



SESSION TWO: TRADE AND THE BLACK SEA - WHERE DOES THE UKRAINIAN SITUATION LEAVE US?



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Ukraine Agriculture and Trade in Wartime: Results of 2022 and Prospects for 2023



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UKRAINE'S PLACE IN GLOBAL AGRICULTURAL EXPORTS IN 2021



% - a share in the global structure of agricultural exports

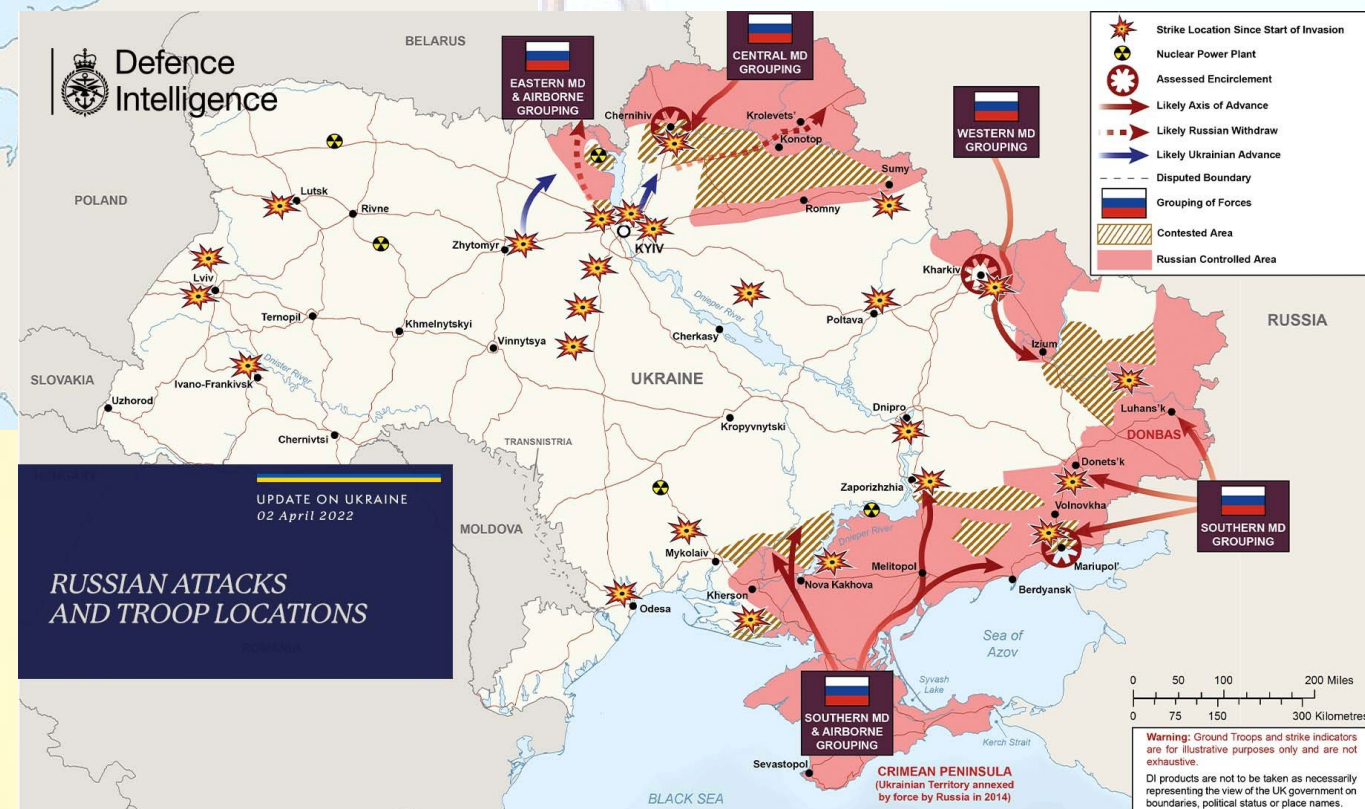


Source: based on the data of the State Customs Service of Ukraine



50% of energy system is destroyed

22% (7 mln hectares) of arable land is occupied



Damages and destroyed infrastructure objects of Ukraine total

\$ 135,9 bln



housing

143,8 thousand units



Agricultural machinery

84,2 thousand units



vehicles

194,8 thousand units



education

2918 units



healthcare

















1131 units



culture and sports

1171 units

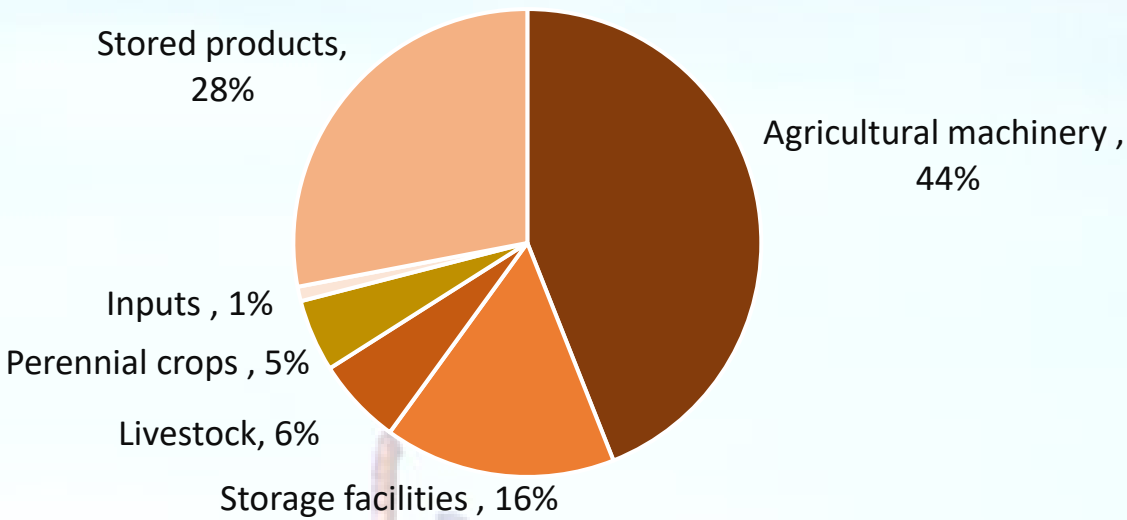


| Property type | Damage assessment, \$ billion |
|--|-------------------------------|
|  Residential buildings | 52,5 |
|  Infrastructure | 35,6 |
|  Enterprise assets, industry | 13,0 |
