

EU-Ukraine Solidarity Lanes:

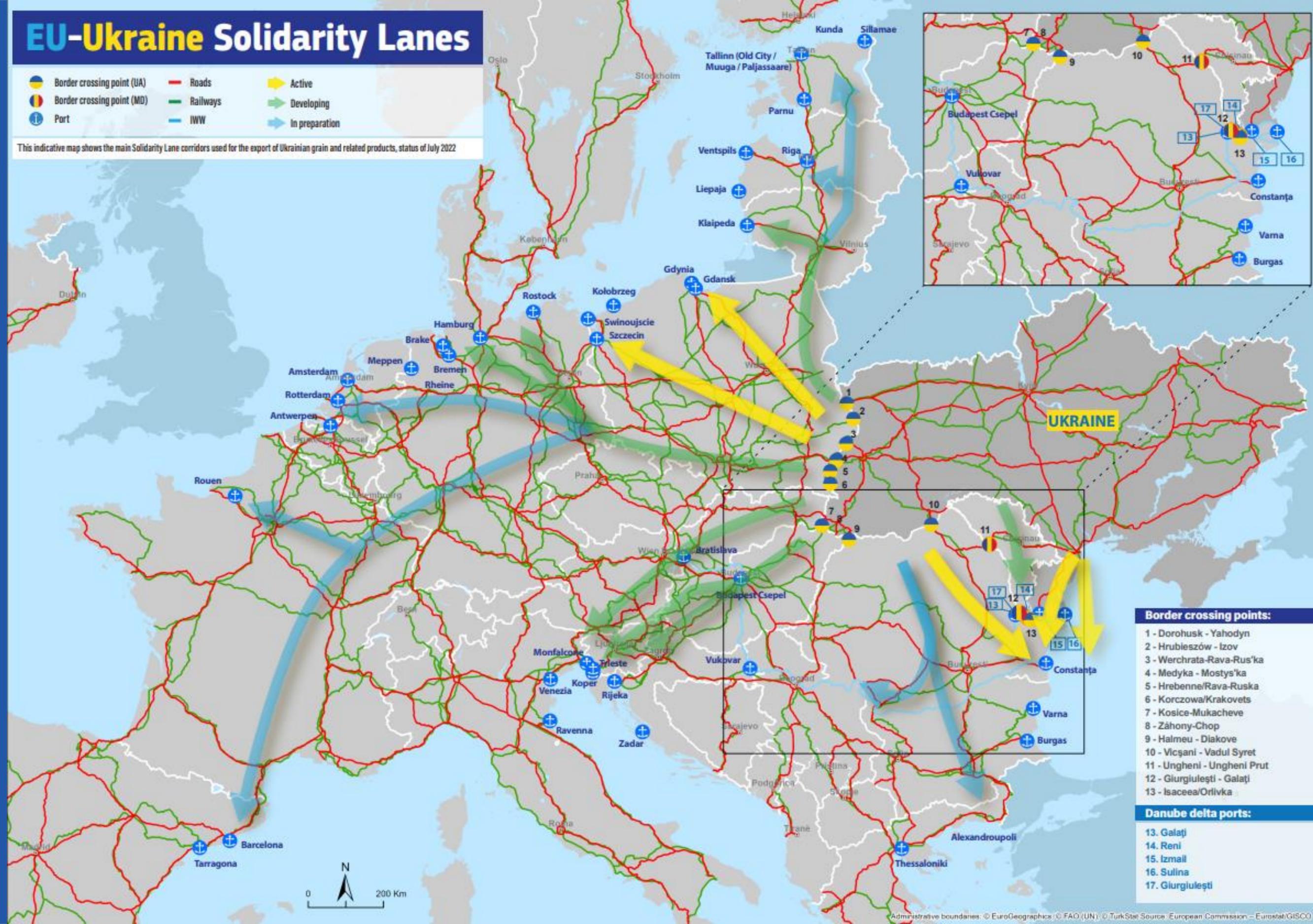


Crops Market Observatory- 7 July

EU-Ukraine Solidarity Lanes

- Border crossing point (UA)
- Border crossing point (MD)
- Port
- Roads
- Railways
- IWW
- Active
- Developing
- In preparation

