



Ukrainian grains exports and production prospects

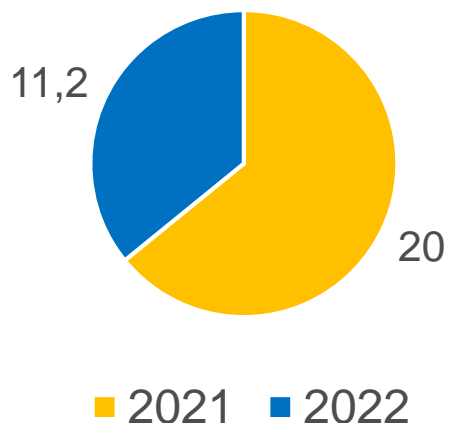
AGRI E4

Crops Market Observatory - 16 March 2023

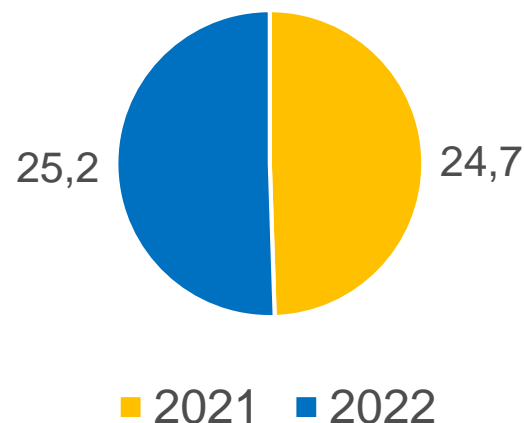
Ukrainian cereals and oilseeds exports

Evolution of Ukrainians exports in 2021 and 2022

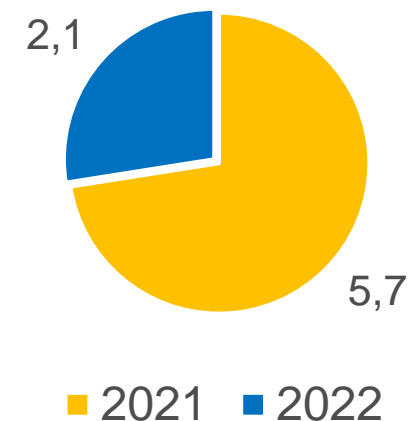
Wheat (million tonnes)



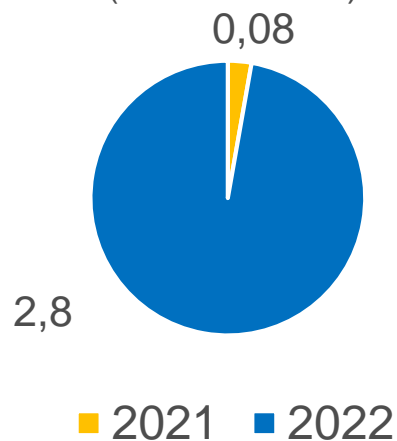
Maize (million tonnes)



Barley (million tonnes)

