



Ministry of Agrarian Policy
and Food of Ukraine

Ukrainian agriculture and food industry: prospects and opportunities





Ukrainian agriculture: State of the play 2018



Grain yield – over **70 mln tons**



Export of grain 2018/19 MY(forecast) – over **49 mln tons**



50.1 thousands agricultural entities in Ukraine, out of which **46.1 thousands** (registered) – private farmers



Capital investments in agriculture, forestry and fishery, 2018 year – **over \$2.5 bln**



Export of agricultural and food products – over **\$18.8 bln**



310 producers of animal products, including fish, meat and honey, are certified for the export of their products to the EU



529 organic market operators, **375** certified organic producers, **\$65 mln** organic export, **95%** export to the EU

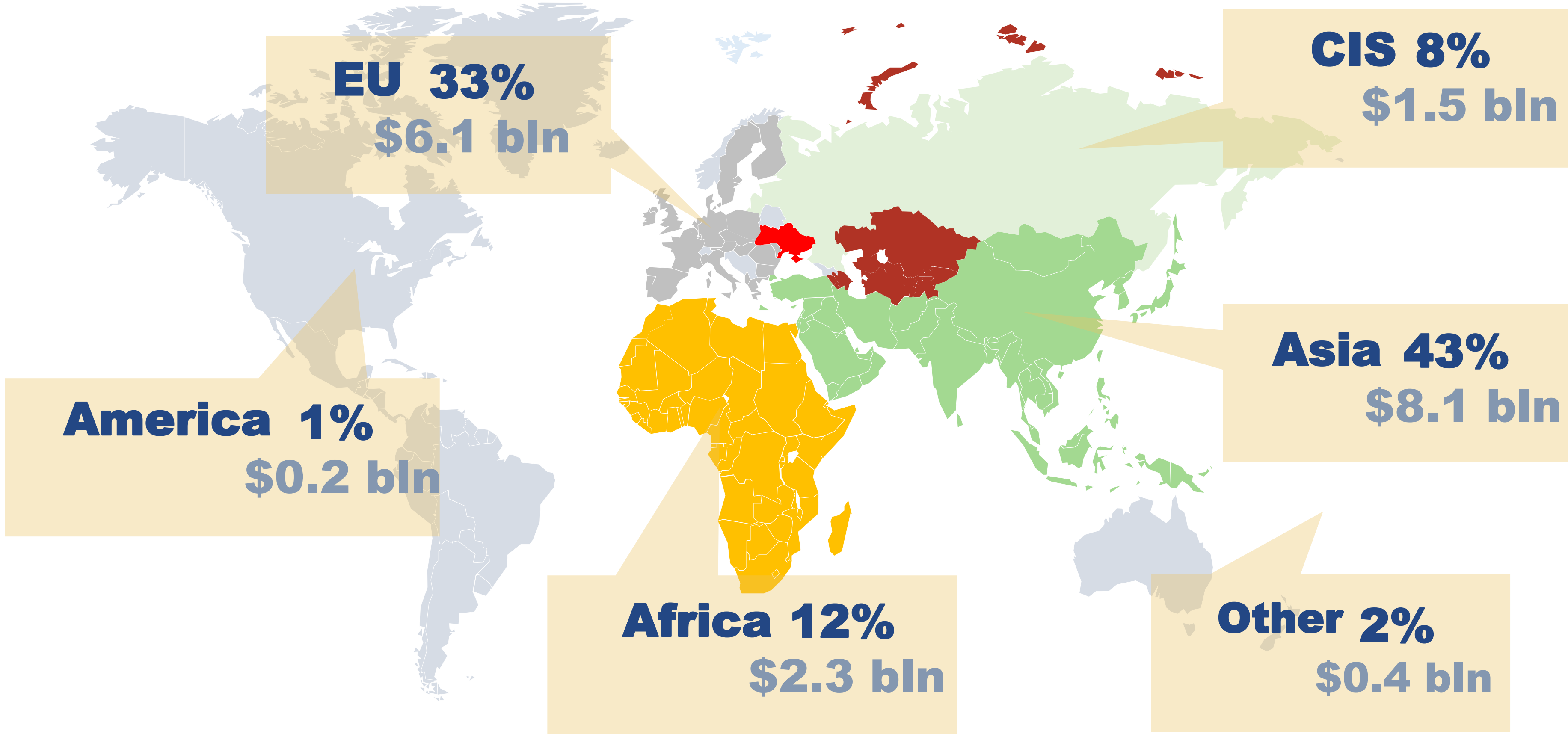


289 thnd ha – the total area of certified organic agricultural land (out of 40 mln ha ag land)

UKRAINIAN AGRARIAN EXPORT STRUCTURE (2018)