This indicative map shows the main Solidarity Lane corridors used for the export of Ukrainian grain and related products, status of July 2022



Border crossing points:

- 1 - Dorohusk - Yahodyn
- 2 - Hrubieszów - Izov
- 3 - Werchrata-Rava-Rus'ka
- 4 - Medyka - Mostys'ka
- 5 - Hrebenne/Rava-Ruska
- 6 - Korczowa/Krakovets
- 7 - Kosice-Mukacheve
- 8 - Záhony-Chop
- 9 - Halmeu - Diakove
- 10 - Vicșani - Vadul Syret
- 11 - Ungheni - Ungheni Prut
- 12 - Giurgiulești - Galați
- 13 - Isaceea/Orlivka

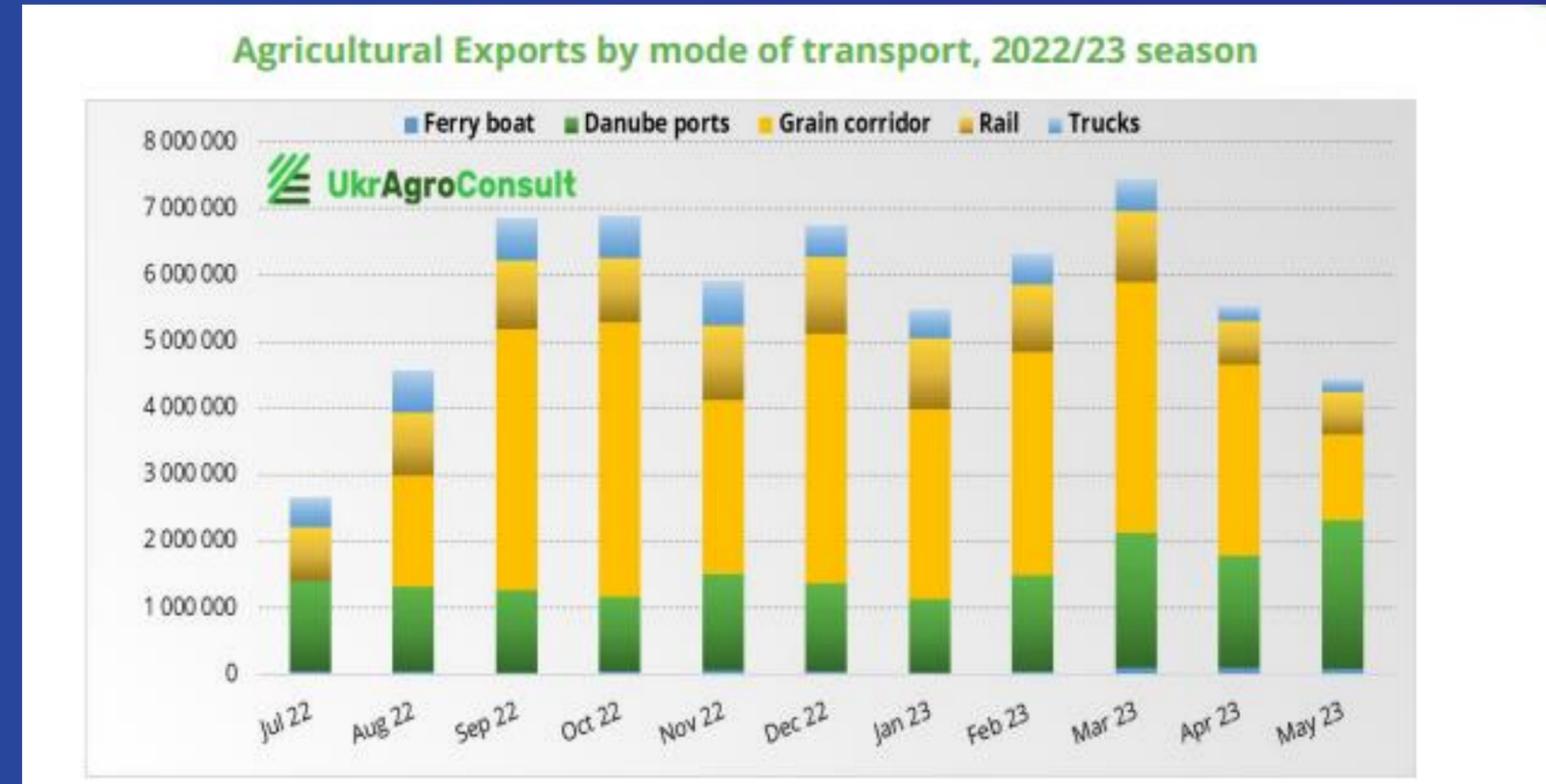
Danube delta ports:

