

Ukraine Invest

YOUR INVESTMENT MATTERS



INVESTMENT OPPORTUNITY OF AGROPROCESSING SECTOR

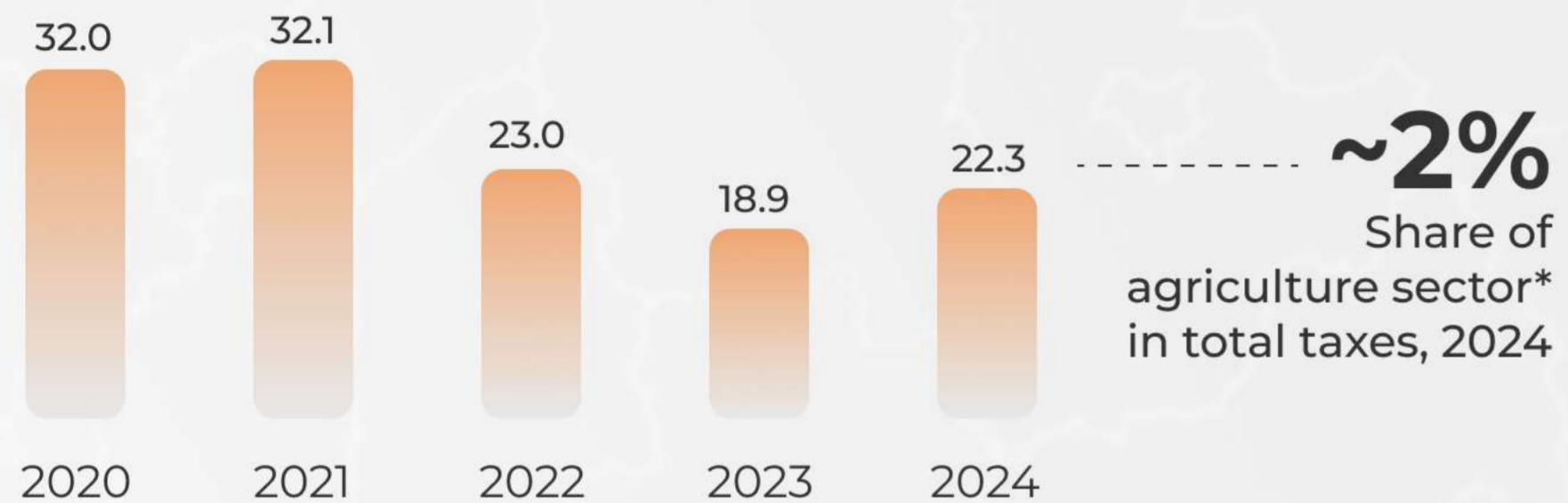


AGRICULTURAL SECTOR OF UKRAINE

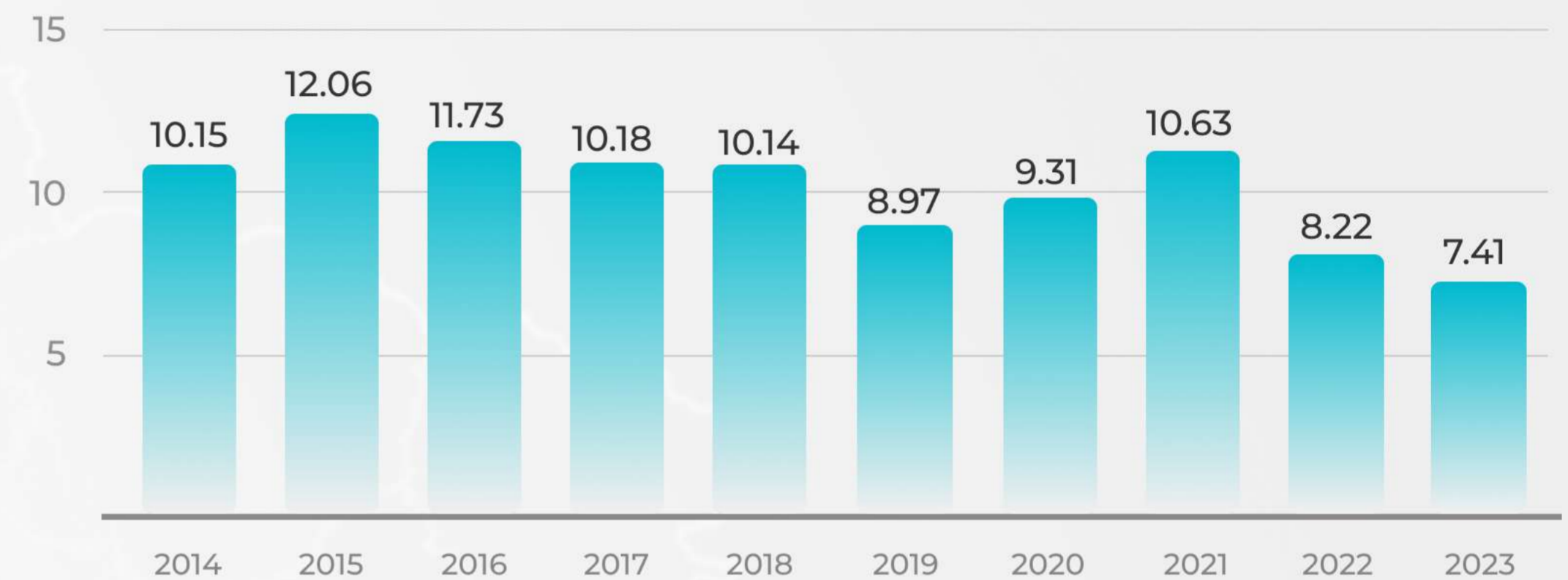