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Oils – 24.2%



Grains – 39.9%



Poultry – 2.7%



Oilseeds – 10.5%

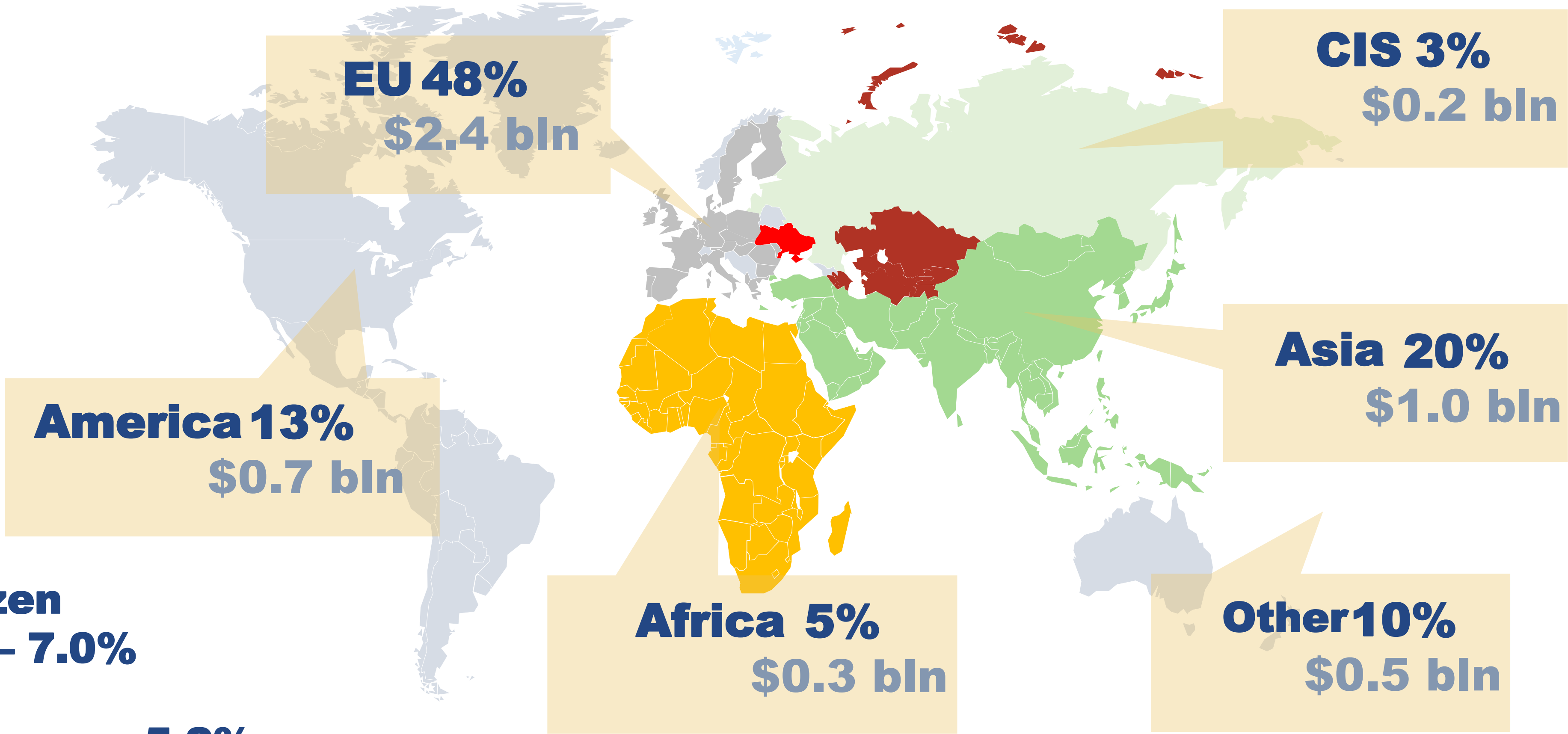


Chocolate – 0.9%



Sugar – 1.2%

UKRAINIAN AGRARIAN IMPORT STRUCTURE (2018)



**Frozen
fish – 7.0%**



Tobacco – 5.2%



**Other food
products – 4.6%**



**Alcohol
drinks – 4.6%**



Citruses – 4.3%



Palm oil – 3.1%



Bananas – 2.9%

Where are we globally as an exporter?



№1 Oil



№4 Corn



№5 Honey



№ 4 Barley



№ 5 Wheat



№ 5 Butter



№ 6 Soybeans



№ 7 Poultry

Export sectoral strategy: «3D» diversification

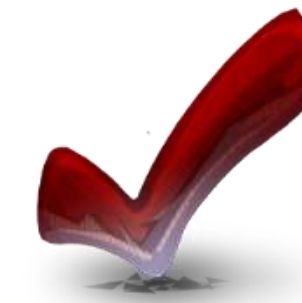
Volumes of Ukrainian agriexport grow faster
at twice than global agritrade



Diversification of export markets



Goal: opening and facilitating accesses to the
priority markets (50 countries)



Diversification of agrarian trade commodities



Goal: increasing of export of processed food

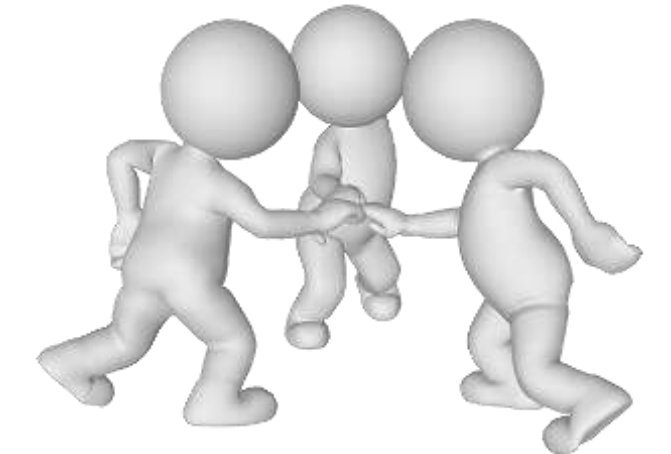
(**raw material**/finished products)

2015:(**52.3%**/47.7%) → 2018:(**49.8%**/50.2%)

2026:(**40.0%**/60.0%)



Diversification of export stakeholders



Goal: increasing of participating of SMF in agro-
export more than **30%** from total export volume



