



GIEWS Country Brief Ukraine

Reference Date: 16-December-2022

FOOD SECURITY SNAPSHOT

- Reduced area planted with 2023 winter cereal crops
- Total cereal production in 2022 forecast 30 percent below five-year average level
- Pace of exports remains below pre-war levels
- About 17.7 million people in need of humanitarian assistance

Reduced area planted with 2023 winter cereal crops

Planting of 2023 winter crops was completed by mid-November and crops are currently in winter dormancy phase. The area sown with wheat amounts to about 3.8 million hectares, well below the 6.5 million hectares planted in 2021. Overall, the area sown with the 2023 winter cereal crops is estimated to be 40 percent below the average level.

Concerns exist over the 2023 cereal production. Although no major shortages of inputs are reported, low domestic farmgate prices are constraining the capacity of many farmers to purchase inputs. General economic uncertainty has also constrained credit availability. Even though some progress has been made on demining areas where fighting is not active, remnants of the war continue to often hamper access to fields. Outbound population movements also limit the availability of labour.¹

Total cereal production in 2022 forecast 30 percent below average

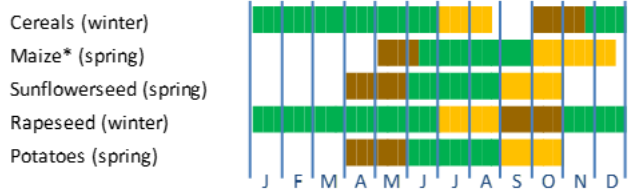
The 2022 winter cereal crops (mostly wheat) were harvested in July and August. Active fighting and the economic impact of the war hampered crop production activities through constrained access to fields, lack of labour, high producing costs and low farmgate prices. Application of fertilizers and harvesting activities were hindered by remnants of the war in fields, especially mines, and large cropped areas were reported to be unharvested. As a result, the 2022 wheat harvest is estimated at about 20 million tonnes, almost 38 percent below the bumper 2021 output and about 25 percent below the average level.

Harvesting of spring cereals (mainly maize) was still ongoing as of early December. High energy costs and damages to energy

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2017-2021	2021	2022	change
	average		forecast	2022/2021
	000 tonnes			percent
Maize	33 750	42 110	24 000	-43.0
Wheat	27 224	32 151	20 000	-37.8
Barley	8 325	9 437	5 500	-41.7
Others	1 738	1 943	1 574	-19.0
Total	71 037	85 641	51 074	-40.4

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

¹ FAO Information Note, *The importance of Ukraine and the Russian Federation for global agricultural markets and the risks associated with the war in Ukraine*, 5 December 2022: <https://www.fao.org/3/cc3317en/cc3317en.pdf>

infrastructure render it prohibitively expensive for farmers to harvest the entire maize crop. In addition, while generally favourable weather conditions prevailed during the cropping season until August, above-average rainfall amounts in autumn challenged maize harvesting activities. As of 8 December 2022, 2.8 million hectares of maize (or 66 percent of the planted area) had been harvested, with an output of 17.2 million tonnes.

FAO forecasts the 2022 cereal harvest, including winter and spring crops, at 51 million tonnes, almost 30 percent below the five-year average level and 40 percent below the exceptional 2021 output.¹

Pace of exports remains below pre-war levels

Exports in the 2022/23 marketing year (July/June) are tentatively forecast at 40 million tonnes as of mid-December 2022, including 23 million tonnes of maize and 14 million tonnes of wheat, 8 and 23 percent, respectively, below the five-year average levels. With the closure of Black Sea ports since the start of the war in late February 2022 until July, agricultural commodities were mostly transported by rail and river, which have a significantly lower capacity compared to sea freight. With the launch and renewal of the Black Sea Grain Initiative, as well as efforts to boost export capacity through non-marine channels, grain exports have increased. However, the pace of exports still remains below the average of pre-war levels and concerns exist that war-induced damages to domestic infrastructure, energy shortages and reduced crop production could keep exports of grains and vegetable oils below potential.¹

About 17.7 million people in need of humanitarian assistance

Despite decreased cereal production, food availability at the national level is reported to be adequate, but access remains a major challenge. The country had already been experiencing elevated levels of food price inflation in the past, due to the economic impact of the conflict in eastern parts of the country. Annual food price inflation in February 2022 stood at 14.3 percent and increased to 35.1 percent in November 2022. In addition, rising energy costs, amidst high unemployment rates and limited livelihood opportunities, are reducing households' purchasing power and driving more people into poverty.

According to the [latest Update](#) of the Ukraine Flash Appeal issued by the United Nations in August 2022, about 17.7 million people were estimated to be in urgent need of humanitarian assistance and protection between March and December 2022. This shows an increase of about 2 million people compared to the number estimated in April 2022, mainly caused by the intensification of fighting and hostilities across the frontline since May. About 7.8 million Ukrainian refugees had been recorded in European countries as of 6 December 2022². Although some people returned to their homes, there are still large numbers of Internally displaced persons (IDPs) located in western parts of the country.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

² United Nations High Commissioner for Refugees (UNHCR): <https://data2.unhcr.org/en/situations/ukraine> (accessed on 14 December 2022).



GIEWS Country Brief Ukraine

Reference Date: 01-August-2022

FOOD SECURITY SNAPSHOT

- Total cereal production in 2022 forecast 40 percent lower year on year and 30 percent below five-year average level
- Unless significant volumes shipped from maritime ports resume, exports likely to be well below average in 2022/23
- About 15.7 million people in need of humanitarian assistance

Total cereal production in 2022 forecast 40 percent lower year on year and 30 percent below average

The 2022 winter crops (wheat and rapeseed), sown last October, are currently being harvested. Weather conditions during the season were overall favourable, but the escalation of the conflict in late February 2022 cast uncertainty over the final crop output. Between 20 and 30 percent of the area planted to the 2022 winter crops may not be harvested as a result of direct destruction, constrained access to fields, labour shortages and lack of economic resources.¹

Planting of sunflower and spring cereal crops, including maize, finalized in mid-June on fields without the remnants of the war, despite being constrained by fuel shortages. According to estimates by the Ministry of Agrarian Policy and Food, maize crops were planted on about 4.6 million hectares, 15 percent below the 2021 area and 7 percent below average. Sunflower crops were sown on 4.7 million hectares, 30 percent below the level of the previous year and 25 percent below the five-year average level.² The aggregate area sown with spring crops is about 20 percent less than the 2021 above-average level.

Overall, in 2022, the reduced area harvested and the decline in yields due to hampered access to inputs, caused by limited access to financial services and high prices, are expected to result in a reduction of cereal production by 40 percent compared to the previous year's exceptional results³ and by about 30 percent compared to the five-year average level. The current forecast for the 2022 cereal harvest indicates a production of about 51 million tonnes: 20 million tonnes of wheat, 24 million

¹ FAO, *Note on the impact of the war on food security in Ukraine*, July 2022: <https://www.fao.org/3/cc1025en/cc1025en.pdf>

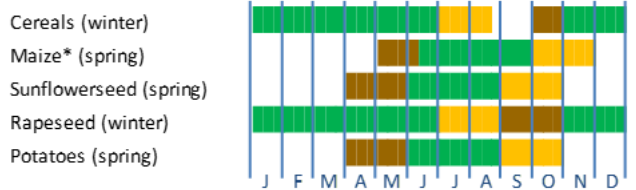
² Ministry of Agrarian Policy and Food, 17 June 2022: <https://minagro.gov.ua/en/news/20222023-planting-campaign-has-done>.

³ FAO, *Note on the impact of the war on food security in Ukraine*, July 2022: <https://www.fao.org/3/cc1025en/cc1025en.pdf>

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2017-2021	2021	2022	change
	average			2022/2021
	000 tonnes			percent
Maize	33 750	42 110	24 000	-43.0
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Barley	8 325	9 437	5 500	-41.7
Others	1 738	1 943	1 574	-19.0
Total	71 037	85 641	51 074	-40.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

tonnes of maize and about 7 million tonnes of other coarse grains. Similarly, the harvest of oilseeds is likely to decrease as production of sunflower seed is expected at 7.5 million tonnes (45 percent below the previous year's level), while production of soybeans and rapeseed is expected at 2.0 million and 1.7 million tonnes, respectively.⁴

Higher-than-expected carryover stocks resulting from the sudden halt of exports in February 2022 remain stored in local storage facilities. While there is enough capacity to store the currently harvested wheat production, there are serious concerns for the maize crop, to be harvested in October, and it is likely to be a decisive factor shaping farmers' harvesting decisions.

Unless significant volumes shipped from maritime ports resume, exports likely to be well below average in 2022/23

As of end-July, closures of maritime ports and damages to transport and storage infrastructure are expected to continue to limit exports in the 2022/23 marketing year (July/June). Currently, grain and other agricultural commodities are mostly transported by rail and river routes, capacity of which is well below those of cargo ships, also due to logistical challenges, partially caused by different railway gauges. Total cereal exports in 2022/23 are tentatively forecast to be about 40 percent below the five-year average volume; exports of maize and wheat are forecast at 15 million and 10 million tonnes, respectively, the lowest levels in the last ten years.⁵ However, re-opening of some Ukrainian marine ports on the Black Sea would allow for larger quantities to be exported.

In early March 2022, the government suspended the exports of some food products, including oats, buckwheat, millet, rye, barley, rapeseed, meat, sugar and salt. The decision was taken to safeguard domestic food supplies, amid the ongoing conflict. In addition, export licensing requirements were introduced for other commodities, including wheat and meslin ([FPMA Food Policy](#)). On 1 July 2022, the government adopted [Resolution 759](#), which cancels wheat and meslin export licenses, lifts the export ban on oats and introduces export licenses.

About 15.7 million people in need of humanitarian assistance

Already prior to the start of the war, about 1.5 million people had been displaced as a result of the nearly eight-year conflict in eastern areas and about 1.1 million people were in need of food and livelihood assistance. The ongoing conflict is increasing humanitarian needs within the country as well as in neighbouring countries where displaced populations are seeking refuge. As of 19 July 2022, about 9.5 million people,⁶ mostly women and children, had been forced to abandon their homes and flee across borders to find safe shelter, with almost 4.8 million refugees crossing borders with Poland.

According to the [April Update](#) of the Ukraine Flash Appeal 2022 issued by the United Nations, about 15.7 million people are estimated to be in urgent need of humanitarian assistance and protection, including 7.7 million internally displaced people.

⁴ FAO, 2022. *Monthly sector brief*. (Internal document)

⁵ FAO, *Crop Prospects and Food Situation*, July 2022: <https://www.fao.org/3/cc0868en/cc0868en.pdf>

⁶ UNHCR: <https://data2.unhcr.org/en/situations/ukraine> (accessed on 20 July 2022).

Although some people have recently returned to their homes, there are still large numbers of IDPs located in the western parts of the country.

It is extremely difficult to predict the evolution of the war and its effect on lives, livelihoods, food security and nutrition in the coming months.⁷ Food security conditions remain particularly concerning in besieged cities, where often humanitarian access is severely constrained.

The prevalence and severity of food insecurity will depend on the length and scale of the conflict and urban areas are likely to be more affected as most rural dwellers typically cultivate some land to produce food to supplement their household's diets.

According to the May 2022 [WFP Food Security Report](#), at national level, one-third of the households were food insecure, of which 5 percent were severely food insecure.

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⁷ FAO, *Note on the impact of the war on food security in Ukraine*: <https://www.fao.org/3/cb9171en/cb9171en.pdf>.



GIEWS Country Brief Ukraine

Reference Date: 22-April-2022

FOOD SECURITY SNAPSHOT

- Production prospects of 2022 winter crops hampered by low availability of inputs, delivery challenges, difficult physical access to fields due to the war and eventual labour shortages
- Forecast for cereal exports in 2021/22 reduced, amid port closures, damage to infrastructure and implementation of government policies to secure sufficient domestic supplies
- As of early March 2022, about 12 million people estimated to be in need of life saving assistance

Uncertain production prospects for 2022 winter crops

The 2022 winter crops (wheat and rapeseed), for harvesting from June onwards, were sown last October. Although drier-than-average conditions delayed planting operations in some regions, the area sown to winter wheat was estimated at an above-average level. Weather conditions during the winter (mid-November to February) were overall favourable and crops have resumed growth after dormancy in mid-March. Following below-average precipitation amounts in March, rain levels returned to normal and, as at the first dekad of April, soil moisture amounts were reported to be near average in most croplands.¹

The escalation of the conflict in late February 2022 casts uncertainty over the harvest of winter crops. Active fighting resulted in population displacements, restricted the movements of people and prevented farmers from attending to their fields.

As of March 2022, it was estimated that about 20 percent of the area planted to the 2022 winter crops may not be harvested as a result of direct destruction, constrained access to fields, labour shortages and/or lack of economic resources. Similarly, national yields are expected to fall by about 10 percent compared to the average level due to delayed or missed application of fertilizers and inability to control pests and diseases.²

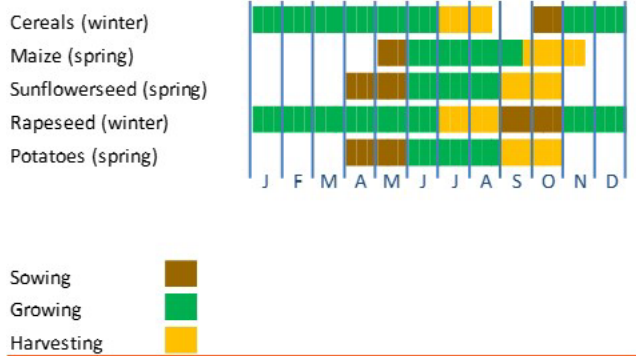
Planting of sunflower seed and spring cereal crops, including maize, started in April and, despite being constrained by fuel shortages, it is currently progressing across the country on fields without the remnants of the war. According to estimates by the

¹ APK-inform: <https://www.apk-inform.com/en/news/1526376>.

² FAO Information Note, 25 March 2022 Update: <https://www.fao.org/3/cb9236en/cb9236en.pdf>.

Ukraine

Crop Calendar



Source: FAO/GIEWS.

Ukraine

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
	000 tonnes			percent
Maize	30 943	30 290	41 870	38.2
Wheat	26 014	24 877	32 075	28.9
Barley	8 325	7 636	9 419	23.3
Others	1 737	1 826	1 949	6.7
Total	67 019	64 630	85 313	32.0

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Ministry of Agriculture, as of 18 April 2022, planting of spring crops was completed on 2.5 million hectares, or 17.6 percent of the projected sown area (corresponding to about 80 percent of the area planted to spring crops in 2021).³ Despite seed and fertilizer stocks being sufficient for 70-80 percent of the needs, considering anticipated decreases in planted areas, safe delivery of inputs to farmers may not be guaranteed. For both maize and sunflower seed, plantings may decline by 30 percent compared to 2021, with yields likely to decrease by 20 percent below the average levels.⁴

Reduced forecast for cereal exports in 2021/22, amid port closures, damage to infrastructure and implementation of government policies

As of late March 2022, total cereal exports in the 2021/22 marketing year (July/June) are forecast to drop at a below-average level of 46 million tonnes. Wheat and maize shipments are forecast at 19 million tonnes and 21 million tonnes, respectively, only slightly above the levels already exported up to 24 February 2022, when the war started. Exports virtually stopped since the escalation of tensions due to port closures and damages to transport and storage infrastructure.

Some quantities are still exportable by rail via western borders, but the capacity, coupled with logistical challenges caused by different railway gauges, is unlikely to make up for the lost maritime exports. In the past, about 300 000 tonnes of agricultural commodities were exported via rail per month.⁵

Based on FAO's forecasts for the ongoing 2021/22 season (July/June) before the start of the war and on the pace of exports, the country was initially expected to export approximately 6 million tonnes of wheat and 14 million tonnes of maize between March and June 2022.⁶

In early March 2022, the government suspended the exports of some food products, including oats, buckwheat, millet, rye, barley, rapeseed, meat, sugar and salt. The decision was taken to safeguard domestic food supplies amid the ongoing conflict. In addition, export licensing requirements were introduced for other commodities, including wheat and meslin ([FPMA Food Policy](#)).

About 12 million people in need of life-saving assistance

Already prior to the start of the war, about 1.5 million people had been displaced as a result of the near eight-year conflict in the eastern areas and about 1.1 million people were in need of food and livelihood assistance. The ongoing conflict is increasing humanitarian needs within the country as well as in neighbouring countries where displaced populations are seeking refuge. As of 20 April 2022, about 5.1 million people,⁷ mostly women and children, had been forced to abandon their homes and flee across borders to safety, with over 2.8 million refugees crossing borders with Poland.

³ Agricensus: <https://www.agricensus.com/Article/Ukraine-s-spring-crop-planting-covers-2-5-million-hectares-to-date-21754.html>.

⁴ FAO Information Note, 25 March Update: <https://www.fao.org/3/cb9236en/cb9236en.pdf>.

⁵ CSIS Presents: <https://www.csis.org/events/agriculture-and-food-security-casualties-war-ukraine>.

⁶ FAO Information Note, 25 March Update: <https://www.fao.org/3/cb9236en/cb9236en.pdf>.

⁷ UNHCR: <https://data2.unhcr.org/en/situations/ukraine> (accessed on 21 April 2022).

According to the [Ukraine Flash Appeal 2022](#), issued on 1 March 2022 by the United Nations, about 12 million people in the country were estimated to be in need of life-saving assistance. In addition, given the scale and direction of ongoing hostilities, 18 million people were projected to be affected, including up to 6.7 million anticipated to be newly internally displaced people. Currently, western parts of the country are reporting large numbers of IDPs, which are putting a strain on local resources. Reports indicate that a large share of refugees have private host accommodations set up in their destination countries, which are often different from their entry countries. However, as the wave of refugees without prearranged hosts intensifies, humanitarian needs in the host countries will increase.

The violence has escalated rapidly and it is extremely difficult to predict the evolution of the war and its effect on lives, livelihoods, food security and nutrition.⁸ Food security conditions remain particularly concerning in besieged cities, many of them suffering constrained humanitarian access.

The prevalence and severity of domestic food insecurity will depend on the length and scale of the conflict and urban areas are likely to be more affected as most rural dwellers typically cultivate some land to produce food to supplement their household's diets.

As food access, production and overall food availability deteriorate, efforts to bolster agricultural production and the functioning of food supply chains will be critical in averting a food crisis in 2022 and into 2023. Under its updated [Rapid Response Plan](#), FAO requires USD 115.4 million to scale up its support to reach 979 320 small farmers and medium-sized producers in the country through December 2022 to boost food availability and access.

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⁸ FAO, *Note on the impact of the war on food security in Ukraine*: <https://www.fao.org/3/cb9171en/cb9171en.pdf>.



GIEWS Country Brief Ukraine

Reference Date: 13-October-2021

FOOD SECURITY SNAPSHOT

- Cereal output forecast at all-time high level in 2021
- Record cereal exports forecast in 2021/22
- Export and domestic prices of wheat and maize well above year-earlier levels in September 2021
- About 3.4 million people estimated in need of humanitarian assistance, of which 1.5 million in need of food and livelihood assistance

Cereal output forecast at all-time high level in 2021

Harvesting of the 2021 winter cereal crops, mainly wheat, finalized in August, while harvesting of maize is ongoing and is expected to be completed in mid-November. Harvesting of other spring cereals (mainly barley), planted between April and June, finished in September.

The 2021 wheat output is estimated at a record high of 31.5 million tonnes, about 20 percent above the five-year average, due to large plantings and favourable weather conditions during the season. Barley production is set at 9.5 million tonnes, about 15 percent above average. Output of maize is tentatively forecast at a bumper level of about 38 million tonnes due to an above-average area planted, supported by high international maize prices.

Total 2021 cereal output, including winter and spring crops, is expected at about 80.8 million tonnes, an all-time high level.

Planting of 2022 winter cereals is ongoing and harvesting is expected to begin in July next year. The total area sown with winter cereals is forecast at about 8 million hectares, slightly above the average level.

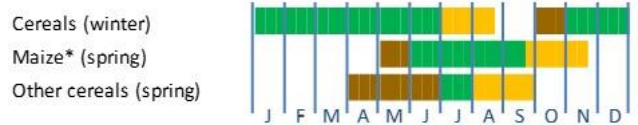
Record cereal exports forecast in 2021/22

Total cereal exports in the 2021/22 marketing year (July/June) are projected at about 58 million tonnes, over 20 percent above the five-year average volume and an all-time high. Owing to sustained demand by importing countries and the expectation of a large wheat output in 2021, wheat shipments are forecast at a record level of 21.5 million tonnes. Similarly, maize exports are forecast at 31 million, the highest historical level, reflecting the country's already ample supplies and the expected 2021 bumper harvest.

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	30 943	30 290	38 000	25.5
Wheat	26 014	24 877	31 500	26.6
Barley	8 325	7 636	9 500	24.4
Others	1 737	1 825	1 821	-0.2
Total	67 019	64 629	80 821	25.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Export and domestic prices of wheat and maize well above year-earlier levels in September 2021

Export prices of milling wheat, after showing an overall declining trend between February and July 2021, increased in August and September, mirroring the trend of other export quotations. The strengthening of international prices was mostly in response to the worsening of 2021 wheat production prospects in some major exporting countries, particularly in the United States of America, Canada, Kazakhstan and the Russian Federation, due to unfavourable weather conditions. In the country, the latest price increases were supported also by the expectation of a below-average quality of the grain. In September 2021, wheat export prices in Ukraine were over 30 percent above their levels a year before.

After increasing sharply between August 2020 and February 2021, amid shrinking availabilities of milling quality wheat, domestic wholesale prices of wheat followed an overall declining trend until July. Prices increased again in the following two months and, in September, they were about 20 percent higher year on year.

Export prices of maize, mainly used for animal feed, increased between December 2020 and May 2021, amid strong demand by importing countries and in line with international market trends, reaching the highest levels since January 2013. Although prices have declined since June, in September, they were about 40 percent above the levels of a year earlier.

Domestic wholesale prices of maize peaked in May 2021 and declined afterwards, although remaining at very high levels, mirroring trends in the export market.

High prices of maize have reportedly contributed to rising production costs in the livestock sector, both at domestic and regional levels.

About 3.4 million people estimated in need of humanitarian assistance

The civil conflict, which began in April 2014 in the eastern part of the country, had a severe negative impact on the food security situation of the people residing in both sides of the “line of contact” that separates the non-government controlled area (NGCA) and the government controlled area (GCA) and caused the displacement of about [1.5 million people](#). In addition, the measures adopted to contain the COVID-19 pandemic had a strong socio-economic impact, especially on the elderly, which account for 37 percent of the total population in need.

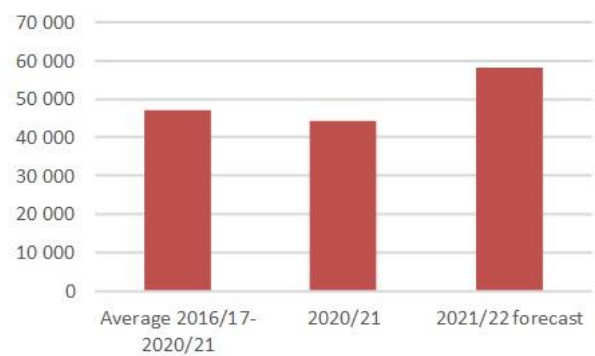
Since the outbreak of the COVID-19 pandemic in mid-March 2020, the five crossing points along the “line of contact” have been closed. Despite the re-opening of two of them in June 2020, the number of people crossing the “line of contact” each month is well below pre-pandemic levels.

People residing in the NGCA are particularly affected by the closing of the checkpoints, as they need to cross the “line of contact” to access their means of livelihood, and social and financial services, including for the withdrawal of their pensions, in the GCA.

