



Ministry of
Agrarian Policy and
Food of Ukraine



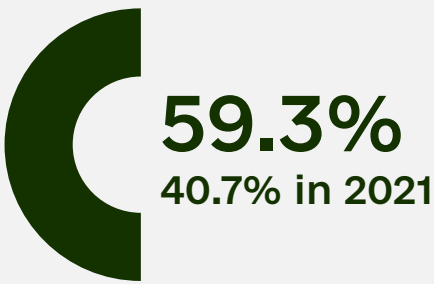
Ukrainian approach in EU integration of agricultural sector

18.01.2025



Ukrainian agri-food sector: 2024 results

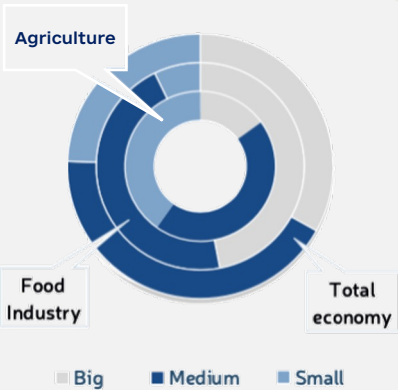
Agricultural
exports, 2024
\$24.7bn
\$27.7 bn in 2021











Agricultural
production, 2023
€1,682bn
In total production value



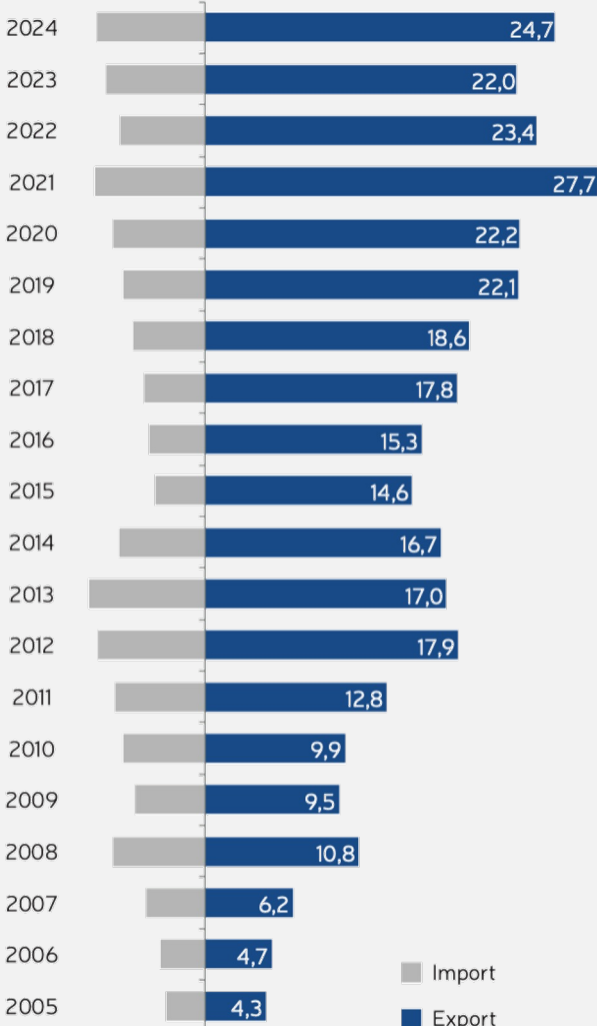
Share of SME in
2023
€1,112bn
In total production value