Ukrainian food production and export capacity

Expectations: 2025

PRODUCTION

EXPORT



Poultry

+340 thnd tons

+270 thnd tons



Beef

+111 thnd tons

+33 thnd tons



Cheeses

+ 328 thnd tons

+ 50 thnd tons



Butter

+302 thnd tons

+184 thnd tons



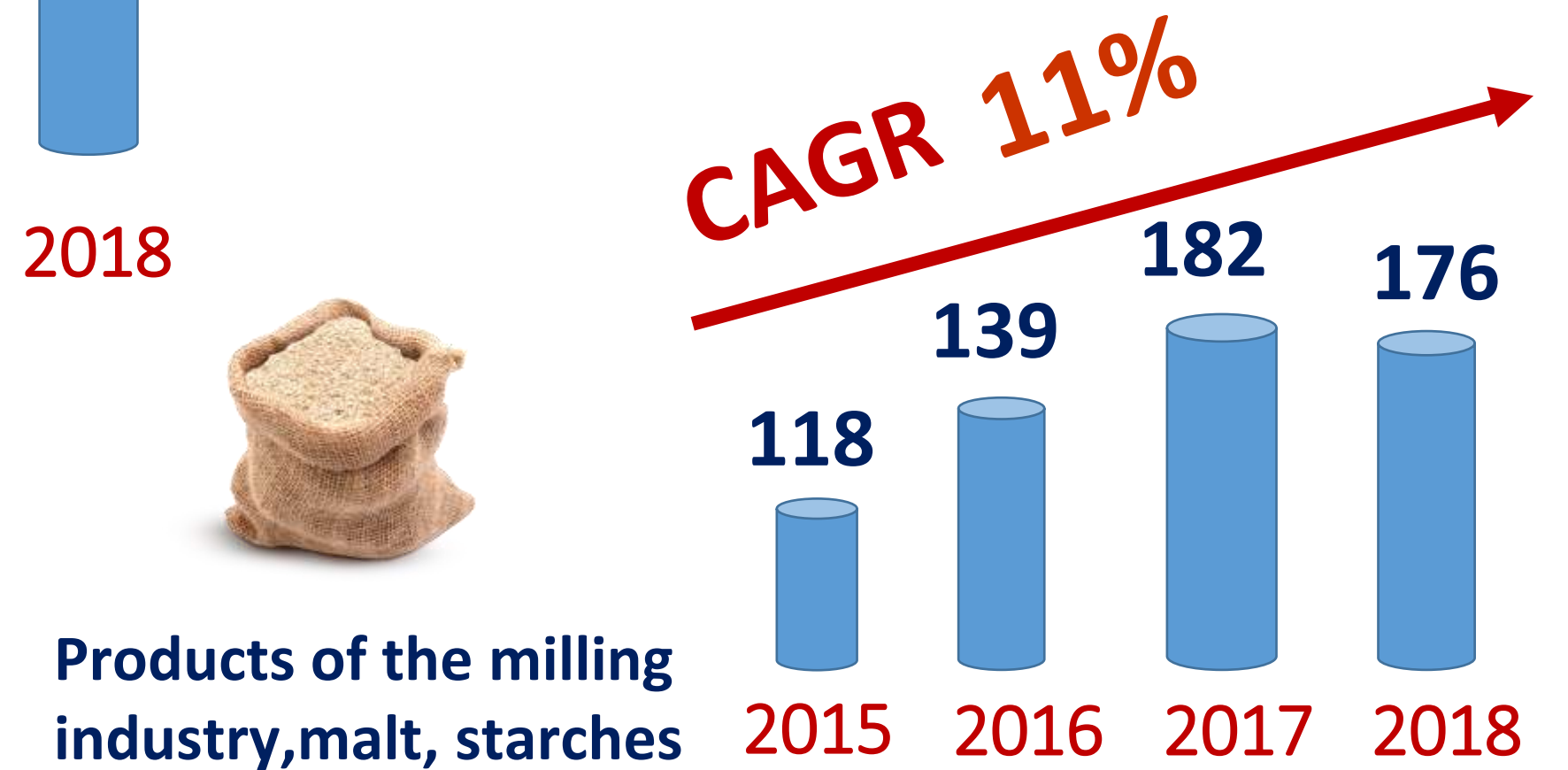
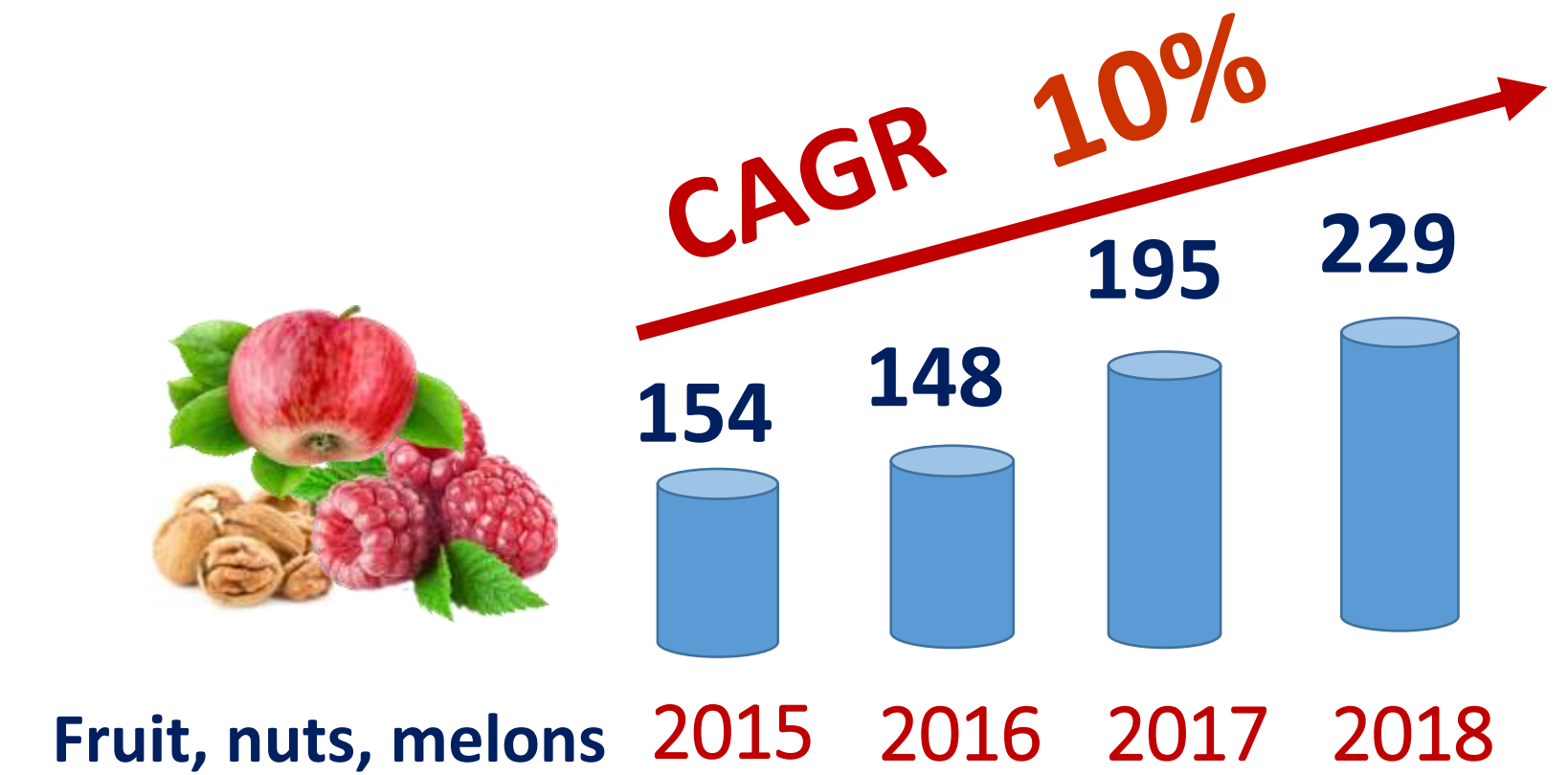