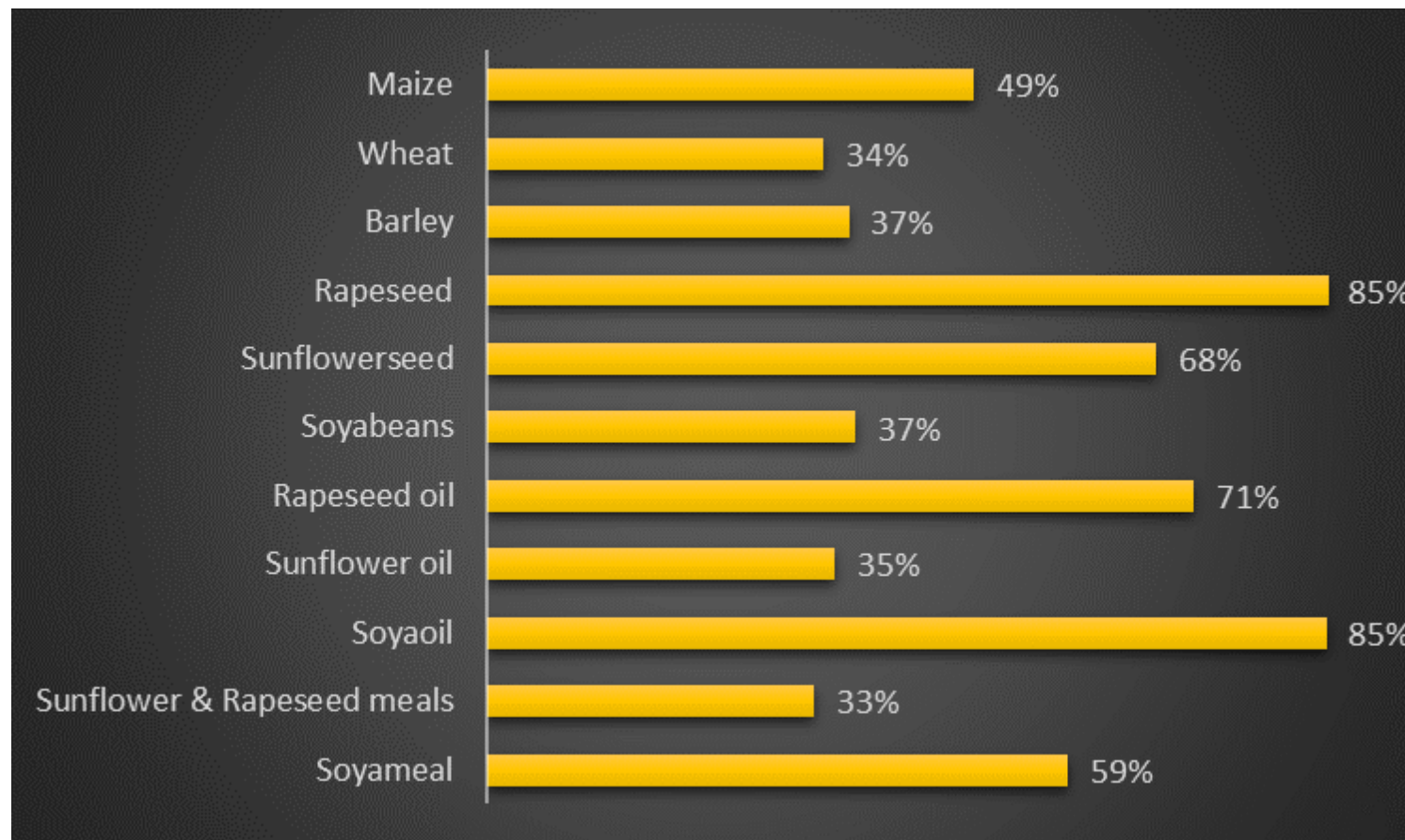


Sunflower seeds
(million tonnes)



Source: Ukrainian Customs Services

EU share in Ukrainian exports of cereals and oilseeds



Source: DG AGRI calculations based on Ukrainian State Customs Service and Taxud Surveillance data