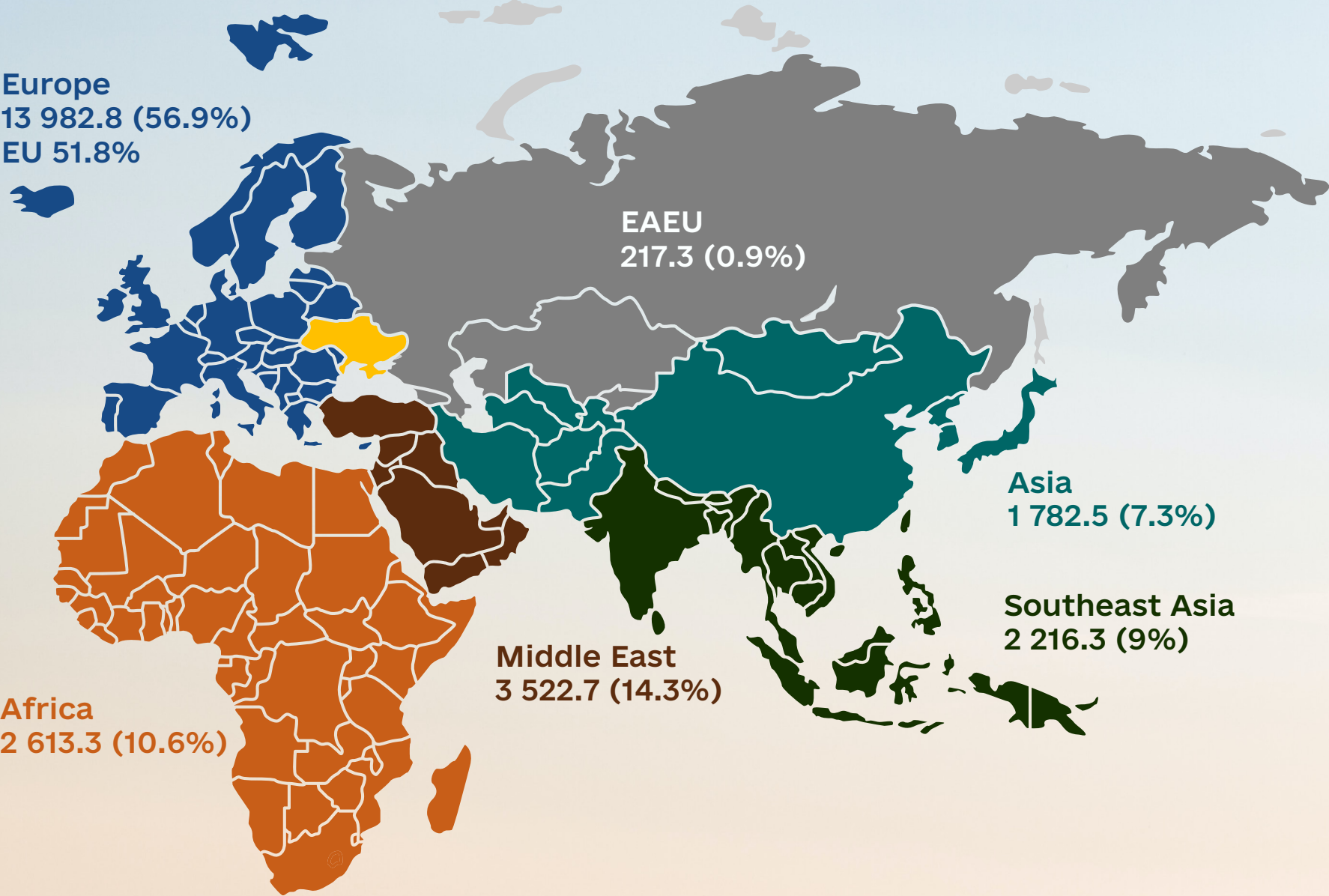
Role of Ukraine in world agriculture

	Export, mln \$	Production	Export
sunflower oil 	5,117	#2	#1
corn 	5,071	#7	#4
wheat 	3,735	#9	#6
rapeseed 	1,850	#7	#3
soybeans 	1,340	#9	#6
sunflower meal 	1,029	#2	#1
poultry 	960	#19	#6
barley 	557	#7	#5
white sugar 	420	#18	#11
soybean oil 	316	#19	#8
soybean meal 	304	#19	#11
rapeseed oil 	239	#15	#7
walnuts 	185	#5	#4
powdered milk, cream 	74	#13	#10
beef 	73	#20	#18
cheese 	54	#12	#9
butter 	49	#13	#7
apples 	21	#9	#14

Dynamics of trade, \$ bn



Ukrainian agri-food sector: 2024 export destinations mln \$



Europe	Netherlands	1,785
	Germany	1,223
	Italy	1,297
	Spain	2,679
Africa	Morocco	134
	Tunisia	329
	Algeria	289
	Libya	273
	Egypt	1,407
EAEU	Kazakhstan	155
	Kyrgyzstan	18
	Armenia	44
Asia	China	1,297
	Republic of Korea	164
Southeast Asia	Vietnam	253
	Thailand	169
	Indonesia	516
	India	846
	Bangladesh	202
	Pakistan	224
	Japan	17
Middle East	Türkiye	1,654
	Saudi Arabia	346
	Israel	379
	Lebanon	400
	Iraq	254