13. Galați
14. Reni
15. Izmail
16. Sulina
17. Giurgiulești

*Indicative map of main routes, not exhaustive

EU-Ukraine Solidarity Lanes

- Since the start of the Russian aggression up to the beginning of May 2023, the EU imported over **20.6 million tonnes of cereals** and **10.2 million tonnes of oilseeds** from Ukraine
- Over this period, the 5 frontline MS (Bulgaria, Hungary, Poland, Romania and Slovakia) imported over 7.7 million tonnes of cereals and 6.3 million tonnes of oilseeds (14 million in total). Almost 52% of the total grain exports from Ukraine have been made through Solidarity Lanes, with the Danube cluster accounting for almost 60% of the total volume.
- Joint Coordination Platform
 - representatives of the European Commission, the 5 MS (Bulgaria, Hungary, Poland, Romania and Slovakia) and Ukraine
 - to improve the functioning of the Solidarity Lanes, remove bottlenecks and facilitate two-way trade flows



Source: UkrAgroConsult

Support measures for the frontline Member States

- Challenges faced by frontline MS – reduced market outlets, low output prices, limited storage availabilities and high transport cost
- 1st support package of **€56,3 million** for Bulgarian, Polish and Romanian farmers
- 2nd support package:
 - on 2 May 2023 the Commission has taken preventive measures pursuant to the safeguard clause included in the ATM Regulation to address the challenges caused by logistical bottlenecks in the 5 Member States.
 - **€ 100 million** for affected farmers in the five Member States- **Bulgaria, Hungary, Poland, Romania and Slovakia**
 - possibility to top-up this with a 200% co-financing rate.

Current import situation

- In June, the proportion of products exported respectively through Black Sea Grain Initiative (41%) vs. Solidarity Lanes (59%) remained similar to May 2023. The total quantity exported through Solidarity Lanes was 4.8 million tonnes
- Due to the difficulties encountered on the border with frontline MS, the share of exports by road sharply decreased compared to early 2023
 - **(- 60%) in May-June 2023** vs. the average of exports in January-March 2023).
 - In June, exports by rail slightly increased compared to April-May 2023 but failing to reach the January-March 2023 level (- 36%).

Estimates (based on UA and UN data)	Solidarity Lanes	Black Sea Grain Initiative	Total
May	2.2		2
June	2.7		2.7
July	3		3
August	3.2	1.4	4.6
Sept	2.9	4	6.9
Oct	3.1	3.9	7
Nov	4.6	2.6	7.2
Dec	3.4	3.6	7
Jan 23	3.2	2.9	6.1
Feb 23	3.3	3.3	6.6
March-23	4.1	3.7	7.8
April 23	2.4	2.9	5.3
May 23	3.8	1.3	5.1
Total	~42.2	~29.6	~71.8

Exports via Solidarity Lanes include UA exports of all goods, including goods such as poultry and meat (not covered by BSGI. BSGI exports only include UA grain, oilseeds and related products.