Ukraine

Cereals Exports

000 tonnes

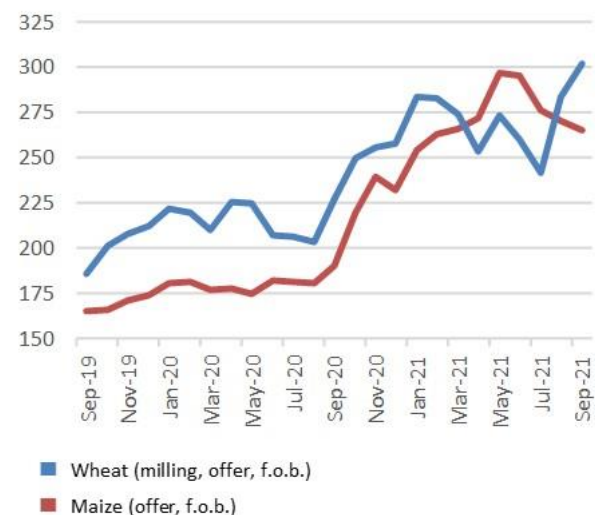


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

US Dollar per tonne



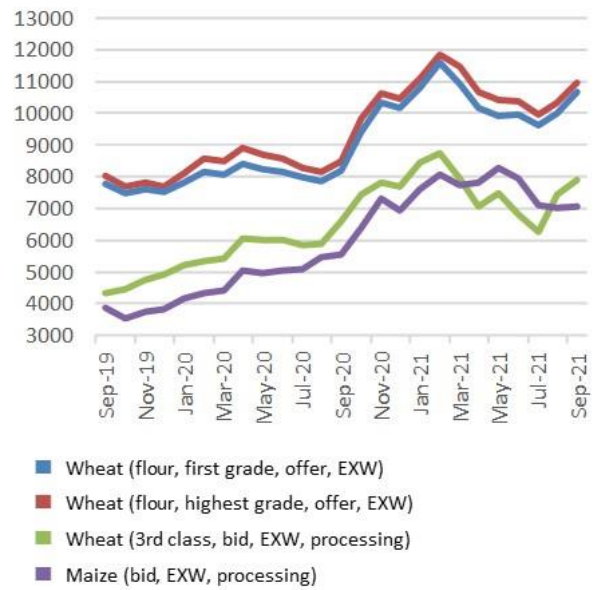
Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

According to the [United Nations Office for the Coordination of Humanitarian Affairs \(OCHA\)](#), about 3.4 million people, 8 percent of the total population, are estimated to be in need of humanitarian assistance in 2021. About 1.67 million people in need reside in the NGCA, while 1.7 million are in the GCA, including 343 000 IDPs. Out of the total 3.4 million people, an estimated 1.52 million are in need of food and livelihood assistance in the conflict-affected areas. About 40 percent of them have needs related to food insecurity.

Ukraine

National average wholesale prices of wheat, wheat flour and maize

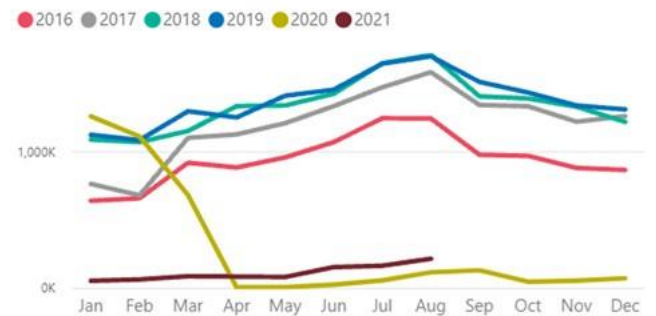
Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

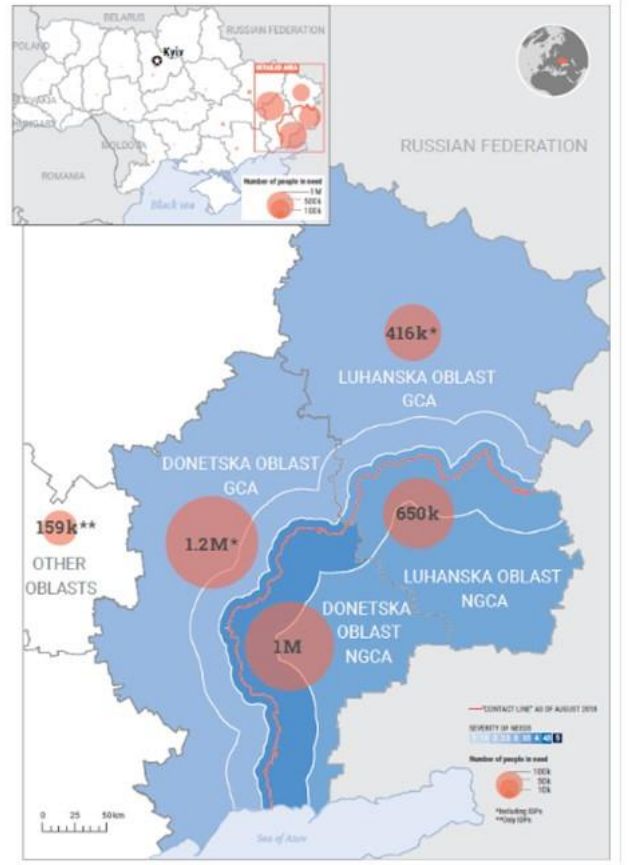
Ukraine checkpoints crossings along the line of contact

Number of crossings per month: 2016-2021



Source: UNHCR.

February 2021



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Source: OCHA.



GLEWS Country Brief Ukraine

Reference Date: 02-July-2021

FOOD SECURITY SNAPSHOT

- Above-average cereal output forecast in 2021
- Cereal exports forecast above average in 2021/22
- Export prices of wheat and maize well above year-earlier levels in June 2021
- About 3.4 million people estimated in need of humanitarian assistance, of which 1.5 million in need of food and livelihood assistance

Above-average cereal output forecast in 2021

Harvesting of the 2021 winter cereal crops, mainly wheat, is ongoing, while planting of maize, to be harvested from late September, took place in May. Planting of other spring cereals, mainly barley, finished in June and the harvest is expected to take place in August and September.

The 2021 wheat output (mainly winter wheat) is forecast at 28.5 million tonnes, 10 percent above the five-year average due to large plantings and favourable weather conditions during the season.

The output of maize is tentatively forecast at a bumper level of about 36 million tonnes, due to an above-average area planted (supported by high international maize prices). Barley production is forecast at a slightly above-average level of 8.5 million tonnes.

As a result, the total 2021 cereal output, including winter and spring crops, is expected at about 75 million tonnes, well above the five-year average level.

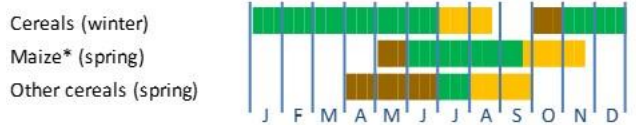
Cereal exports forecast above-average in 2021/22

Total cereal exports in the 2021/22 marketing year (July/June) are projected at about 52 million tonnes, 10 percent above the five-year average volume. Owing to sustained demand by importing countries and the expectation of a large wheat output in 2021, wheat shipments are forecast at an above-average level of 19 million tonnes. Similarly, maize exports are forecast at a well above-average level of 28 million, reflecting the country's already ample supplies and a likely bumper maize harvest in 2021.

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, June 2021



Source: FAO/GIEWS Earth Observation System.

Ukraine

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
	000 tonnes			percent
Maize	30 943	30 290	36 000	18.8
Wheat	26 014	24 877	28 500	14.6
Barley	8 325	7 636	8 500	11.3
Others	1 737	1 825	1 821	-0.2
Total	67 019	64 629	74 821	15.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Export prices of wheat and maize well above year-earlier levels in June 2021

Export prices of milling wheat showed an overall declining trend between February and June 2021. In particular, prices decreased by about 10 percent between February and April 2021, mainly due to a weakening of demand by importing countries. They increased by 7 percent in May, reflecting concerns over the impact of dry weather conditions on the 2021 wheat production in the United States of America, Europe and the Russian Federation, that put upward pressure on international prices. Finally, prices declined again in June, mainly due to favourable production prospects for domestic wheat, but remained about 25 percent higher than a year earlier.

Export prices of maize, mainly used for animal feed, increased between December 2020 and May 2021, amid strong demand by importing countries and in line with international market trends, reaching the highest levels since January 2013. Prices remained stable in June, at values over 60 percent above those a year earlier, raising concerns over regional livestock production.

Domestic wholesale prices of milling wheat followed an overall declining trend between February and June 2021. In June, prices were about 13 percent above their levels a year before, reflecting the reduced harvest obtained in 2020.

About 3.4 million people estimated in need of humanitarian assistance

The civil conflict, which began in April 2014 in the eastern part of the country, had a severe negative impact on the food security situation of people residing in both sides of the “line of contact” that separates the non-government controlled area (NGCA) and the government controlled area (GCA) and caused the displacement of about 1.5 million people. In addition, the measures adopted to contain the COVID-19 pandemic had a strong socio-economic impact especially on the most vulnerable people, particularly the elderly, which account for 37 percent of the total population in need.

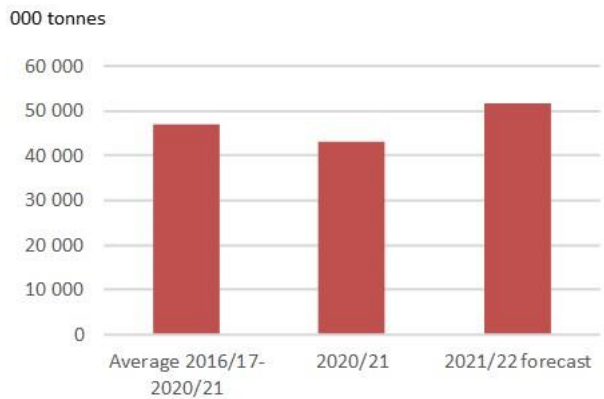
With the outbreak of the COVID-19 pandemic in mid-March 2020, the five crossing points along the “line of contact” were closed. Despite the reopening of two checkpoints in June 2020, the number of monthly crossings has dropped compared to pre-pandemic levels.

People residing in the NGCA are particularly affected by the closing of the checkpoints, as they need to cross the “line of contact” to access social and financial services, including withdrawing their pensions, in the GCA.

According to the [United Nations Office for the Coordination of Humanitarian Affairs \(OCHA\)](#), about 3.4 million people, 8 percent of the total population, are estimated to be in need of humanitarian assistance in 2021. About 1.67 million people in need reside in the NGCA, while 1.7 million are in the GCA, including 343 000 IDPs. Out of the total 3.4 million people, an estimated 1.52 million are in need of food and livelihood assistance in the conflict-affected areas.

Ukraine

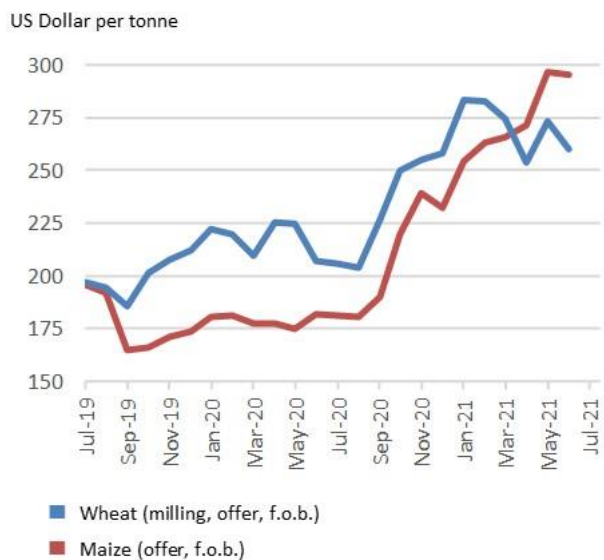
Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

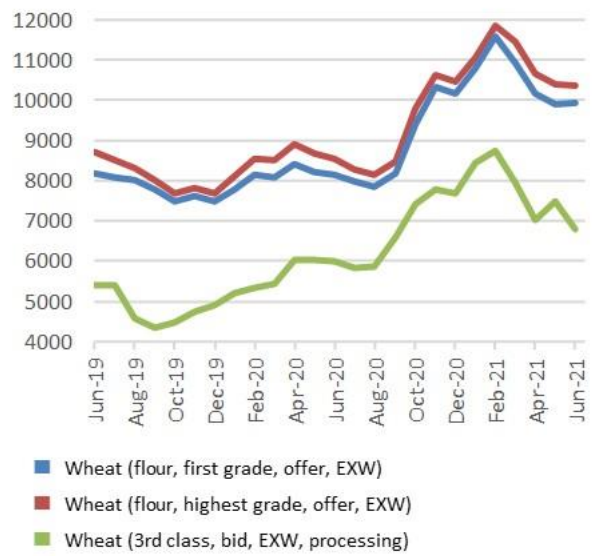


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat flour

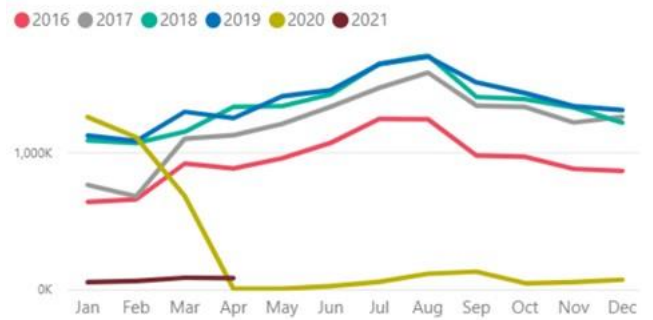
Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

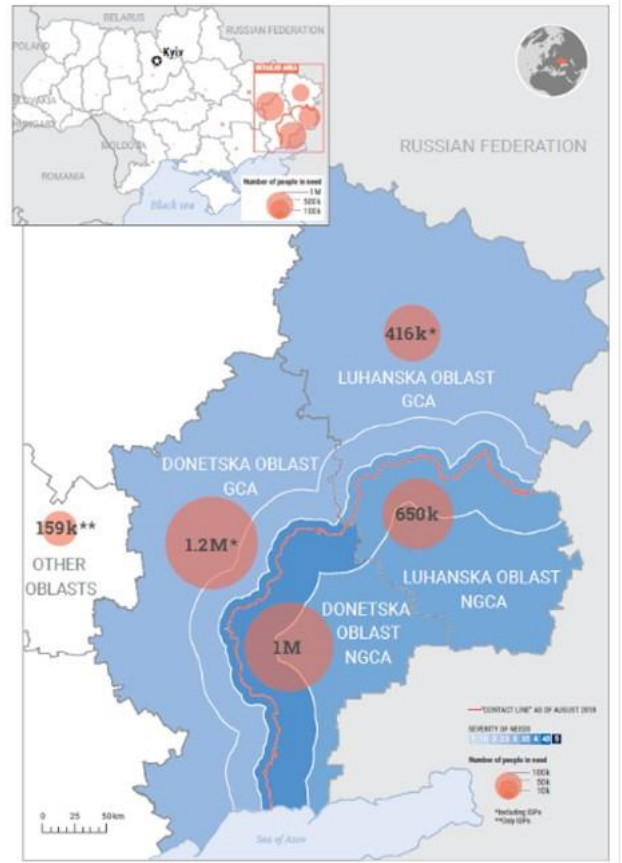
Ukraine checkpoints crossings along the line of contact

Number of crossings per month: 2016-2021



Source: UNHCR.

February 2021



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Source: OCHA.



GLEWS Country Brief Ukraine

Reference Date: 03-March-2021

FOOD SECURITY SNAPSHOT

- Winter cereals for 2021 harvest at dormancy stage
- Near-average cereal output obtained in 2020
- Below-average cereal exports forecast in 2020/21
- Export and wholesale prices of wheat increased in September
- About 3.4 million people estimated in need of humanitarian assistance as of February 2021, of which 1.5 million people in need of food and livelihood assistance

Winter cereals for 2021 harvest at dormancy stage

Planting of winter cereal crops, to be harvested between July and August 2021, was completed last October over a slightly above-average area of 8 million hectares. Precipitations have been overall adequate since late September 2020, benefiting soil moisture levels and supporting crop establishment. As of mid-February 2021, crops were dormant and sufficient snow levels prevented them to freeze. Snow cover is also crucial to secure good moisture reserves in early spring (March-April), when plant growth resumes.

Near-average cereal output obtained in 2020

The total 2020 cereal output (winter and spring crops) is estimated at a near-average level of 64.9 million tonnes. Despite the impact of drier and warmer-than-average weather conditions in August and September 2020, the maize output is officially set at 30.3 million tonnes, slightly above the average level due to record high plantings. By contrast, wheat and barley outputs are officially estimated at 25.1 and 7.8 million tonnes, respectively, well below the previous year's level and slightly below average.

Below-average cereal exports forecast in 2020/21

Total cereal exports in the 2020/21 marketing year (July/June) are projected at about 45 million tonnes, slightly below the five-year average volume. The forecast is based on the expectation of below-average exports of wheat and barley, due to the reduced harvests obtained in 2020. Maize exports, by contrast, are forecast at slightly an above-average level of 24 million tonnes, corresponding to the quota set by the Ministry of Economic Development, Trade and Agriculture on 26 January 2021 ([FPMA Food Policy](#)). This measure aims to

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	29 550	35 880	30 284	-15.6
Wheat	26 345	28 328	25 100	-11.4
Barley	8 455	8 917	7 750	-13.1
Others	1 735	1 628	1 780	9.3
Total	66 085	74 753	64 914	-13.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

ensure adequate domestic availabilities and preserve food security in the context of the ongoing COVID-19 pandemic.

Export and wholesale prices of wheat increased since September 2020

Export prices of milling quality wheat increased between August 2020 and January 2021, mainly due to strong demand by importing countries and the tightening domestic availabilities of milling quality wheat. Prices in January reached levels 25 percent above those recorded a year before and were the highest since June 2014.

In the domestic market, wholesale prices of milling wheat decreased slightly in December 2020, but increased sharply in January 2021, in line with seasonal trends. Prices remained well above their year-earlier levels, reflecting the reduced harvest obtained in 2020 and a year on year weaker domestic currency, which also contributed to the annual increase in export prices.

About 3.4 million people estimated in need of humanitarian assistance as of February 2021

The civil conflict, which began in April 2014 in the eastern part of the country, has had a severe negative impact on the food security situation of people residing in both sides of the “line of contact” that separates the non-Government controlled area (NGCA) and the Government controlled area (GCA) and caused the displacement of about 1.5 million people. In addition, the measures adopted to contain the COVID-19 pandemic had strong socio-economic impacts on the vulnerable people, particularly the elderly, which account for almost 40 percent of the total population in need.

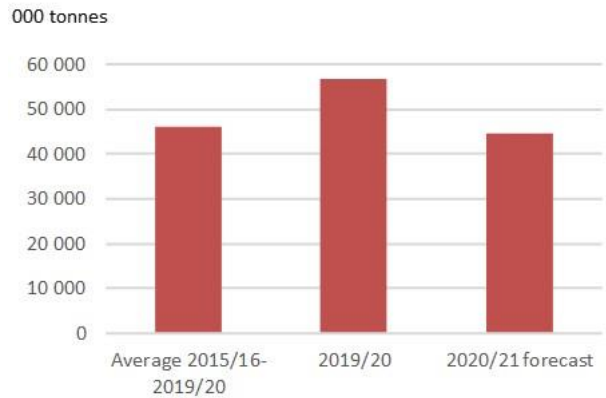
People residing in the NGCA are the most affected, as they need to cross the “line of contact” to access social and financial services, including withdrawing their pensions.

With the outbreak of the COVID-19 pandemic, in mid-March 2020, the five crossing points along the “line of contact” were closed. Despite the partial re-opening of two checkpoints in June 2020, the number of monthly crossings in January 2021 has dropped by over 90 percent compared to 12 months before.

According to [UN-OCHA](#), as of February 2021, about 3.4 million people, 8 percent of the total population, were estimated to be in need of humanitarian assistance. About 1.67 million people in need reside in the NGCA, while 1.7 million are in the GCA, including 343 000 IDPs. Out of the total 3.4 million people, an estimated 1.5 million are in need of food and livelihood assistance in the conflict affected areas. About 40 percent of them have needs related to food insecurity.

Ukraine

Cereals Exports

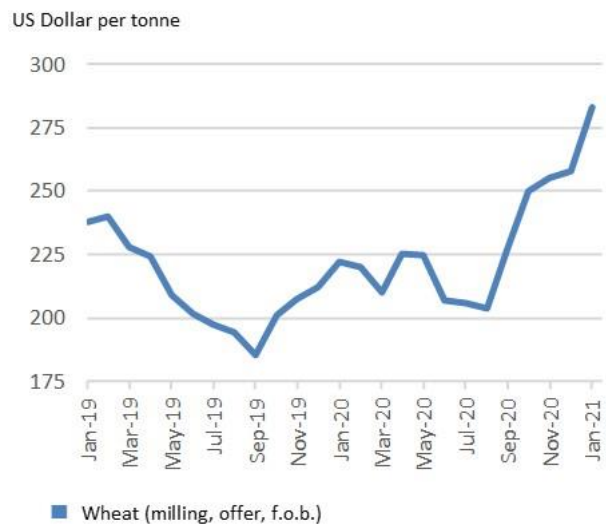


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat

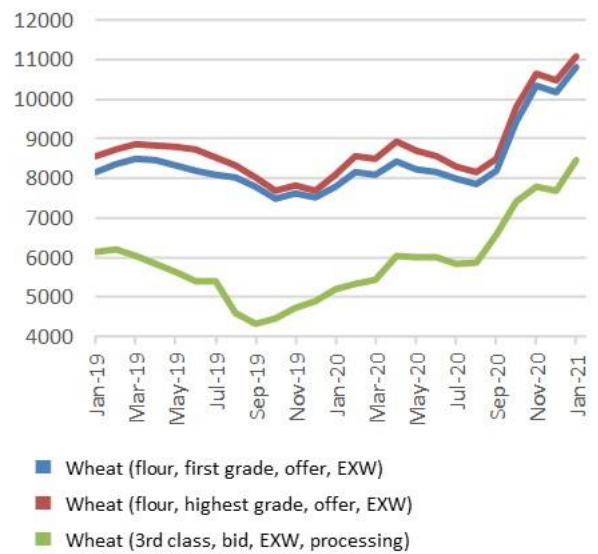


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat flour

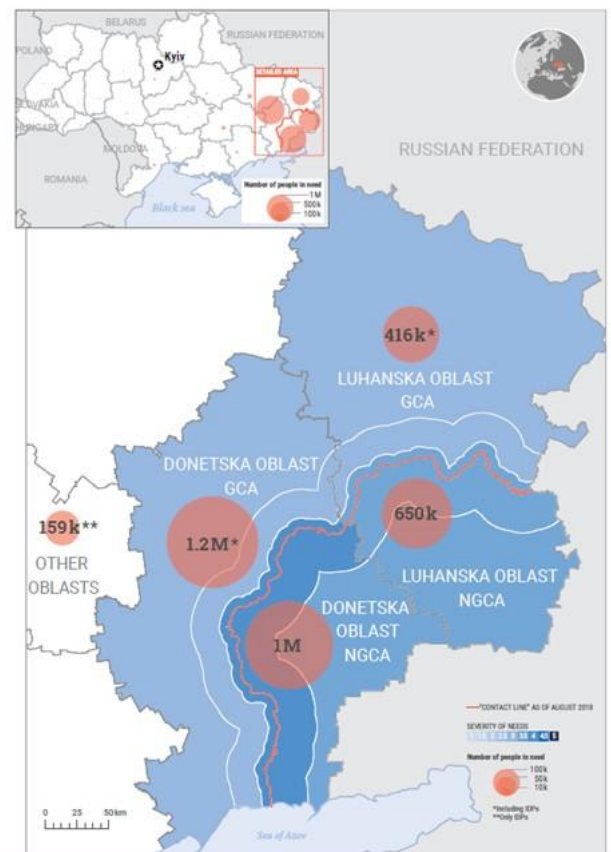
Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine - People in need of humanitarian assistance

February 2021



Source: UN-OCHA

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GLEWS Country Brief Ukraine

Reference Date: 06-October-2020

FOOD SECURITY SNAPSHOT

- Total cereal output forecast above-average in 2020 amid bumper maize production
- Bumper cereal exports forecast in 2020/21
- Export and wholesale prices of wheat increased in September
- About 3.2 million people estimated in need of humanitarian assistance as of October 2020

Total cereal output forecast above-average in 2020 amid bumper maize production

The total 2020 cereal output (winter and spring crops), including maize crops to be harvested until mid-November, is forecast at 71.5 million tonnes, 8 percent above the five-year average. Wheat and barley outputs are estimated at 26.5 and 8.2 million tonnes, respectively, near the average levels. Although drier and warmer-than-average weather conditions in August and September likely affected maize yields, the 2020 output is expected at a well above-average level of 35 million tonnes due to record high plantings.