|  Agriculture and land resources | 6,6 |
|  Social sphere | 0,2 |
|  Vehicles | 2,9 |
|  Education | 8,2 |
|  Trade | 2,4 |
|  Energy* | 6,8 |
|  Healthcare | 1,7 |
|  Utilities | 2,3 |
|  Culture, tourism, sports | 2,1 |
|  Administrative buildings | 0,8 |
|  Digital infrastructure | 0,6 |
|  Financial sector | 0,1 |
|  Environment** | 14,0 |
| Total | 135,9 |

DIRECT LOSSES FROM THE WAR IN UKRAINIAN AGRICULTURE

| Category | Unit of measurement | Damages, units | Value, \$ bln |
|--------------------------------------|-----------------------------------|--|---------------|
| Agricultural machinery and equipment | thousand pcs | 84.2 | 2,885.4 |
| Storage facilities | volume, million tonnes | 9.4 | 1,062.5 |
| Livestock | heads, thousands | sheep and goats – 95 cattle – 212 pigs – 507 poultry – 11,700 bee families – 400 | 362.5 |
| Perennial crops | hectares | Fertilizers 14,340 | 348.7 |
| Destroyed and stolen inputs | thousand tonnes million liters | fertilizers – 124 fuel – 11.5 | 95.4 |
| Destroyed and stolen products | million metric tonnes | grain - 2.8 oil seeds – 1.2 | 1,872.0 |
| Total damages | x | x | 6,626.8 |

