UKRAINIAN GRAIN ASSOCIATION

President
Mykola Gorbachov
UA production and export of grain & oilseeds
UA production and export evolution
UA grain production and export

Domestic consumption 25,000 kt/annually

Harvested area, thd ha: 25,237
Production, thd t: 106,419
Export, thd t: 53,785
Ending stocks, thd t: 25,906

Percentage of cropland by occupation status
- Currently occupied
- Previously occupied
- Liberated area

Percentage of spring croplands by occupation status
- 15%
- 9%
- 65%

Percentage of winter croplands by occupation status
- 15%
- 9%
- 65%

Temporary occupied UA territory
Wheat production forecast, kt

Ukraine

Wheat production forecast 2022

Total wheat production forecast 2022
20,800 kt

Total wheat export forecast 2022
10,000 kt

2022 VS 2021 -38%

Wheat production forecast 2022
Total wheat production f’cast
6 630 kt
Total wheat export f’cast
2 000 kt

2022 VS 2021 -35%

Barley production f`cast 2022
TOP world grain exporters

Canada, mmt
- 15.3 / 22.8*
- 2.8 / 3.4*

Ukraine, mmt
- 19.0 / 10.0*
- 5.8 / 2.0*
- 23.5 / 10.0*

Russia, mmt
- 33.1 / 37.1*
- 3.3 / 4.8*
- 2.9 / 2.9*

EU, mmt
- 32.8 / 40.0*
- 11.5 / 11.1*
- 5.5 / 3.7*

USA, mmt
- 21.7 / 21.8*
- 63.5 / 61.0*

Turkay, mmt
- 6.6 / 7.1*

Kazakhstan, mmt
- 7.6 / 7.8*
- 0.5 / 0.7*

Argentina, mmt
- 14.5 / 14.5*
- 4.0 / 4.2*
- 35.8 / 41.0*

Brazil, mmt
- 40.5 / 43.6*

Australia, mmt
- 25.0 / 24.7*
- 8.7 / 7.3*

2022-2022 / 2022-2023*
IGC est&f'cast 23.06.2022
TOP UA destinations after 24 February 2022
Grain export July 21-February 22, kt

- Total 46,411 kt
- Wheat 18,533
- Barley 2,648
- Oats 5,620
- Rye 18,206
- Millet
- Rapeseed

Grain export March – June 22, Kt

- Total 4,258 kt
- Wheat 995
- Barley 231
- Corn 2,751
- Soybeans 224
- SFS 56

Grain export by products 2021/2022
Grain exports by months, Kmt

2019-2020: 62.2 mmt
2020-2021: 49.9 mmt
2021-2022: 53.8 (68.0*) mmt
2022/2023*: 31.5* mmt
Almost all Ukrainian ports are closed due to occupation, blockade, mine danger, and the danger of piracy by Russia.

- 3 are working
- 6 entry and exit is not possible
- 4 don't work
- 5 occupied since 2014

90% of port turnover
75% of foreign trade in peacetime passed through sea lanes
≈10% of annual exports of cereals and pulse crops are blocked in Ukrainian ports

70 ships are blocked in ports
$170 mln a day are Ukraine’s losses due to the blockade of ports

Sources: GMI Center, UNFPA Representative Martin Frick, Slavo and Dilo, Deputy Minister of Infrastructure of Ukraine Yurii Vaskev during a briefing at the Ukraine — Ukrimform Media Center, data as of May 6, 2022; losses per day — data as of April 21, 2022.

Vice President of the Kyiv School of Economics Oleh Novinsky.
GRAIN SUPPLY CHAIN CAPACITY

Inland storage capacity
~1200 silos = 66 mmt

~25%*

~ 65%

~ 10%

Port storage capacity ~ 5.6 mmt

*before 24.02.2022

UKRAINE
Loading capacity
715,000 mt/day

RW capacity
~ 26,000 t/day

Transshipment capacity
~ 70,000 mt/day

Trucks capacity
~ 10,000 t/day

River barges capacity
~ 30,000 t/day

Bottlenecks – DIS.CAPACITY, STATIONS

*after 24.02.2022
Before 24.02.2022

- Sea: 5,800 kmt
- Other: 200 kmt

6 mmt per month

After 24.02.2022

- River: 1,069 kmt
- Railway: 746 kmt
- Trucks: 323 kmt

2 mmt per month

Grain export by transport

June 2022*

- Sea: 5,800 kmt (95%)
- Other: 200 kmt (5%)

6 mmt per month

2 mmt per month

River 1069 kmt

Railway 746 kmt

UGA
~53/*100

~48/*116

~day crossing capacity in June 22
*max possible crossing capacity
1 rw wagon = 60-65 t

Transportation corridors of agricultural export

Border stations capacity rw wagons per day
If US ports will be blocked, how much grain can be exported by land?

- **UA export capacity**
  - Land 5% 2-3 mmt
  - Ukraine
  - Poland
- **US export capacity**
  - Sea 95% 60 mmt
  - Sea 90% 90 mmt
  - United States
  - Canada

Sea 90% 90 mmt

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This is what Russia brings to Ukraine
UA fields after russian invasion
UrkTransAgro port terminal Mariupol
Kryvyi Rig, Dnipropetrovsk region
UA tractors on the mined fields by Russia
UA fields after Russian invasion
Thank you

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