Planting of the 2021 winter crops is ongoing under drier-than-average weather conditions and it is expected to finalize by end-October. The area sown with winter wheat, the major winter crop, is officially planned at 6.1 million hectares, below the previous year's level and the five-year average due to unfavourable soil moisture levels in most croplands, amid scarce rains in August and September (see satellite images on soil moisture).

Bumper cereal exports forecast in 2020/21

Total cereal exports in the 2020/21 marketing year (July/June) are forecast at about 50 million tonnes, 8 percent above the five-year average and the second highest level on record after the all-time high volume exported in 2019/20. Maize exports are forecast at 28 million tonnes, 20 percent above average on account of the large domestic outputs obtained in 2019 and expected in 2020. Wheat exports, by contrast, are contained at a slightly below-average level by a Government directive established on 17 August 2020. The directive sets the [maximum quantities of wheat and rye shipments](#) at 17.5 million tonnes and 1 000 tonnes, respectively, for the 2020/21 marketing year. On 23 September, the maximum quantity of rye exports was raised to 16 000 tonnes. These measures aim to ensure adequate

Ukraine

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	29 550	35 880	35 000	-2.5
Wheat	26 345	28 328	26 500	-6.5
Barley	8 455	8 917	8 200	-8.0
Others	1 737	1 636	1 786	9.1
Total	66 087	74 761	71 486	-4.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

domestic availabilities and preserve food security in the context of the ongoing COVID-19 pandemic.

Export and wholesale prices of wheat increased in September

Export prices of milling quality wheat, after decreasing sharply in June 2020 with the start of the winter harvest and mirroring trends in the international market, declined slightly in the following two months and rose sharply in September. The recent increase is mainly due to strong demand for wheat from importing countries and regional concerns regarding the 2021 winter wheat planting campaign due to dry weather. In September 2020, export prices were about 20 percent above those a year before mainly due to the reduced domestic wheat output obtained in 2020 compared to a year earlier.

In the domestic market, wholesale prices of milling wheat remained overall stable or decreased slightly between May and August and increased sharply in September.

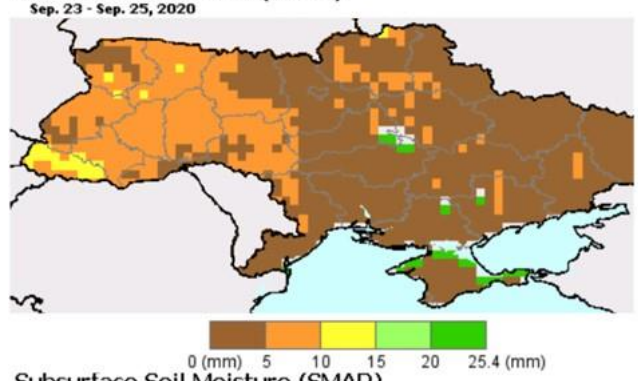
About 3.2 million people estimated in need of humanitarian assistance as of October 2020

The civil conflict, which began in the spring of 2014 in the eastern part of the country, has severely impacted the overall food security situation in the conflict-affected areas and caused the displacement of about 1.4 million people. In addition, the measures adopted to contain the spread of COVID-19 had strong socio-economic impacts particularly on the most vulnerable people.

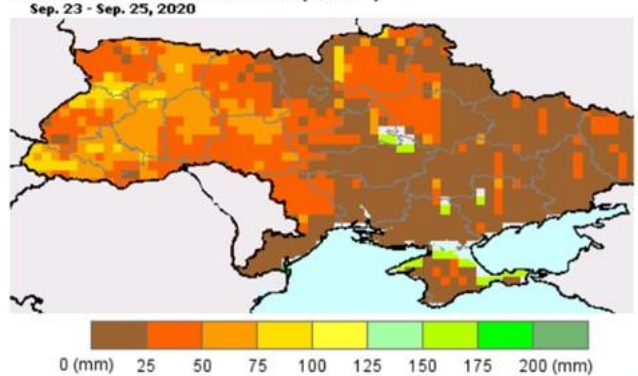
According to OCHA, as of October 2020, about 3.2 million people, nearly 8 percent of the total population, are estimated to be in need of humanitarian assistance. About 1.62 million people in need reside in the non-Government controlled area (NGCA), while 1.53 million live in the Government controlled area (GCA), including 340 000 IDPs.

Ukraine - Soil moisture

Surface Soil Moisture (SMAP)



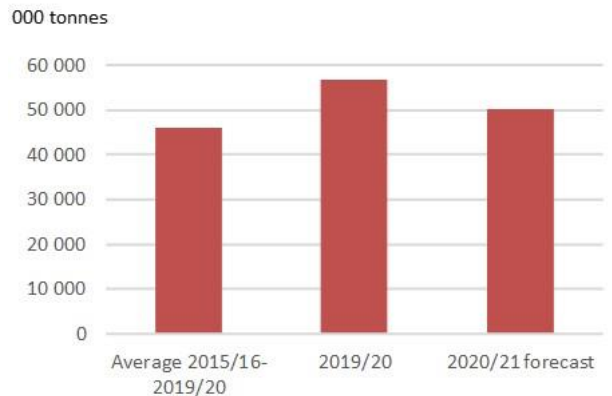
Subsurface Soil Moisture (SMAP)



Source: USDA Crop Explorer.

Ukraine

Cereals Exports



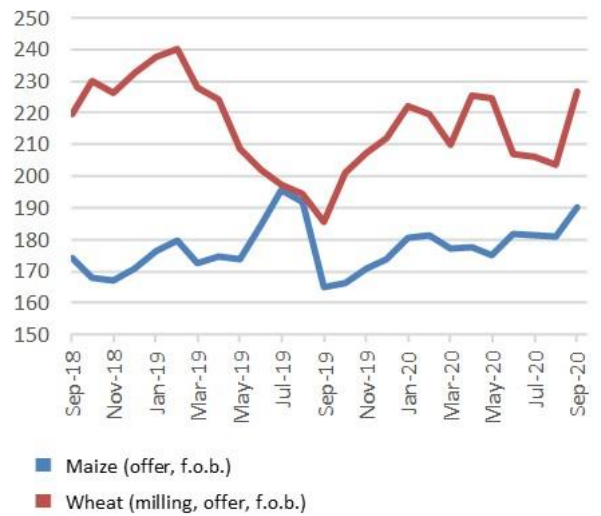
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

US Dollar per tonne

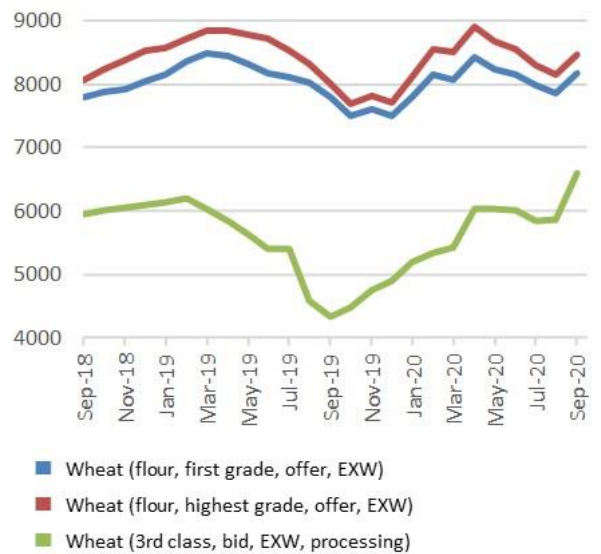


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat flour

Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Ukraine

Reference Date: 29-May-2020

FOOD SECURITY SNAPSHOT

- Slightly below-average production prospects for 2020 wheat crop
- All-time high cereal production estimated in 2019
- Record cereal exports forecast in 2019/20
- Export and domestic prices of wheat increased in April
- About 3.4 million people estimated in need of humanitarian assistance

Slightly below-average production prospects for 2020 wheat crop

Planting of the 2020 spring cereal crops, accounting for about half of the total annual cereal production, started at the beginning of April under drier-than-average weather conditions. Improved rains from early May increased soil moisture levels and benefitted crop establishment. Planting of spring barley, wheat and oats was completed in mid-May, over slightly above-average areas. Sowing of the 2020 maize crop is expected to be completed by end-May and the area planned to be sown is officially set at a record of 5.2 million hectares. Crops are expected to be harvested from August.

Despite the difficulties related to the countrywide lockdown and movement restrictions due to the COVID-19 emergency (see box below), planting operations of the 2020 crops were not reported to be affected.

Harvesting of the 2020 winter cereals, mainly wheat, planted between late August and October 2019, is expected to begin in July. Favourable rains in May are reported to have benefitted winter wheat crops, amounting to about 95 percent of the total annual wheat production, but to have only partially reversed the effects of the scarce precipitation in March and April.

Given that the total area sown with wheat, winter and spring, is estimated at a near-average level of 6.6 million hectares, the 2020 aggregate wheat output is tentatively forecast at 25 million tonnes, 5 percent below the average level.

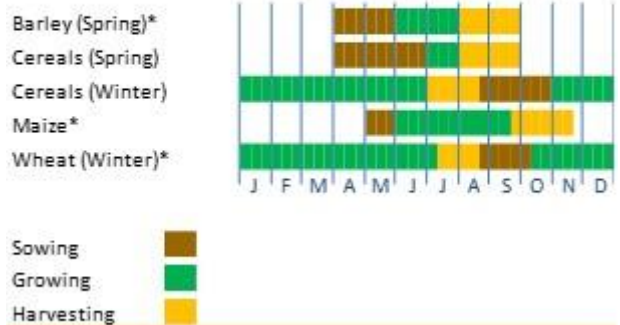
All-time high cereal production estimated in 2019

Harvesting of the 2019 crops was completed last November and the aggregate cereal production is estimated at a record of

Ukraine

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Ukraine

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	28 074	35 801	35 880	0.2
Wheat	25 502	24 606	28 328	15.1
Barley	8 481	7 349	8 917	21.3
Others	1 812	1 556	1 636	5.2
Total	63 869	69 312	74 761	7.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

74.7 million tonnes on account of favourable weather conditions, which boosted yields, and large plantings. Over the last ten years, the area sown with maize almost doubled: from 2.7 million hectares in 2010 to the record level of about 5 million hectares in 2019.

Record cereal exports forecast in 2019/20

Total cereal exports in the 2019/20 marketing year (July/June) are forecast at 55.4 million tonnes, about 30 percent above the five-year average and an all-time high. The upsurge is mainly due to record shipments of wheat and maize, forecast at 20.2 and 30 million tonnes, respectively, on account of the large domestic outputs obtained in 2019.

In response to the COVID-19 emergency (see box below), on 30 March 2020, the Government set a maximum wheat export volume of 20.2 million tonnes in the 2019/20 marketing year (July/June) in an effort to ensure sufficient domestic supplies and avoid price increases. In addition, on 2 April 2020, the Cabinet of Ministers declared the temporary [ban on exports of buckwheat](#) (until 1 July 2020) to ensure adequate availabilities on the national market and prevent price increases.

Export and domestic prices of wheat increased in April

Export prices of milling quality wheat showed an overall increasing trend between September 2019 and April 2020, despite some declines in February and March. Prices increased particularly in April, due to strong demand for imports and concerns over the impact of the March and April dry weather conditions on the 2020 wheat crop. Similarly, domestic wheat prices have been seasonally increasing since last September, with a spike in April due to strong consumer demand and tightening supplies of high-quality wheat.

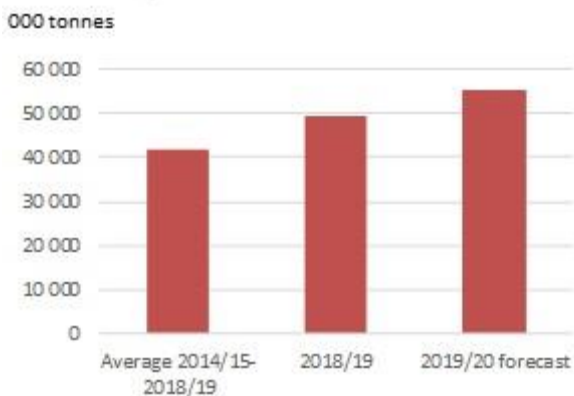
In response to the COVID-19 emergency (see box below), in an effort to avoid price increases, on 23 April 2020, the Government introduced State regulations on prices of a range of food items, including wheat flour, buckwheat, pasta, bread, milk and sugar. Furthermore, the Government announced, on 27 March 2020, the sale on the local markets of 160 000 tonnes of milling wheat from State-owned agricultural companies.

About 3.4 million people estimated in need of humanitarian assistance

The civil conflict, which began in the spring of 2014 in the eastern part of the country, has severely affected the overall food security situation in the conflict-affected areas and caused the displacement of about 1.4 million people. According to [UN-OCHA](#), as of January 2020, about 3.4 million people, nearly 8 percent of the total population, were estimated to be in need of humanitarian assistance. About 1.9 million people in need reside in the non-Government controlled area (NGCA), while 1.5 million live in the Government controlled area (GCA), including 350 000 IDPs.

Ukraine

Cereals Exports

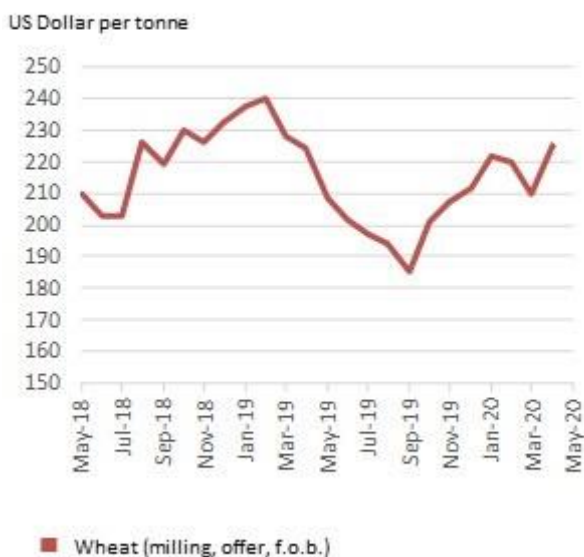


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, the Government has taken a number of [measures](#), including the implementing temperature screening procedures from 25 February 2020, closing borders and suspending all commercial flights. On 12 March 2020, the Government imposed a nationwide quarantine, closed all educational institutions and prohibited public events with over 200 people as well as private gatherings with more than ten people. On 17 March 2020, the closure of cafes, restaurants, gyms, shopping malls and entertainment venues was also ordered. On 25 March 2020, a State of Emergency was declared.

On 29 March 2020, a draft law was submitted to amend the State budget and to redirect funds from non-priority State programmes to measures related to the COVID-19 crisis. On 13 April 2020, the amendment was approved, creating a UAH 64.7 billion (USD 2.4 billion) fund to deal with COVID-19, which allocates UAH 15.8 billion (USD 600 million) to the National Health Service and UAH 29.7 billion (USD 1.1 billion) to the pension fund.

In addition, UN-OCHA issued an Emergency Response Plan for USD 165 million. The Plan is aimed at:

- Strengthening the health sector and social protection systems.
- Supporting local micro, small and medium enterprises (MSMEs) through grants to re-organize their activities, reduce job losses and create new job opportunities as well as to minimize the negative impact on the local economy.
- Protecting the livelihoods of the most vulnerable households and enhance their food production as a means to prevent potential spikes of food insecurity.

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Ukraine

National average wholesale prices of wheat grain and wheat flour

Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Ukraine

Reference Date: 26-November-2019

FOOD SECURITY SNAPSHOT

- Unfavourable weather conditions negatively affected planting and germination of 2020 wheat crops
- All-time high cereal production estimated in 2019
- Record cereal exports forecast in 2019/20
- Export and domestic prices of wheat increased in October, after seven months of consecutive declines
- About 1.1 million people estimated food insecure in conflict-affected areas

Unfavourable weather conditions affected planting and germination of 2020 wheat crops

Land preparation and planting operations of the 2020 winter cereals, mainly wheat, took place between late August and October and crops are expected to be harvested in July and August next year. As of mid-November, the southeastern key wheat-producing provinces were experiencing soil moisture deficits. This is due to poor rainfall amounts and warmer-than-average temperatures in September and October. As a result, the area planted with wheat is officially estimated at a below-average level 6.2 million hectares. The unfavourable weather conditions have also delayed germination and emergence of crops in these areas.

All-time high cereal production estimated in 2019

Harvesting of the 2019 winter and spring crops was completed by mid-August and mid-November, respectively, under favourable weather conditions. The 2019 aggregate cereal production is estimated at 73.5 million tonnes, 15 percent above the five-year average and an all-time high, mainly due to record outputs of wheat and barley crops, estimated at 28.8 and 9.1 million tonnes, respectively, on account of favourable weather conditions during the crop growing period, which boosted yields. Production of maize is estimated at a bumper level of 34 million tonnes, 20 percent above the five-year average, mainly due to a progressive increase of the planted area. Over the last ten years, the area sown with maize almost doubled: from 2.7 million hectares in 2010 to the record level of about 5 million hectares in 2019.

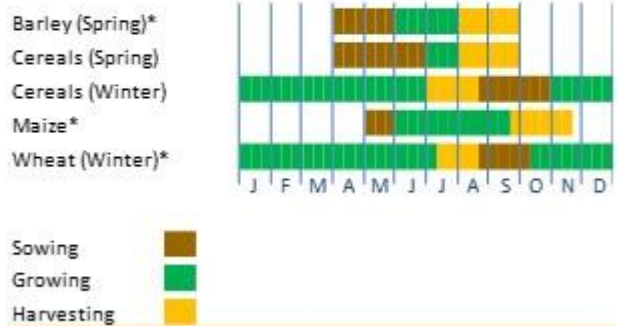
Record cereal exports forecast in 2019/20

Total cereal exports in the 2019/20 marketing year (July/June) are forecast at 50 million tonnes, about 20 percent above the

Ukraine

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Ukraine

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
Maize	28 074	35 801	34 000	-5.0
Wheat	25 502	24 606	28 779	17.0
Barley	8 481	7 349	9 111	24.0
Others	1 812	1 556	1 595	2.5
Total	63 869	69 312	73 485	6.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

five-year average and an all-time high. The upsurge is mainly due to record shipments of wheat and barley, forecast at 18.5 and 5 million tonnes, respectively, on account of the 2019 large domestic outputs. Maize shipments are also forecast at a bumper level of 26.5 million tonnes, about 25 percent above average and the second highest level after last year's record.

Export and domestic prices of wheat increased in October

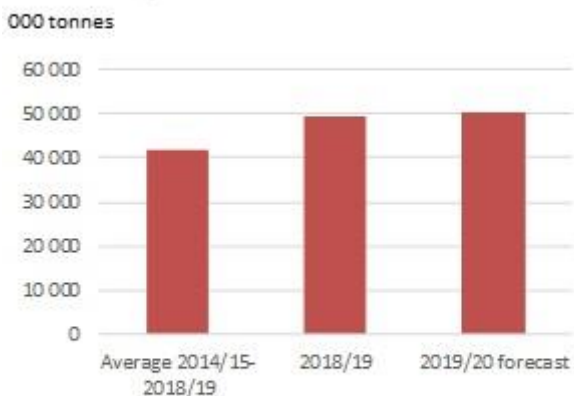
After decreasing between March and September 2019, export prices of milling quality wheat increased in October by about 8 percent. The rise mainly reflects the stronger demand by importers and the prevailing trends in the international market. Prices, however, remained more than 10 percent below those in October 2018. Domestic wheat prices also slightly rose in October, after seven months of consecutive declines, but remained lower than their values a year earlier, amid the bumper domestic output obtained in 2019.

About 1.1 million people estimated food insecure in conflict-affected areas

The civil conflict, which began in the spring of 2014 in the eastern part of the country, has severely affected the overall food security situation in the conflict-affected areas and caused large-scale population displacement. In eastern provinces, employment opportunities decreased with the drastic reduction of industrial production, especially in the Donbas Region, formerly the economic heartland of the country. In rural areas, where households mostly rely on self-production of food, transport connections have been largely damaged by the conflict, hampering the access to agricultural inputs, such as vegetable seeds, fodder for livestock, fertilizers and tools. Unemployment, reduced income and high inflation rates have severely limited the access to food for about 1.1 million people.

Ukraine

Cereals Exports

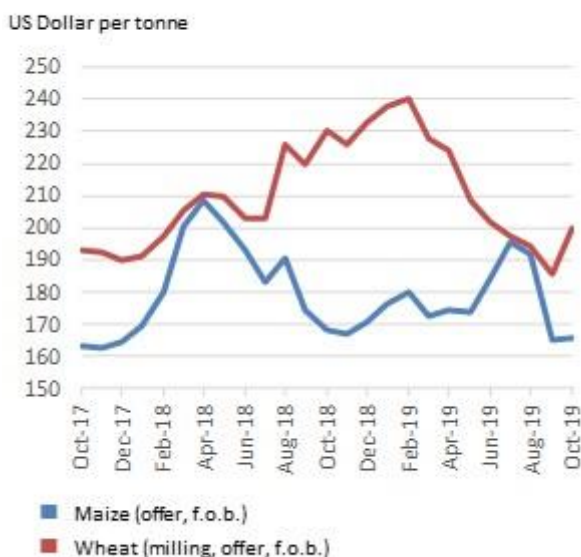


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

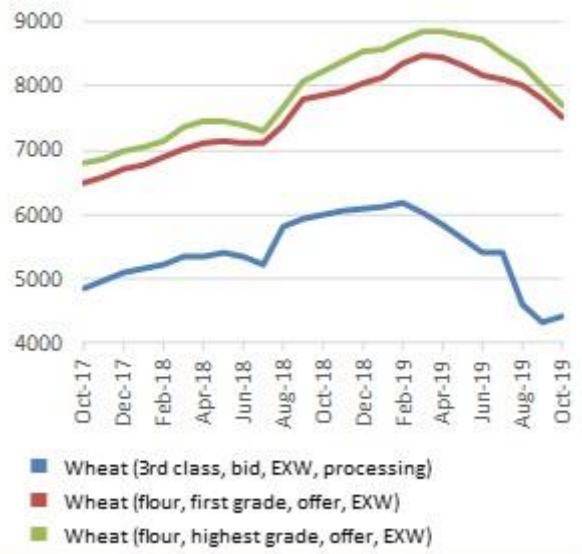


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat

Hryvnia per tonne



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Ukraine

Reference Date: 12-June-2019

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2019 cereal crop output
- Maize production reached all-time high in 2018
- Record maize exports forecast in 2018/19
- Export prices of wheat decreased in May, after reaching four-year high levels in February
- About 1.1 million people estimated food insecure in conflict-affected areas

Favourable prospects for 2019 cereal crop output

Harvesting of the 2019 winter crops, planted between August and October 2018 over an above-average area of 7.6 million hectares, is expected to start in July. Average precipitations across the country in December 2018 and January 2019 were followed by below average rains in February and March. Rainfall amounts returned to average in April and became above average in May, especially in the western regions, where they fully replenished soil moisture and benefited crop development. According to remote sensing data, by the end of May, vegetation conditions were near average across most of the country.

Planting of spring cereals finalized in early June under favourable weather conditions. The area sown with spring cereals is officially set at an above-average level of 7.2 million hectares.