Macroeconomic overview

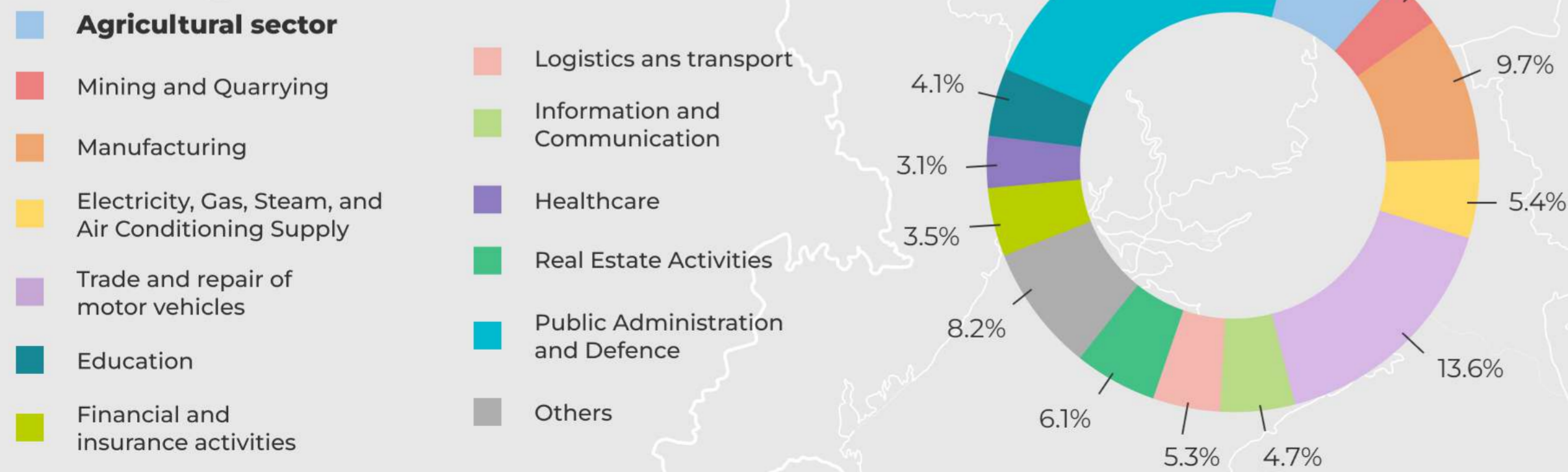
Taxes paid in the agriculture sector*, billion UAH



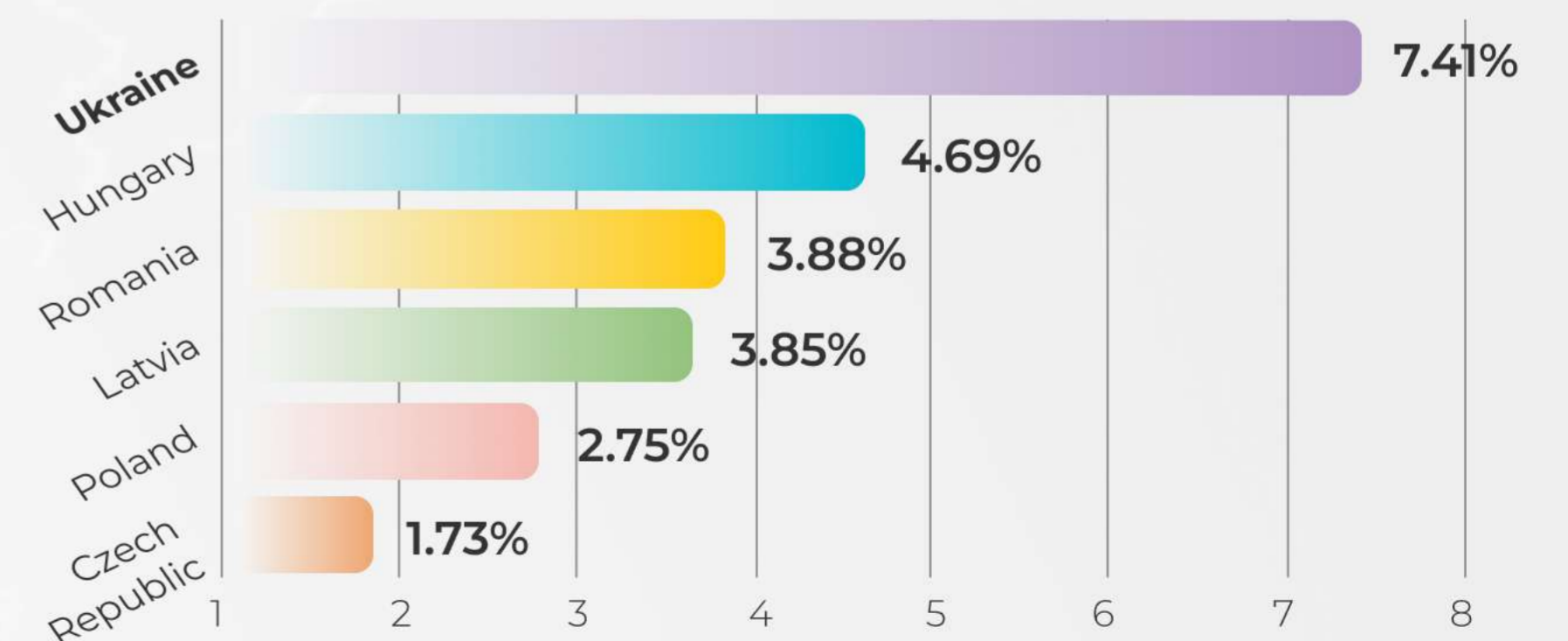
Agricultural sector share in Ukraine's GDP, %