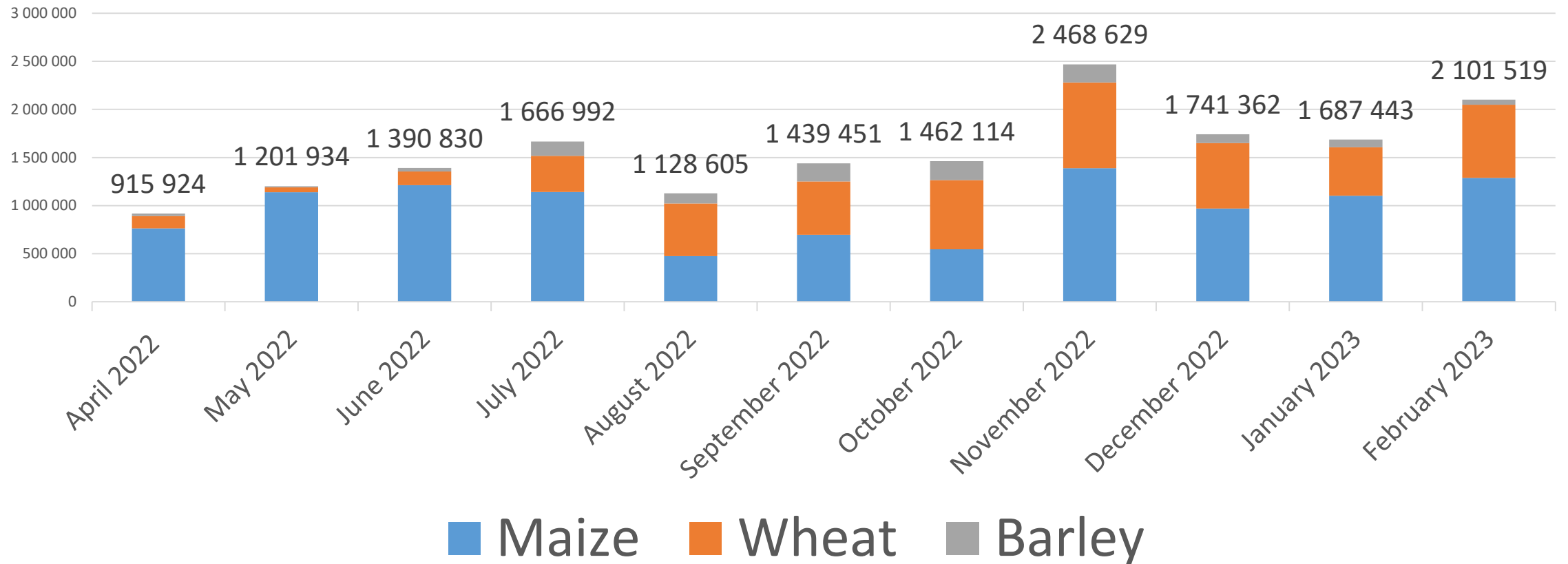
Table 7. Evolution of EU imports from Ukraine for the main cereals

Product (tonnes) / Member State	Wheat		Maize		Barley	
	2021	2022	2021	2022	2021	2022
Austria		2 559		78 803		714
Belgium	0	47	583 041	389 376		
Bulgaria	0	19 562	431	17 174		5 118
Croatia				45 126		
Cyprus	0	4 561	16 662	113 171	13 384	39 470
Czechia	22	3 938		14 759		
Denmark			3 500	8 554	0	
Estonia		120	858	3 962		
France		0	0	5 319		
Germany	3 416	38 344	174 892	386 531	0	20 078
Greece	32 397	209 274	9 517	121 484		34 491
Hungary	65	188 659	15 394	1 089 027	0	4 881
Ireland			203 057	138 035		
Italy	122 100	175 748	754 313	871 945	9 019	4 151
Latvia		10 905	5 325	8 394		403
Lithuania	0	25 881	26 928	87 736		23
Netherlands	42 524	16 752	2 248 642	1 869 514	965	3 503
Poland	3 187	519 538	5 907	1 859 088		41 584
Portugal		15 200	799 182	344 416		8 543
Romania		505 390	69	739 299		80 549
Slovakia		67 958		404 545	477	13 675
Slovenia		26 805	8 902	198 756		
Spain	84 038	1 017 910	2 452 990	3 130 146	26 301	470 904
Sweden				22		
Northern Ireland				95 100		
Total	287 749	2 849 151	7 309 611	12 020 280	50 144	728 088

Table 8. Evolution of EU imports from Ukraine for the main oilseeds and oilseeds products

