Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Ukraine

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FOOD SECURITY SNAPSHOT
- **Planting of 2023 spring crops completed, amid number of war-induced challenges**
- **Total cereal production in 2023 forecast over 30 percent below five-year average level**
- **Export volumes remain below pre-war levels**
- **About 17.6 million people in need of humanitarian assistance**

Planting of 2023 spring crops completed, amid number of war-induced challenges

Planting of the 2023 winter crops was completed by mid-November. About 4.1 million hectares were planted with winter wheat in areas under government control. In 2021, before the start of the war, about 6.1 million hectares were planted with winter wheat in the whole country.

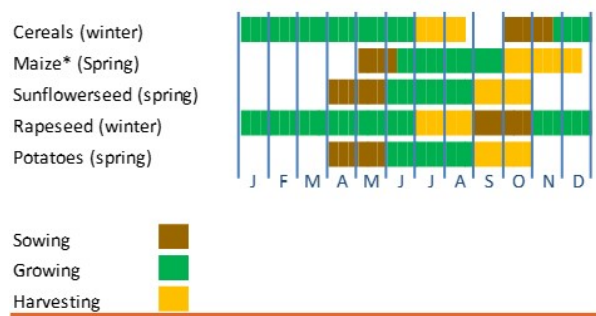
The 2023 spring crops, mostly maize and sunflower, were planted by late June and area planted in areas under government control is estimated slightly above 5.6 million hectares, 5 percent below the previous year. The 2023 maize crop, the economically most significant grain, was planted on about 4 million hectares, compared to 4.2 million hectares planted in 2022. Some land was switched from cereals to more profitable oilseeds.

Weather conditions have been generally conducive to crop development. However, unlike in 2022, when farmers still had financial reserves or purchased inputs before the start of the war, 2023 agricultural activities have been hampered by generally low liquidity of farmers. Although no major shortages of inputs are reported, low domestic output prices are constraining the capacity of many farmers to purchase adequate quantities of inputs. In mid-September 2022, weighted average domestic prices of major export-oriented crops were about 60 percent lower than before the start of the war. General economic uncertainty has also constrained credit availability, especially for farmers with smaller holdings. Outbound population movements and military duty also continue to limit the availability of labour. Although progress has been made on demining areas without active fighting, remnants of the war in many cases continue to hamper access to fields.

Although immediate losses of crop production due to flooding caused by the Kakhovka Dam destruction on 6 June 2023 have been relatively limited, the destroyed infrastructure carries

Ukraine

Crop Calendar *(*major foodcrop)*



Ukraine

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Maize	34 216	27 000	22 500	-16.7
Wheat	26 032	20 200	18 500	-8.4
Barley	7 828	5 800	5 200	-10.3
Others	1 704	1 569	1 560	-0.6
Total	69 781	54 569	47 760	-12.5

Note: Percentage change calculated from unrounded data.

long-term consequences for the region, especially for the irrigated agricultural production, including the 2023 spring crops recently planted.

Total cereal production in 2023 forecast over 30 percent below average

The harvest of the 2023 winter cereal crops, mostly wheat, is onging and will be concluded by August. As a result of a smaller planted area, the 2023 wheat harvest in areas under government control is estimated at 18.5 million tonnes, about 8 percent below the already war-affected 2022 output.

FAO forecasts 2023 cereal harvest, including winter and spring crops, at 47.8 million tonnes, about 12 percent below the 2023 output.

Export volumes remain below pre-war levels

Cereal exports in the 2022/23 marketing year (July/June) reached 49 million tonnes, including 29.5 million tonnes of maize, 16.8 million tonnes of wheat and 2.7 million tonnes of barley. Out of this amount, 16.8 million tonnes of maize, 8.9 million tonnes of whear and 1.3 million tonnes of barley were exported from designated Ukrainian Black Sea ports under the Black Sea Grain Initiative (BSGI). The latest extension of the BSGI is set to expire on 17 July 2023 and, despite continuing consultations and negotiations, prospects of additional renewal remain unclear. The expiration of the BSGI coincides with the peak of the wheat harvest in the country. Wheat is usually exported from September onwards, freeing storage for the maize crop. If the BSGI is not extended and the export pace via alternative channels (rail, road and river) is not adequate, the storage capacity for the 2023 maize crop could become an issue.

The state carrier estimates the capacity of cross-border rail transportation at 1.5 million tonnes of grains and oilseeds per month, based on the availability of the train cars and not considering logistical challenges of border crossing. In the month of November 2022 alone, slightly over 1 million tonnes of grains and oilseeds crossed the western borders, a record level. In the first quarter of 2023 (latest figures available), about 900 000 tonnes of grains and oilseeds were exported via the western border. In June 2023, the European Council approved an extension of the duty free import regime for Ukrainian products for one year. However, the import ban of Ukrainian wheat, maize, rapeseed and sunflower seeds by five member states (Poland, Slovakia, Hungary, Romania and Bulgaria) was extended until 15 September 2023, although transit of agricultural products across these countries remains allowed.

Similarly, the volume of exports via three Ukrainian Danube ports increased gradually from about 55 000 tonnes per month in January 2022 to 1.5 million tonnes in August 2022, reaching a record level of 3 million tonnes in May 2023.However, given prevailing bottlenecks in the railroad transport towards the river ports, replicating this record level might not be immediately attainable.

About 17.6 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 has already experienced elevated levels of food price inflation in the past, due to the economic impact of the conflict in eastern areas. Since the peak in October 2022, the domestic food price inflation has decreased, but it remains significantly elevated. According to the State Statistics Service of Ukraine, food prices in May 2023 remained over 20 percent above their level of May 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.

The country continues to be a significant supplier of food commodities at the global level. However, according to the 2023 Humanitarian Needs Overview, about 17.6 million people are estimated to need multisectoral humanitarian assistance in 2023, including over 11 million people in need of food security and livelihood interventions. As of late May 2023, slightly over 5 million people were estimated to be displaced in the country (International Organization for Migration [IOM]), while the presence of about 6 million Ukrainian refugees was recorded in European countries as of mid-June 2023 (United Nations High Commissioner for Refugees [UNHCR]).

This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS) https://www.fao.org/giews/data-tools/en/.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool https://fpma.fao.org/.
FAO/GIEWS Earth Observation for Crop Monitoring https://www.fao.org/giews/earthobservation/.
Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.
The importance of Ukraine and the Russian Federation for global agricultural markets and the risks associated with the war in Ukraine. July 2023 https://www.fao.org/3/cc6797en/cc6797en.pdf.