Gross value added structure, %, 2023



Agricultural sector share in the country's GDP, 2023

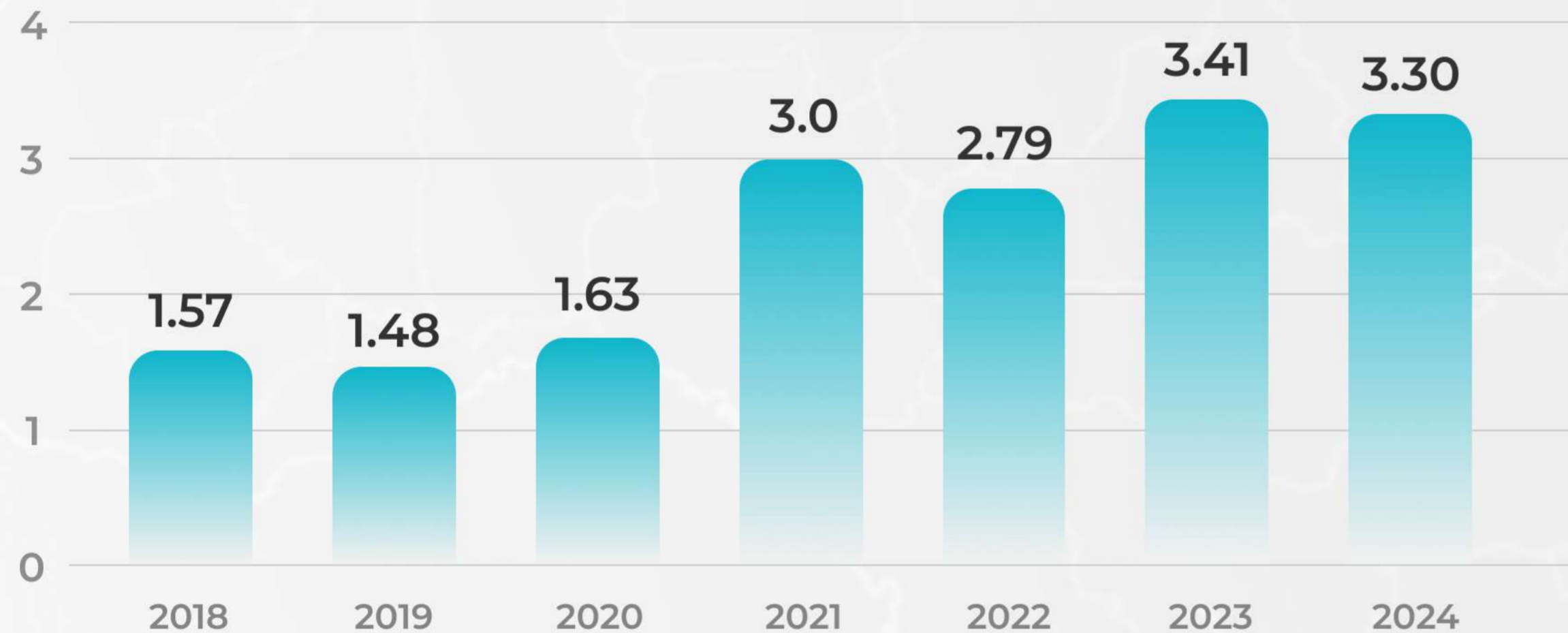


AGRICULTURAL SECTOR OF UKRAINE

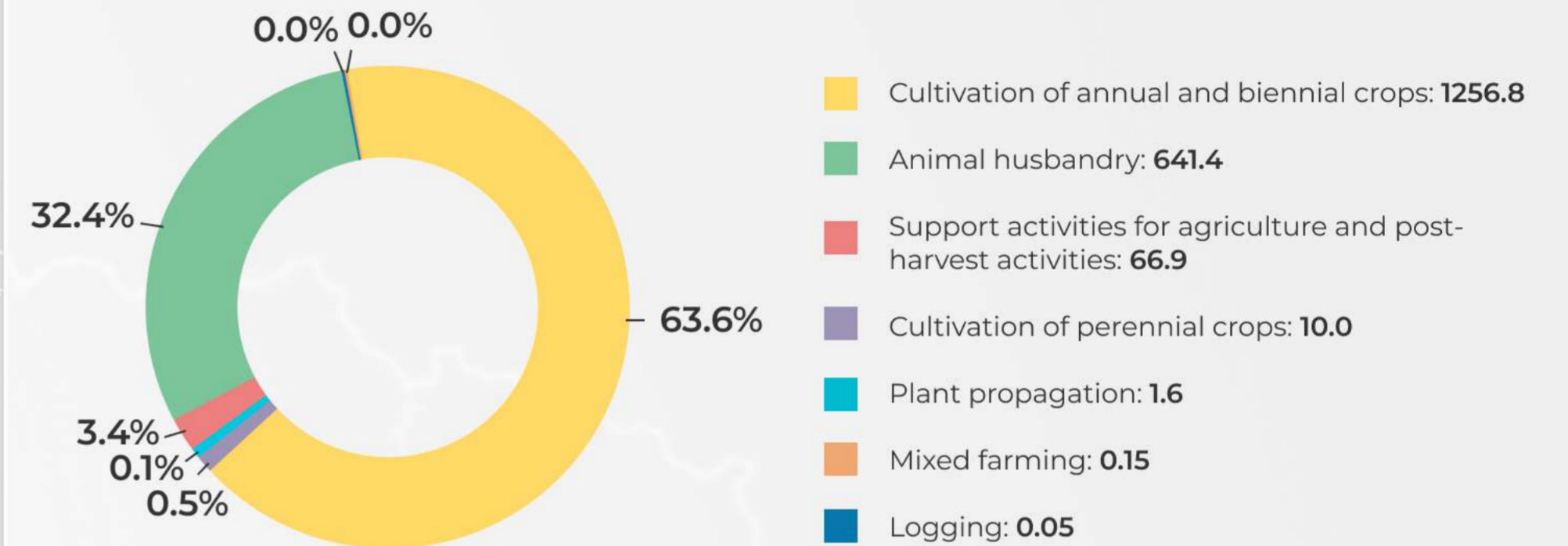


FDI snapshot

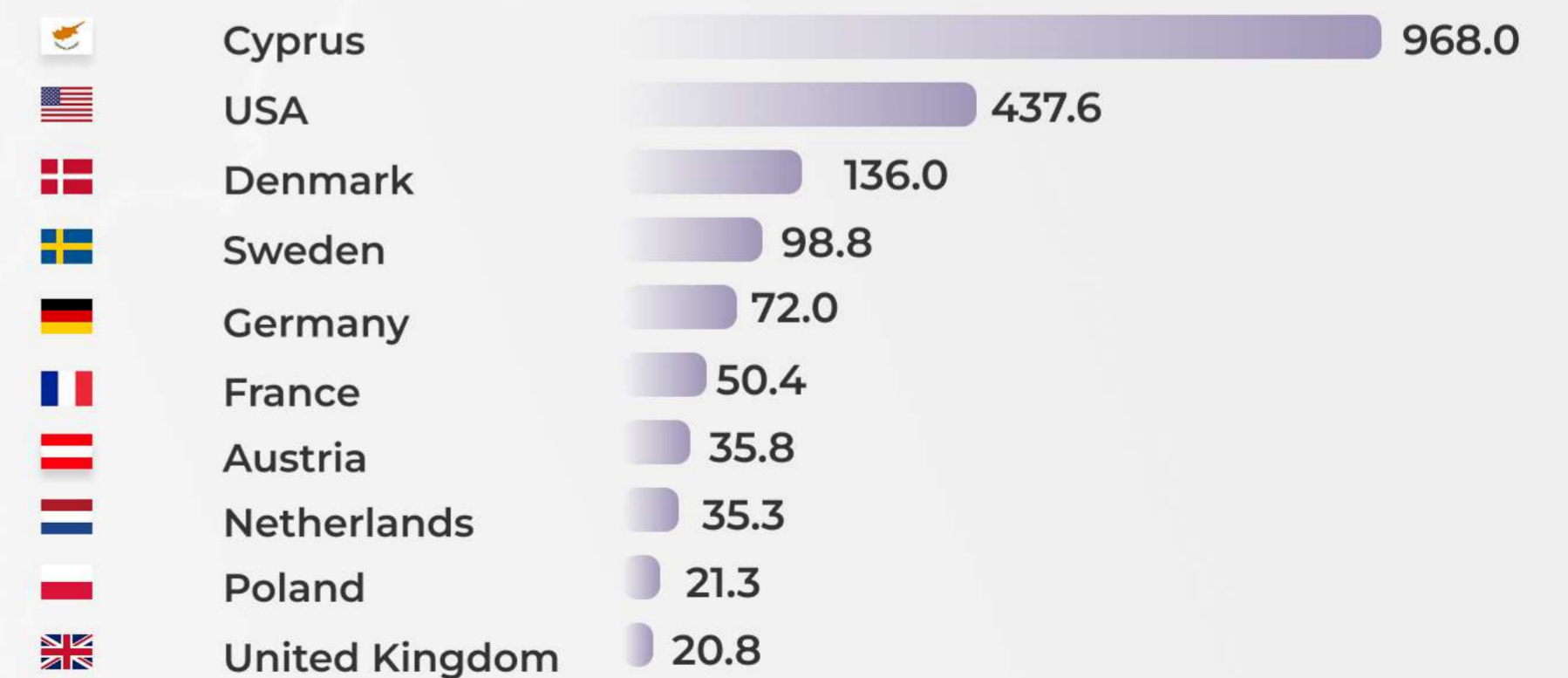
FDI stocks in agricultural sector*, billion USD



