121	6831	6541	6344
Yield (MT/HA)	3.1282	3.2315	3.7798	3.645	3.6	3.7736

(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 beginning stocks estimate is 52 percent lower than USDA's official number on available export data for MY2023/24.

For MY2024/25, Post's barley production estimate is 7 percent higher than USDA's official number on MAPFU's harvest data.

Post's MY2024/25 barley export estimate is 17 percent lower than USDA's official number, based on lower beginning stocks.

For MY2024/25, Post's barley feed and residual estimate is 12 percent higher than USDA's official number on distribution of individual crops in feed rations.

Post's MY2024/25 barley ending stocks estimate is 16 percent lower than USDA's official number on production, consumption, and export estimates for MY2024/25.

Table 3: Corn

Corn Market Year Begins	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Area Harvested (1000 HA)	4050	4128	4200	3978	4100	4050
Beginning Stocks (1000 MT)	7796	7796	2795	2815	1460	200
Production (1000 MT)	27000	26200	32500	31043	26200	23300
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	35310	33873	27680	23520
MY Exports (1000 MT)	27122	27122	29600	28550	23000	17800
TY Exports (1000 MT)	27122	27122	29600	28550	23000	17800
Feed and Residual (1000 MT)	4000	3200	3300	4200	3100	4100
FSI Consumption (1000 MT)	900	880	950	923	950	916
Total Consumption (1000 MT)	4900	4080	4250	5123	4050	5016
Ending Stocks (1000 MT)	2795	2815	1460	200	630	704
Total Distribution (1000 MT)	34817	34017	35310	33873	27680	23520
Yield (MT/HA)	6.6667	6.3469	7.7381	7.8037	6.3902	5.7531

(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: [PSD Online Advanced Query](#)

For MY2024/25, Post's corn beginning stocks estimate is 73 percent lower than USDA's official number on available export data for MY2023/24.

In MY2024/25, Post's corn production estimate is 11 percent lower than USDA's official number on lower yield estimates.

Post's MY2024/25 corn export estimate is 18 percent lower than USDA's official number due to lower beginning stocks and production estimates.

Post's MY2024/25 corn feed and residual estimate is 17 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	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Area Harvested (1000 HA)	5600	5631	5010	5007	5200	5162
Beginning Stocks (1000 MT)	6265	6265	2926	3102	706	452
Production (1000 MT)	21500	22075	23000	22970	22900	22800
MY Imports (1000 MT)	83	83	57	57	80	80
TY Imports (1000 MT)	83	83	57	57	80	80
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	27848	28423	25983	26129	23686	23332
MY Exports (1000 MT)	17122	17122	18577	18577	16000	15200
TY Exports (1000 MT)	17122	17122	18577	18577	16000	15200
Feed and Residual (1000 MT)	3000	3400	2000	2300	2000	2300
FSI Consumption (1000 MT)	4800	4799	4700	4800	4700	4996
Total Consumption (1000 MT)	7800	8199	6700	7100	6700	7296
Ending Stocks (1000 MT)	2926	3102	706	452	986	836
Total Distribution (1000 MT)	27848	28423	25983	26129	23686	23332
Yield (MT/HA)	3.8393	3.9203	4.5908	4.5876	4.4038	4.4169

(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 3, both export and import volumes for flour and wheat products (HS Codes 1101, 190219, 190230, 190240) are converted to wheat grain equivalent by multiplying the product weight by 1.368 and are then added to export volumes for wheat (HS Code 1001) to present a comprehensive picture of Ukrainian wheat trade.

For MY2024/25, Post's wheat beginning stocks estimate is 36 percent lower than USDA's official number on available export data for MY2023/24.

Post's MY2024/25 wheat feed and residual estimate is 15 percent higher than USDA's official number on distribution of individual crops in feeding diets.

Post estimates MY2024/25 wheat ending stocks 15 percent lower than USDA's official number on production, consumption and export estimates for MY2024/25.

Table 5: Rye

Rye 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)	100	106	80	78	70	72
Beginning Stocks (1000 MT)	164	164	184	202	145	152
Production (1000 MT)	315	322	240	231	200	210
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	479	486	424	433	345	362
MY Exports (1000 MT)	18	18	2	2	10	10
TY Exports (1000 MT)	14	14	2	2	10	10
Feed and Residual (1000 MT)	2	2	2	2	2	2
FSI Consumption (1000 MT)	275	264	275	277	275	275
Total Consumption (1000 MT)	277	266	277	279	277	277
Ending Stocks (1000 MT)	184	202	145	152	58	75
Total Distribution (1000 MT)	479	486	424	433	345	362
Yield (MT/HA)	3.15	3.0377	3	2.9615	2.8571	2.9167

(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: [PSD Online Advanced Query](#)

Post's MY2024/25 rye ending stocks estimate is 29 percent higher than USDA's official number and is based on production, consumption, and export estimates for MY2024/25.

Attachments:

No Attachments