

# EU-Ukraine Agricultural Trade and Resilience

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European Parliament. Exchange of Views on the Benefits of EU-Ukraine Trade

March 18th, 2025

# Outline

- Ukraine's perspective: Trade with the EU is critical for recovery and development
- EU's perspective: EU benefits from a liberalized trade with Ukraine

# Ukraine's Agriculture: A Key Economic Driver

Agriculture (incl. up- and downstream sectors) generates:

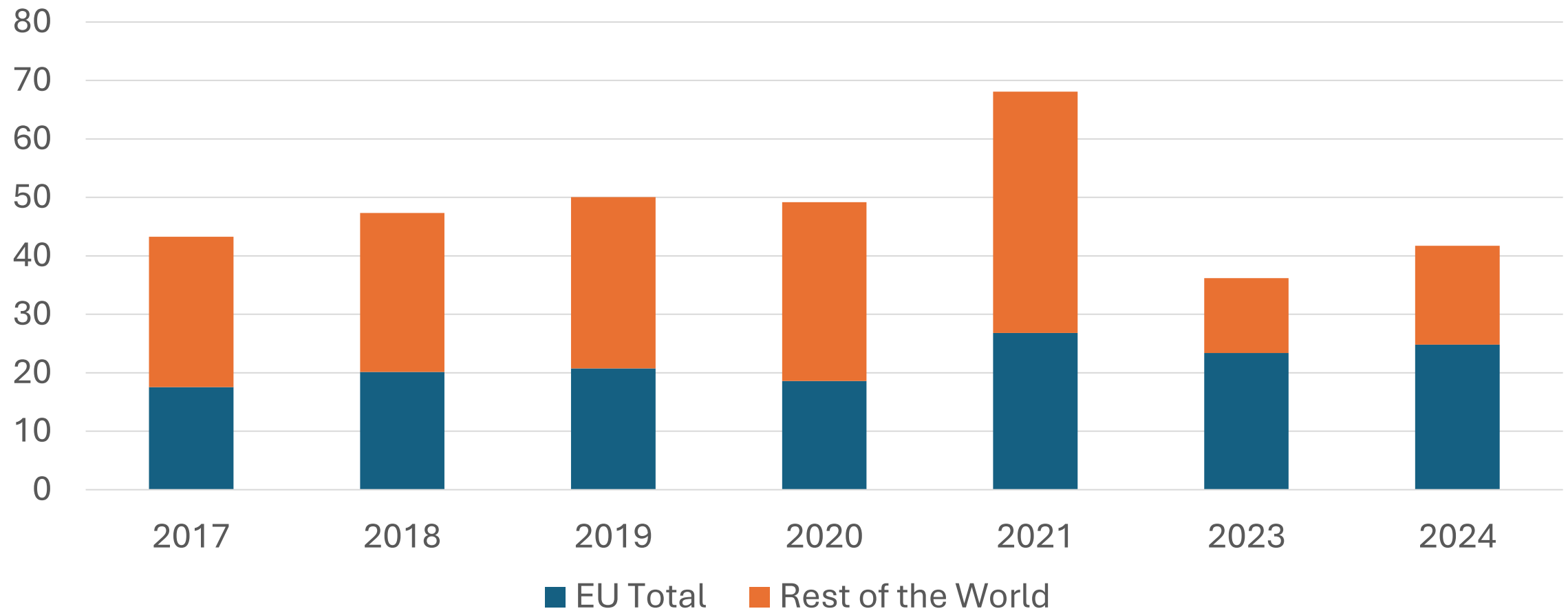
- over 20% to Ukraine's GDP
- 60% of total Ukraine's exports

Recovery and reconstruction needs: USD **524 billion** (World Bank, 2025).

This is nearly 3 times Ukraine's projected GDP for 2024.