FDI stocks in the agricultural sector by economic activity group, million USD, 2024



Top countries investing in Ukraine's healthcare, million USD, 2024



6%

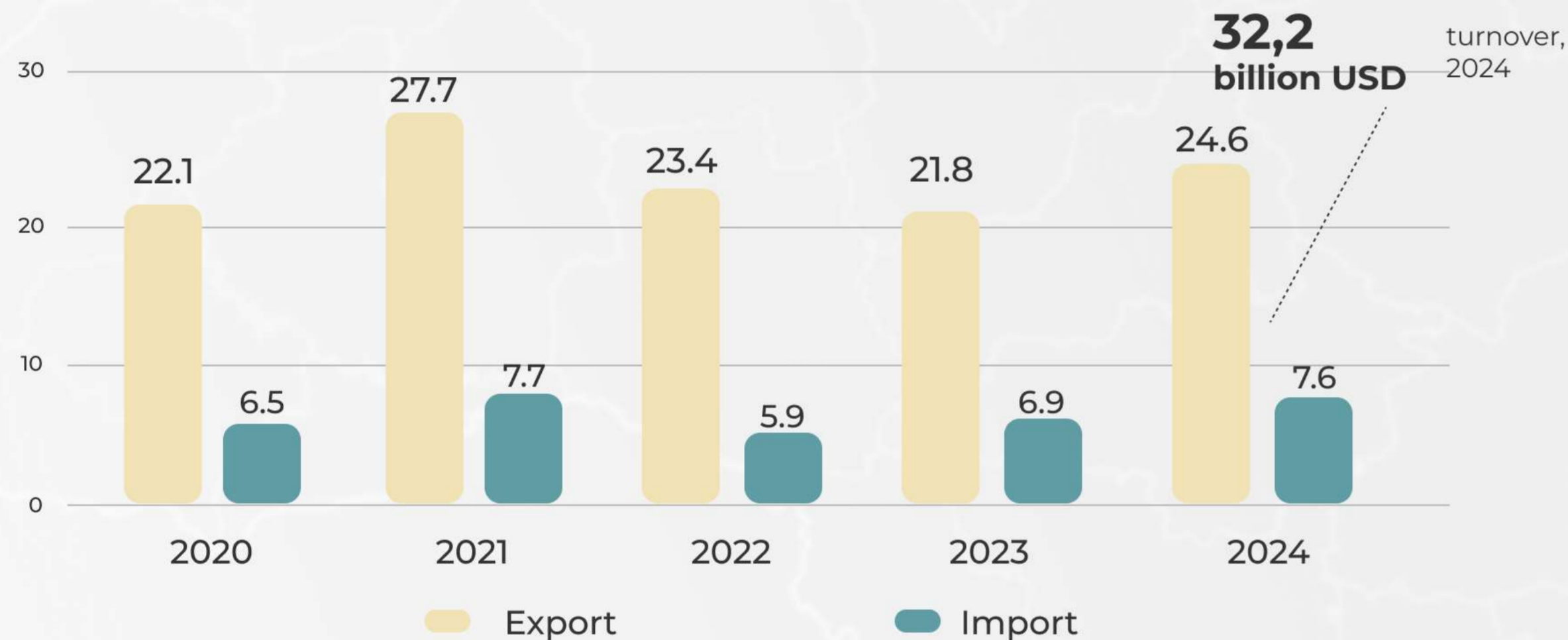
share of FDI stocks in **agricultural sector** in Ukraine relative to other economic activities, 2024