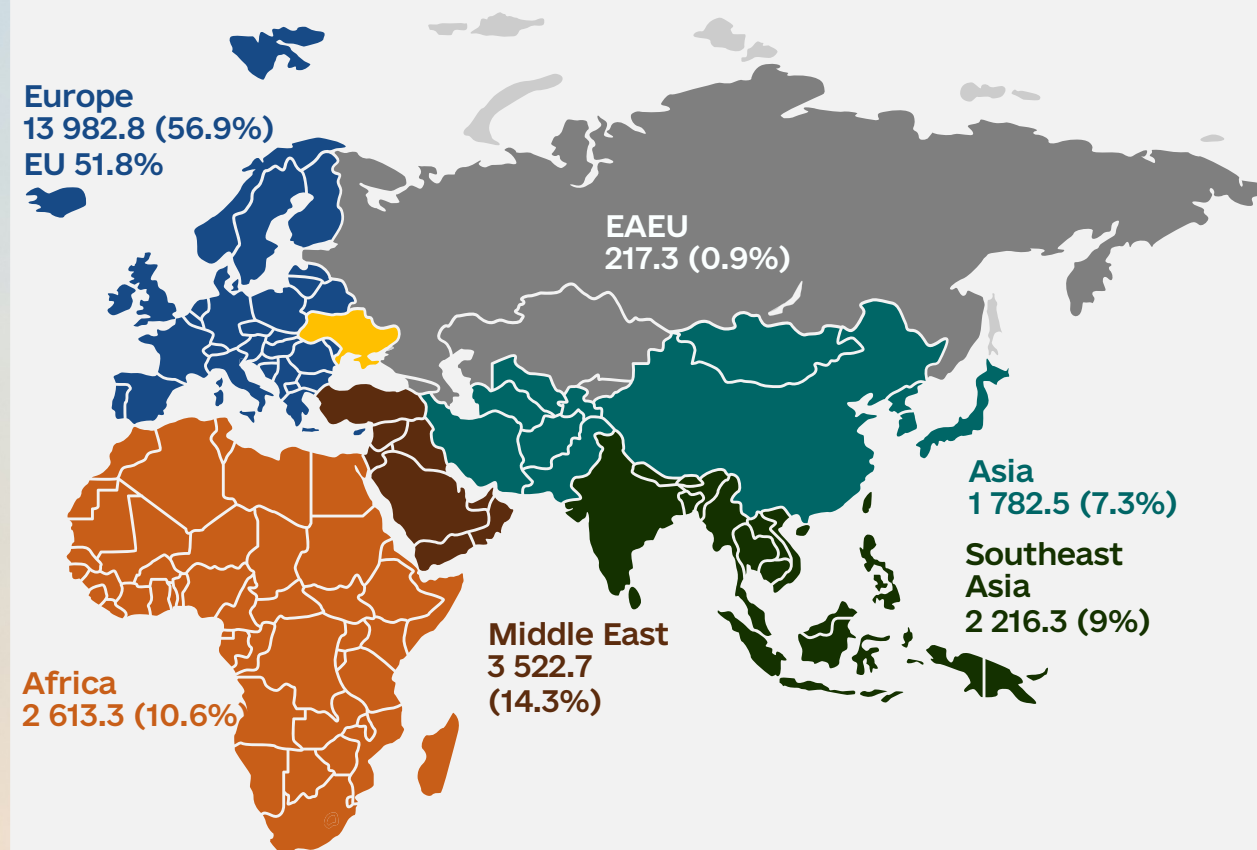
Ukrainian agri-food sector: 2024 vs 2022 export destinations