The structure of damages by category



Regional distribution of damages to Ukrainian agriculture

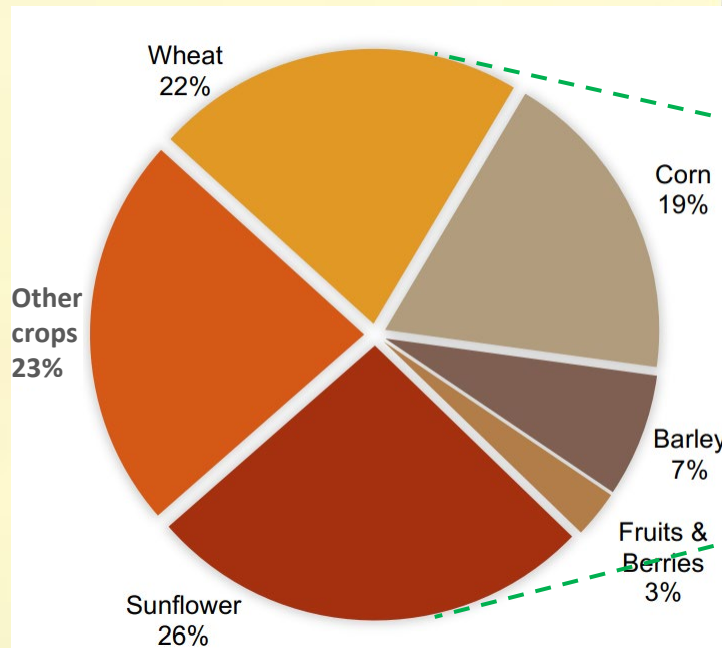
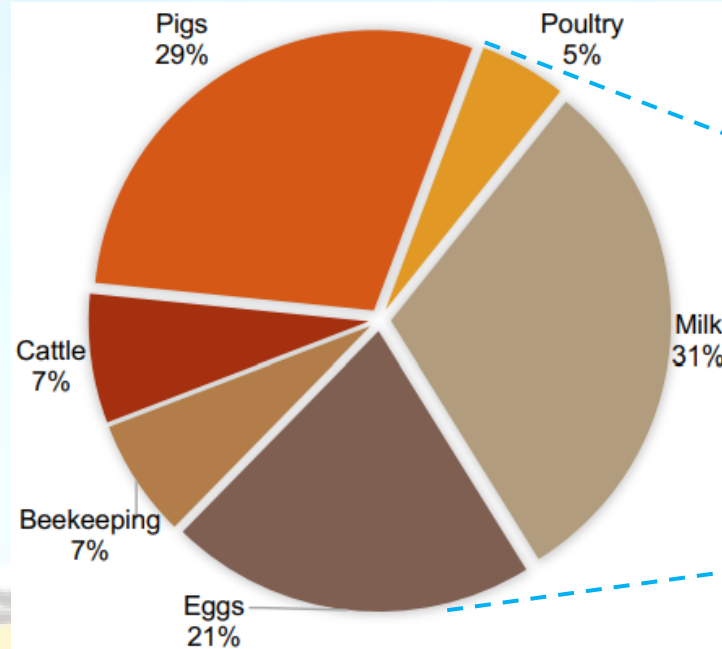


Source: Kyiv School of Economics, November, 2022

Created with Datawrapper

LOSSES FROM THE WAR IN UKRAINIAN AGRICULTURE

(Indirect assessment of damage)