AGRICULTURAL SECTOR OF UKRAINE



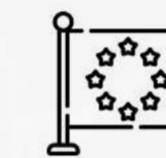
Agricultural products turnover

Food and agricultural products turnover in Ukraine, billion USD



Agricultural exports from Ukraine by country, billion USD, 2024

	Spain	2.67		Italy	1.30
	Netherlands	1.79		China	1.30
	Turkey	1.66		Germany	1.26
	Poland	1.45		India	0.85
	Egypt	1.41		Romania	0.83



~55%

agricultural exports share from Ukraine to Europe, ~30% to Asia and ~12% to Africa

Agricultural imports to Ukraine by country, million USD, 2023

	Poland	854.1		Netherlands	302.6
	Italy	587.6		USA	280.9
	Turkey	575.3		Spain	272.9
	Germany	567.1		China	247.9
	Norway	331.4		France	239.2

EXPORTED, 2024



20.6 mln t
of wheat



29.6 mln t
of corn



6.1 mln t
of sunflower oil



78.3 mln t total net weight of exported products

AGRICULTURAL SECTOR OF UKRAINE



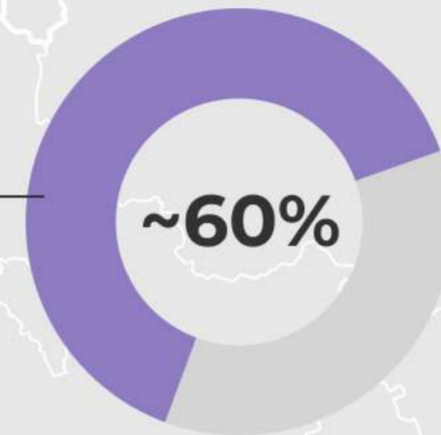
Agricultural exports



24.6 billion USD

Exports of food and agricultural products of Ukraine, 2024

SHARE IN TOTAL EXPORTS OF UKRAINE



4th place

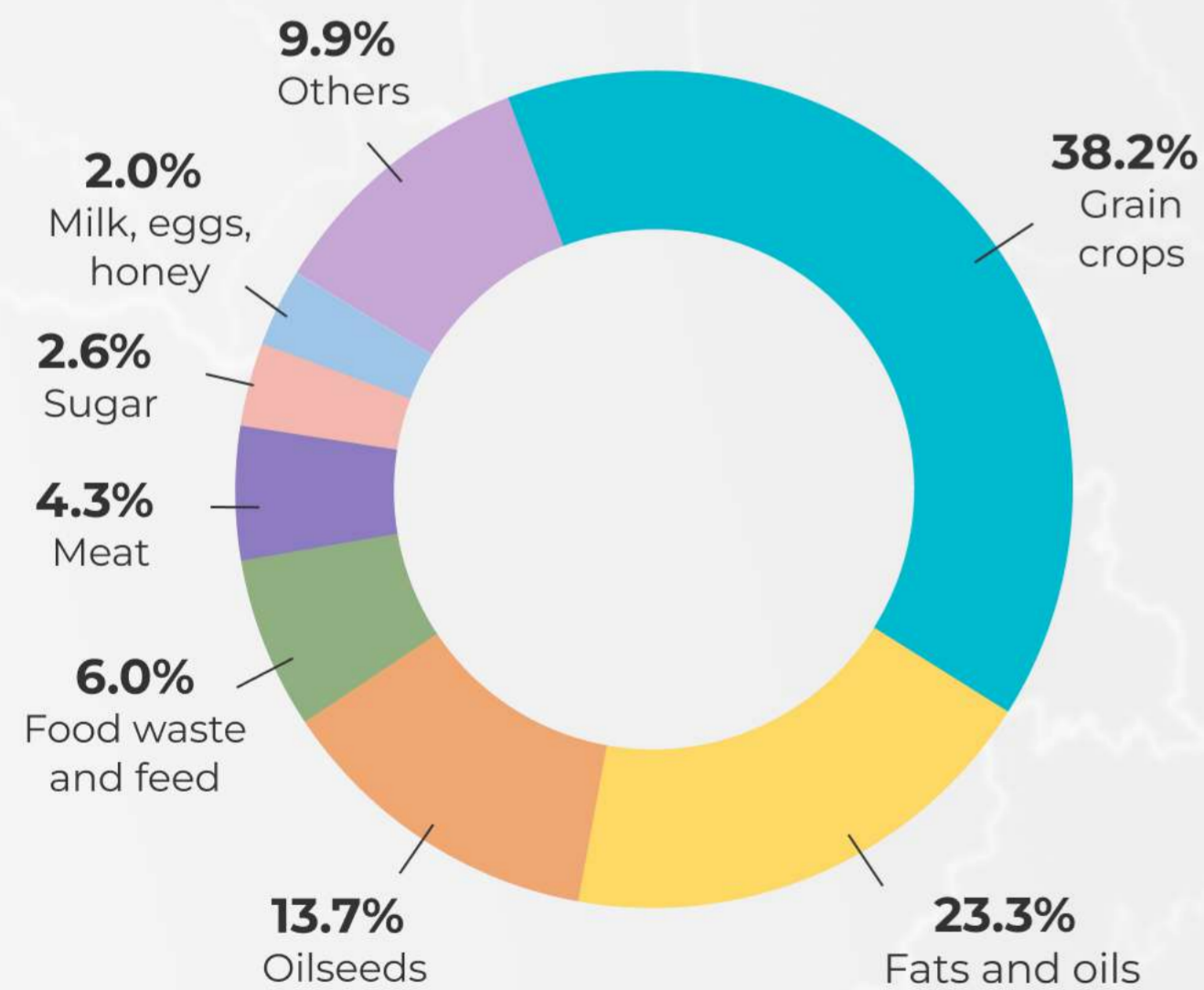
Ukraine's position among the world's cereals exporting countries