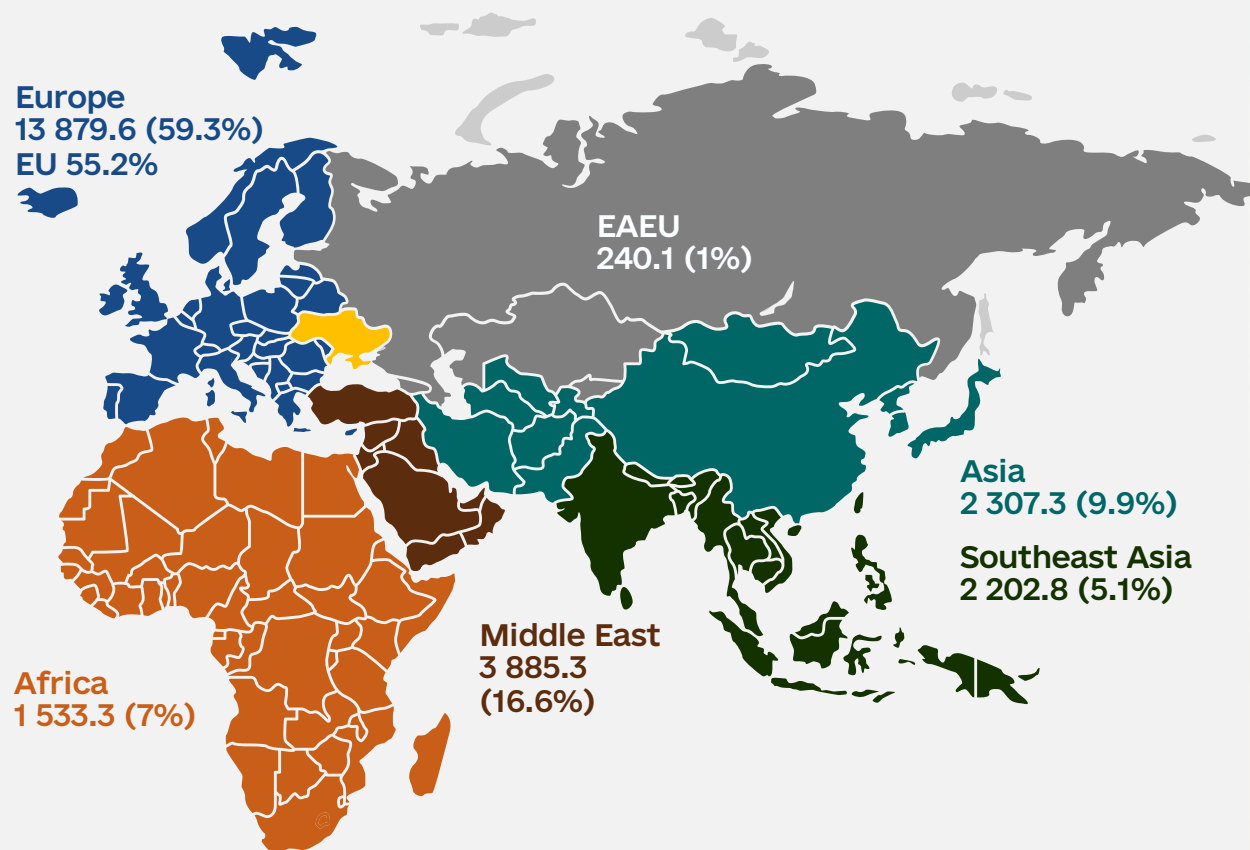
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2024 export destinations mln \$