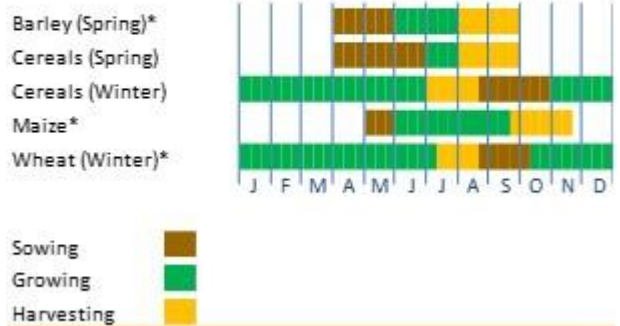
Following the increase in area planted with both winter and spring cereals, if weather conditions remain favourable throughout the remainder of the cropping season, the early forecast of the 2019 aggregate cereals output points to about 69 million tonnes, close to the previous year's well above average level.

Maize production reached all-time high in 2018

The 2018 aggregate cereal production is estimated at 69.3 million tonnes, 10 percent above the five-year average. The upsurge is due to a record output of maize, officially estimated at 35.8 million tonnes, 24 percent above the five-year average level and with a 45 percent year-on-year increase. The rise is due to a larger planted area and abundant rainfall in July 2018, which resulted in higher yields. Wheat output is set at the near-average level of 24.6 million tonnes, while barley production is estimated at 7.4 million tonnes, 14 percent below the average, as yields were reduced by unfavourable weather conditions during the crop growing period.

Ukraine

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Ukraine

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	27 103	24 669	35 801	45.1
Wheat	25 037	26 159	24 606	-5.9
Barley	8 523	8 285	7 349	-11.3
Others	1 932	1 736	1 556	-10.4
Total	62 596	60 849	69 312	13.9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Record maize exports forecast in 2018/19

Total cereal exports in the 2018/19 marketing year (July/June) are forecast at 47.4 million tonnes, about 20 percent above the five-year average and an all-time high. The upsurge is mainly due to record maize shipments, expected at 27.5 million tonnes, about 30 percent above the five-year average. Wheat exports are forecast at 16 million tonnes, about 7 percent above the average level. Barley exports are forecast at a near-average level of 3.6 million tonnes.

Export prices of wheat decreased in May, after reaching four-year high levels in February

Export prices of milling quality wheat reached, in February 2019, four-year high levels, amid tightening availabilities, following the 2018 below average domestic output of wheat and large export flows. However, between February and May 2019, prices declined by about 13 percent, due to favourable 2019 wheat production prospects and a slowdown in demand for imports in the international market. Domestic wheat prices slightly declined during the last two months, but in May, they were still above the levels reached a year earlier.

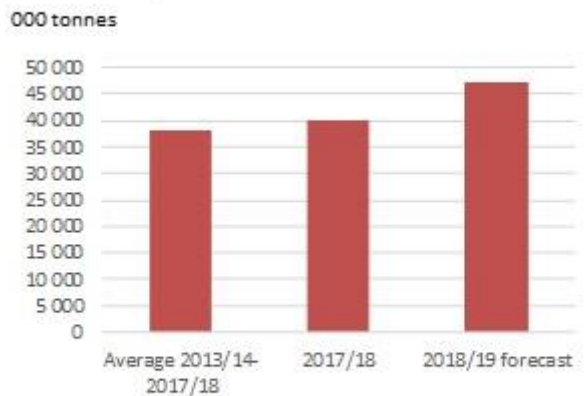
About 1.1 million people estimated food insecure in conflict-affected areas

The civil conflict, which began in the spring of 2014 in the eastern part of the country, has severely affected the overall food security situation in the conflict-affected areas. In eastern provinces, employment opportunities decreased with the drastic reduction of industrial production, especially in the Donbas Region, formerly the economic heartland of the country. The 2018 production of cereals and legumes has particularly decreased in the Donetsk Province, where it was set at about 35 percent below the pre-crisis levels. In rural areas, where households mostly rely on self-production of food, transport connections are largely damaged due to the conflict. This, as a result, complicates the access to agricultural inputs, such as vegetable seeds, fodder for livestock, fertilizers and tools. Unemployment, reduced income and high inflation rates severely limited the access to food for about 1.1 million people in 2018.

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Ukraine

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

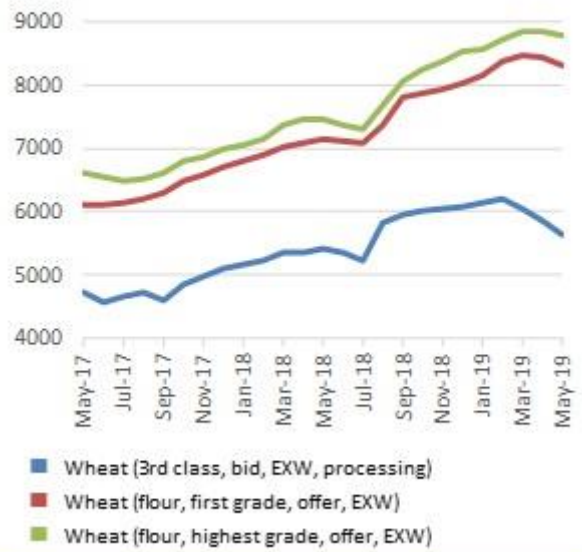


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat flour

Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Ukraine

Reference Date: 20-February-2019

FOOD SECURITY SNAPSHOT

- Winter cereals for 2019 harvest in dormancy stage
- Record maize production in 2018
- Well above average cereal exports forecast in 2018/19
- Higher export and domestic prices of wheat in January
- About 1.1 million people estimated to be food insecure in conflict-affected areas

Winter cereals for 2019 harvest in dormancy stage

Winter crops, to be harvested between July and August 2019, entered the dormancy phase in late November and, as of early February, weather conditions were reported to be favourable, with a thick snow cover protecting crops from frosts.

The planted area with winter cereals, mostly wheat, is officially estimated at 7.6 million hectares, slightly above the five-year average.

Record maize production in 2018

Harvesting of 2018 cereals finalized by mid-November and aggregate cereal production is estimated at 69 million tonnes, 9 percent above the five-year average. The upsurge is mainly due to a record output of maize, set at 35.6 million tonnes, 24 percent above the average level, due to a larger planted area and abundant rainfall in July, which resulted in higher yields. Wheat output in 2018 is estimated at the near average level of 24.6 million tonnes, while barley production is set at 7.4 million tonnes, 14 percent below the average, as yields were reduced by unfavourable weather conditions during the crop-growing period.

Well above average cereal exports forecast in 2018/19

In the 2018/19 marketing year (July/June), total cereal exports are forecast at 47.8 million tonnes, about 20 percent above the five-year average and well above the previous year's volume. Shipments of maize are expected at a record of 28 million tonnes, about 30 percent above the five-year average, on account of strong demand on international markets and bumper output.

Ukraine

Crop Calendar (*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ukraine

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	27 103	24 669	35 569	44.2
Wheat	25 037	26 159	24 586	-6.0
Barley	8 523	8 285	7 346	-11.3
Others	1 932	1 736	1 553	-10.5
Total	62 596	60 849	69 054	13.5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Wheat exports are forecast at 16 million tonnes, about 7 percent above the average level. Barley exports are forecast at a near average level of 3.6 million tonnes.

Higher export and domestic prices of wheat in January

In January 2019, export prices of milling quality wheat increased for the second consecutive month, driven up by tightening availabilities of high quality wheat and steady foreign demand, while shipping operations are made difficult by weather conditions. On a yearly basis, prices reached a four-year high, with levels 25 percent higher than in January 2018 on account of the reduced output in 2018, strong international demand for locally-produced wheat and a weakening of the national currency.

Shrinking supplies put upward pressure also on domestic prices of wheat grain and wheat flour, which have been moderately but constantly increasing since July 2018 and, in January 2019, they reached levels almost 20 percent above the values in the corresponding month last year.

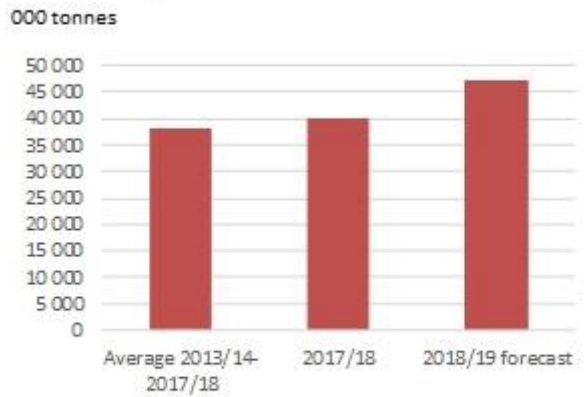
About 1.1 million people estimated to be food insecure in conflict-affected areas

The civil conflict, which began in spring 2014 in the eastern part of the country, has severely affected the overall food security situation in conflict-affected areas. In eastern Oblasts, employment opportunities decreased with the drastic reduction of industrial production, especially in the Donbas Region, once the economic heartland of the country. Unemployment, reduced income and high inflation rates severely limited the food access for about 1.1 million people in 2018. The elderly, individuals living alone and women-headed households are particularly vulnerable in this context, especially during the cold winter months of December and February, when higher heating expenses force families to make cuts in areas such as medication, schooling or food.

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Ukraine

Cereals Exports

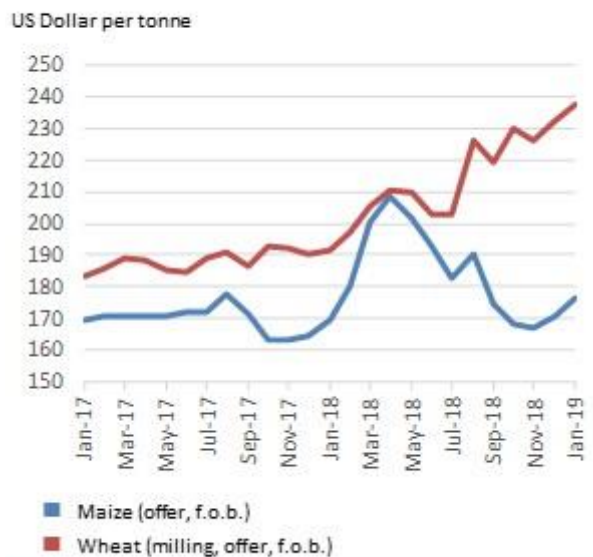


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

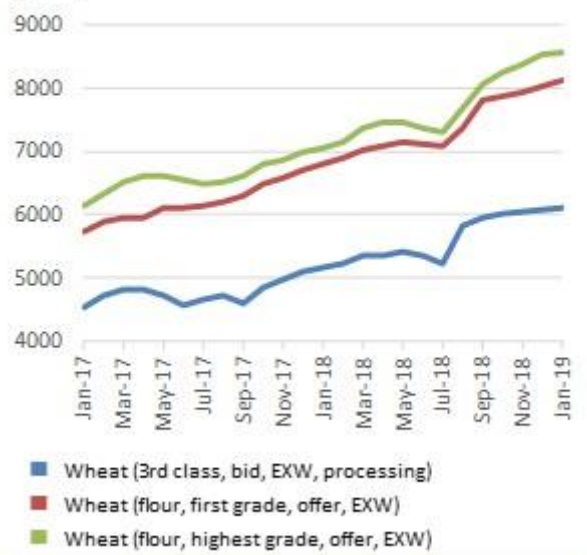


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat

Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Ukraine

Reference Date: 01-October-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 estimated close to five-year average
- Grain exports in 2018/19 marketing year forecast above-average
- Export and domestic prices of wheat increased on yearly basis

Cereal production in 2018 estimated close to five-year average

Harvesting of the 2018 winter crops is about to be finalized, while harvest of spring crops will continue until mid-November. Aggregate cereal production is estimated at a near-average level of 63 million tonnes in 2018, slightly above the low level of the previous year. The increase is mainly due to a bumper maize output, which is forecast at 29 million tonnes, about 18 percent above the previous year's level and the highest production obtained since 2013, following abundant rainfall in July. By contrast, July rains had a negative effect on yields and quality of the wheat crop, output of which is set at 24.8 million tonnes, about 5 percent below the level of last year but still close to the five-year average.

Grain exports in 2018/19 forecast above-average

Total cereal exports in the 2018/19 marketing year (July/June) are expected to increase from the average level of the previous year on expectations of higher shipments of maize. Maize exports are forecast to increase by 23 percent to 21.7 million tonnes, following a bumper domestic output, strong import demand and competitive prices on the international markets. Despite the decline in domestic production, barley exports are also expected to increase by 5 percent to 4.5 million tonnes, due to a strong import demand. By contrast, wheat shipments (wheat and wheat flour in grain equivalent) are set to decline to 16 million tonnes, about 10 percent below the high level of 2017, but still close to the average of recent years.

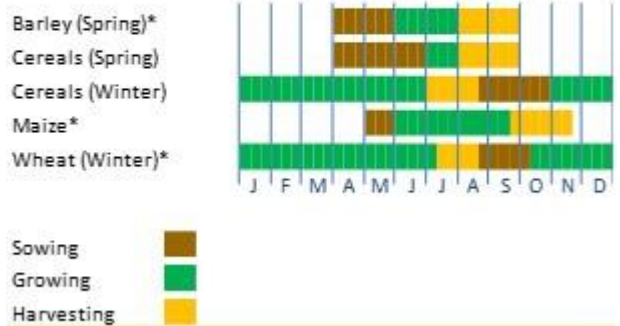
Export and domestic prices of wheat increased on yearly basis

Export prices of milling wheat rose sharply over the June-August period, supported by the expected reduction of the 2018 output and the lower quality of grain as well as strong export demand. Export prices showed a small decline in September, but were still

Ukraine

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Ukraine

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	27 103	24 669	29 000	17.6
Wheat	25 037	26 159	24 800	-5.2
Barley	8 523	8 285	7 400	-10.7
Others	1 930	1 726	1 729	0.2
Total	62 594	60 839	62 929	3.4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

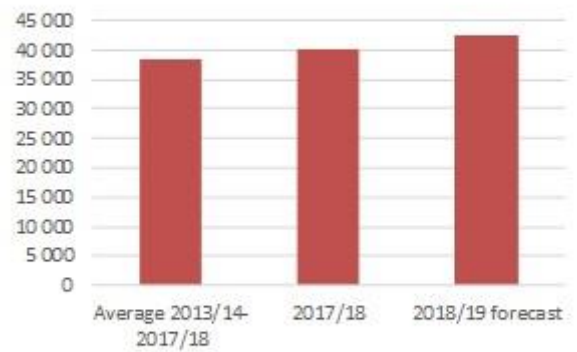
about 17 percent higher than in the corresponding month last year. Domestic prices of wheat increased by about 30 percent year-on-year as of September 2018, driven by the strong pace of wheat exports in July-August 2018, reduced availability of milling quality wheat and weakening of national currency.

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Ukraine

Cereals Exports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Ukraine

Export prices of wheat and maize

US Dollar per tonne

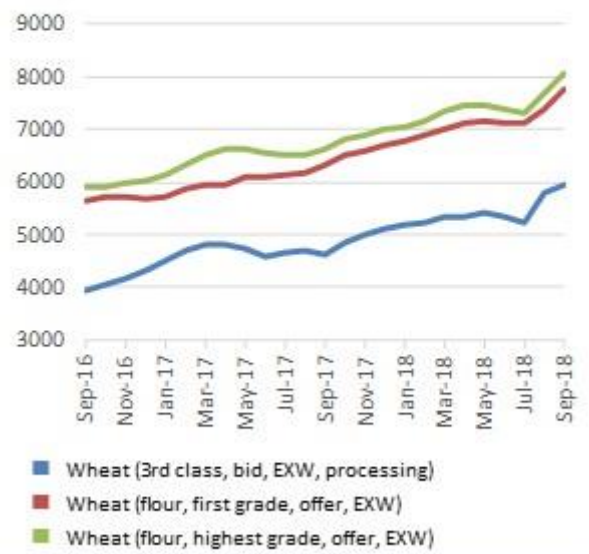


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ukraine

National average wholesale prices of wheat and wheat flour

Hryvnia per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Ukraine

Reference Date: 11-June-2018

FOOD SECURITY SNAPSHOT

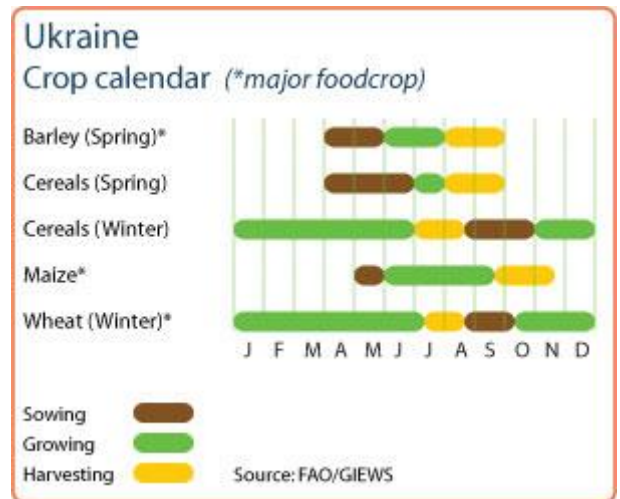
- Cereal production in 2018 estimated at above average level
- Grain exports in 2018/19 marketing year forecast close to previous year's record
- Export and domestic prices of wheat increased over last three months

Cereal production in 2018 estimated at above average level

Harvesting of the 2018 winter crops will start in mid-June. The area planted with winter cereals is officially estimated at 7.2 million hectares, a slight increase from the above-average level of the previous year. Weather conditions during the January-April period were favourable for wintering of cereals, while a moisture deficit caused by a dry period at the beginning of May was compensated by abundant precipitations at the end of May-beginning of June. Planting of spring cereals is about to be completed under generally favourable conditions. As a result, the 2018 cereal output is set at 63.6 million tonnes, 6 percent above last year's below-average level. The increase mainly reflects favourable prospects for maize production, which is anticipated to rise from 16 percent to 28.2 million tonnes, well above the five-year average, following an increase in planted area. Wheat output is expected at 26 million tonnes, close to the 2017 high level, as the increase in area planed was offset by a year-on-year decline in yields due to unfavourable weather conditions.

Cereal exports in 2018/19 forecast close to previous year's record

Total cereal exports in the 2018/19 marketing year (July/June) are forecast at about 40.6 million tonnes, close to the previous year's record level. Strong import demand and competitive prices for maize are supposed to keep cereal exports at high levels for the second consecutive year. Maize shipments are forecast at a record level of 20 million tonnes, about 2 million above the average level of 2017/18, owing to higher domestic production. By contrast, total wheat exports (wheat and wheat flour, in grain equivalent) are set at 16 million tonnes, about 7 percent below the high level of 2017/18. Barley exports are also expected to decline by 9 percent to 4.3 million tonnes due to a smaller domestic crop in 2018.



Ukraine
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	26 991	24 108	28 200	17
Wheat	25 036	26 158	26 000	-1
Barley	8 523	8 285	7 700	-7
Others	1 930	1 725	1 703	-1
Total	62 481	60 276	63 603	6

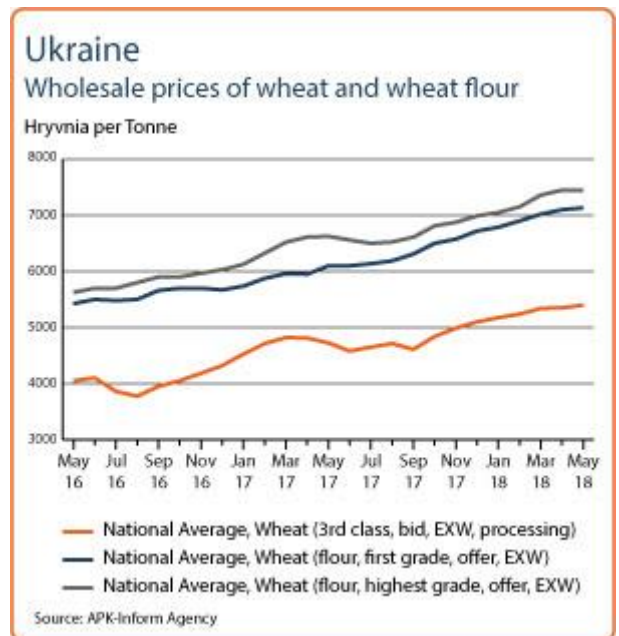
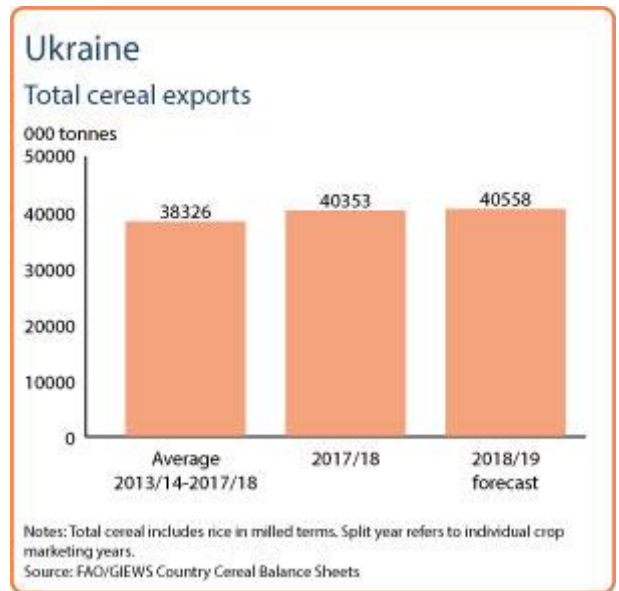
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Export and domestic prices of wheat increased over last three months

Export prices of wheat increased since December 2017 on stronger demand from traditional importers. However, export prices of milling wheat eased in May 2018, mainly reflecting a slowdown in trading activity before the new harvest.

Domestic prices of wheat continued to rise over the previous three months. Wholesale prices of milling wheat and wheat flour strengthened in May 2018 and were well above their levels of a year-ago, supported by a weakening of the local currency and sustained domestic demand for milling quality wheat.

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GIEWS Country Brief Ukraine

Reference Date: 18-January-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 estimated at above average level
- Grain exports in 2017/18 marketing year forecast below previous year's record
- Domestic prices of wheat increased over last year
- Around 1.2 million people estimated to be food insecure in conflict-affected areas

Plantings of winter cereals for harvest in 2018 entered dormancy stage

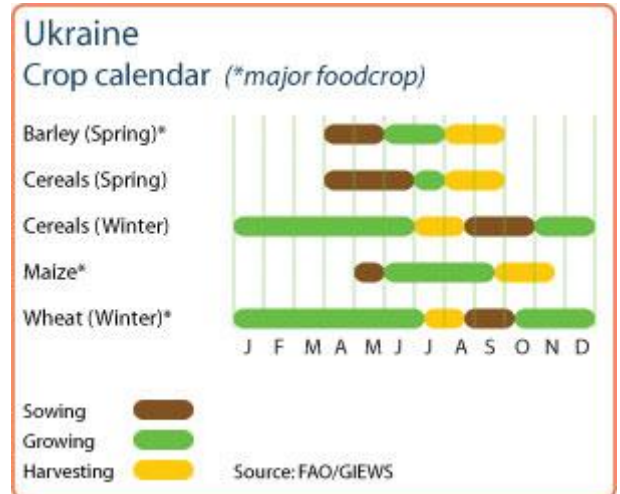
Planting of the 2018 winter cereals started at the end of August and concluded by the end of November 2017. The area planted under winter cereals is estimated to be close to the previous year's level. According to the Ministry of Agriculture, as of 5 January 2018, around 86 percent of the plantings are reported to be in good and fair conditions. Weather conditions during the November-December 2017 period were favourable for wintering of cereals, which have entered dormancy stage.

Cereal production in 2017 estimated at above average level

Harvesting of the 2017 cereal crops was completed by November 2017. Aggregate cereal output is estimated at 62.3 million tonnes, still above the five-year average. Wheat output is set at 26.6 million tonnes, marginally above the high level of the previous year and close to the record of 2015. However, the share of milling wheat is estimated to be below the previous year.

Harvesting of maize was finalized by the end of November 2017 and production is estimated at 25.5 million tonnes, 9 percent below the record of 2016. The lack of rainfall during the growing season resulted in a 10 percent year-on-year decline in yields. Moreover, excessive precipitations at harvesting time negatively affected the quality of grains.

Barley production is estimated to decline by 11 percent from the good level of 2016 to 8.4 million tonnes. This decline is mainly on account of a 13 percent reduction in the area planted due to less competitive prices which induced farmers to opt for other crops.