7.8%

of world wheat exports are supplied by Ukraine

Structure of agricultural exports by value, 2024



Ukraine's position in global agricultural exports, 2024

Category	Position	billion USD	%	Category	Position	billion USD	%
Sunflower oil <small>safflower or cotton-seed oil</small>	1	5.1	29.3	Barley	7	0.5	6.5
Rape seeds <small>or colza seeds</small>	3	1.8	13.3	Poultry	9	0.9	2.7
Oilcake <small>and other solid residues</small>	3	1.0	10.1	Soybean oil	9	0.3	2.6
Maize or corn	4	5.1	11.1	Vegetable products	9	0.03	2
Wheat, <small>meslin</small>	5	3,7	7.8	Grain sorghum	9	0.01	0.4
Natural honey	5	0,2	7.2	Rape, <small>colza or mustard oil</small>	11	0.2	2
Soybean oil	6	1.3	1.7	Egg products	12	0.03	1.8
Linseed	6	0.04	3.1	Buckwheat, millet	12	0.03	2.4

AGRICULTURAL SECTOR OF UKRAINE



Access to regional consumer markets

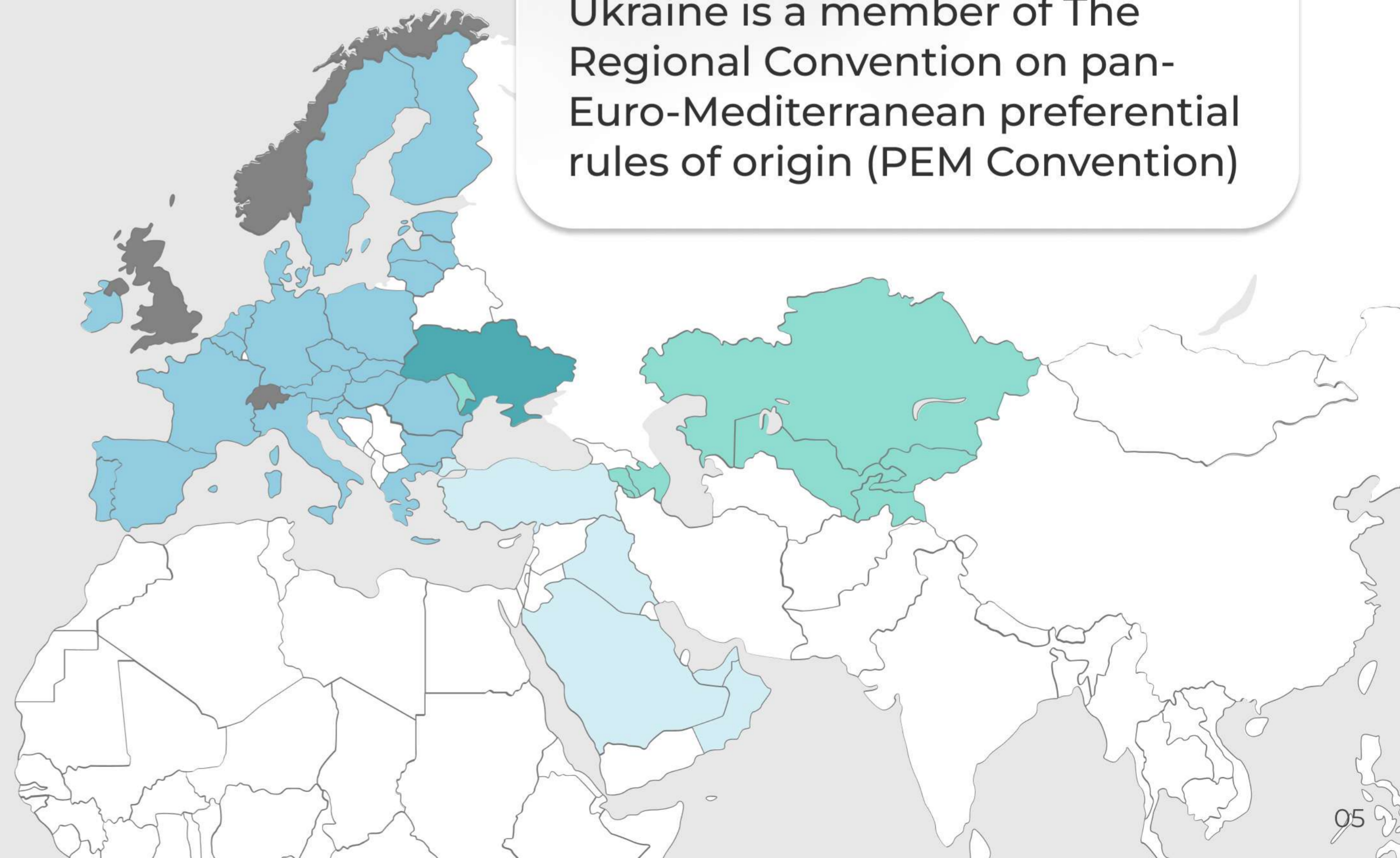
Nearly 1 bln consumer market can be reached within 2 500 miles

- ~450 mln **European Union**
- ~90 mln **CIS (selected)**
- ~500 mln **Non EU**
- ~40 mln **Ukraine**