Ukrainian grain harvest forecast

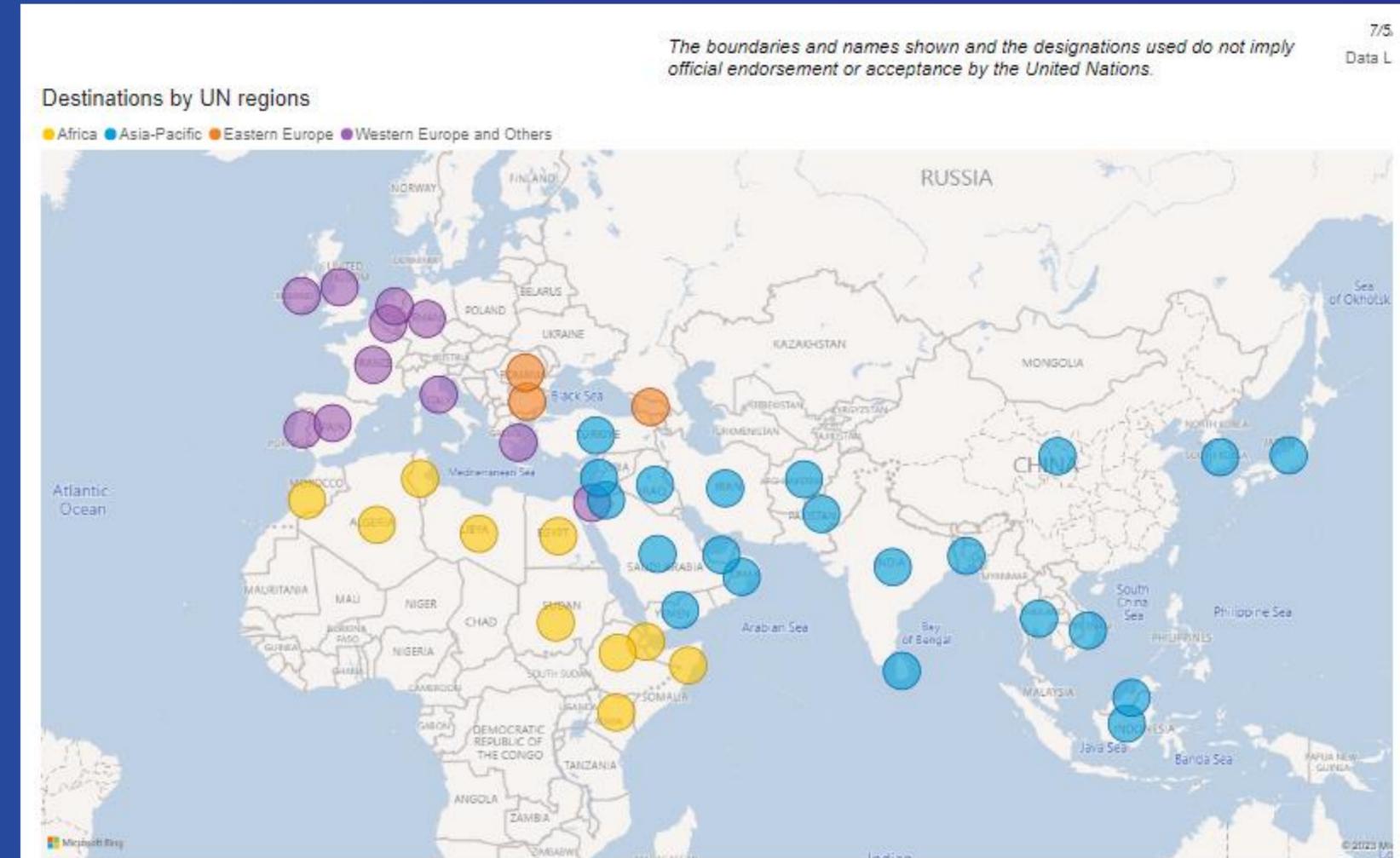
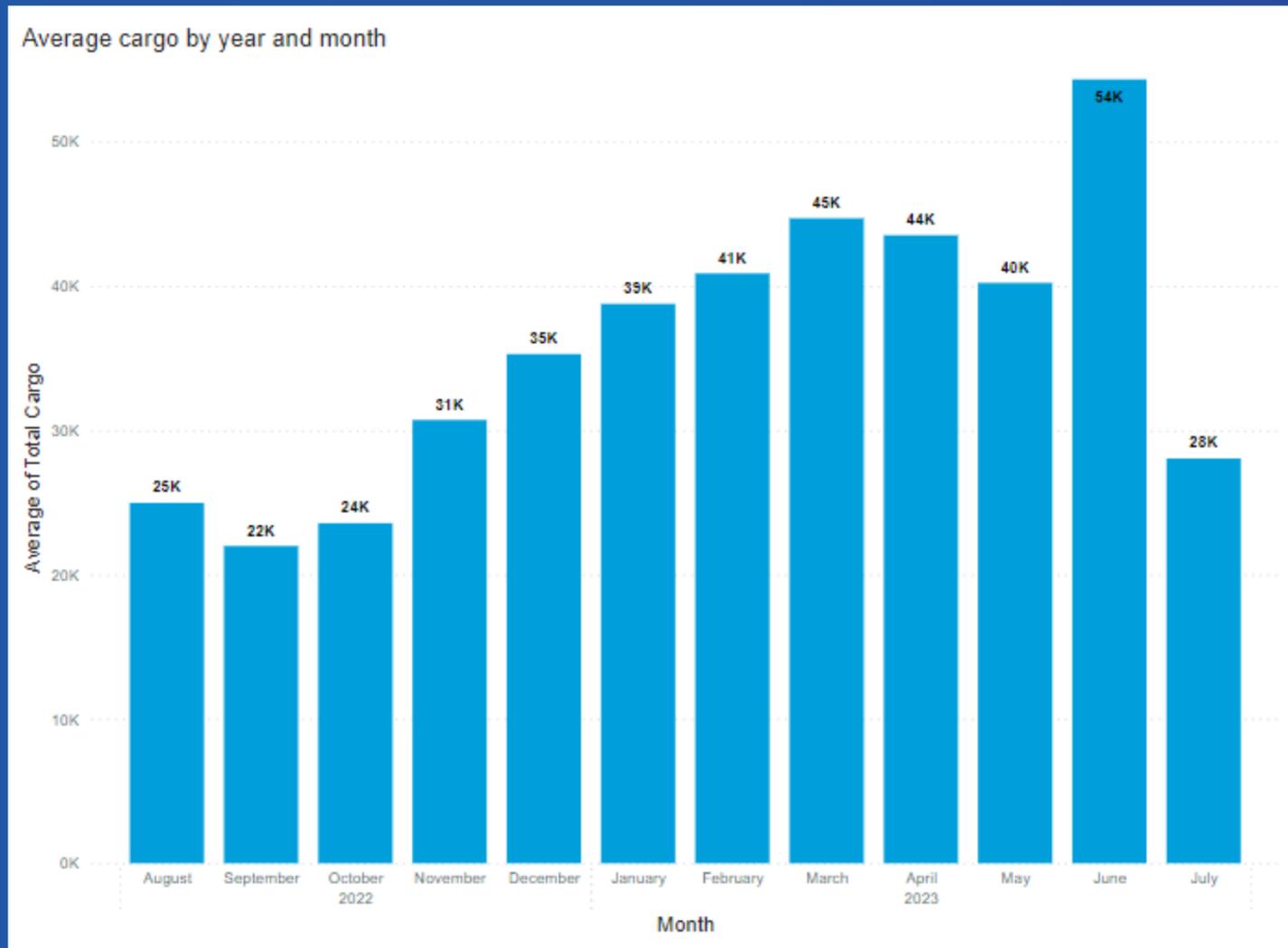
Production (m t)	2020/21	2021/22 est	2022/23 f'cast	2023/24 proj	y/y %	23/24 vs 21/22 (%)
Wheat	25.4	33.0	26.3	22.5	-14.5	-31.9
Maize	30.3	42.1	27.0	24,0	-11.1	-43.0
Barley	7.9	10.0	6.6	6.2	-5.2	-37.3
Exports (m t; Jul/Jun)						
Wheat	16.8	18.9	16.8	11.5	-31.5	-39.1
Maize	23.1	23.6	28.5	18,0	-36.8	-23.7
Barley	4.2	5.7	2.8	1.8	-34.5	-68.7
Production (m t)						
Rapeseed	2.6	2.9	3.7	4.7	+28.2	+62.1
Soya beans	2.8	3.4	3.9	4.4	+11.0	+28.3
SFS	13.1	16.4	14.0	15.3	+8.9	-6.9
Exports (m t; Oct/Sep)						
Rapeseed	2.5	2.7	3.2	3.4	+3.1	+26.0
Soya beans	1.4	1.6	2.4	2,0	-20.2	+19.6
SFS	0.2	1.8	2.3	1.2	-49.8	-36.5

Source: IGC GMR 44, 24/06/2023

*forecast for the entire Ukrainian territory including occupied territory and Crimea

Black Sea Grain initiative

- Since the start of the initiative in August 2022, **32.8 million tonnes** of grains were exported through Black Sea Grain Initiative



Thank you!