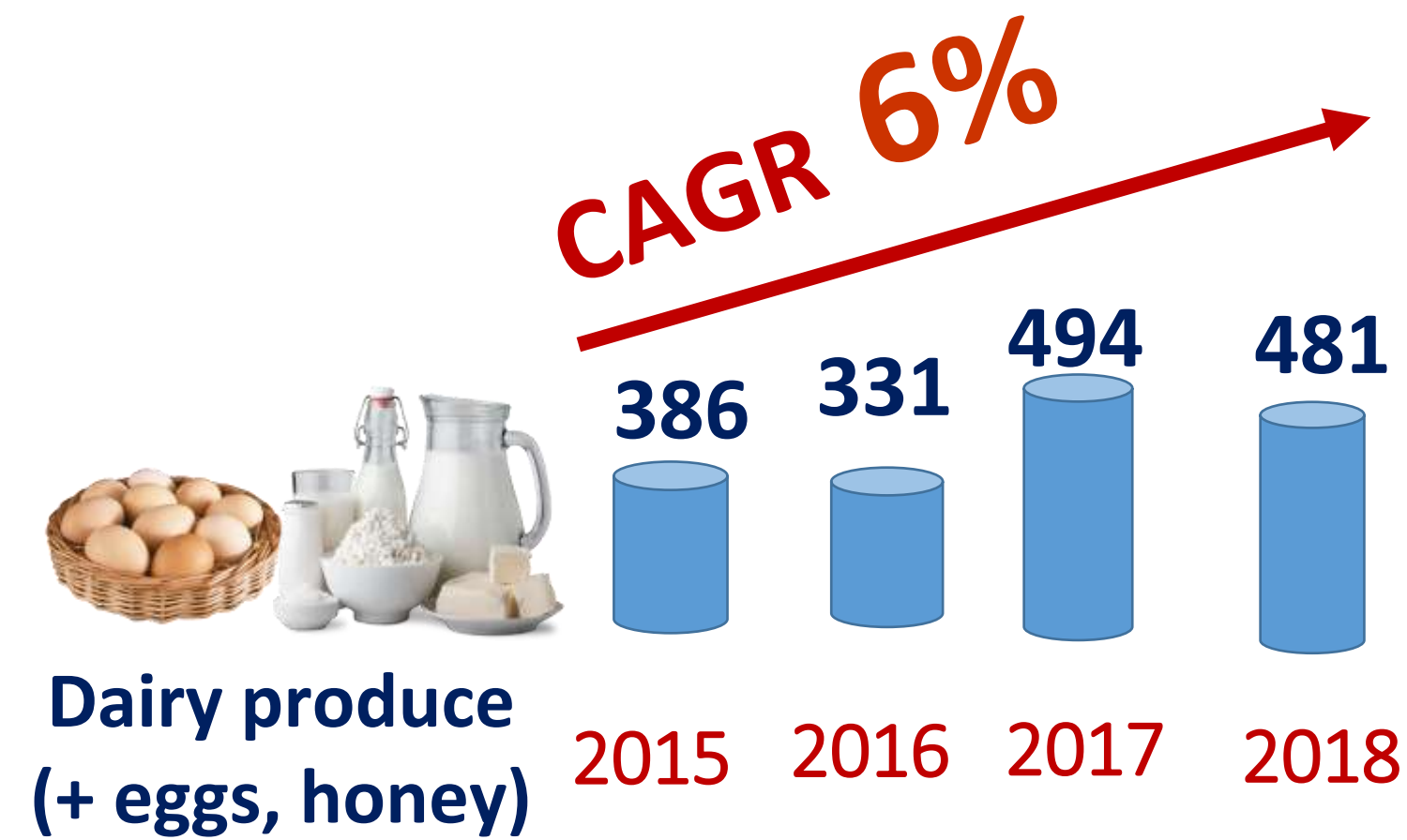
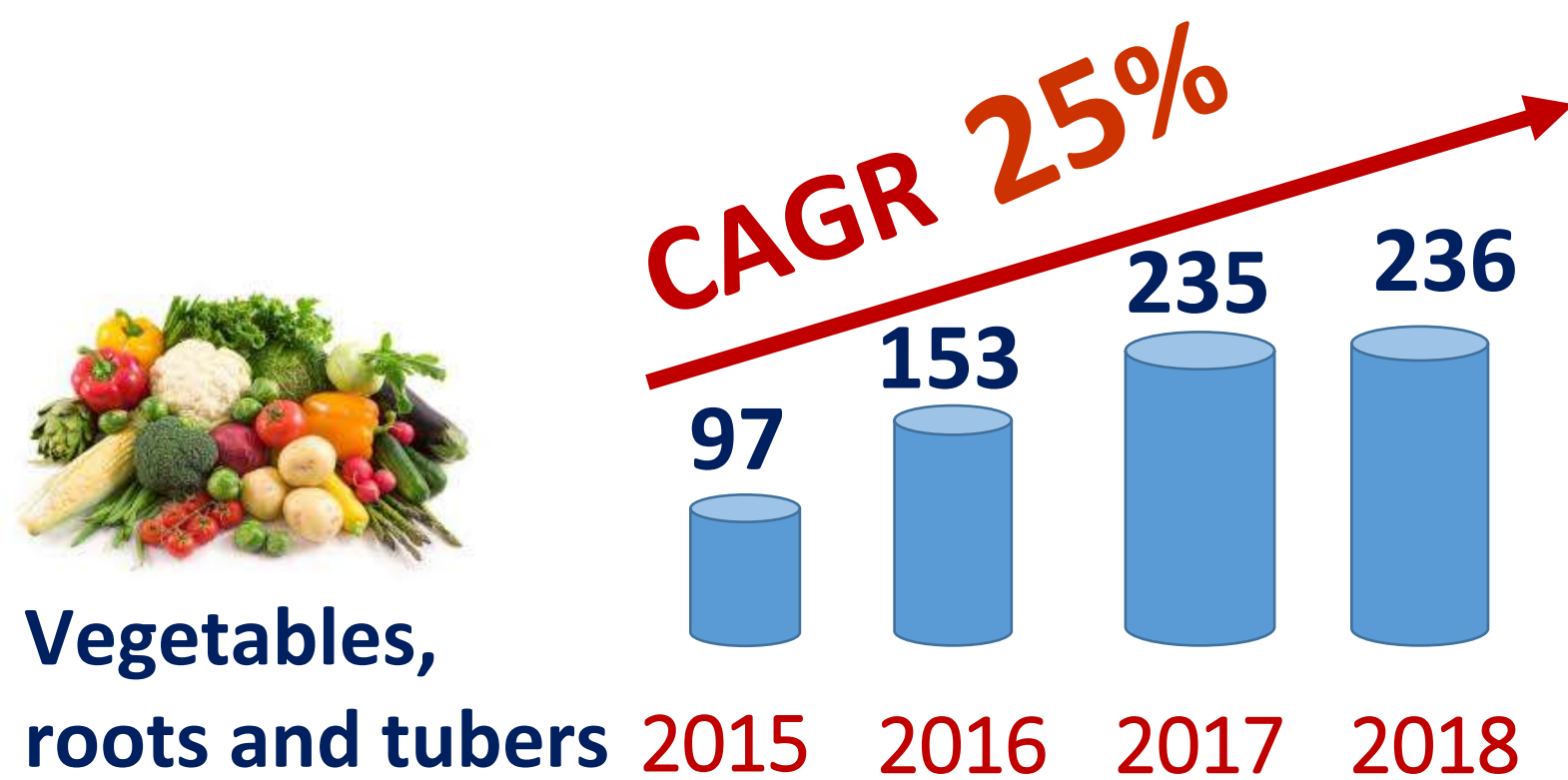
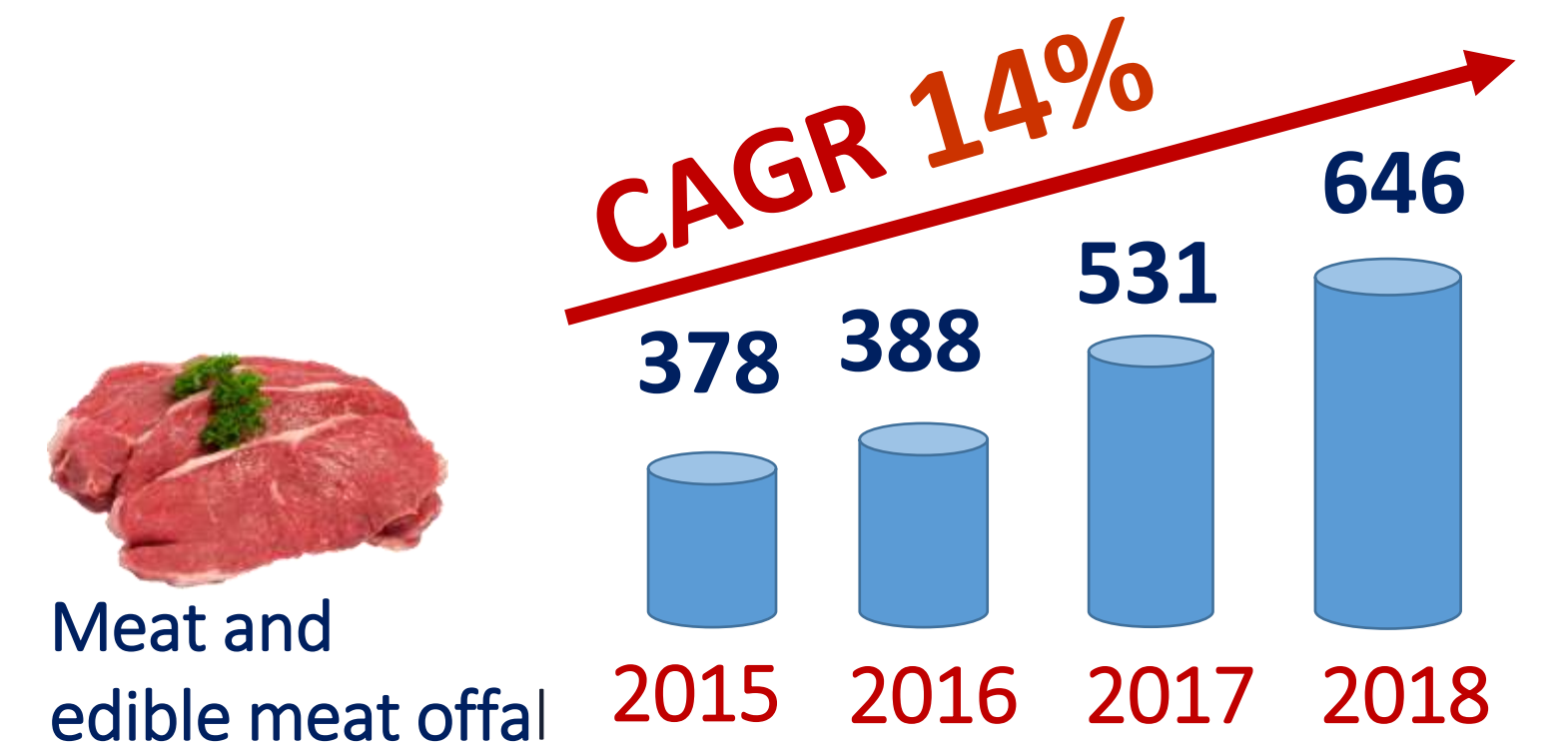
Dried dairy products