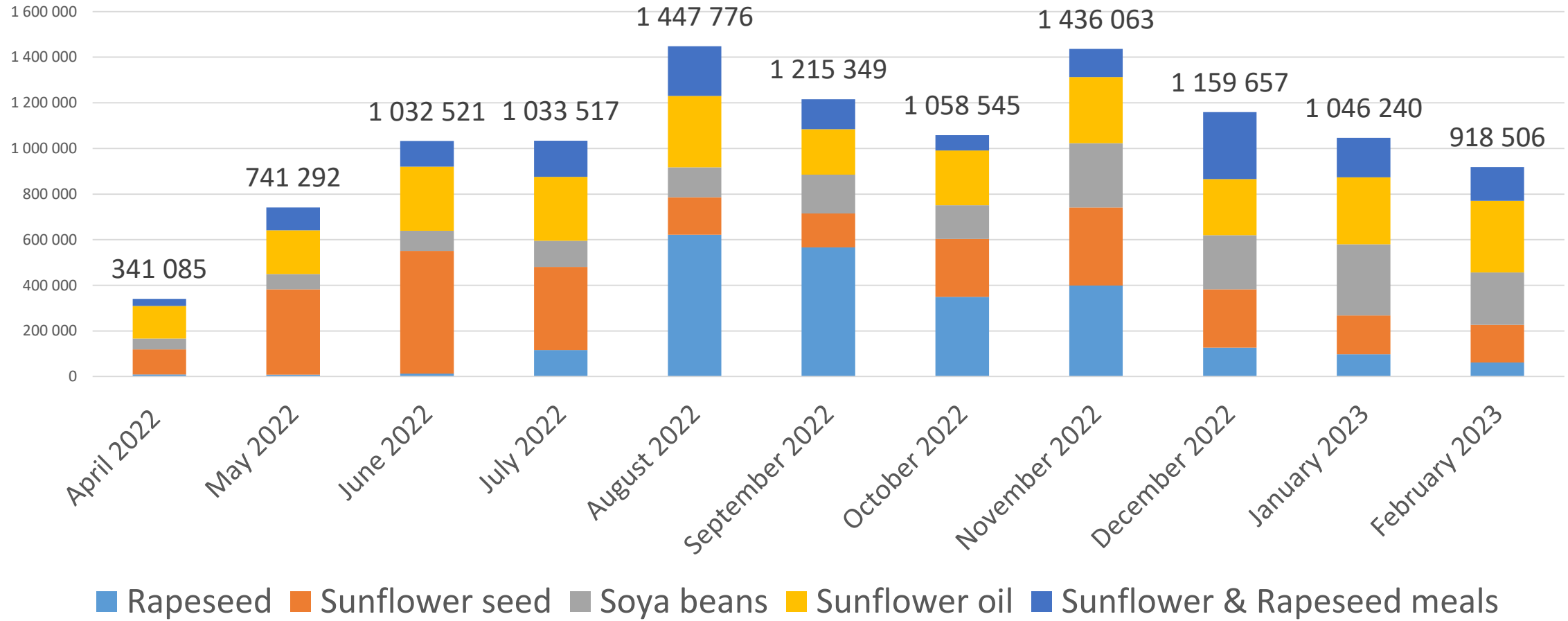
Product (tonnes) / Member State	Rapeseed		Sunflowerseed		Sunflowerseed oil	
	2021	2022	2021	2022	2021	2022
Austria	1 686	6 663	22	11 947	4 169	12 814
Belgium	464 710	428 137	1 080		5 062	6 621
Bulgaria	17 357	30 702	3 748	892 026	3 131	222 957
Croatia		663		14 506	82	1 008
Cyprus					3 081	3 925
Czechia	1 703	45 372	443	1 177	4 067	14 034
Denmark			516	351	61	1 752
Estonia		1 441	6 412	5 418	3 870	1 196
Finland			119		3	131
France	182 749	178 069	2	78 775	122 173	141 481
Germany	244 726	188 862	2 495	6 971	4 886	16 421
Greece		28 126	3	61	5 919	3 472
Hungary		87 533	759	314 270	652	110 254
Ireland			21	43	1	89
Italy		318	137	282	259 396	163 329
Latvia		33 392	586	103	2 644	3 559
Lithuania		24 106	719	443	11 625	20 481
Luxembourg						351
Malta					1 024	491
Netherlands	582 882	291 123	2 970	26 522	535 802	226 388
Poland	81 801	661 989	4 538	19 281	97 689	396 045
Portugal	39 850	76 149	38	39 233	30 060	6 276
Romania	60	320 849	405	359 158	2 462	50 231
Slovakia		110 541		22 854	9 551	7 793
Slovenia		719		968		18 775
Spain		0	249	61 204	369 818	256 654
Sweden				136	1 186	4 342
Total	1 617 523	2 514 753	25 262	1 855 730	1 478 412	1 690 868