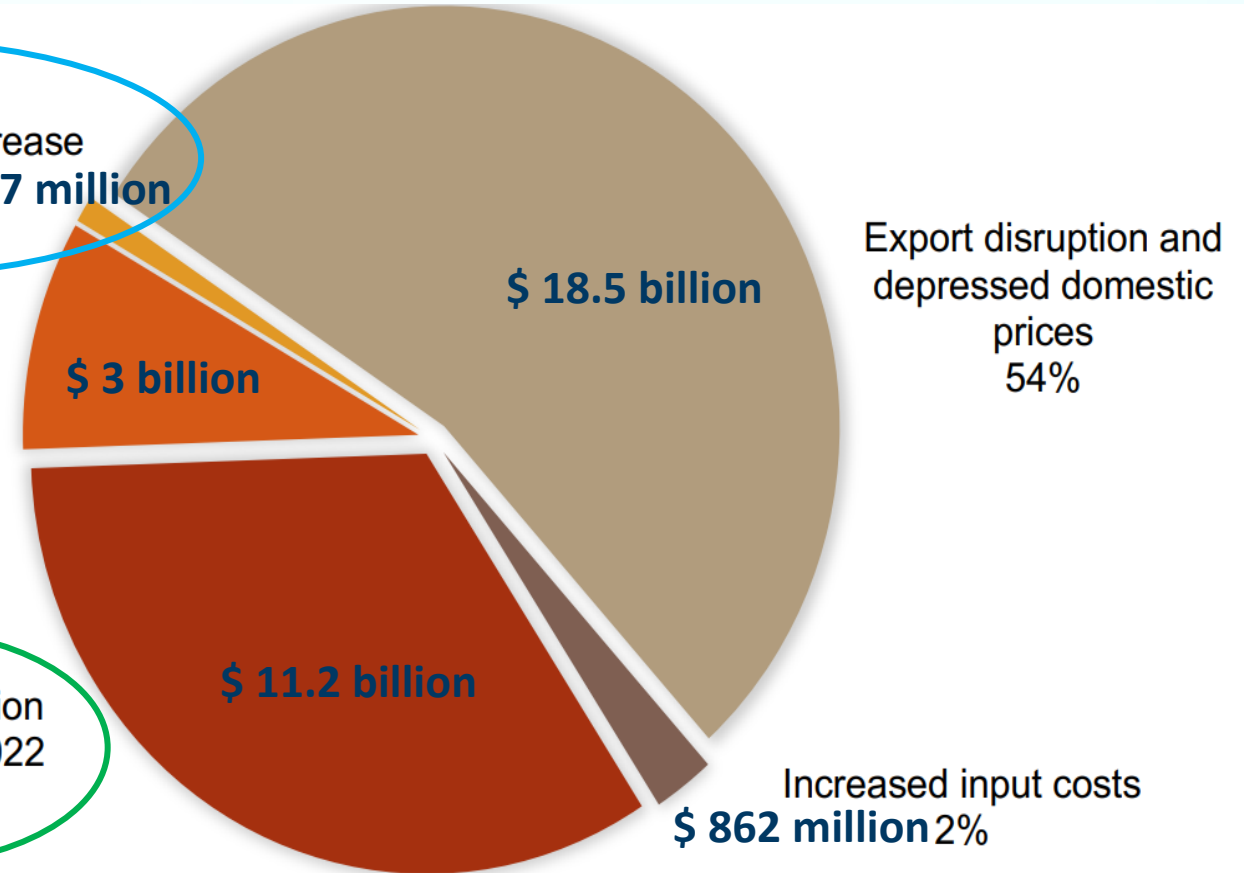
\$ 34.25 billion

DAMAGES STRUCTURE BY CATEGORY