+71 thnd tons

+35 thnd tons



Development of Ukrainian export TOP-10 of Processed Products (mln\$)



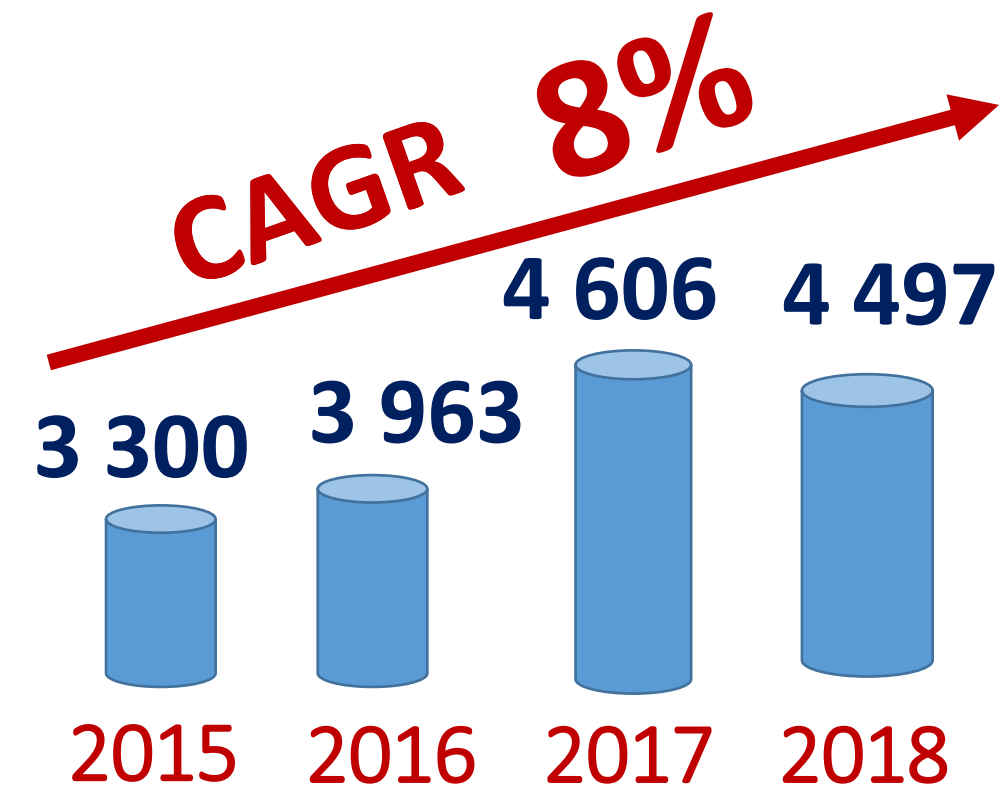
Development of Ukrainian export TOP-10 of Processed Products (mln\$)