Ukraine
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Maize	26 360	28 075	25 500	-9
Wheat	22 946	26 043	26 564	2
Barley	8 266	9 436	8 363	-11
Others	2 046	1 943	1 874	-4
Total	59 617	65 497	62 300	-5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal exports in 2017/18 forecast slightly below previous year's record

Total cereal exports in the 2017/18 marketing year (July/June) are forecast at about 40 million tonnes, 9 percent below the previous year's record level. Most of the decline is on account of the expected reductions in shipments of wheat following the increased competition with the Russian Federation, which has gathered a record wheat crop in 2017. Moreover, the new requirements for imported wheat, raising the protein content from 11.5 to 12.5 percent for wheat bought from the Black Sea region, have been imposed by Egypt, the country's largest wheat buyer. This measure is expected to favour the Russian Federation, where wheat has higher protein content compare to Ukraine. Therefore, wheat exports from Ukraine are set at 16.5 million tonnes, down 6 percent from the high level of 2016/17.

Barley exports are also expected to decline by 12 percent to 4.7 million tonnes due to a smaller domestic crop in 2017.

Similarly, maize exports are forecast at 19 million tonnes in the 2017/18 marketing year, down 9 percent from the record level of the previous year. The high level of exports, together with the decline in domestic production, are expected to withdraw the country's maize stocks to the lowest level since 2012/13.

Domestic prices of wheat increased over last year

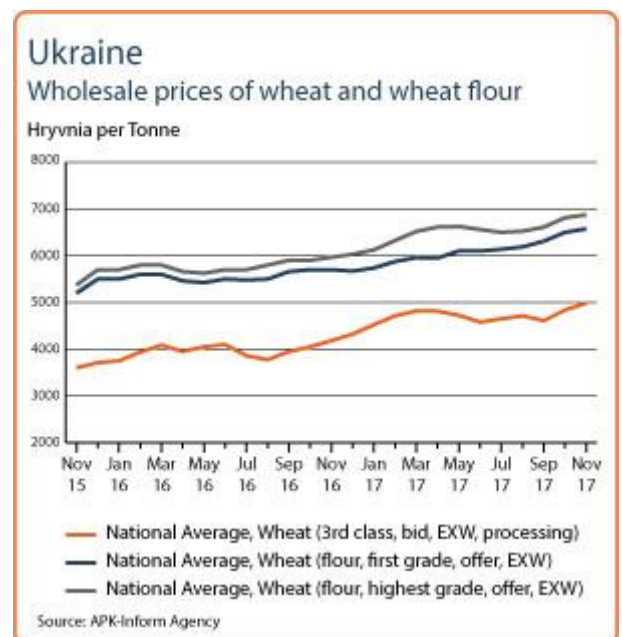
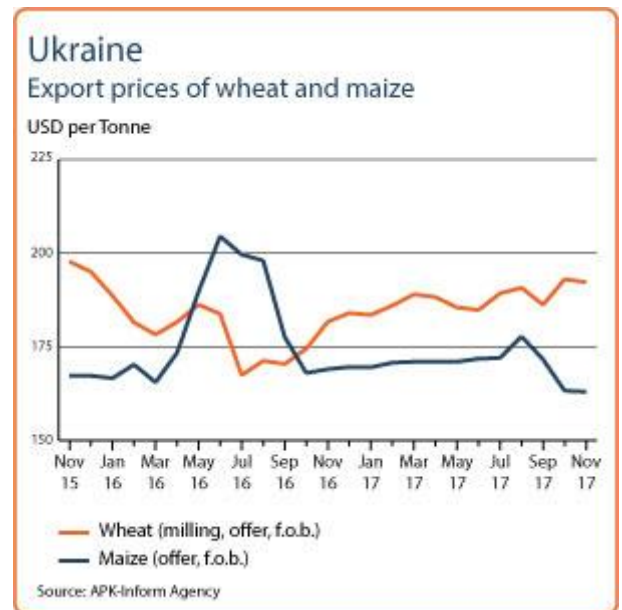
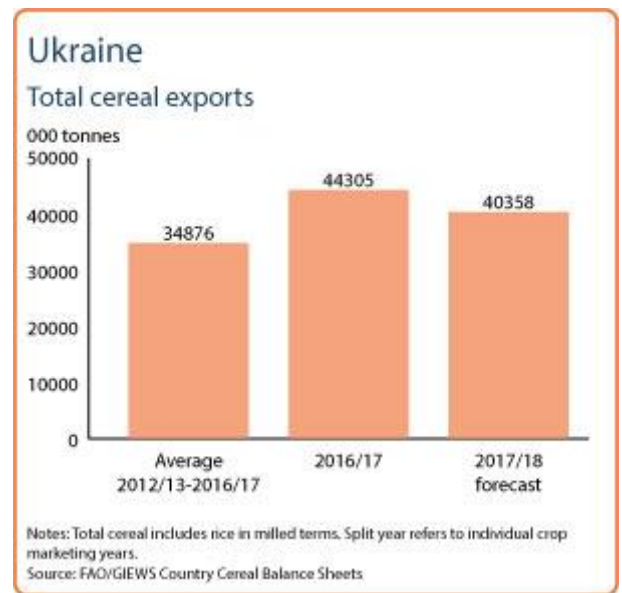
Export prices of wheat increased since last September on stronger demand from traditional importers. However, export prices of milling wheat eased in November 2017, pressured downwards by strong competition in the international markets.

By contrast, domestic prices of wheat showed some increases. Wholesale prices of milling wheat and wheat flour strengthened in November 2017, supported by a weakening of the local currency in the second half of the month and sustained domestic demand for milling quality wheat. In November 2017, domestic prices of wheat were around 20 percent higher than their values of a year earlier.

Around 1.2 million people estimated to be food insecure in conflict-affected areas

In conflict-affected areas, the overall cereal production is close to average. However, unemployment, reduced income and high inflation rates in conflict-affected eastern areas of the country are severely limiting food access for about 1.2 million people in 2017. The elderly living alone and female-headed households are particularly vulnerable, especially during cold winter periods of December-February.

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GIEWS Country Brief Ukraine

Reference Date: 02-October-2017

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 estimated at above average level
- Grain exports in 2017/18 marketing year forecast slightly below previous year's record
- Export and domestic prices of wheat declined in September

Cereal production in 2017 estimated at above average level

Harvesting of the 2017 cereal crops, with the exception of maize, is almost completed. Despite unfavourable weather conditions during the planting of winter and spring cereals, aggregate output is estimated at 63.5 million tonnes, well above the five-year average. Wheat output is expected at 26 million tonnes, marginally above the high level of the previous year and similar to the record of 2015. The quality of the crop is reported to be good and the share of milling wheat is estimated at 50 percent.

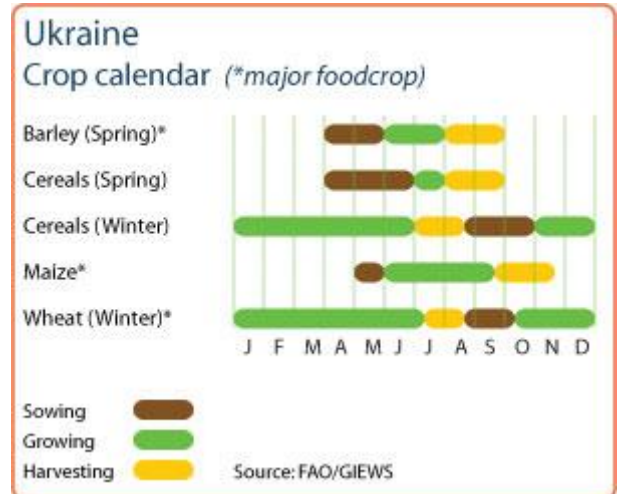
Harvesting of maize will be finalized by the end of November and production is expected at 27 million tonnes, well above the average and just 3 percent below the record of 2016.

By contrast, barley production is estimated to decline by 11 percent from the good level of 2016 to 8.4 million tonnes. This decline is mainly on account of a 13 percent reduction in the area planted due to less competitive prices which induced farmers to opt for other crops.

Planting of the 2018 winter cereals started at the end of August. By end-September, 2.4 million hectares were planted under wheat (39 percent of planned), 60 000 hectares under barley (6 percent) and 73 000 hectares under rye (46 percent). For the third consecutive year, winter cereals are planted under dry weather conditions.

Cereal exports in 2017/18 forecast slightly below the previous year's record

Total cereal exports in the 2017/18 marketing year (July/June) are forecast at about 42 million tonnes, 5 percent below the previous year's record level. Most of the decline is on account of the expected reductions in shipments of wheat following the increased competition with the Russian Federation, which has gathered a record wheat crop production in 2017. Moreover, Egypt, the country's largest wheat buyer, imposed new



Ukraine
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes		percent	
Maize	26 627	28 075	27 130	-3
Wheat	23 468	26 043	26 145	0
Barley	8 466	9 436	8 363	-11
Others	2 027	1 943	1 881	-3
Total	60 588	65 497	63 519	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

requirements for imported wheat, raising the protein content from 11.5 to 12.5 percent for wheat bought from the Black Sea region. This measure is expected to favour the Russian Federation, where wheat has higher protein content compare to Ukraine. Therefore, wheat exports from Ukraine are set at 16.5 million tonnes, down 6 percent from the high level of 2016/17.

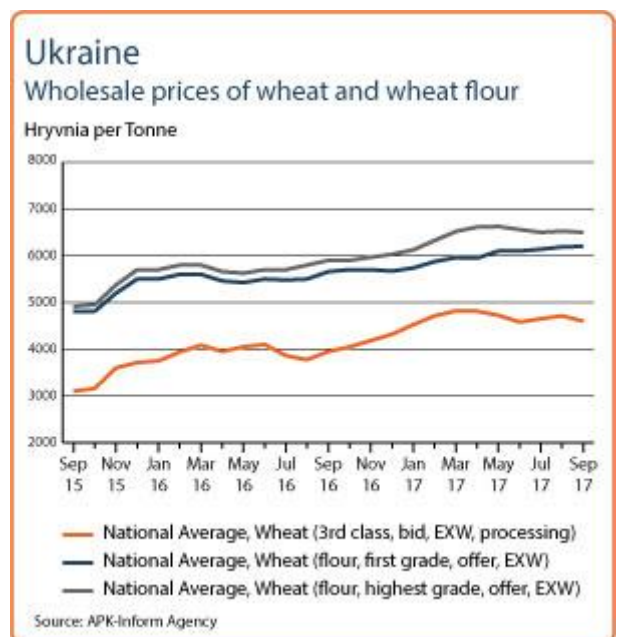
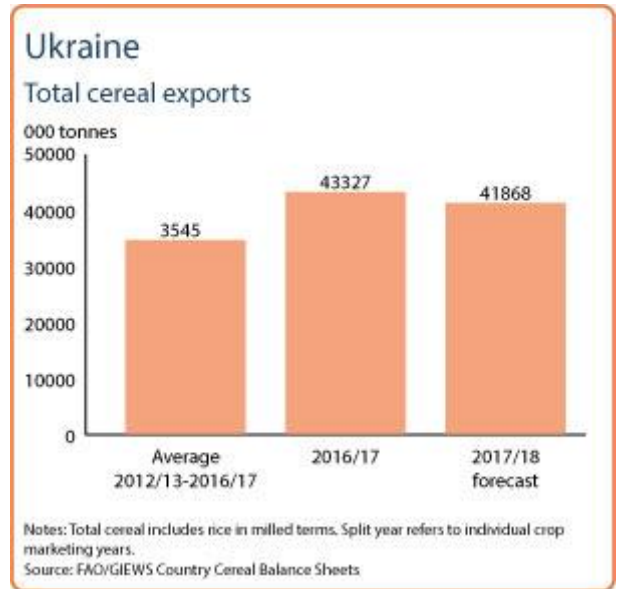
Barley exports are also expected to decline by 12 percent to 4.7 million tonnes, due to a smaller domestic crop in 2017.

By contrast, maize shipments are forecast at 20.2 million tonnes in the 2017/18 marketing year, close to the record level of the previous year. The high level of exports together with the decline in domestic production are expected to withdraw the country's maize stocks to the lowest level since 2012/13.

Export and domestic prices of wheat declined in September

Export prices of wheat started to decline since mid-August, pressure by the availability of newly-harvested crops. However, the declining trend was hampered at the end of September as prices received support from an increase in demand by traditional importers.

Domestic prices of wheat declined since the end of August reflecting the start of the harvest, but the decreases were limited as a result of upward pressure from a weakening currency. In September, domestic prices of wheat were around 17 percent higher than their values of a year earlier and almost 50 percent higher than two years ago.



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GIEWS Country Brief Ukraine

Reference Date: 27-April-2017

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 forecast below previous year's level
- Cereal exports in 2017/18 marketing year forecast to decline from previous year's level
- Export and domestic prices of wheat remained stable in April

Cereal production in 2017 forecast below previous year's level

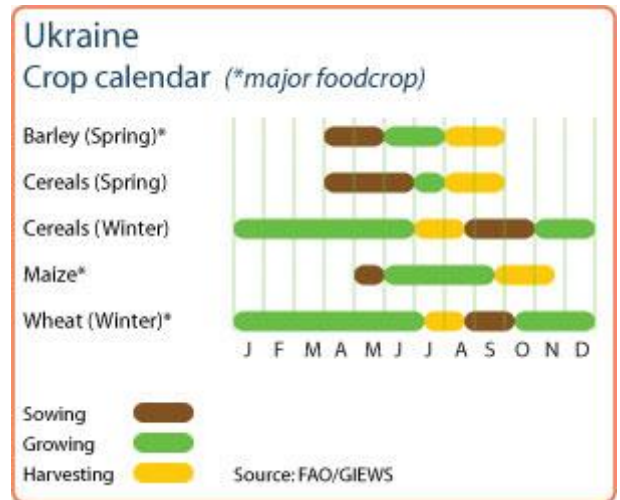
Unfavourable weather negatively affected planting of winter cereals, mainly wheat and barley, for harvest in mid-2017. Excessive precipitations during October-November delayed the winter plantings that consequently lasted until mid-November. The planted area under winter cereals is officially reported at 6.1 million hectares, down 1 percent from the previous year.

According to the results of a recent Government-led survey of winter cereal crops, crop conditions have improved since growth resumption. According to the Ministry of Agriculture, 37 percent of the crops were in good condition, by the end of February. A month later, the portion of good crops was up at 43 percent. In-time fertilization and sufficient level of precipitations were the main reasons behind this improvement. Therefore, almost no re-seeding of winter wheat was observed this year.

Planting of early spring cereals started later than usual in March due to unfavourable weather. However, by mid-April, the 2017 pace of plantings overcame the 2016 level by 2.4 percent. Assuming an increase in spring wheat plantings to partially compensate for the decline in winter cereal output, FAO's early forecasts the 2017 cereal output at 61 million tonnes, about 6 percent down from the previous year's good level.

Cereal exports in 2017/18 marketing year forecast to decline from previous year

Total cereal exports in the 2017/18 marketing year (July/June) are forecast at around 36 million tonnes, down 4 million tonnes from the previous year's high level. Most of the decline is on account of the expected reductions in shipments of maize following the smaller harvest this year. Maize exports are set at 16.5 million tonnes, down 10 percent from the 2016/17 level. Similarly, wheat exports are expected to decline by 9 percent to 15.5 million tonnes.



Ukraine
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	26,338	27,964	26,720	-4
Wheat	22,953	26,082	25,042	-4
Barley	8,272	9,463	7,762	-18
Others	2,043	1,929	1,814	-6
Total	59,605	65,438	61,338	-6

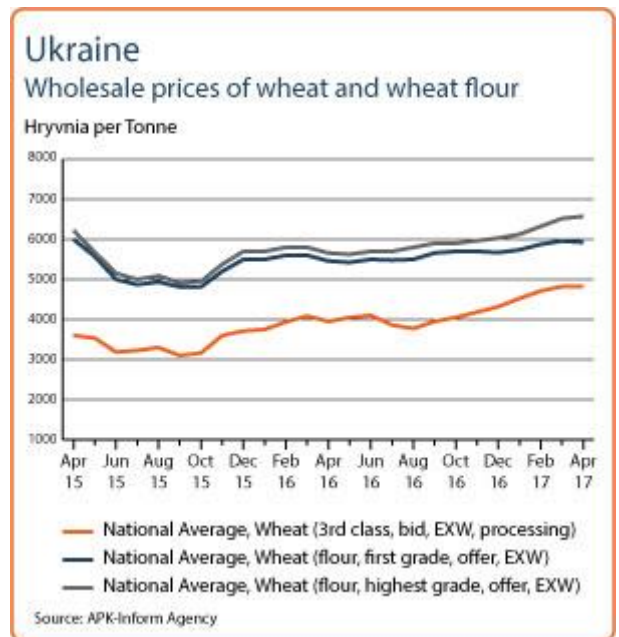
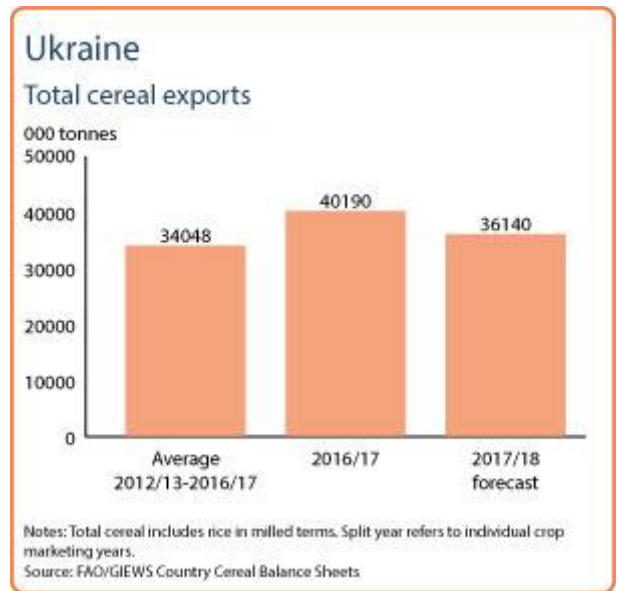
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Export and domestic prices of wheat remained stable in April

Export prices of wheat remained stable in April, after increasing over the last months, supported by the steady demand from the main importing countries and due to reduced local supplies of high-quality wheat. As a result, export prices of milling wheat were 6 percent higher in April compared to their values three months ago.

Similarly, domestic prices of wheat stabilized in April at 6 percent above the level of three month earlier. Over the past months, prices were underpinned by tightening supplies of milling quality wheat and the weakening of the national currency. Domestic prices of wheat were around 22 percent higher in April than their values of a year earlier.

Export prices of maize declined in April, but were still 5 percent higher their values of January 2017, supported by international quotations and strong import demand.





GIEWS Country Brief Ukraine

Reference Date: 20-December-2016

FOOD SECURITY SNAPSHOT

- Cereal production above average in 2016
- Cereal exports in 2016/17 marketing year forecast to decline from previous year's record high
- Export and domestic prices of wheat increased in November

Cereal production above average in 2016

FAO's latest estimate for total cereal output in 2016 is set at 62 million tonnes, up 4 percent from the 2015 high level. Larger maize and barley crops offset a small decline in wheat production. Wheat output is set to decline to about 26 million tonnes, 2 percent less than in the previous year. By contrast, maize production is estimated at almost 25 million tonnes, around 7 percent up from reduced level of last year following favourable weather and improved yields. Similarly, barley production increased by 15 percent as a result of better yields.

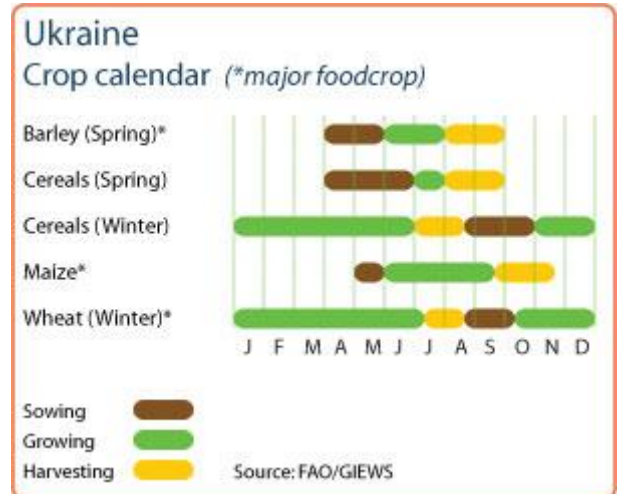
Planting of winter cereals, mainly wheat and barley, with small areas planted to rye, is underway and crops are generally in good conditions.

Cereal exports in 2016/17 marketing year to decline from previous year's record high

Total cereal exports in the 2016/17 marketing year (July/June) are forecast at around 39 million tonnes, down marginally from the previous year's record level. Most of the decline is on account of the expected reductions in shipments of wheat following the smaller harvest this year. Wheat exports are set at 15.5 million tonnes, around 53 percent of the total domestic availability. By contrast, maize exports are forecast up 3 percent to 18 million tonnes. Exports of barley are expected to increase to 5 million tonnes, 600 000 tonnes below the 2015 level.

Domestic and export prices of wheat increased in November

Following a small reduction in the 2016 crops and shortages of high-quality wheat, together with strong import demand, supported export and domestic prices of milling wheat in November. Export prices of wheat in Ukraine rose slightly over last month, but were 6 percent below their levels of last year. At this level, prices of wheat remain less competitive on the international market considering that Argentina is now entering the market with its newly-harvested crops and the Russian



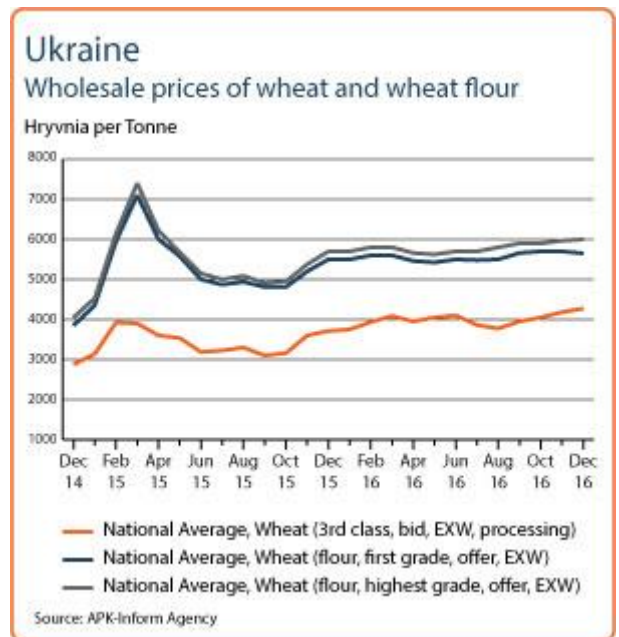
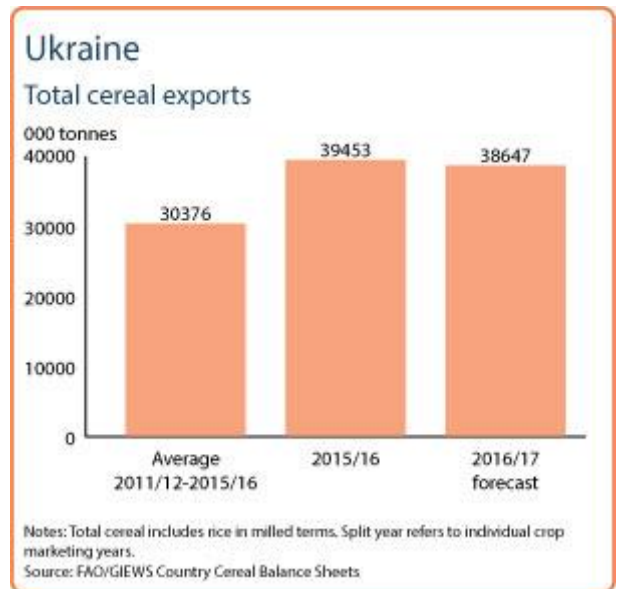
Ukraine
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	25 205	23 328	24 839	6
Wheat	22 201	26 532	26 100	-2
Barley	8 198	8 288	9 547	15
Others	2 099	1 813	1 889	4
Total	57 703	59 961	62 375	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Federation started to compete with Ukraine in the Indian market. These factors may exert downward pressure on Black Sea region prices in early 2017.

