



Ukrainian grains and oilseeds production forecast, exports, logistics situation

*Civil Dialogue Group, Cereals, oilseeds, protein crops
6 September 2023*

Solidarity lanes

- Following the blockade of Ukrainian Black Sea ports, the Solidarity Lanes have established alternative logistics routes using all transport modes, linking the EU to Ukraine.
- In May 2022, the European Commission put forward an action plan for EU-Ukraine Solidarity Lanes to facilitate Ukraine's agricultural export and bilateral trade with the EU which were severely impacted by Russia's war of aggression.

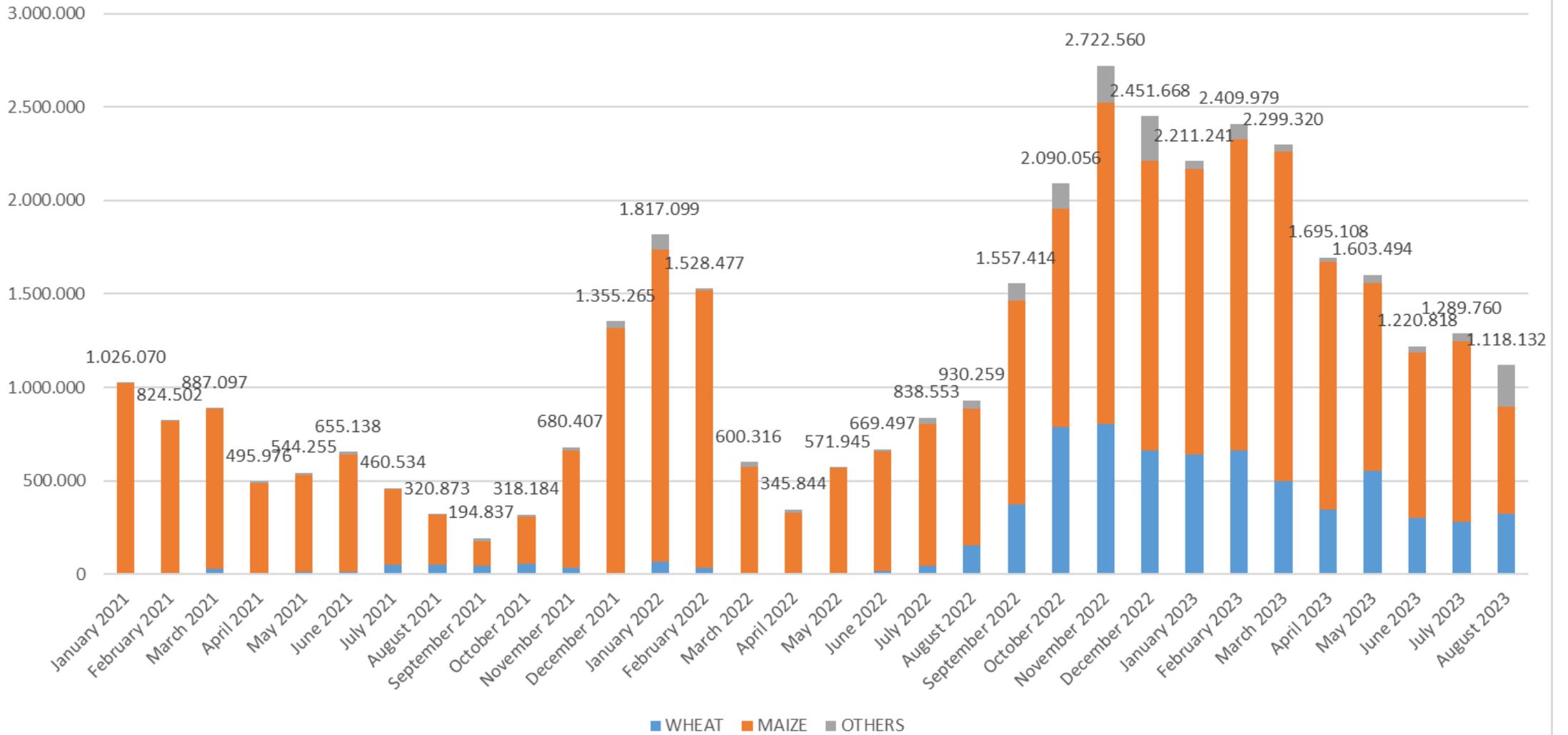
Black Sea Grain initiative

- On 17 July, the Russian Federation refused to renew the Black Sea Grain Initiative, which since July 2022 had allowed the safe export of nearly 33 million tonnes of grain (40% of all UA grain exports when the Initiative was at full capacity) and foodstuffs to 45 countries.