About **6 mln** Ukrainian refugees were registered in Europe as of 1H 2024

Ukraine has 19 FTAs with 47 countries, including DCFTA with the EU

Ukraine is a member of The Regional Convention on pan-Euro-Mediterranean preferential rules of origin (PEM Convention)



AGRICULTURAL SECTOR OF UKRAINE



Losses* due to full-scale invasion



1.9 million ha of agricultural land contaminated or unusable due to landmines

4.3 USD annual export losses due to landmines

Total agricultural damages by category, 2024

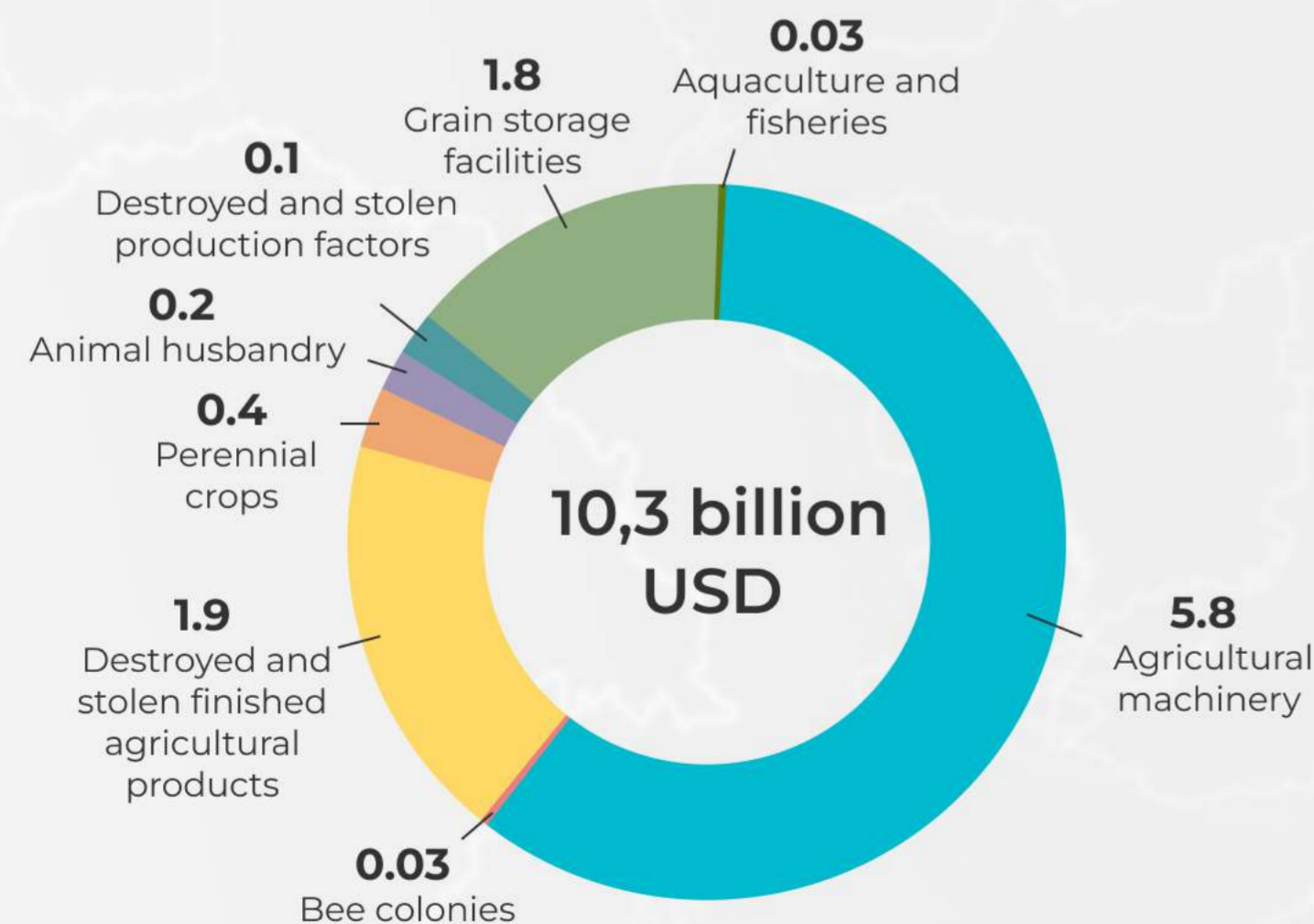


10.3 billion USD
Amount of direct damages caused to the agricultural sector of Ukraine