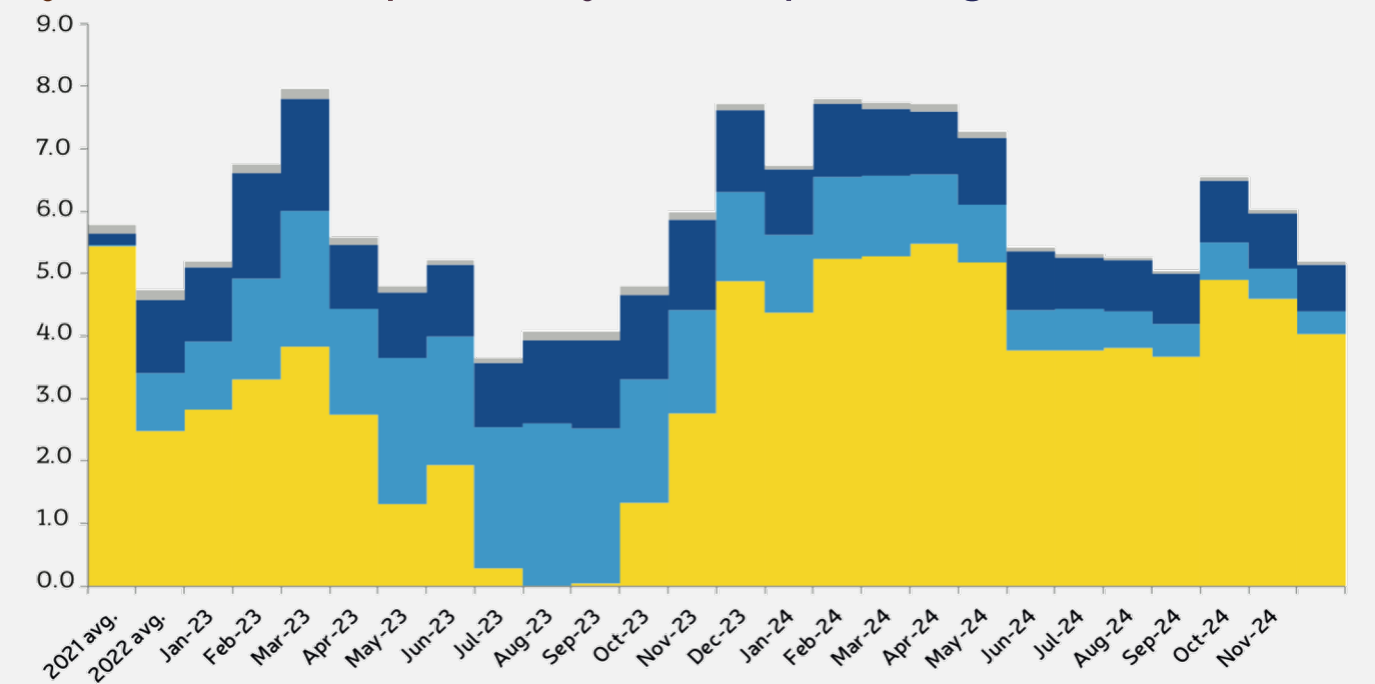


2022 export destinations mln \$

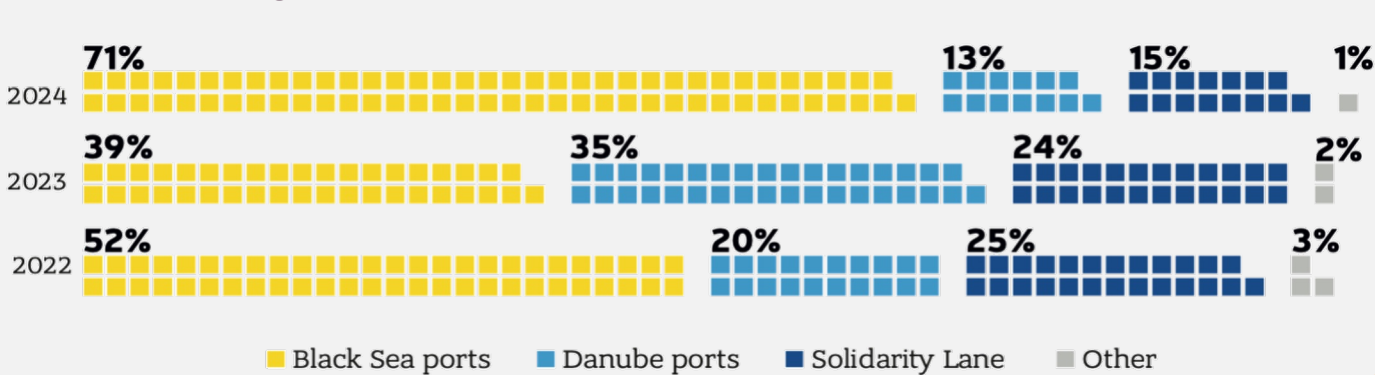


Evolution and routes of agricultural export logistics

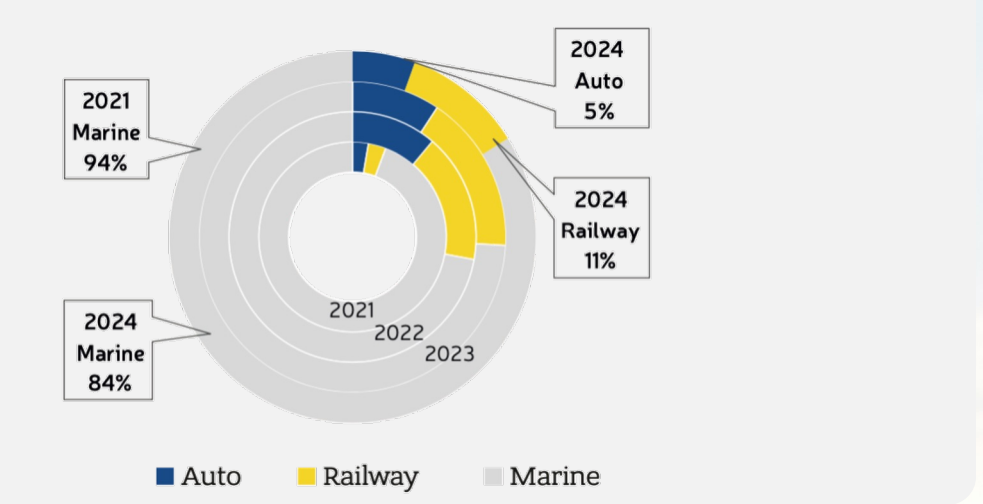
Dynamics and pathways of export logistics, MMT



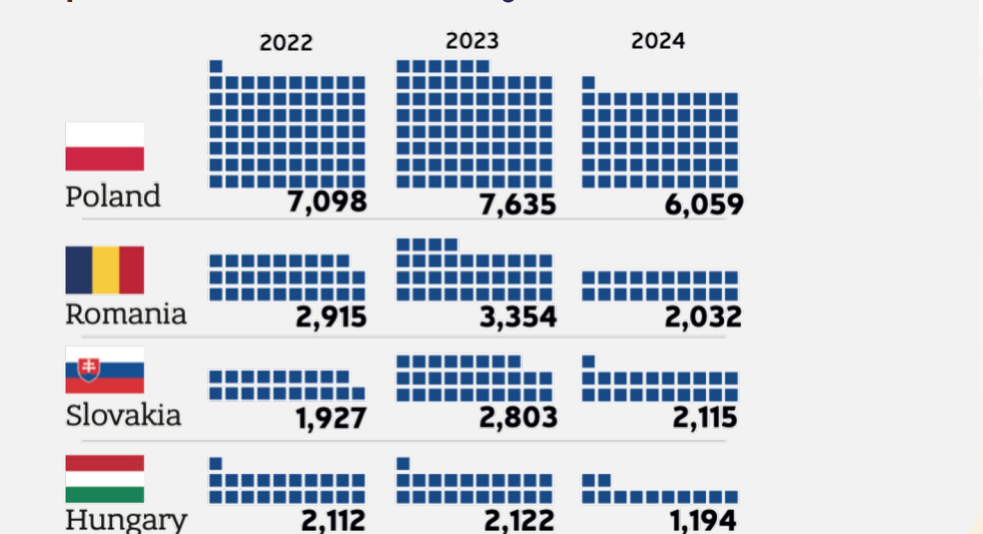
Exports logistics channels



Export logistics by type of transports



Export via Solidarity Lanes



Crops balance sheets: 2024/25 MY forecast

Cereals balance, thous. t	Wheat				Corn			
	2021/22	2022/23	2023/24	2024/25f	2021/22	2022/23	2023/24	2024/25f
Beginning stocks	1 699	6 209	3 963	1 428	1 610	12 731	6 452	3 696
Production	32 151	21 396	22 236	22 679	42 110	29 044	32 056	26 055
Import	98	44	68	62	18	30	24	27
Animal Feed	1 171	1 410	1 351	1 311	5 241	4 980	4 420	4 650
Consumption	4 241	3 815	3 851	3 815	195	190	153	160
Seed	1 514	940	808	986	312	185	169	184
Industrial processing	42	60	59	55	542	260	300	315
Losses	1 856	375	143	160	980	510	271	251
Export	18 913	17 086	18 627	16 794	23 737	29 228	29 523	22 114
Ending stocks	6 209	3 963	1 428	1 048	12 731	6 452	3 696	2 103