Estimated monthly Ukraine cereals exports through Solidarity Lanes



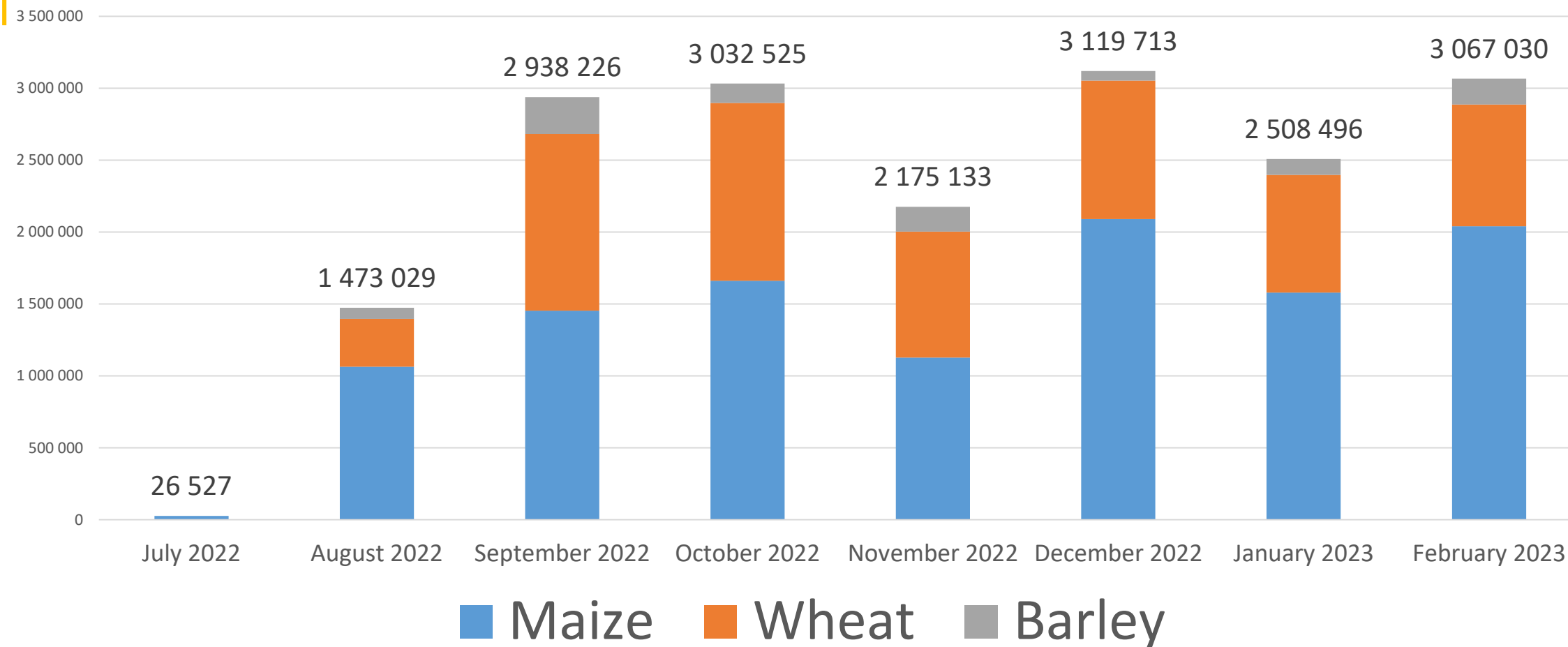
Source: DG AGRI calculations based on Ukrainian State Customs Service and United Nations Black Sea Grain Initiative Joint Coordination Centre

Estimated monthly Ukraine oilseeds and oilseeds products exports through Solidarity Lanes