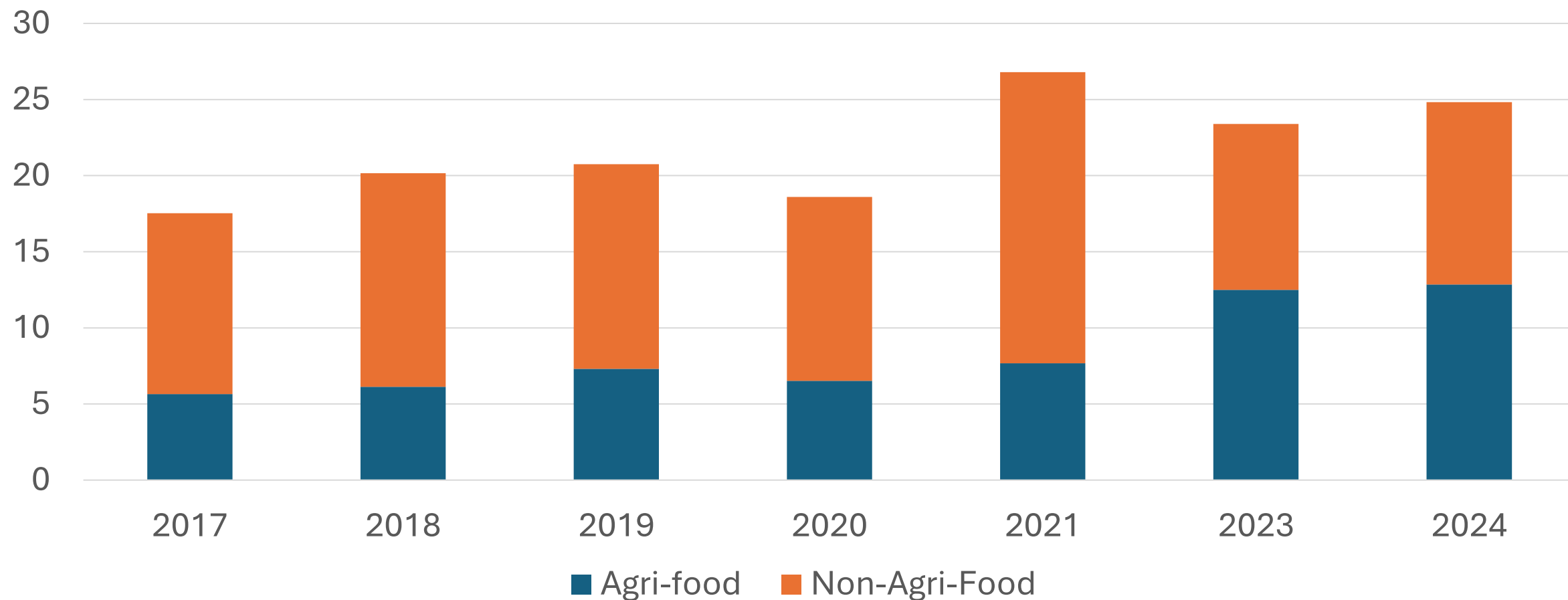
# EU became a major trade partner of Ukraine - Exports

Ukraine's Exports, in billion USD



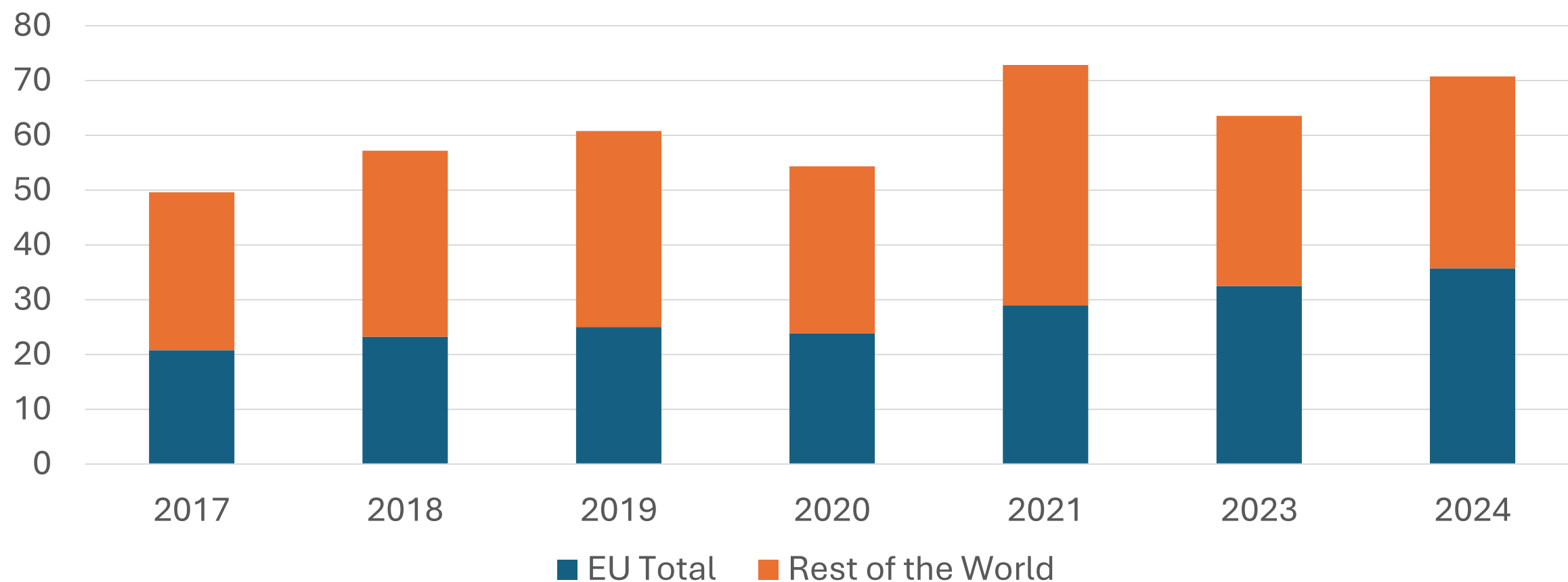
# Agricultural goods dominate in Ukraine's exports to the EU