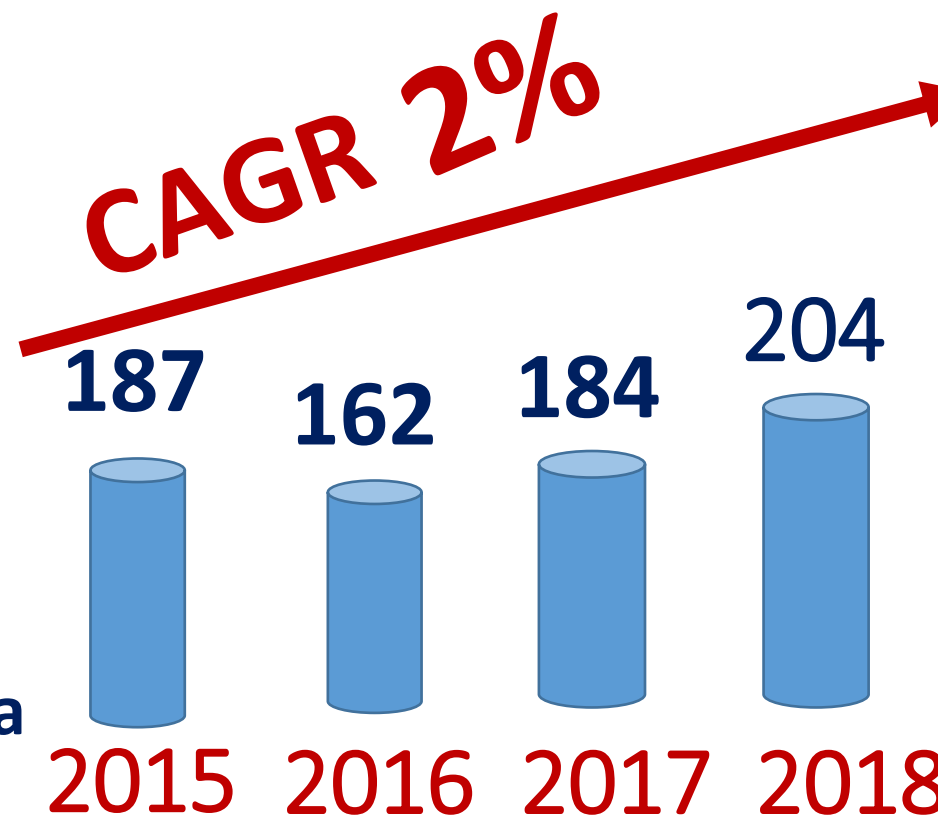
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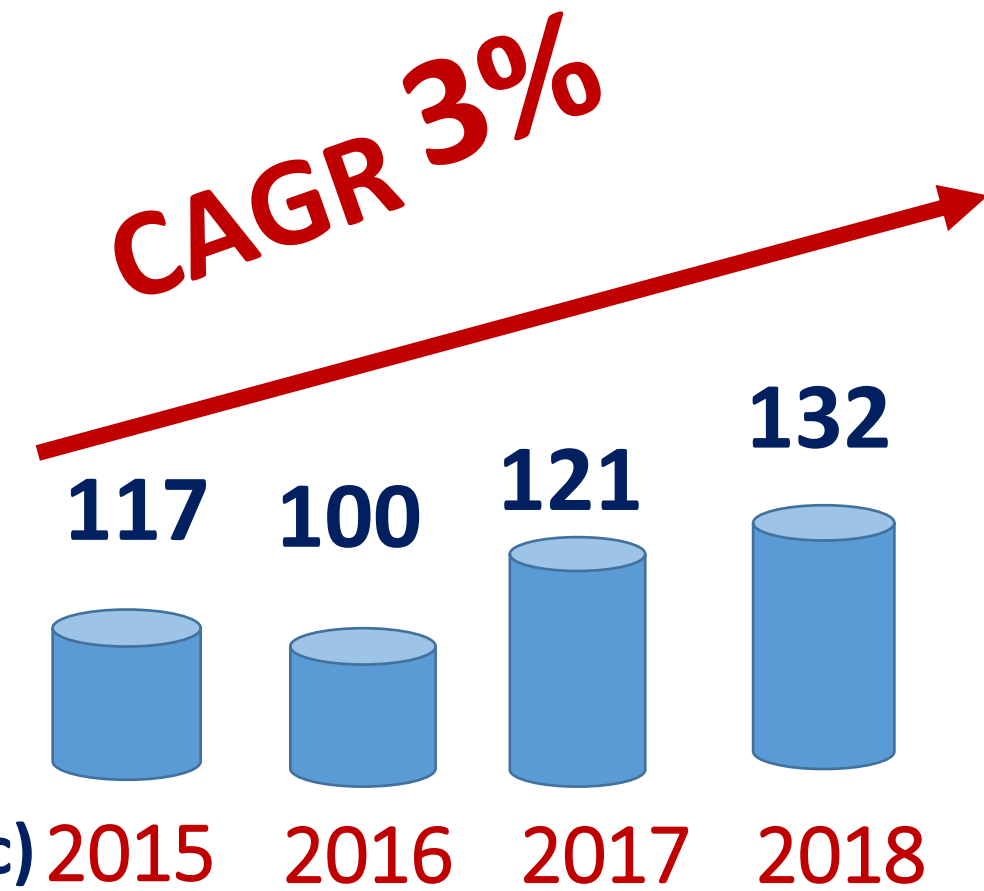
Fats and oils