Crops balance sheets: 2024/24 MY forecast



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Oilseeds balance, thous. t	Sunflower				Rapeseed			
	2021/22	2022/23	2023/24	2024/25f	2021/22	2022/23	2023/24	2024/25f
Production	16 392	13 301	14 017	11 048	3 119	3 625	4 788	3 627
Beginning stocks	101	2 942	1 394	230	108	70	90	75
Import	21	31	20	24	12	40	7	10
Export	1 623	1 855	313	35	2 710	3 399	3 695	2 861
Processing and other	11 262	13 025	14 888	11 167	457	245	1 115	771
Ending stocks	2 942	1 394	230	100	70	90	75	80

Sugar balance, thous. t	2021/22	2022/23	2023/24	2024/25p
Production	1 450	1 285	1 826	1 730
Beginning stocks	332	470	313	435
Import	13	9	9	10
Export	91	452	733	770
incl. sugar	55	414	691	730
Losses	80	50	55	55
Ending stocks	470	313	435	450
Consumption	1 154	949	926	900

Strategy for Agriculture and Rural Development until 2030



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The purpose of the Strategy



Preparation for joining the EU



Ensuring sustainable development of agriculture and rural areas



Competitive, sustainable and diversified agri-food sector of Ukraine

Results



Long-term food security



Enhanced environmental protection



Climate changes mitigation



Strengthening the socio-economic balance of rural areas



for 30.8% of obligations
responsibility of the Ministry of Agrarian
Policy and Food of Ukraine

Progress execution of the Association Agreement



71%
ARD Chapter



82%
SPS Chapter

European integration law adopted in 2024

Law of Ukraine dated 22.08.2024 No. 3928-IX "On grapes, wine and viticulture"

European integration laws developed in 2024

3 draft Laws	ARD
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1 draft law	SPS
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7 draft laws	Fisheries
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Initial assessment of the state of implementation of the EU acquis



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The Cabinet of Ministers of Ukraine has approved the composition of working groups tasked with formulating Ukraine's negotiating positions for discussions with the EU

Cluster 2. Internal market

Free movement of goods

 3 is partially completed

Intellectual property rights

 2 is fully completed

Cluster 5. Resources, agriculture and cohesion policy

Agriculture and Rural Development

 5 is fully completed

 8 is partially completed

 6 in progress

Fishing

 4 is fully completed

 7 is partially completed

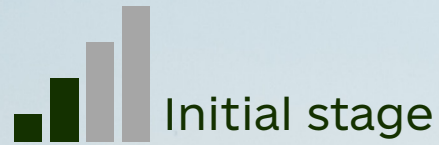
 1 in progress

Food security and SPS

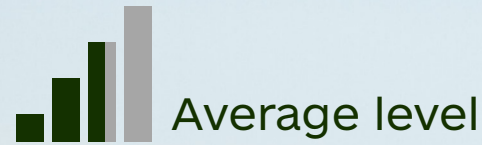
 6 is fully completed

 6 is partially completed

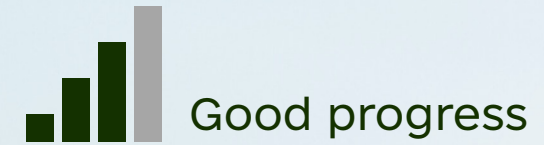
 2 in progress



Chapter 11 "Agriculture and Rural Development "



Chapter 12 "Food Safety, Veterinary and Phytosanitary Policy"



Chapter 13 " - Fisheries and Aquaculture "

For 2025

- adopt and start implementation of the Strategy for Agriculture and Rural Development until 2030, strengthen administrative capacities for its implementation and continue approximation to the EU acquis ;
- to implement legislation on CAP and use CAP for all programs supporting agriculture and rural development;
- to develop a data system on sustainable economic development (FSDN).
- complete the legislative approximation necessary to meet the requirements of the Association Agreement on plant health, GMOs and official controls, continue the approximation to EU legislation on animal welfare and strengthen the administrative capacity to meet the requirements;
- continue to expand the use of TRACES with new certificates for phytosanitary and other purposes;
- continue the reform of food safety authorities and ensure registration, identification and monitoring of animal movements in accordance with EU requirements
- continue to align national legislation with the EU acquis , including legislation on data collection, management and use, water traceability and control systems;
- take preparatory measures for the establishment of a special fishing control body to combat illegal, unaccountable and unregulated (IUU) fishing;
- continue to modernize the state electronic fisheries management system (e Fish) and harmonize it with the relevant EU registers

Presenter



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