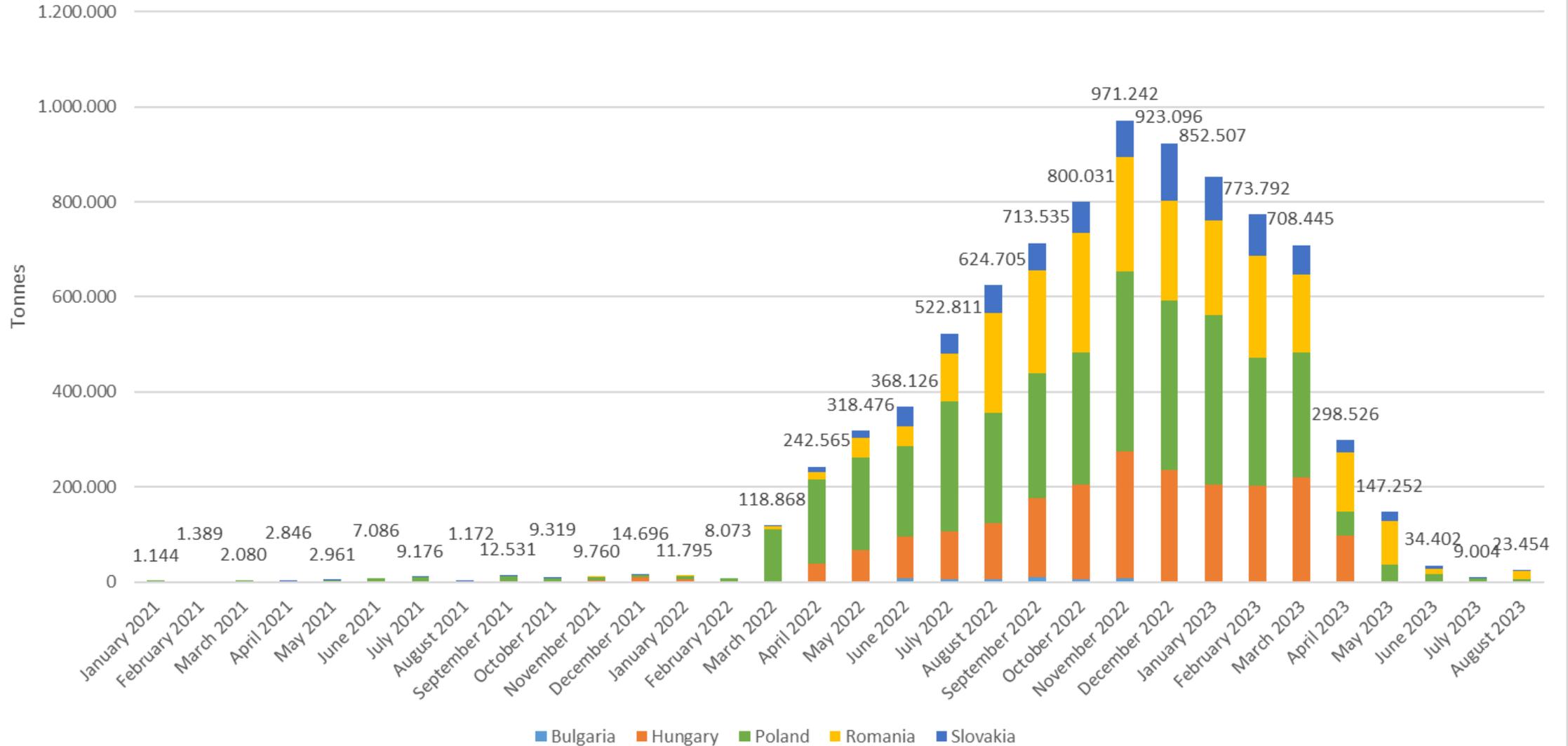
Temporary preventive measures

- In May 2022, the EU adopted temporary trade liberalisation measures for Ukrainian products under the Association Agreement between the EU and Ukraine. On 6 June 2023, these Autonomous Trade Measures were renewed for another year.
- The imports of agricultural goods, notably grain, from Ukraine to the neighbouring Member States increased considerably, creating logistical bottlenecks.
- On 2 May 2023 the Commission adopted preventive measures restricting the imports of wheat, maize, rapeseed and sunflower seed into five Member States: Bulgaria, Hungary, Poland, Romania and Slovakia, while allowing transit.
- On 5 June, the Commission renewed those preventive measures until 15 September.