Export prices of maize eased in November as a result of a bumper crop this year.





GIEWS Country Brief Ukraine

Reference Date: 03-August-2016

FOOD SECURITY SNAPSHOT

- Cereal production above average in 2016
- Cereal exports in 2016/17 marketing year forecast to decline from previous year's record high
- Domestic prices of wheat declined in July

Cereal production above average in 2016

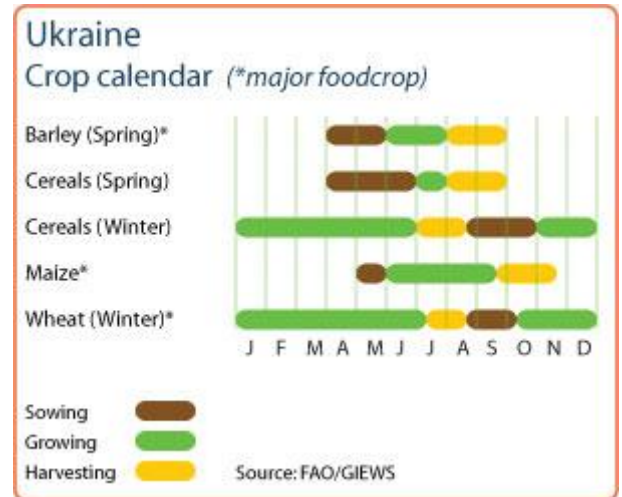
Total cereal output in 2016 is forecast at 59 million tonnes, slightly below the 2015 high level, but still well above the average of the previous five years. A significant decline in wheat production was not completely offset by a larger maize crop, and output of barley, the third most important cereal, declined slightly. Following dry weather in autumn, wheat plantings were reduced by 15 percent. Thus, although good weather during the growing stage helped to ensure satisfactory yields, wheat output is set to decline to about 23 million tonnes, 14 percent less than in the previous year. Similarly, barley production decreased by 2 percent as a result of a reduction in area in response to high input costs. By contrast, maize production is forecast at almost 27 million tonnes, around 14 percent up from reduced level of last year.

Cereal exports in 2016/17 marketing year to decline from previous year's record high

Total cereal exports in the 2016/17 marketing year (July/June) are forecast at 32.7 million tonnes, down 17 percent from the previous year's record level. Most of the decline is on account of expected reductions in shipments of wheat and barley, following the smaller harvests this year. Wheat exports are set at 10.5 million tonnes, around 44 percent of total domestic availability, while exports of barley are expected to fall to 3.8 million tonnes, 700 000 tonnes below the 2015 level. By contrast, maize exports are forecast up 6 percent to 18.3 million tonnes.

Domestic and export prices of wheat eased in July

Despite the reduction in wheat output forecast in 2016, prospects for a somewhat better than expected production as the harvest progresses weighed on domestic prices of grain in July. Export prices decreased even further, reflecting ample supplies overall in the Black Sea region. Export prices of maize also eased in July and were 4 percent above their year-earlier levels.



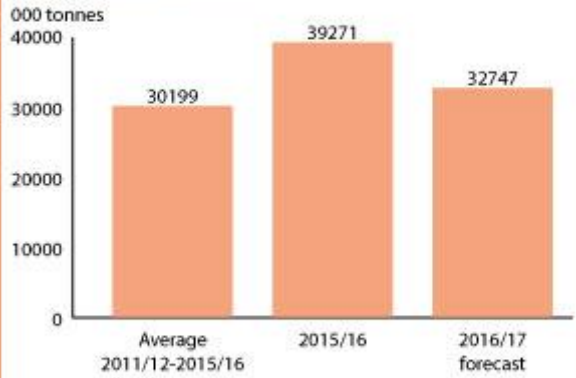
Ukraine
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes		percent	
Maize	25 205	23 328	26 700	14
Wheat	22 201	26 532	22 729	-14
Barley	8 198	8 288	8 155	-2
Others	2 099	1 813	1 889	-4
Total	57 703	59 961	59 473	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ukraine

Total cereal exports



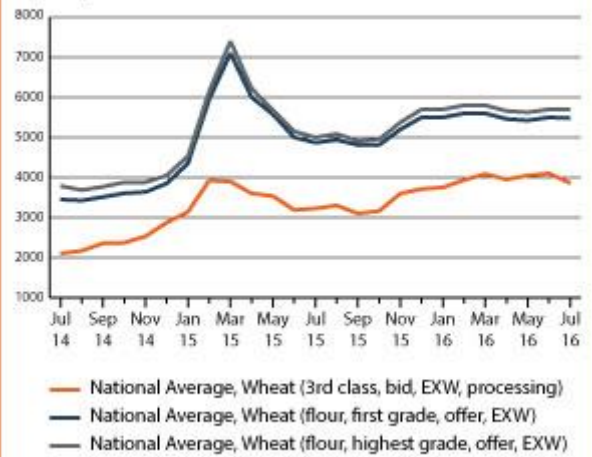
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Ukraine

Wholesale prices of wheat and wheat flour

Hryvnia per Tonne

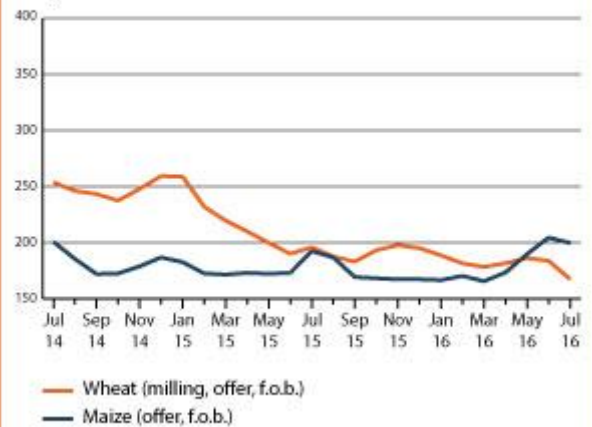


- National Average, Wheat (3rd class, bid, EXW, processing)
- National Average, Wheat (flour, first grade, offer, EXW)
- National Average, Wheat (flour, highest grade, offer, EXW)

Source: APK-Inform Agency

Export prices of wheat and maize in Ukraine

USD per Tonne



- Wheat (milling, offer, f.o.b.)
- Maize (offer, f.o.b.)

Source: APK-Inform Agency

Reference Date: 05-April-2016

HIGHLIGHTS

- Cereal production forecast to decline in 2016 from previous year's level
- Cereal exports in 2015/16 marketing year (July/June) forecast close to previous year's record high
- Domestic prices of wheat and wheat flour remained stable in early 2016

Reduced cereal production forecast in 2016 due to dry weather during winter cereals planting period

Unfavourable weather conditions during the planting period for winter cereals, mainly wheat, for harvest in 2016 led to a significant reduction in area planted. As a result, wheat production in 2016 is forecast to decline by almost 20 percent from the previous year. Spring cereal plantings got underway in late February, earlier than normal because of the unusually warm weather, and areas are expected to increase by 11 percent from 2015 to about 2.6 million hectares, with more area available after the reduced winter planting. Most of the increase is expected in maize, output of which, as a result, is seen rising to 25.6 million tonnes in 2016. Thus, at this early stage, FAO's forecast for overall cereal production in 2016 stands at about 57.6 million tonnes, 4 percent down from last year but close to the average of the past five years.

Cereal production declined in 2015 from previous year's record level, but was still above average

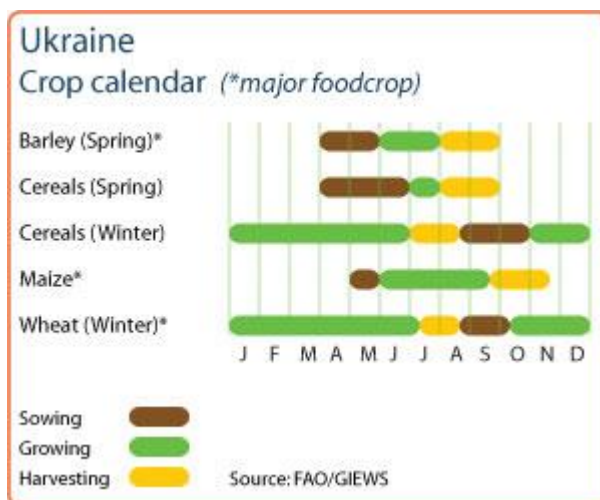
FAO's latest estimate of the 2015 cereal output stands at 60 million tonnes, 6 percent below the record of 2014 but well above the five-year average. Most of the decrease was on the account of a reduced maize crop, which declined by 18 percent due to reduced plantings and lower yields. Similarly, barley production decreased by 8 percent as a result of a reduction in area in response to high input costs. By contrast, wheat output reached a record level of 26.5 million tonnes in 2016.

Cereal exports in 2015/16 marketing year (July/June) forecast close to previous year's record high

Total cereal exports in the current 2015/16 marketing year (July/June) are forecast at 34.3 million tonnes, nearly unchanged from the previous year's record level, supported by the sharp devaluation of the national currency during the marketing year. Wheat and wheat flour exports increased to a record level of 15 million tonnes, up 34 percent from 2014/15.

Domestic prices of wheat and wheat flour remained stable in early 2016

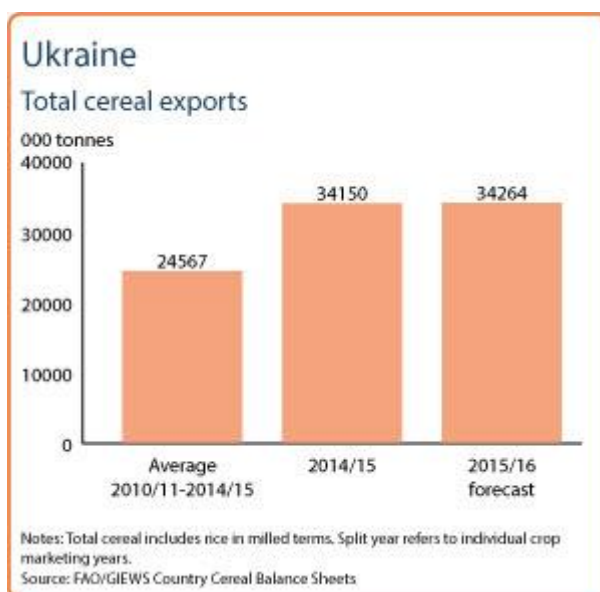
Domestic prices of wheat and wheat flour were generally stable in the first quarter of 2016, after rising for several months as a result of the



Ukraine
Cereal production

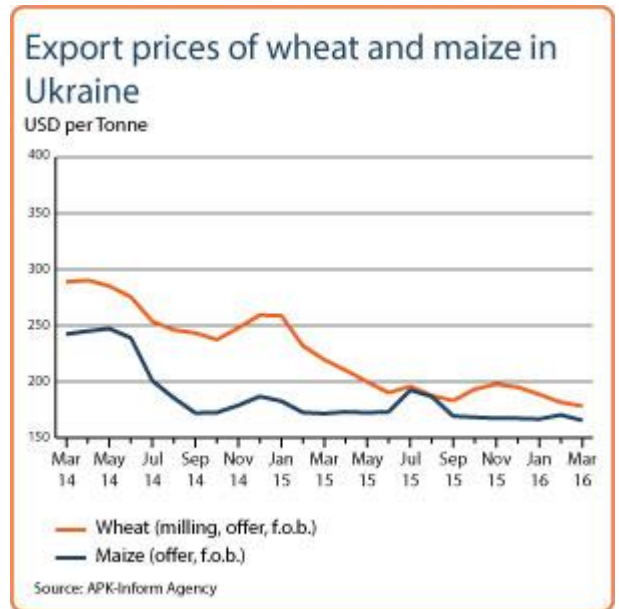
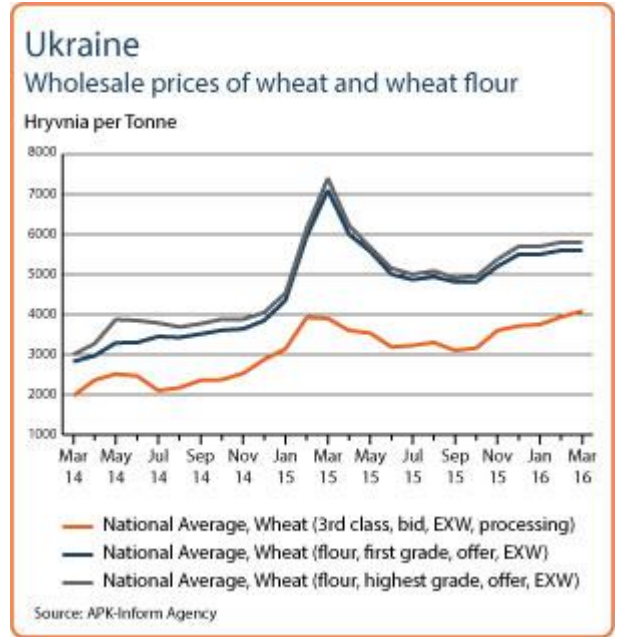
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	25 205	23 328	25 620	10
Wheat	22 201	26 532	21 511	-19
Barley	8 198	8 288	8 559	3
Others	2 099	1 813	1 906	5
Total	57 703	59 961	57 596	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



sharp devaluation of the national currency and worries over the winter wheat conditions. However, with outlook improving for 2016 wheat production, prices stabilized in March, with prices for wheat around their levels of March 2015, while prices for wheat flour were 20 percent below their year-earlier levels.

Export prices of maize and wheat also declined in March and were below their year-earlier levels by 3 and 18 percent, respectively, in line with the trends in the international market.



Reference Date: 30-September-2015

HIGHLIGHTS

- Cereal production declined in 2015 from last year's record level but was still above average
- Cereal exports in 2015/16 marketing year (July/June) forecast close to previous year's record high
- Domestic prices of wheat and wheat flour declined in September, but still high

Cereal production declined in 2015 from last year's record level but was still above average

Harvesting of the 2015 cereal crops, with the exception of maize, is virtually completed and aggregate output is estimated at 60.2 million tonnes, 5 percent down from the 2014 record level but well above the five-year average. Wheat output increased by 7 percent to the near-record level of 25.8 million tonnes, although grain quality is poorer compared to 2014: about 60 percent of the output is reportedly graded as feed due to adverse weather, mainly in western regions. By contrast, despite higher yields, barley production decreased by 9 percent to 8.2 million tonnes as a result of reduced plantings in response to high input costs. For maize, however, a reduction in area, coupled with lower yields, is expected to result in a significant 14 percent contraction in output to 24.5 million tonnes.

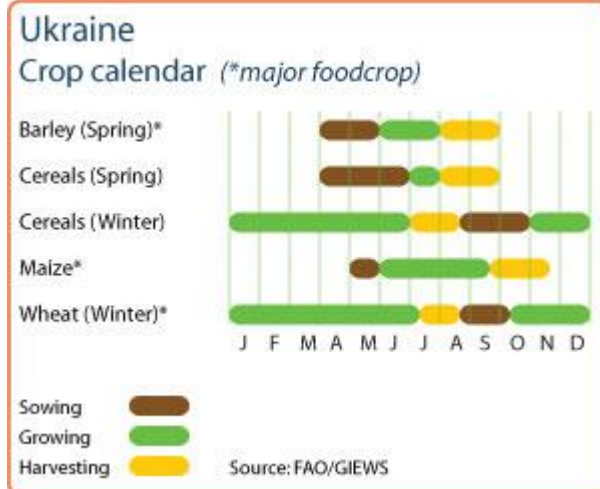
Regarding the winter cereals for harvest in 2016, planting conditions are reported to be generally satisfactory in western and northern parts. By contrast, dry weather persisted in eastern and southern regions, particularly Kherson, delaying planting activities.

Cereal exports in 2015/16 marketing year (July/June) forecast close to previous year's record high

Total cereal exports in the current 2015/16 marketing year (July/June) are forecast at 32.4 million tonnes, 5 percent below the previous year's record level but 32 percent above the average of the past five years, supported by the sharp devaluation of the national currency during the marketing year. Wheat exports increased by 7 percent to 12 million tonnes, while barley and maize exports reduced by 28 percent to 3.2 million tonnes and by 6 percent to 17 million tonnes.

Domestic prices of wheat and wheat flour declined in September, but still high

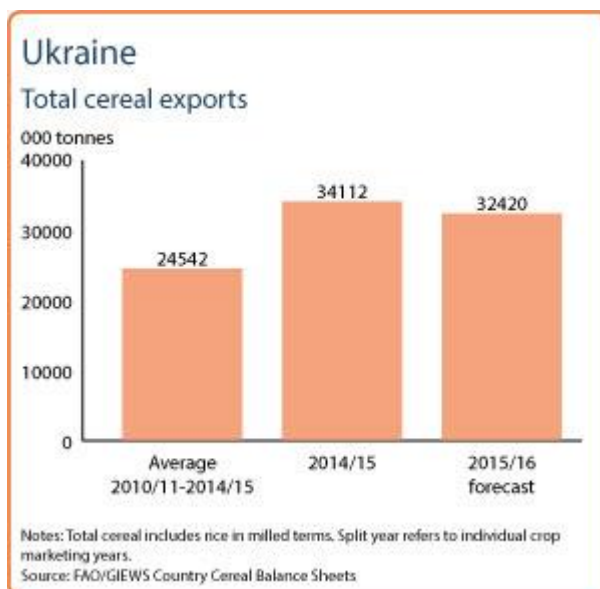
Domestic prices of wheat and wheat flour declined in September due to abundant supply in the market following the 2015 bumper harvest. However, after the sharp devaluation of the national currency in past months some strengthening in September added to the downward pressure on prices. Despite recent declines, however, prices remained well-above their year-earlier levels, after sustained increases since late 2014 due to the devaluation.



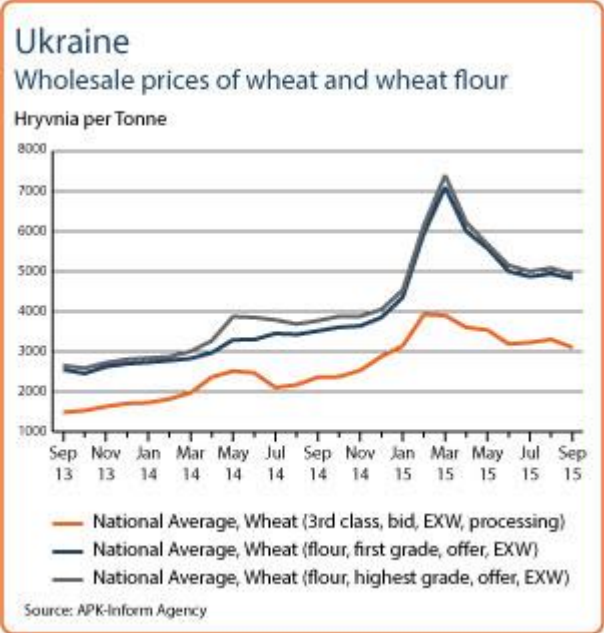
Ukraine
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Maize	22 739	28 497	24 500	-14
Wheat	20 264	24 114	25 800	7
Barley	8 238	9 046	8 200	-9
Others	2 008	2 009	1 797	-11
Total	53 249	63 666	60 297	-5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Export prices of maize and wheat also declined in September and were almost one-third below their year-earlier levels, in line with trends in the international market.



Reference Date: 01-June-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 forecast at high level, although below last year's record
- Cereal exports in 2014/15 marketing year (July/June) expected at record levels
- Domestic prices of wheat and wheat flour declined in May, but still high

Cereal production in 2015 forecast at high level, although below last year's record

The 2015 winter cereal crops, mainly wheat, rye and barley, to be harvested from July, are currently growing under overall favourable weather conditions, with 90 percent of the wheat crops reported in good and satisfactory conditions. Sowing of spring cereals, mainly maize, is about to finish, and the area planted is expected to contract mainly due to high input costs. Assuming favourable weather conditions continue throughout the cropping season, FAO's latest forecasts put the 2015 aggregate cereal production at 58.7 million tonnes, an 8 percent decline from last year's record level but still 11 percent above the country's five-year average. The 2015 wheat output is anticipated at 22.5 million tonnes, down from last year's record level; production of both barley and maize is also expected to decrease by more than 10 percent, due to lower plantings and yields compared to the high levels in 2014.

Cereal exports in 2014/15 marketing year (July/June) expected at record levels

Cereal exports in the 2014/15 marketing year (July/June) are expected at a record of 33 million tonnes, slightly above the previous year's level, supported by the sharp devaluation of the national currency during the marketing year. Wheat and barley exports are forecast to increase by 16 percent to 11 million tonnes and by 120 percent to 4.4 million tonnes, respectively, while maize exports are projected at 17.5 million tonnes, a decrease of 2 million tonnes, compared to the record level of 2013/14.

Domestic prices of wheat and wheat flour declined in May, but still high

Domestic prices of wheat and wheat flour continued to decline in May pressured by favourable production prospects for the 2015 wheat crop and increased sales ahead of the new harvest. Some strengthening of the national currency added to the downward pressure on prices. Despite recent declines, however, prices remained well-above their year-earlier levels, after sustained increases since late 2014 which were mainly driven by the sharp depreciation of the national currency.

Export prices of maize and wheat also declined in May and were almost one-third below their year-earlier levels, in line with trends in the international market.

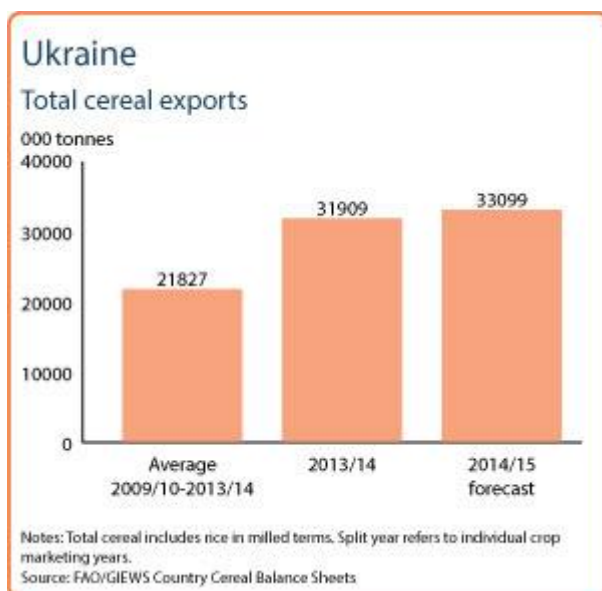


Ukraine

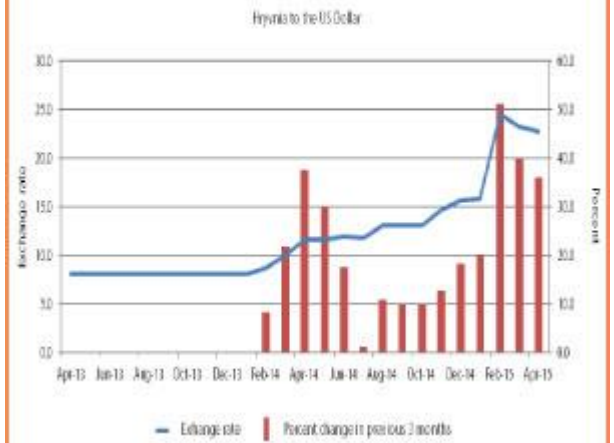
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Maize	22,739	28,497	25,000	-12
Wheat	20,264	24,114	22,500	-7
Barley	8,238	9,046	8,000	-12
Others	2,027	2,096	2,134	2
Total	53,269	63,753	57,634	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



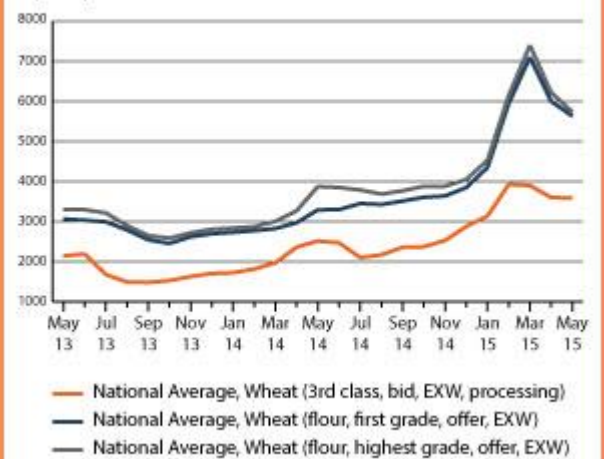
Ukraine exchange rate movements



Ukraine

Wholesale prices of wheat and wheat flour

Hryvnia per Tonne

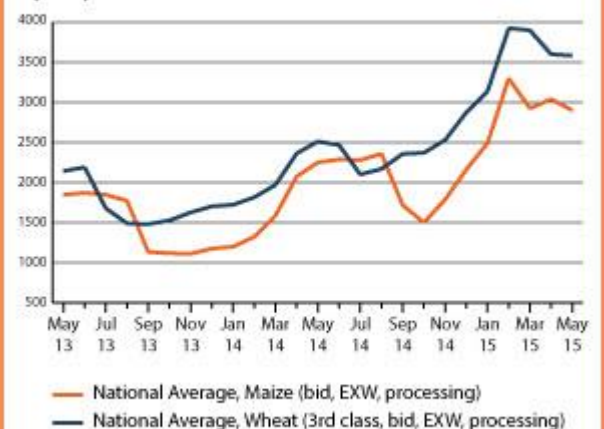


Source: APK-Inform Agency

Ukraine

Selected wholesale cereal prices

Hryvnia per Tonne



Source: APK-Inform Agency

Reference Date: 26-January-2015

FOOD SECURITY SNAPSHOT

- Early prospects for 2015 winter crops overall favourable
- Record cereal production in 2014
- Cereal exports expected at record levels in 2014/15 marketing year (July/June)
- Wheat and wheat flour prices increasing and at record levels by mid-January
- Serious food security concerns in eastern part of Ukraine

Early prospects for 2015 winter crops overall favourable

The area planted under 2015 winter crops (wheat, rye and barley) is estimated at about 7.6 million hectares, higher than last year, mainly on account of a 7 percent increase in wheat plantings. Most crops were into winter dormancy by mid-January and 82 percent were reportedly in good or satisfactory conditions, despite early concerns about cold weather affecting crop establishment.