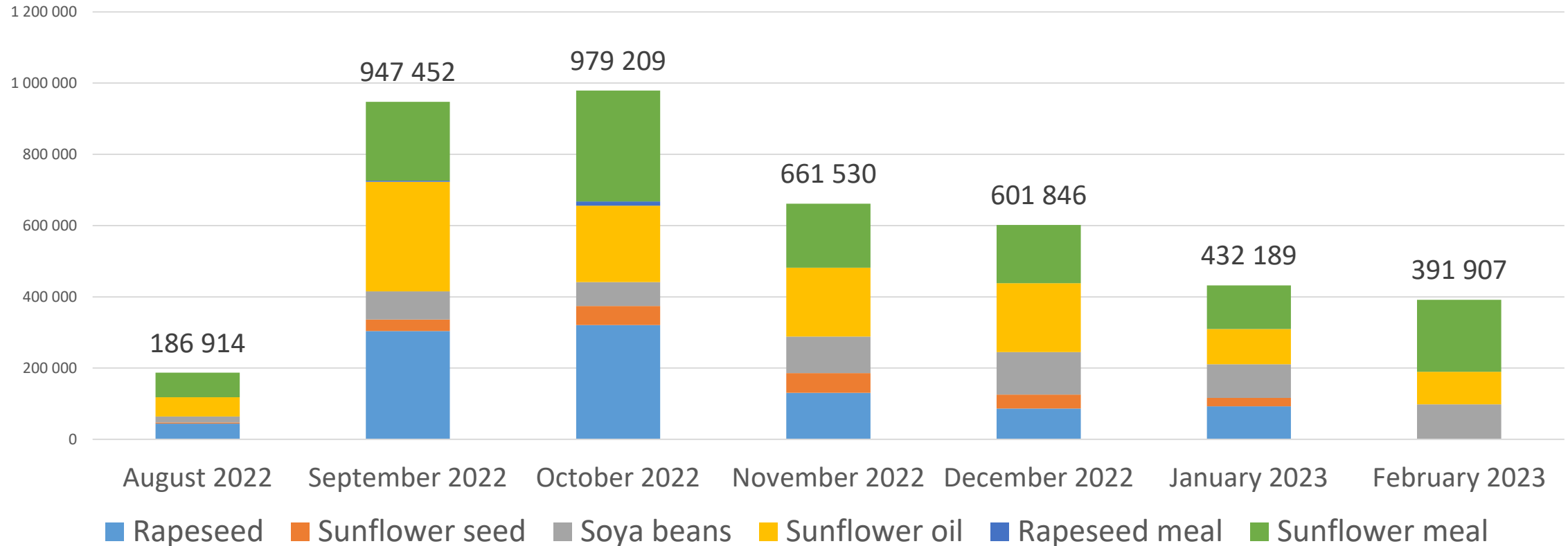
Source: DG AGRI calculations based on Ukrainian State Customs Service and United Nations Black Sea Grain Initiative Joint Coordination Centre