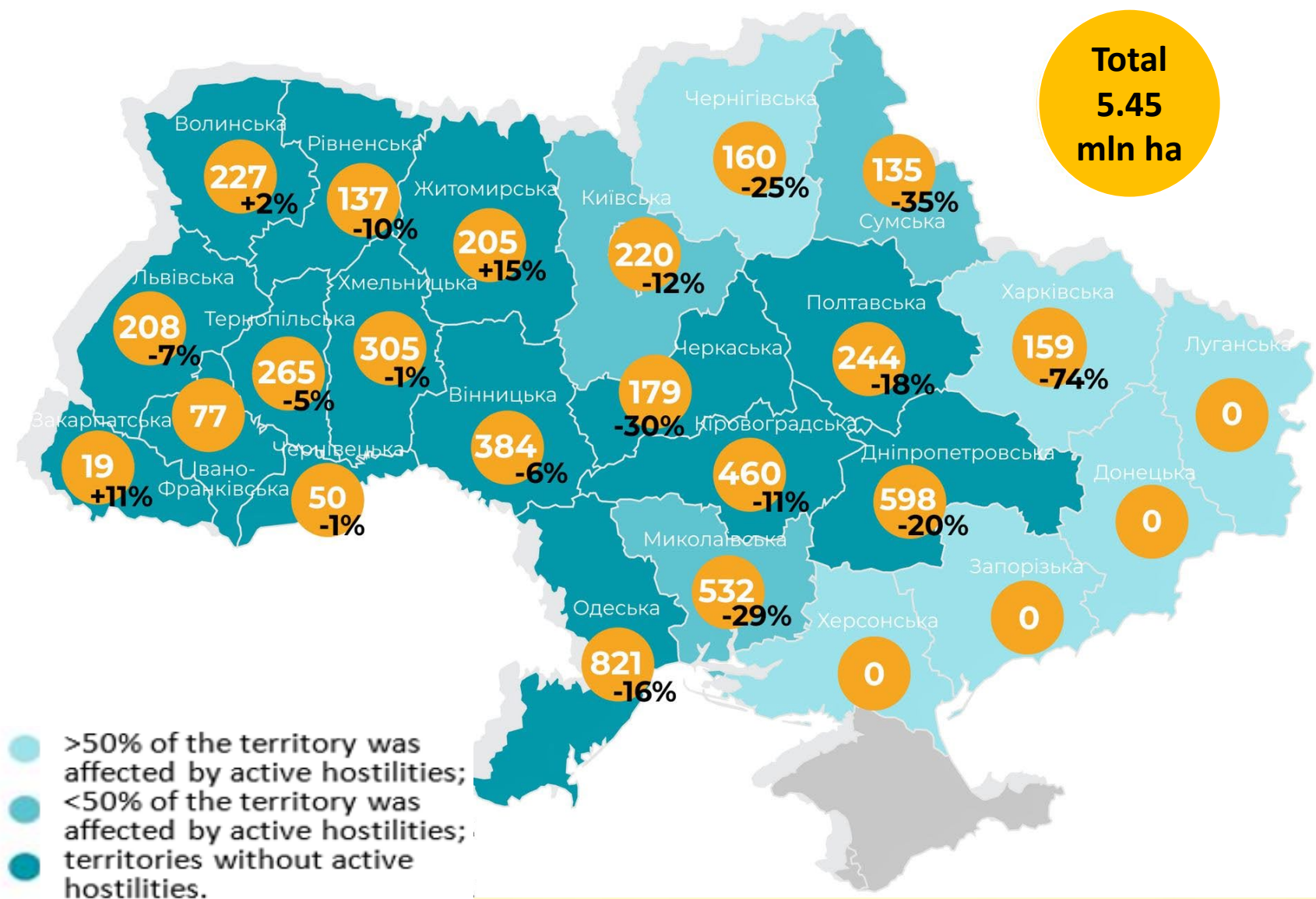
Livestock production decrease
1% **\$ 348.7 million**