Record cereal production in 2014

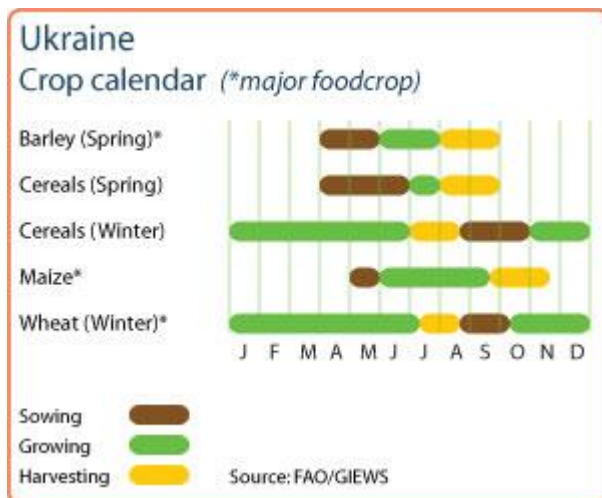
Harvesting of the 2014 cereal crops (mainly wheat, maize and barley) was completed in November last year. FAO's latest estimate puts the 2014 wheat production at 24 million tonnes, 14 percent up from last year's above-average level. The good output mainly reflects near-record yields, following favourable weather conditions during the cropping season, which more than offset a slight contraction in planted area. Similarly, the 2014 barley output is estimated 22 percent higher than last year at 9 million tonnes. By contrast, maize output is put at 28 million tonnes, some 7 percent below the record level in 2013, but still above average, as yields were estimated to have returned to normal from last year's high levels. Overall, the aggregate cereal output in 2014 stands at a record of 63.2 million tonnes, almost 28 percent above the previous five-year average.

Cereal exports expected at record levels in 2014/15 marketing year (July/June)

Cereal exports in the 2014/15 marketing year (July/June) are forecast at a record of 31.9 million tonnes, slightly above the previous year's level. Wheat and barley exports are forecast to increase by 10.5 percent to 10.5 million tonnes and 60 percent to 4 million tonnes, respectively, while maize exports are projected at 17.5 million tonnes, a decrease of 2 million tonnes, compared to the record level of 2013/14 due to lower production of 2014.

Wheat and wheat flour prices increasing and at record levels by mid-January

Wholesale prices of wheat and wheat flour increased markedly in the first two weeks of January and were at record levels in nominal terms, after sustained increases in the past months. Despite ample supplies from the record 2014 harvest, prices were supported by the sharp depreciation of the national currency. Export prices of wheat and maize

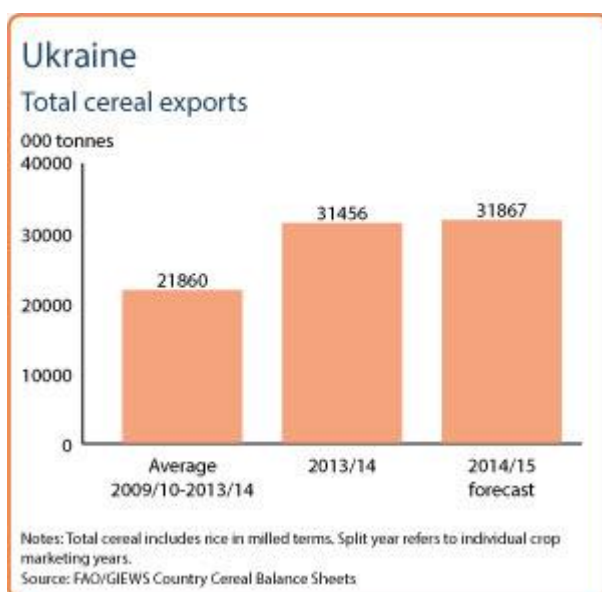


Ukraine

Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Wheat	19 367	21 000	24 014	14
Maize	18 957	30 000	28 000	-7
Barley	8 753	7 350	8 988	22
Others	2 096	2 115	2 148	2
Total	49 174	60 465	63 150	4

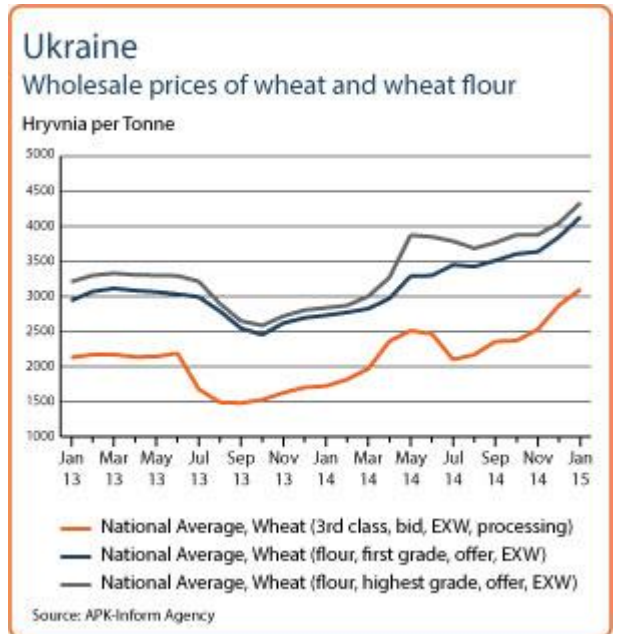
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



(in USD terms) also increased by 4.6 percent and 4.5 percent, respectively, since December.

Serious food security concerns in eastern part of Ukraine

The civil conflict, which began in spring 2014 in the eastern part of the Ukraine, has severely affected the overall food security situation in this area. Food reserves in these areas are reportedly fully depleted and infrastructure is partly destroyed. Furthermore, record prices of wheat products, as well as marketing disruption have led to an increasingly difficult food security situation. In response, an Emergency Operation (EMOP) was approved jointly by WFP and FAO on 10 November 2014 to provide food assistance consisting of about 878 tonnes of food and cash transfers for a total of USD 1.76 million to an estimated 120 000 IDPs, returnees and vulnerable residents affected by the conflict for a period of six months, until April 2015.



Reference Date: 17-December-2014

FOOD SECURITY SNAPSHOT

- Early prospects for 2015 winter crops overall favourable
- Record cereal production in 2014
- Cereal exports expected at record levels in 2014/15 marketing year (July/June)
- Domestic cereal prices at high levels by mid-December
- Serious food security concerns in eastern part of Ukraine

Early prospects for 2015 winter crops overall favourable

The area planted under 2015 winter crops (wheat, rye and barley) is estimated at about 7.6 million hectares, higher than last year, mainly on account of a 7 percent increase in wheat plantings. Most crops were at the emerging state by mid-December and 82 percent were reportedly in good or satisfactory conditions, despite early concerns about cold weather affecting crop establishment.

Record cereal production in 2014

Harvesting of the 2014 cereal crops (mainly wheat, maize and barley) was recently completed. FAO's latest estimate puts the 2014 wheat production at 24.7 million tonnes, 12 percent up from last year's above-average level. The good output mainly reflects near-record yields, following favourable weather conditions during the cropping season, which more than offset a slight contraction in planted area. Similarly, the 2014 barley output is estimated 24 percent higher than last year at 9.4 million tonnes. By contrast, maize output is put at 27 million tonnes, some 12 percent below the record level in 2013, but still above average, as yields were estimated to have returned to normal from last year's high levels. Overall, the aggregate cereal output in 2014 stands at a record of 63.2 million tonnes, almost 28 percent above the previous five-year average.

Near record cereal exports in 2014/15 marketing year (July/June)

Cereal exports in the 2014/15 marketing year (July/June) are forecast at 31.5 million tonnes, close to last year's record level. Wheat and barley exports are forecast to increase by 8 percent to 10.3 million tonnes and 42 percent to 3.5 million tonnes, respectively, while maize exports are projected at 17.5 million tonnes, a decrease of 2 million tonnes, compared to the record level of 2013/14 due to the lower production this year.

Wheat and wheat flour prices increasing and at high levels by mid-December

Wholesale prices of wheat and wheat flour increased markedly in the first two weeks of December and were at record levels in nominal terms, after sustained increases in the past months. Despite ample supplies from the record 2014 harvest, prices were supported by the depreciation of the national currency which dropped by some 20 percent since early November, after depreciating by 16 percent in

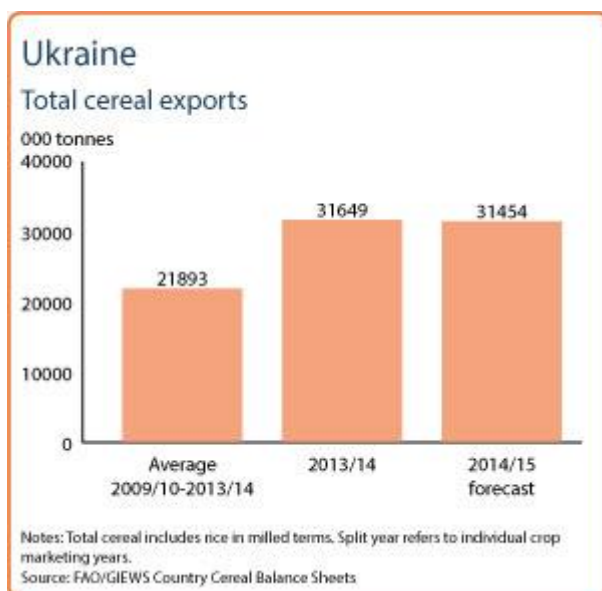


Ukraine

Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Wheat	19 567	22 000	24 700	12
Maize	19 097	30 700	27 000	-12
Barley	8 803	7 600	9 400	24
Others	2 100	2 132	2 170	2
Total	49 567	62 432	63 270	1

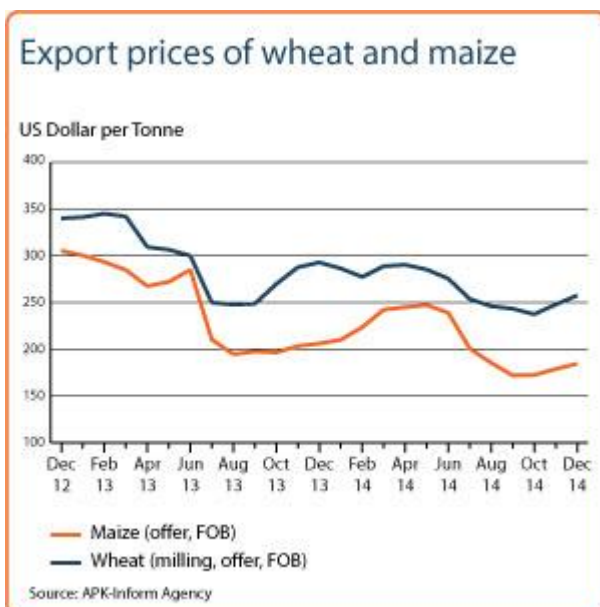
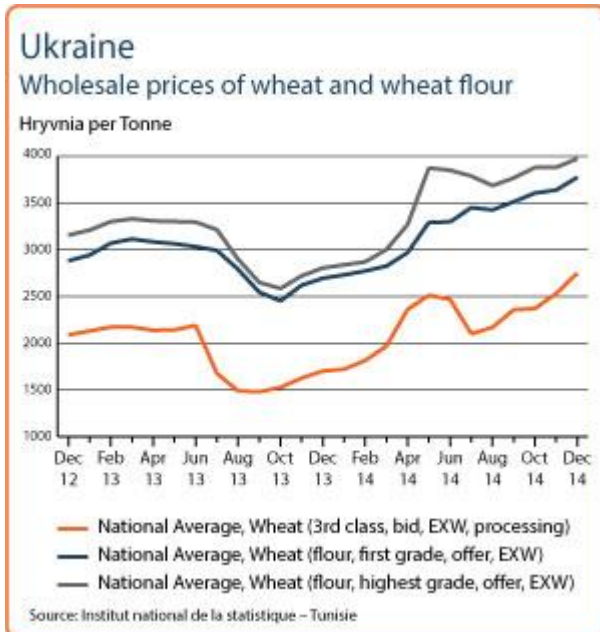
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



August. The depreciation also supported export prices of wheat and maize which increased by 6 percent and 7 percent, respectively (in USD terms) since early November.

Serious food security concerns in eastern part of Ukraine

The civil conflict, which began in spring 2014 in the eastern part of the Ukraine, has severely affected the overall food security situation in this area. According to official reports, food reserves of these areas are fully depleted and infrastructure is partly destroyed. Furthermore, record prices of wheat products, as well as destroyed transportation routes and city markets leads to an increasingly difficult food security situation. In response, an Emergency Operation (EMOP) was approved jointly by WFP and FAO on 10 November 2014 to provide food assistance, about 878 tonnes of food and cash transfers totalling USD 1.76 million to an estimated 120 000 IDPs, returnees and vulnerable residents affected by conflict in eastern Ukraine for a period of six months, starting November 2014 to April 2015.



Reference Date: 14-November-2014

FOOD SECURITY SNAPSHOT

- 2014 cereal production close to last year's record level
- Record cereal exports expected in 2014/15 marketing year (July/June)
- Domestic cereal prices at high levels in October
- Serious food security concerns in eastern part of Ukraine

2014 cereal production close to last year's record level

Harvesting of the 2014 cereal crops (mainly wheat, maize and barley) was completed recently. FAO's latest estimate puts the 2014 wheat production at 24.3 million tonnes, 10 percent up from last year's above-average level. The good output mainly reflects near-record yields, following favourable weather conditions during the cropping season, which more than offset a slight contraction in planted area. Similarly, the 2014 barley output is estimated by FAO to increase by 24 percent compared to last year to 9.4 million tonnes. The 2014 maize output, is estimated at 26 million tonnes, some 15 percent below last year's record level, as yields are estimated to have returned to average from last year's high levels. Overall, total cereal output in 2014 stands at 61.8 million tonnes, close to last year's record crop and some 25 percent above the previous five-year average.

Planting of winter cereals is currently underway after dry weather in the first half of October delayed field operations. According to preliminary estimates, as of early November, some 7.3 million hectares were sown under winter crops, including 6.3 million hectares of wheat, which is slightly above last year's same season's level.

Near record cereal exports in 2014/15 marketing year (July/June)

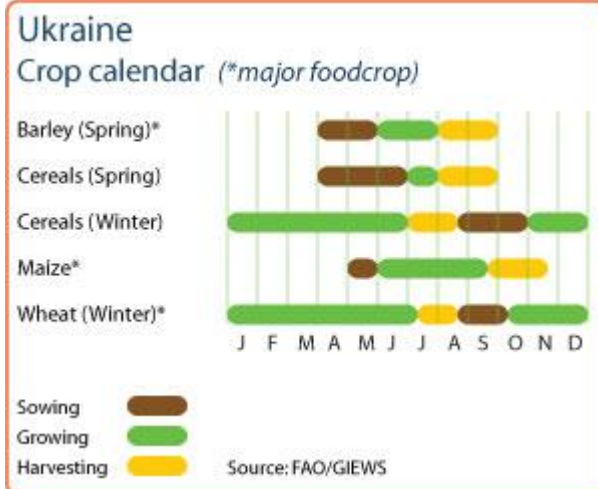
Cereal exports in the 2014/15 marketing year (July/June) are forecast at 31.5 million tonnes, close to last year's record level. Wheat and barley exports are forecast to increase by 8 percent to 10.3 million tonnes and 42 percent to 3.5 million tonnes, respectively, from last year's level. By contrast, maize exports are projected at 17.5 million tonnes, a decrease of 2 million tonnes, compared to the record level of last year due to lower production.

Domestic cereal prices at high levels in October

Despite ample supplies from the record 2014 harvest and declining export quotations, wholesale prices of wheat and wheat flour increased to record levels in October, continuing the upward trend of the past months. The increases reflect the strong devaluation of the national currency (Ukrainian hryvnia) since early 2014, coupled with the political tensions in the country.

Serious food security concerns in eastern part of Ukraine

The civil conflict, which began in spring 2014 in the eastern part of the

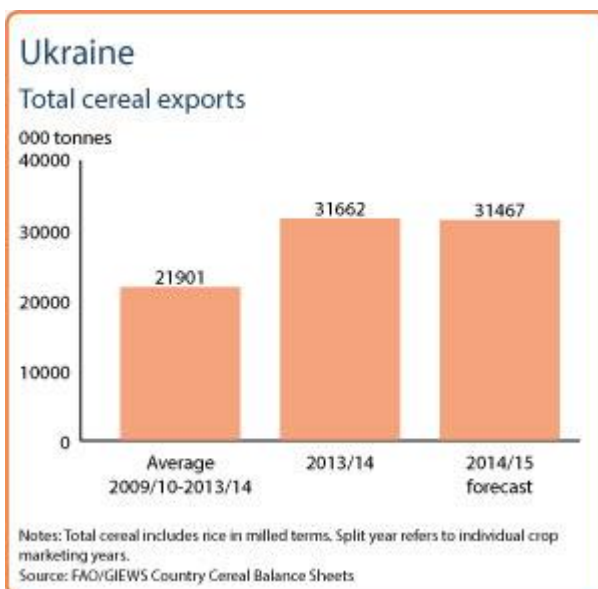


Ukraine

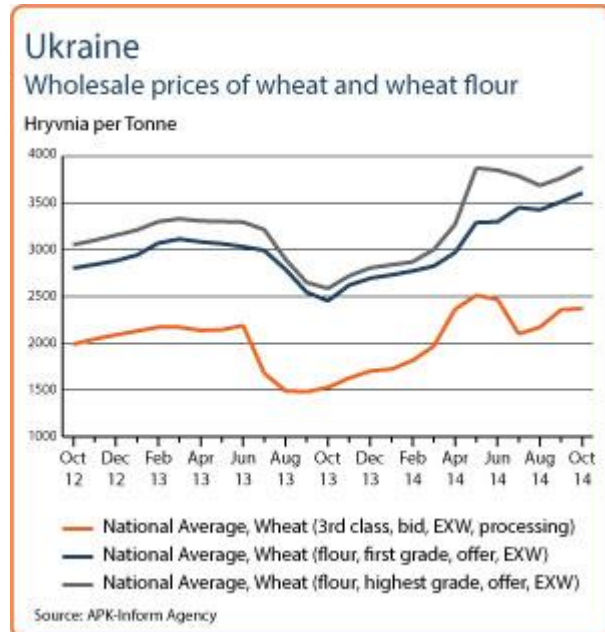
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	19 567	22 000	24 300	10
Maize	19 097	30 700	26 000	-15
Barley	8 803	7 600	9 400	24
Others	2 096	2 115	2 148	2
Total	49 564	62 415	61 848	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Ukraine, has severely affected the overall food security situation in this area. According to official reports, food reserves of these areas are fully depleted and infrastructure is partly destroyed. Furthermore, record prices of wheat products, as well as destroyed transportation routes and city markets leads to an increasingly difficult food security situation. In response, an Emergency Operation (EMOP) was approved jointly by WFP and FAO on 10 November 2014 to provide food assistance, about 878 tonnes of food and cash transfers totalling USD 1.76 million to an estimated 120 000 IDPs, returnees and vulnerable residents affected by conflict in eastern Ukraine for a period of six months, starting November 2014 to April 2015.



Reference Date: 16-July-2014

FOOD SECURITY SNAPSHOT

- Positive outlook for 2014 cereal production
- Cereal exports in the 2013/14 marketing year (July/June) estimated at a record level
- Domestic cereal prices at record levels in June

Positive outlook for 2014 cereal production

Harvesting of winter cereals, mainly wheat and barley, is currently underway and will continue until late August, while that of smaller amounts of spring cereals will be concluded by the end of September.

Crop conditions are reported generally favourable. As a consequence of the mild winter temperatures, winter crops have developed one dekad earlier than normal. Spring cereals are slightly ahead of schedule due to the warm temperatures recorded in May. Increased precipitation and above-average rainfall in late June-early July resulted in improved soil moisture in all regions. In the southern and southeastern regions affected by dry weather in previous months, soil moisture considerably improved especially for spring crops. The total planted area under cereals is estimated at 15.7 million hectares, which is slightly below last year's level and close to the five-year average. Taking into account the current conditions of winter and spring crops, the 2014 aggregate cereal production is forecast at about 57.1 million tonnes, a 9 percent decrease from the previous year's record level, but still well above average, mainly as a result of a return to more normal yields.

Record cereal exports in the 2013/14 marketing year (July/June)

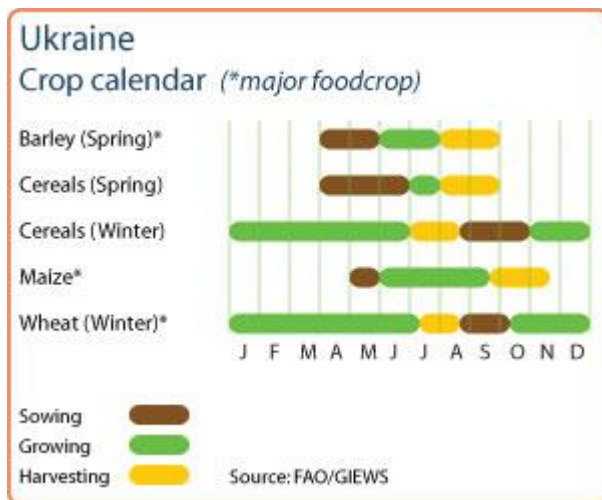
Ukraine is one of the biggest exporters of cereals. Cereal exports in 2013/14 (July/June) increased by 43 percent compared to the good level of the previous year, to a record level of 32.4 million tonnes. This is mainly as a result of the bumper 2013 cereal production. This includes 9.8 million tonnes of wheat, 2.5 million tonnes of barley and 20 million tonnes of maize, 42 percent, 13 percent and 48 percent, respectively, above the level of the previous marketing year.