Monthly exports of main cereals through the BSGI



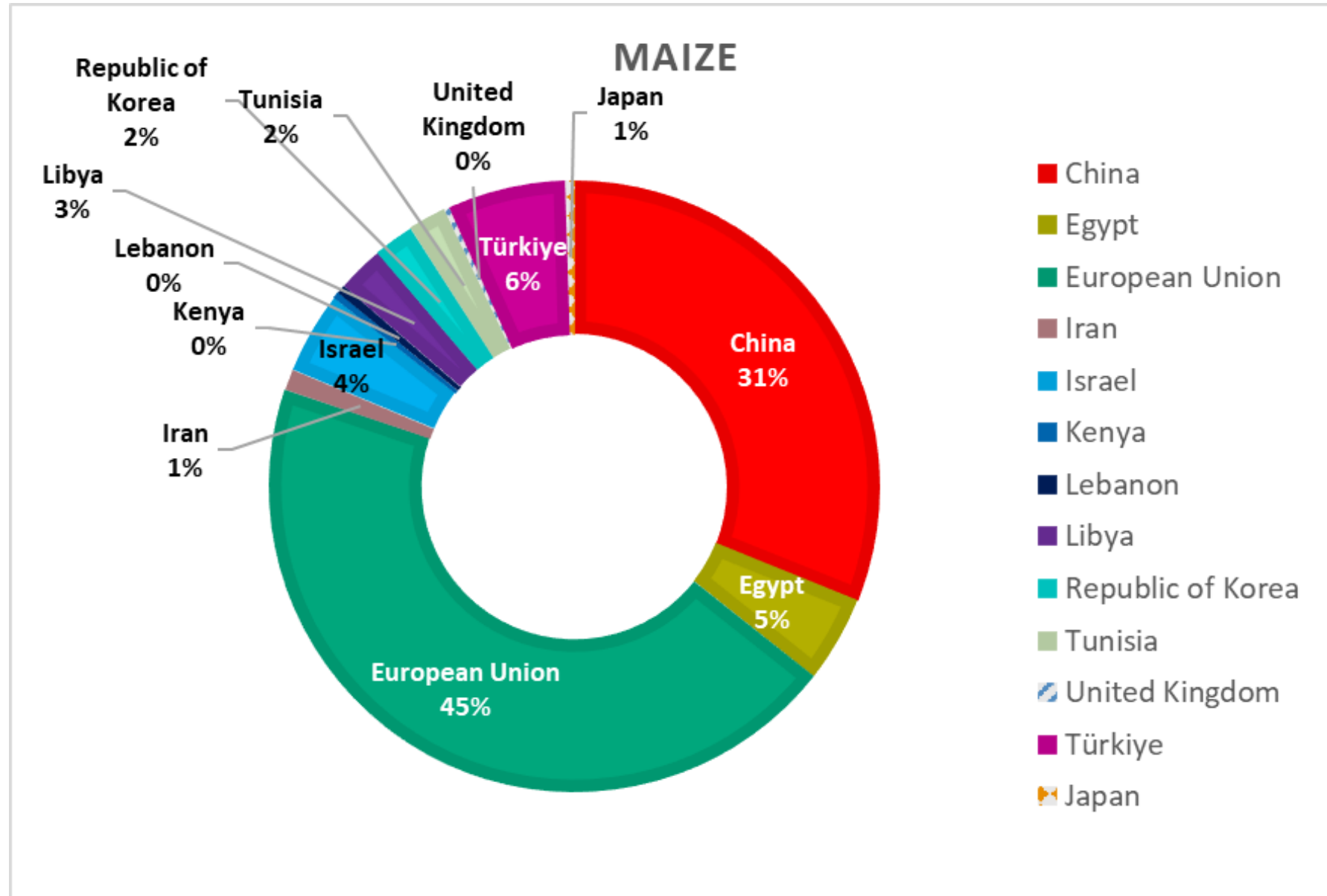
Source: United Nations Black Sea Grain Initiative Joint Coordination Centre