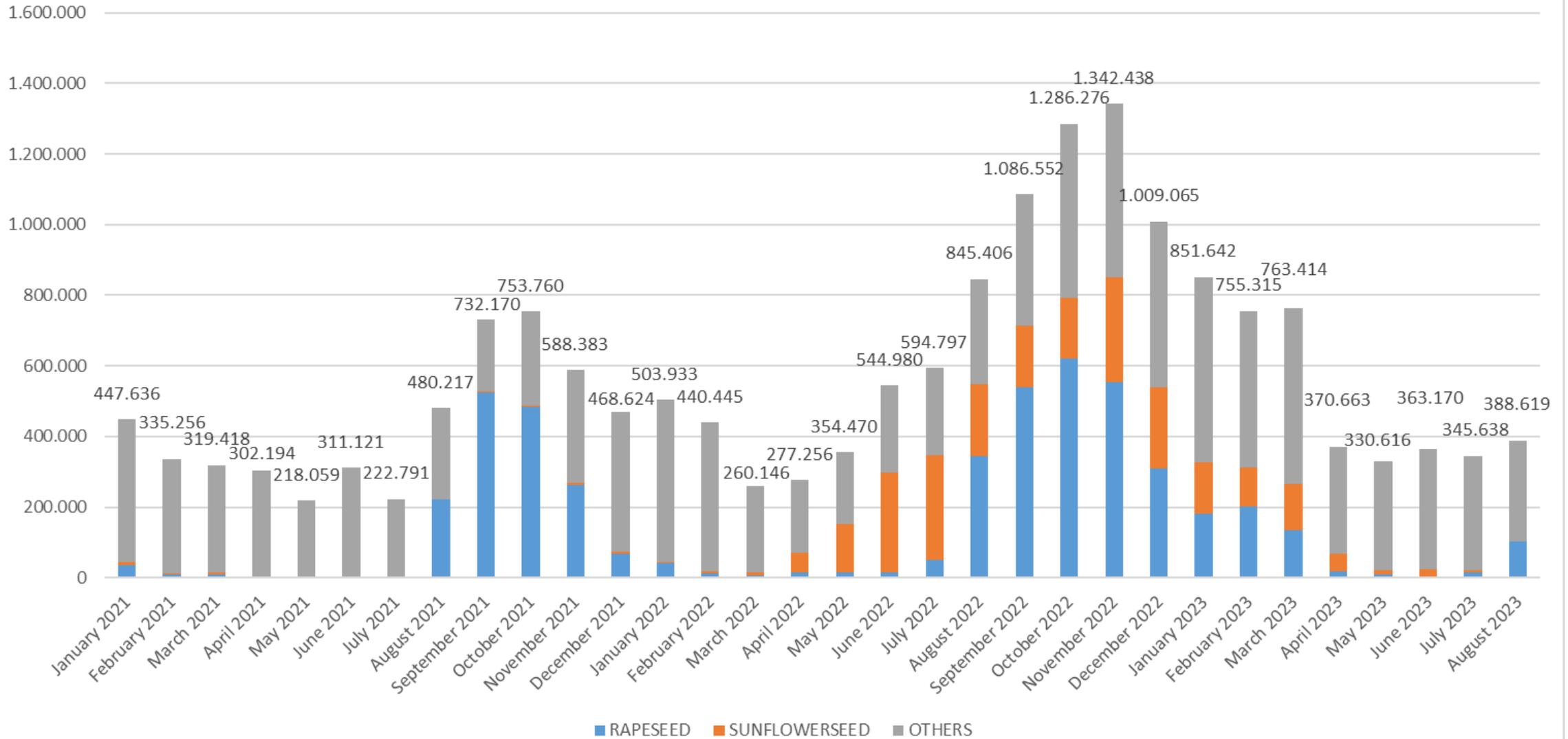
EU MONTHLY CEREALS IMPORTS FROM UKRAINE



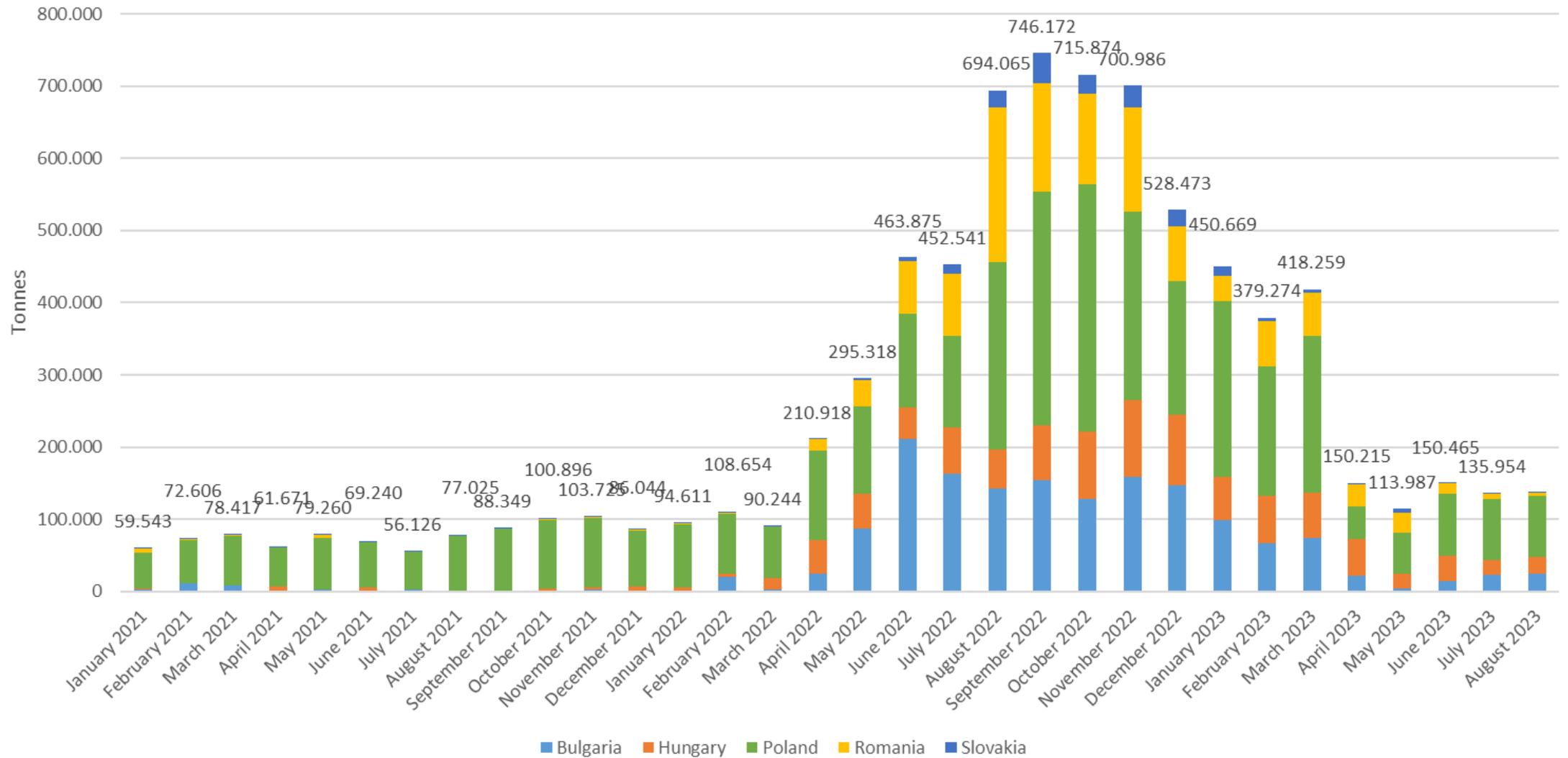
IMPORTS OF **CEREALS** FROM UKRAINE INTO FRONTLINE MEMBER STATES



EU MONTHLY OILSEEDS IMPORTS FROM UKRAINE



IMPORTS OF **OILSEEDS** FROM UKRAINE INTO FRONTLINE MEMBER STATES



Coordination platform

- In May 2023, Commission President von der Leyen and President Zelenskyy of Ukraine announced setting up a coordination Platform to improve the flow of trade of Ukrainian grain and ensure the full functioning of the Solidarity Lanes.
- Executive Vice-President Valdis Dombrovskis is leading this process at the political level.
- The Platform coordinates the efforts of the Commission, Bulgaria, Hungary, Poland, Romania and Slovakia, as well as Ukraine and the Republic of Moldova, to improve the flow of trade between Ukraine and the EU, including the transit of goods along corridors to the rest of the world