Winter crops production decrease in 2023
9%

Crops production decrease in 2022
34%

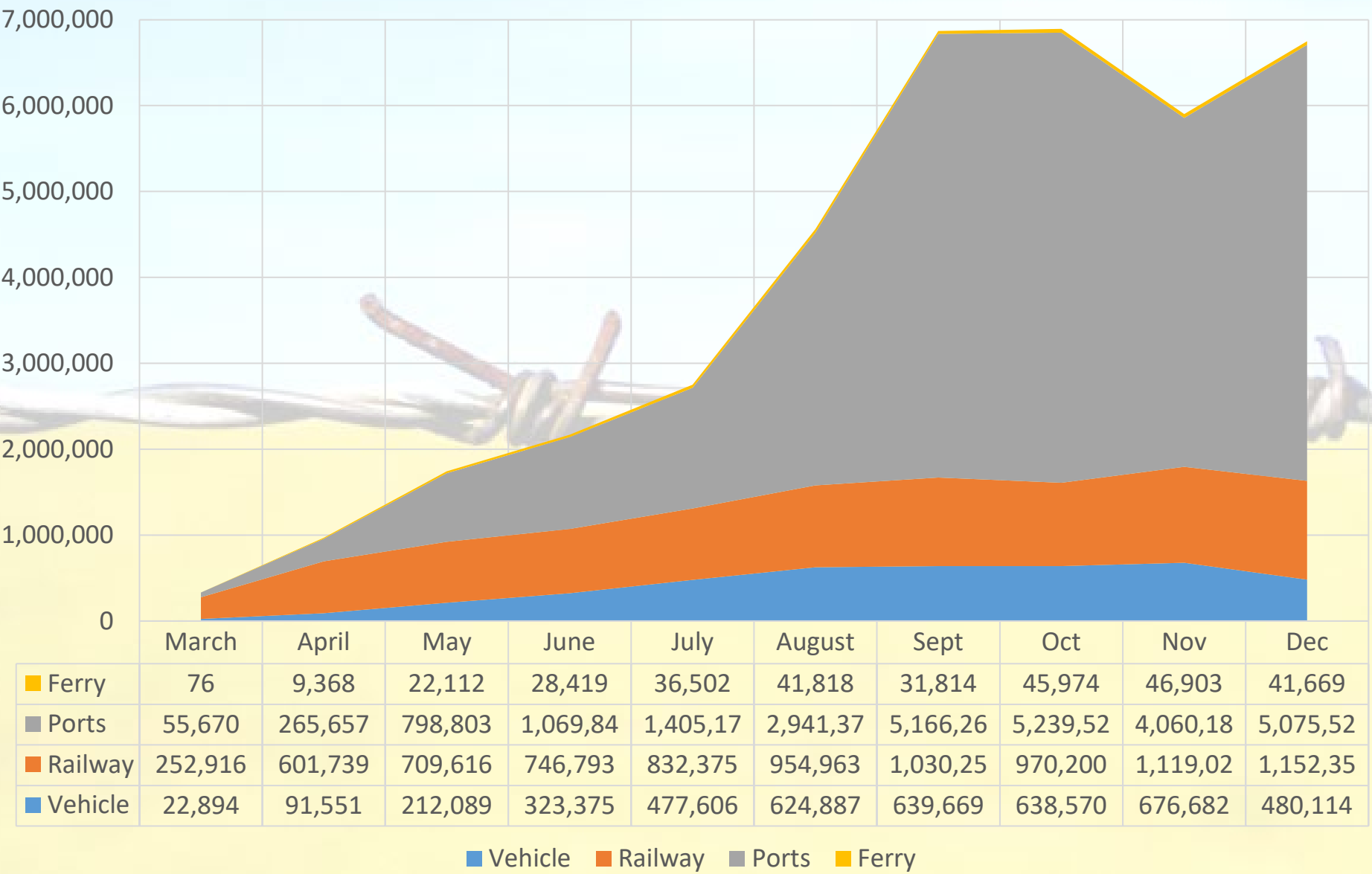


SOWN AREA OF WINTER CROPS,
as of December 1, 2022, thousand hectares

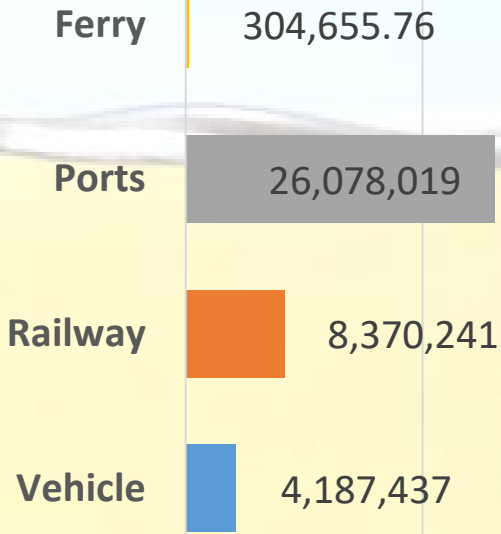


Source: UCAB based on the data of the State Statistic Service of Ukraine and Ministry of Agrarian Policy and Food of Ukraine

**BORDER-CROSSING OF AGRICULTURAL PRODUCTS FROM UKRAINE IN TRANSPORTATION BREAKDOWN,
March, 1 – December 31, 2022, metric tonnes**