Monthly exports of main oilseeds and oilseeds products through the BSGI



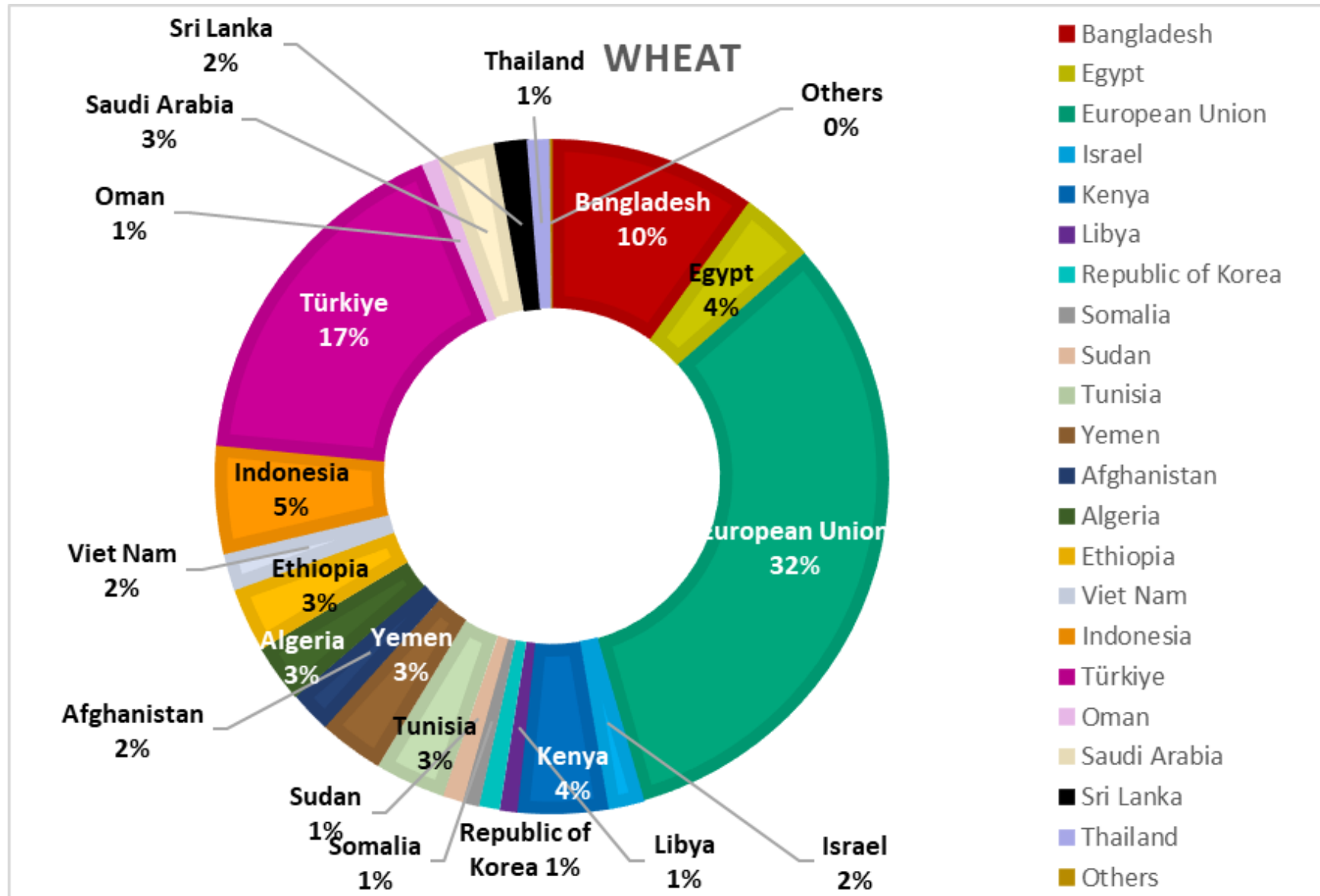
Source: United Nations Black Sea Grain Initiative Joint Coordination Centre

Black Sea Grains Initiative



Source: United Nations Black Sea Grain Initiative Joint Coordination Centre

Black Sea Grains Initiative



Source: United Nations Black Sea Grain Initiative Joint Coordination Centre

Ukrainian production prospects in 2023/24

Forecast for harvested area in 2023/24

- Wheat

	20/21	21/22 (est.)	22/23 (f'cast)	23/24 (proj.)	m ha y/y change
Europe	25.2	26.7	27.0	26.9	- 0.4%
EU	22.9	24.0	24.2	24.1	- 0.5%
CIS	51.9	52.2	52.6	49.9	- 5.2%
Kazakhstan	12.1	12.7	12.8	12.6	- 1.2%
Russia	28.7	27.6	28.7	27.8	- 3.2%
Ukraine	6.8	7.4	6.6	4.9	- 25.2%

- Maize

	20/21	21/22 (est.)	22/23 (f'cast)	23/24 (proj.)	m ha y/y change
Europe	10.6	10.6	10.2	10.0	- 2.5%
EU	9.4	9.3	8.9	8.7	- 2.8%
CIS	9.2	9.5	7.7	6.7	- 12.0%
Russia	2.7	2.9	2.5	2.6	+ 3.6%
Ukraine	5.4	5.5	4.0	3.2	- 20.0%

Source: IGC, forecast for Ukraine include uncontrolled territories.

Thank you



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