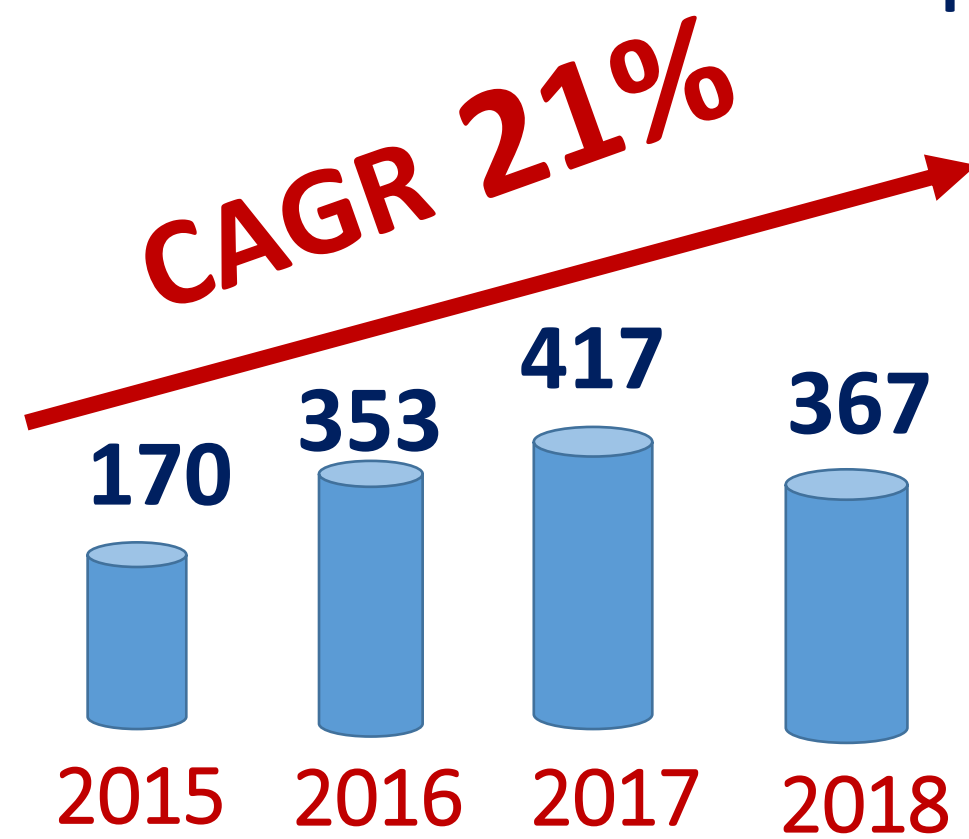
Cocoa and cocoa
preparations



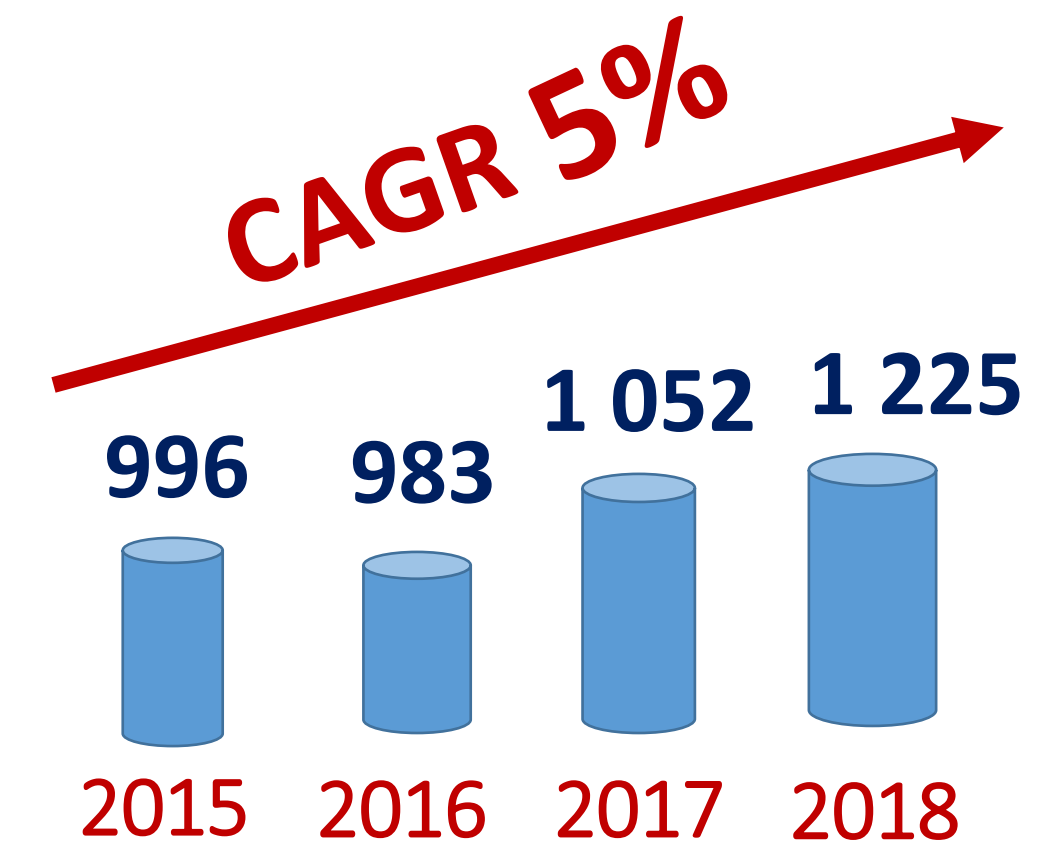
Miscellaneous edible
preparations (extracts,
essences and concentrates etc)



Sugars and sugar
confectionery



Animal fodder (meal)



AgTech in Ukraine today



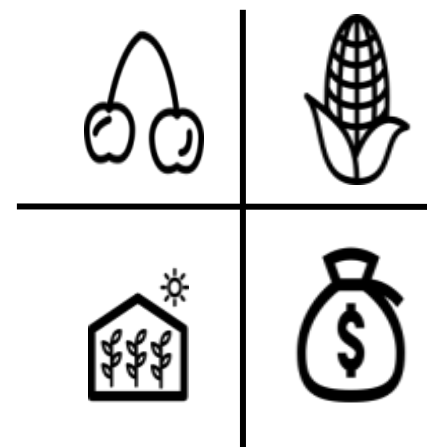
5 years of active development



AgTech term is in the TOP-10 for Ukrainian media in 2018



Agro holdings – drivers of technological progress



Active sectors: crop production, gardening, production of vegetables and berries, greenhouse production, trading



Key drivers for development: possibilities for export and reducing of market marginality

Ag Tech: TOP- 6 technologies



Accounting programs and planning software tools



Field equipment GPS monitoring and parallel driving systems



GPS tracking and fuel consumption monitoring



Land bank management and digital field maps



Satellite and drones field monitoring



Agrometeorology



What do we have

- ✓ Highly qualified specialists
- ✓ Booming AgTech sector
- ✓ Fast developing export oriented production of food products



Where to look



Seeds production



Organic production



Network of laboratories



Infrastructure and logistics



Equipment for food
and process industry



Cereals & Oilseeds Processing



Processed Fruits & Vegetables



Infant and child formulas



Beef production & processing



Snacks and healthy food



Green and renewable energy

Ukraine – Italy bilateral agrarian trade, 2018 year

Ukrainian agrarian export to Italy – **\$737,9 mln**

 Grains – **\$335,6 mln**

 Oils – **\$236,8 mln**

 Oilseeds – **\$56,5 mln**

 Wastes and residues, animal feed – **\$45,2 mln**

 Hides and skins of the animals – **\$34,4 mln**

Italian agrarian export to Ukraine – **\$276,7 mln**

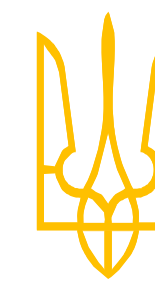
 Wines – **\$59,9 mln**

 Tobacco – **\$52,1 mln**

 Grain products – **\$20,6 mln**

 Tea and coffee – **\$20,6 mln**

 Hides and skins of the animals – **\$27,6 mln**



Ukraine – Italy bilateral agrarian trade, January – April 2019 year

Ukrainian agrarian export to Italy – **\$274,6 mln**



Grains – **\$147,6 mln**



Oils – **\$90,4 mln**



Hides and skins of the animals – **\$11,2 mln**



Wastes and residues, animal feed – **\$9,5 mln**



Vegetables and plans – **\$3,4 mln**

Italian agrarian export to Ukraine – **\$91,9 mln**



Wines – **\$15,9 mln**



Tobacco – **\$19,4 mln**



Grain products – **\$7,2 mln**



Fruits and nuts – **\$6,7 mln**



Hides and skins of the animals – **\$6,9 mln**



We are open for cooperation!

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