In spite of socio-political turmoil, export commitments were fulfilled. In the new 2014/15 marketing year (July/June) total cereal exports are forecast to decrease from the record level of 2013/14 to 27.6 million tonnes.

For the 2013/14 marketing year (July/June), cereal exports are estimated to have increased significantly reaching record levels at 32.4 million tonnes, as a result of a record 2013 cereal production. The exports of maize and wheat in 2013/14 are set at 20 and 9.8 million tonnes, respectively, up 48 and 42 percent on the 2012/13 high level. Similarly, barley shipments have increased by 14 percent to 2.5 million tonnes, but remained considerable below average level.

Domestic cereal prices at record levels in June

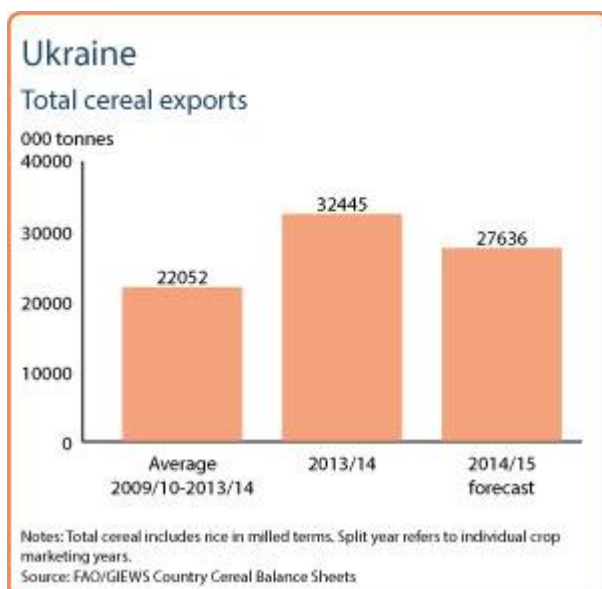
Despite favourable prospects for the new wheat crop and the slight



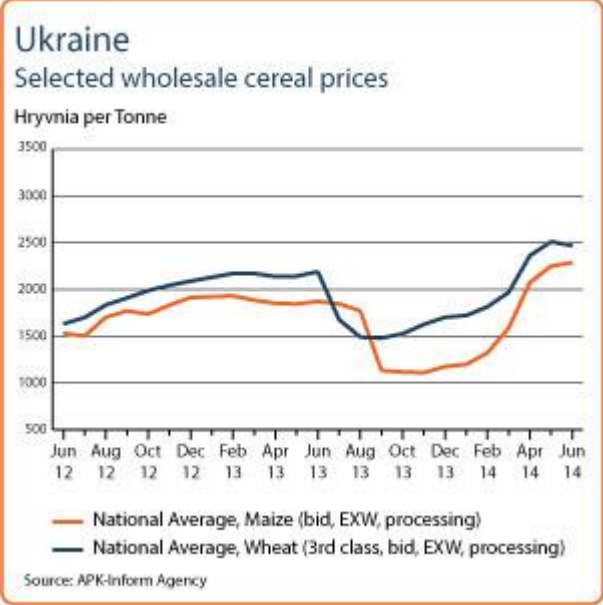
Ukraine Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	19 627	22 300	20 000	-10
Maize	19 137	30 900	28 000	-9
Barley	8 783	7 500	7 000	-7
Others	2 090	2 082	2 100	1
Total	49 637	62 782	57 100	-9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



decline in export quotations in recent months, domestic prices of wheat products in June were at record levels, in nominal terms, after sharp increases in April and May. Similarly, wholesale prices of maize surged since the beginning of the year and reached all-time highs in June. The increases reflect the strong devaluation of the national currency since early 2014, coupled with the political tensions in the country.



Reference Date: 26-March-2014

FOOD SECURITY SNAPSHOT

- Early prospects for 2014 winter cereal crops are favourable
- Record high 2013 cereal production and 2013/14 cereal exports
- Domestic cereal prices increasing despite ample production reflecting the national currency depreciation

Early prospects for 2014 winter cereal crops are favourable

According to official information, winter wheat for 2014 harvest was planted on 6.3 million hectares and winter barley on 1.2 million hectares compared to 6.7 million and 1.1 million hectares respectively, planted in the previous year. General mild temperatures during winter led to early development of winter cereals. However, cumulated rainfall remains below average, particularly in the central regions (Cherkas'ka, Mykolayivs'ka) and could limit future prospects if soil moisture is not replenished. Up-to-date, spring planting is progressing satisfactorily despite worries about the impact of current political crisis on production due to increased cost of production. Taking into account the current conditions of winter crops in the country as well as further favourable spring cropping season, early forecast of Ukrainian 2014 cereal production points to about 60 million tonnes including 19 million tonnes of wheat.

Record high 2013 cereal production, 2013/14 (July/June) cereal exports

Following a decline in the cereal production in 2012 due to weather conditions, good crop conditions resulted in a record high 2013 cereal production of 62 million tonnes, including 21.5 million tonnes of wheat (36 percent above 2012 drought stricken harvest) and record breaking 31 million tonnes of maize (almost double of the 2012 production).

Like the production, exports in 2013/14 (July/June) reached record heights. Cereal exports are forecast at almost 30 million tonnes of cereals, including 9 million tonnes of wheat, 2.2 million tonnes of barley and 18 million tonnes of maize. Barley exports remain around the level of the previous marketing year, while significant increases are recorded for wheat and maize.

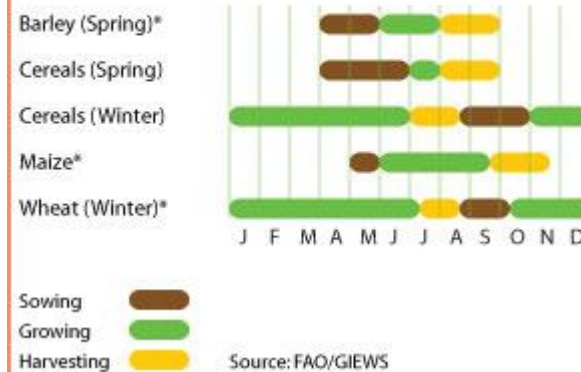
Political developments in Ukraine raised speculations about its ability to keep export commitments. As of now, the bulk of the projected wheat and maize exports for the 2013/14 marketing season has already been delivered and there are no signs of any major disruption in trade that would prevent final shipments matching projections.

Cereal prices increased significantly during last year

Domestic wheat and wheat flour prices started to increase in November 2013 reflecting currency depreciation and increased export demand. However, at the March levels prices were below their peaks of a year earlier reflecting the bumper 2013 harvest. With increased uncertainty about the exchange rate in Ukraine, farmers may hold on

Ukraine

Crop calendar (*major foodcrop)



Ukraine

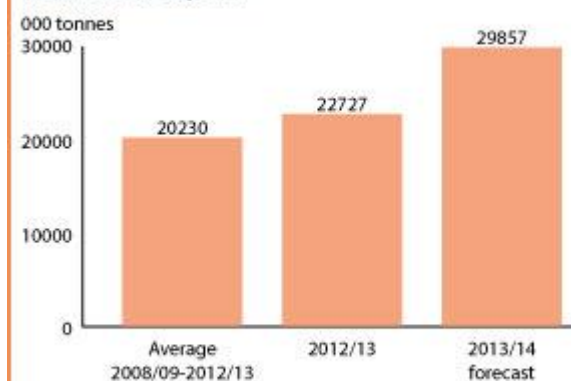
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	20 344	15 800	21 500	36
Maize	15 243	21 000	30 900	47
Barley	9 805	7 000	7 300	4
Others	2 220	2 069	2 180	5
Total	47 613	45 869	61 880	35

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ukraine

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

to their crops unless they really need to sell. Export wheat prices, in US dollars, have remained relatively stable in recent months.



Reference Date: 15-January-2013

FOOD SECURITY SNAPSHOT

- Early prospects for 2013 winter cereal crops are favourable
- Sharp reduction of the 2012 cereal production
- Cereal export from Ukraine in marketing year 2012/13 (July/June) remain high
- Cereal prices increased significantly during last year

Early prospects for 2013 winter cereal crops are favourable

According to official information, winter grains for 2013 harvest were planted on 8.1 million hectares, including some 6.7 million hectares of winter wheat and 1.1 million hectares of winter barley. By the end of December, 92 percent of the crops were reported in satisfactory conditions. Assuming normal weather in the remaining of the agricultural season, the cereal production in 2013 is expected to recover from last year's reduced level.

Sharp reduction of the 2012 cereal production

A number of factors negatively influenced the area planted and cereal production in 2012. The dry weather during the autumn months was followed by low temperatures and severe frosts in January and February, combined with drought in parts during the summer months. As a result, the 2012 cereal production declined by 20 percent compared to the previous year to a level of 45.3 million tonnes. This included 15.5 million tonnes of wheat.

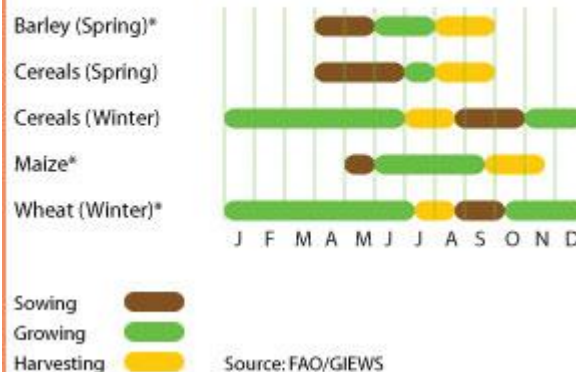
Cereal export from Ukraine in marketing year 2012/13 (July/June) remain high

In spite of the significant reduced cereal production, exports in 2012/13 (July/June) remained high thanks to ample stocks accumulated from the previous year's good level. Cereal exports are forecast at over 21 million tonnes of cereals, including 6 million tonnes of wheat, 2.3 million tonnes of barley and 12.7 million tonnes of maize, around the level of the previous marketing year.

Cereal prices increased significantly during last year

Wheat export prices started to increase in 2012 reflecting reduced harvest and surging of international prices and by the end of last year were about 38 percent higher than for the same period of 2011.

Ukraine Crop calendar (*major foodcrop)

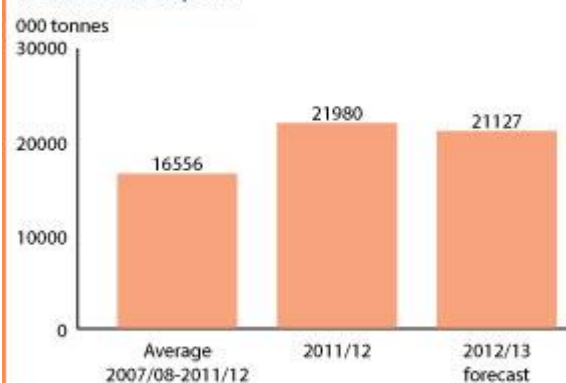


Ukraine Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	19,972	22,300	15,500	-30
Maize	12,527	22,300	21,000	-6
Barley	9,605	9,097	6,700	-26
Others	2,186	2,221	2,065	-7
Total	44,291	55,918	45,265	-19

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

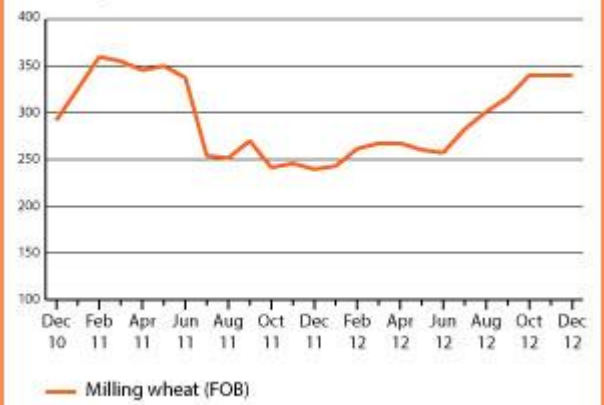
Ukraine Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ukraine Export prices of wheat

US Dollar per Tonne



Source: APK-Inform Agency

Reference Date: 7-March-2012

FOOD SECURITY SNAPSHOT

- Early prospects for 2012 winter cereal crops uncertain
- Cereal production recovered significantly in 2011
- Cereal exports are expected to increase considerably in 2011/12 marketing year (July/June)
- Cereal prices rose in February

Uncertain prospects for the 2012 winter cereal crops

Dry weather during autumn reduced the area planted of the 2012 winter wheat and barley crops, estimated some 3 percent below the level of the same season last year. The dry weather was followed by low temperatures and severe frosts in January and February, which coupled with limited snow cover, have resulted in higher than normal winterkill, particularly in the eastern and southern regions. According to official information only 63 percent of the winter cereals are reported in good and satisfactory conditions. Although replanting with spring wheat is expected, at this stage the 2012 wheat output is forecast to fall from last year's above average level.

Cereal production recovered significantly in 2011

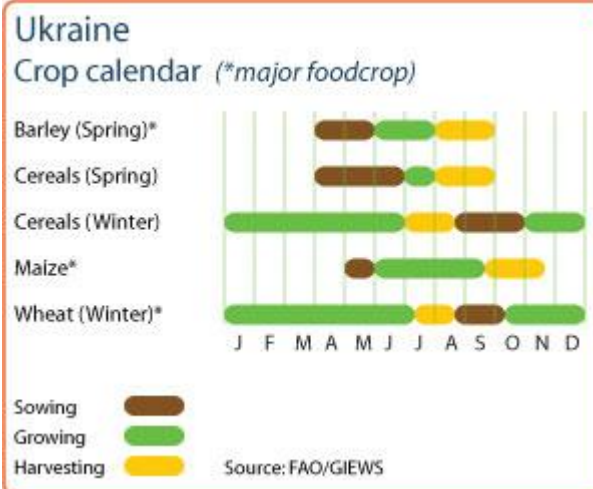
A bumper cereal harvest was obtained in 2011 following favourable weather conditions during the agriculture season. The output was estimated at a well above average level of 55.4 million tonnes, compared with a reduced crop of 39 million tonnes in 2010. A significant increase was recorded in wheat production, estimated at 22.3 million tonnes, while maize output reached a record level of 22 million tonnes and barley production was put at 9.1 million tonnes.

Cereal exports are expected to increase in 2011/12 marketing year (July/June)

As a result of the good 2011 harvest, cereal exports in the current marketing year 2011/12 are forecast at 21.6 million tonnes, which is 65 percent higher than in the 2010/11. Wheat exports may reach 7 million tonnes and those of barley and maize 3.5 and 11 million tonnes respectively. The significant increase in cereal exports follows the revision of trade policies in Ukraine, in particular the removal of export quotas. However, severe cold weather during winter months have dramatically slowed down the pace of grain exports from the Black Sea ports.

Cereal prices increased in February

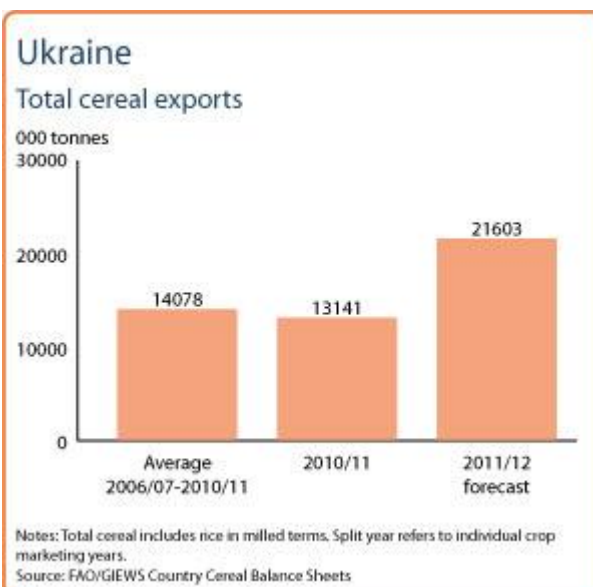
Cereal prices increased in February, mainly due to concerns about the impact of dry weather and low temperatures on the 2012 wheat crop. However, prices wheat and wheat flour remained 9 and 4 percent below their high levels at the same time a year earlier. This reflects the good 2011 harvest which pushed prices down in the second half of 2011. Prices of maize, used for animal feed, also increased in February but were 7 percent lower than a year earlier.



Ukraine Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	18 303	16 851	22 300	32
Barley	10 054	8 485	9 100	7
Maize	9 543	11 953	22 000	84
Others	2 229	1 687	2 027	20
Total	40 129	38 976	55 427	42

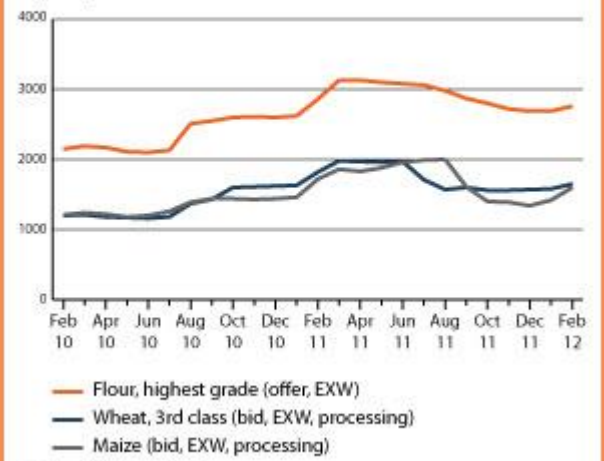
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Ukraine

Selected wholesale cereal prices

Hryvnia per Tonne



Source: APK-Inform Agency

Reference Date: 17-January-2012

FOOD SECURITY SNAPSHOT

- Cereal production significantly increased in 2011
- Cereal exports are expected to increase significantly in 2011/12 marketing year (July/June)
- Cereal prices stable in January

Cereal production significantly increased in 2011

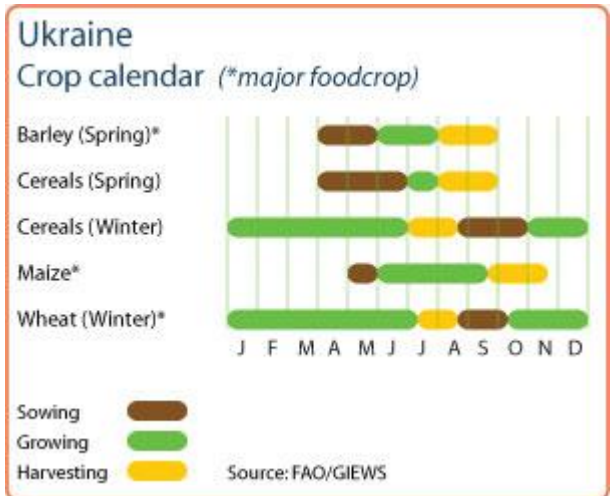
Favourable crop conditions contributed to a good cereal harvest in 2011 which is estimated at 51.5 million tonnes, a second record level during the last ten years. A significant increase in wheat production of 21 million tonnes has been estimated, along with a record increase in maize production of 19 million tonnes and a good barley output of 9.45 million tonnes. The shortage of rains, together with poor soil moisture during the planting season of winter cereals, might put the 2012 cereal production at risk although weather conditions during spring can still improve the situation.

Cereal exports are expected to increase significantly in 2011/12 marketing year (July/June)

In 2010/11, cereal exports decreased due to the introduction of export quotas which have been replaced by export duties on grains effective until December 2011. Total cereal exports in the current marketing year are estimated at 23 million tonnes, which is well above last year's level or 78 percent higher. Wheat exports may reach the level of 8 million tonnes while barley and maize will respectively reach 4 and 11 million tonnes. The significant increase of cereal exports is the result of the good cereal harvest and the revision of trade policies in the Ukraine.

Cereal prices stable in January

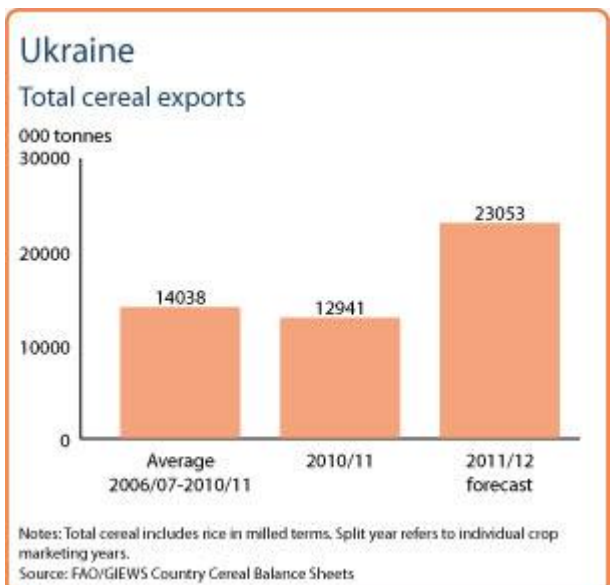
Prices of staple foods wheat and wheat flour remained virtually unchanged in the past two months. Ample availabilities from the 2011 wheat harvest helped to stabilise prices despite support from concerns over the impact of dry weather conditions on the new 2012 winter wheat crop. In January, prices of wheat and wheat flour were close to their relatively high levels at the same time a year earlier. Prices of maize, used for animal feed, sharply declined since September with the 2011 harvest and in January were nearly 8 percent below their levels in January 2010.



Ukraine Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	18 333	17 000	21 000	24
Barley	10 057	8 500	9 450	11
Maize	9 372	11 100	19 000	71
Others	2 252	1 802	2 015	12
Total	40 014	38 402	51 465	34

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 28-May-2011

FOOD SECURITY SNAPSHOT

- Crop prospects are favourable for cereal production in 2011
- Cereal exports to decline in 2010/11 marketing year (July/June)
- Food prices increasing in recent months

Crop prospects are favourable for cereal production in 2011

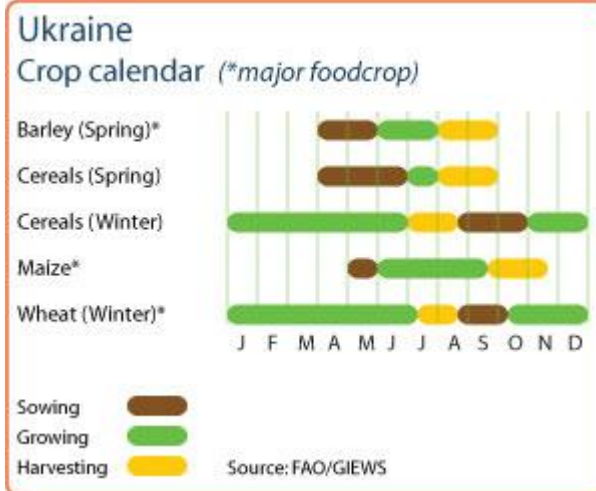
Favourable rains in May improved growing conditions for the winter and recently planted spring crops. Overall good weather conditions since the beginning of the season have benefited the 2011 cereal crops and production is expected to recover from the reduced level of last year which was affected by dry weather during summer. Early forecasts indicate a 2011 aggregate cereal production (winter and spring crops) of 44 million tonnes, including 20.2 million tonnes of wheat.

Cereal export to decline in 2010/11 marketing year (July/June)

The introduction of export quotas since the autumn of 2010 has slowed down exports during the 2010/11 marketing year (July/June), which are forecast at around 11.4 million tonnes, a decline of about 44 percent compared with the previous marketing year. The export quotas have been removed in April 2011 for maize. Grain export quotas have been replaced with export duties: wheat: 9 percent; barley: 14 percent; maize: 12 percent. The duties will be effective from June to December 2011.

Food prices increasing in recent months

Official information indicates that from December 2010 until end-April 2011, wholesale prices of wheat and wheat flour increased by 14 and 10 percent respectively. The increases in wholesale prices are pushing up retail prices of bread and wheat flour. The food price inflation in the same period has been 5 percent, slightly higher than the overall inflation in the country. The government is releasing state reserves of grain to stabilize bread prices.



Ukraine Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	18 017	17 200	20 200	17
Barley	9 898	8 500	8 800	4
Maize	8 464	11 300	13 000	15
Others	2 160	1 705	1 890	11
Total	38 660	38 860	44 047	13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