Ukraine's Exports to the EU, in billions USD



# EU became a major trade partner of Ukraine - Imports

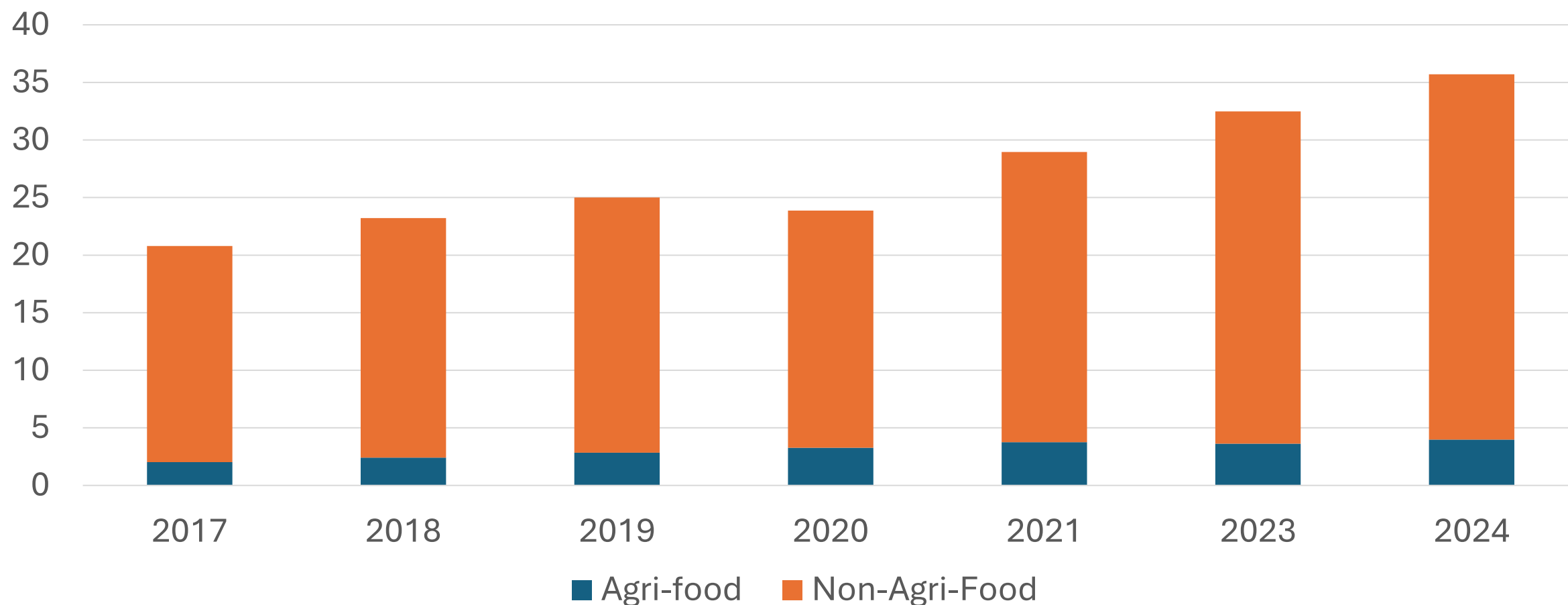
Ukraine's Imports, in billion USD



Source: own presentation using UKRSTAT data

# Non-Agro goods dominate in Ukraine's imports from the EU

Ukraine's Imports from the EU, in billion USD



Source: own presentation using UKRSTAT data

# EU imports from Ukraine, MY 2023/24

Selected agricultural products	Volume, in mln tones	% of total EU imports of a product
wheat	4.7	70.4
barley	0.7	49
maize	8.6	65
rapeseed	2.7	67
sunflowerseed	0.16	30
sunflowerseed meal	0.8	37.7

Source: EU Comission

# Example of European Solidarity Lanes (ESL)

- Scenario 1. Weak ESL - limited ESL capacity (12 mln t/year)
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- Scenario 2: Strong ESL - full transshipment capacity of ESL (30 mln tons/year)
- Both scenarios assume no agricultural exports from Ukraine's Black Sea ports
- GTAP Version 7 CGE model and GTAP 11 database updated to 2021 (160 regions and 65 economic sectors)

# Example of European Solidarity Lanes (ESL) - Results

Selected regions/countries	Scenario 1: <b>weak ESL</b>		Scenario 2: <b>strong ESL</b>	
	GDP, %	Welfare, bln USD	GDP, %	Welfare, bln USD
Ukraine	-10.6	-17.6	-2	-4.6
Europe	-0.01	-0.5	0.01	1.9
Middle East North Africa	-0.07	-1.9	-0.03	-1.1

Source: [Countryman](#) et al (2024)

# Conclusions

- EU is a vital export market for Ukraine, badly needed for resistance and recovery
- EU overall also benefits from more liberalized trade with Ukraine