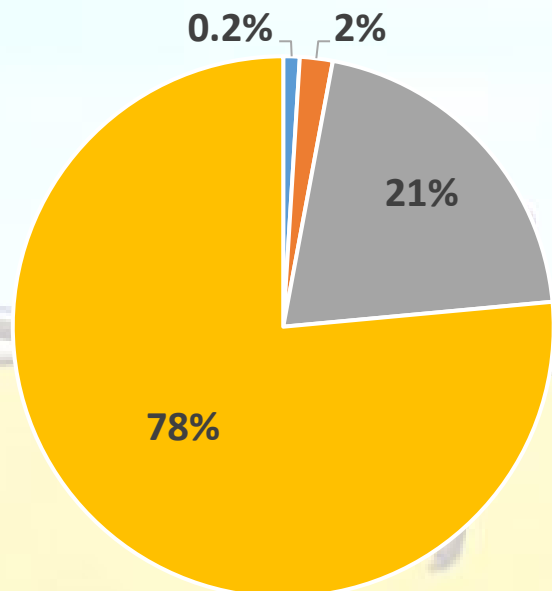


**Total
38,940,352
metric tonnes**



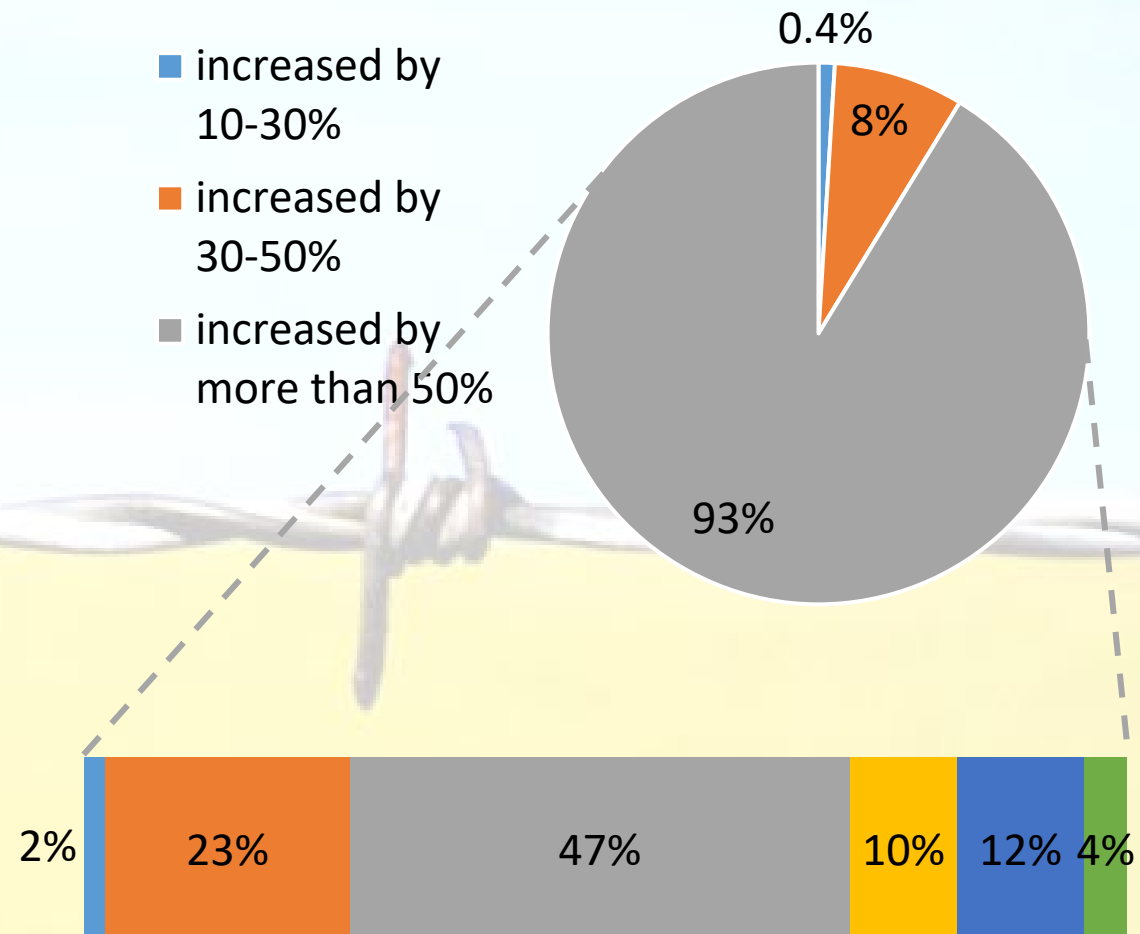
Source: Ministry of Agrarian Policy and Food of Ukraine
Ministry of Infrastructure of Ukraine

INCREASE IN THE PRODUCTION COST OF THE 2022-HARVEST COMPARED TO 2021-HARVEST



■ increased by less than 10% ■ increased by 10-30%
■ increased by 30-50% ■ increased by more than 50%

INCREASE IN THE COST OF DELIVERY COMPARED TO THE PRE-WAR PERIOD



■ up to 100% ■ in 2 times
■ more than twice ■ in 2-3 times
■ more than in 3 times ■ other



Thank you!

Questions?

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QUESTION AND ANSWER

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***TO SUBMIT A QUESTION, CLICK ON THIS
SESSION IN THE MOBILE APP AND TYPE IN
THE Q&A TAB, OR LINE UP AT A MIC***