- The Platform provides a forum for the regular exchange on all issues of relevance between the neighbouring Member States, Ukraine and the Republic of Moldova.

Coordination platform – operational plans

- to upscale capacity on the Danube corridor towards the Black Sea to reach 4 Mt/month;
- to increase the use of the Common Transit Convention;
- to minimise non-essential sanitary and phytosanitary and other checks and move controls away from the border;
- improve infrastructure at the main border crossing points with Ukraine and Republic of Moldova.
- Concrete guidance and best practice for transit procedures has been disseminated
- Monitoring harvest projections, trade flows, and storage capacity

2023/24 Ukrainian cereals and oilseeds production forecast and export potential

2023/24 (million tonnes)	Production forecast	Export Potential
Soft wheat	22,1	13,3
Maize	28,1	21
Barley	5,8	2,4
Total cereal (including small cereals and pulses)	56,4	36,7
Sunflower	12	1.9
Rapeseed	4	3,5
Soya bean	4,3	3,1
Total oilseeds (*including oils & meals)	20,3	19,3*
Total	79,9	<u>56</u>

Source: UA Ministry and private forecasters as regards exports projections

Less significant export potential compared to pre-war period but only slightly lower than previous season

UA exports (million tonnes)	2021/22	2022/23	2023/24	y/y change	2023/24 compared to 2021/22
Total cereals	48.5	43.9	36,7	-16,4%	-24,4%
Total oilseeds	14,51	17,24	19,3	11,2%	33%
Total	63,01	61,14	56	-8,4%	-11,1%

Thank you



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Overview available funding for the Solidarity Lanes

Funding for the Solidarity Lanes