6.1% agricultural sector and land resources

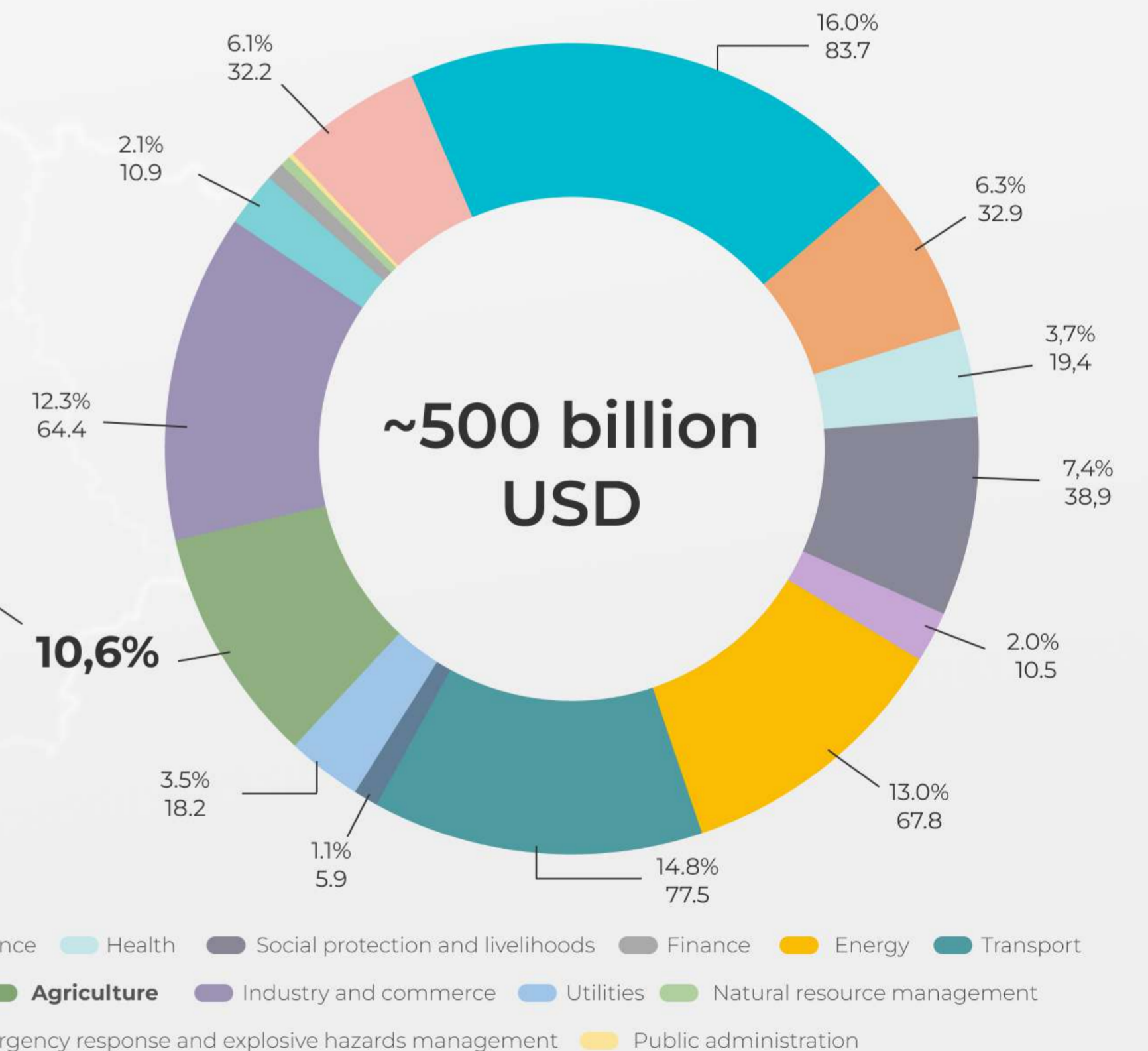
Structure of damages to the agricultural sector and land resources, billion USD:



Recovery and reconstruction needs, billion USD**



55.5 billion USD in reconstruction and rehabilitation needs



Sources: KSE, RDNA4: European Business Association, Diia, World Bank Group, European Commission and the UN system, Ministry of Agrarian Policy and Food

* - 02.2022 – 01.2024

** - Recovery and reconstruction needs for 10 years from 2025 to 2035, as of December 2024

AGRICULTURAL SECTOR OF UKRAINE



Food security



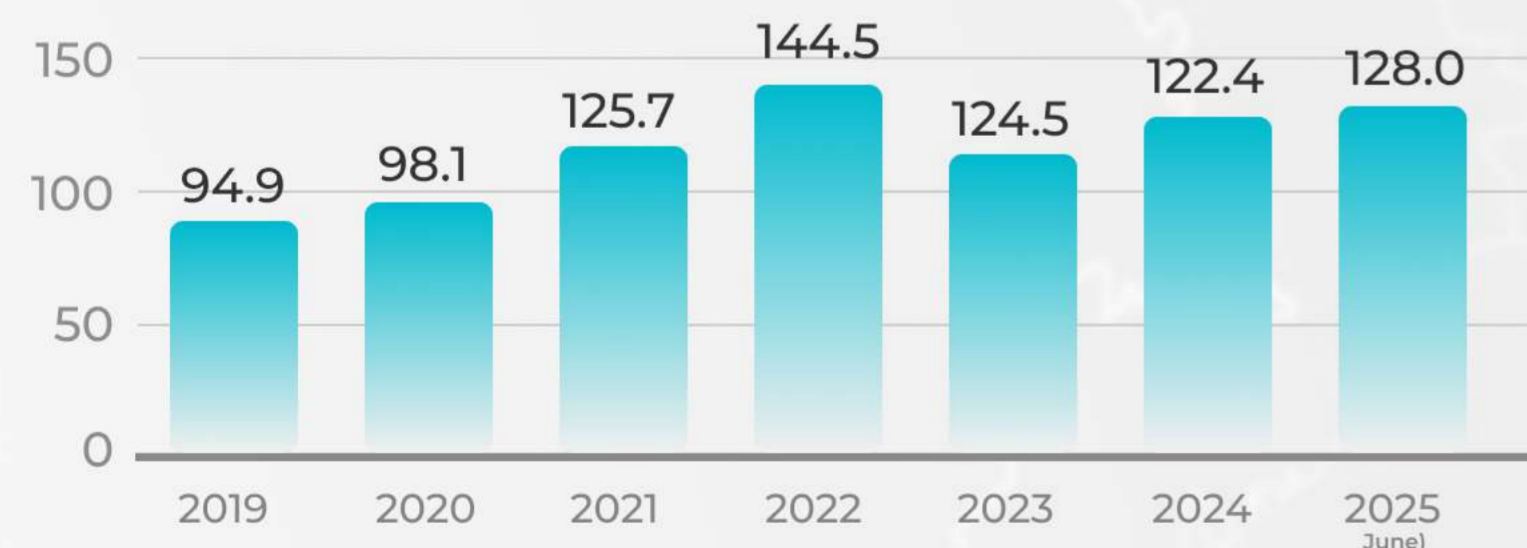
Russia's full-scale invasion has significant implications for **global food security**, as Ukraine is a major supplier of agricultural products, including grain, to the world market

Disrupted traditional supply chains have put more than 70 million people around the world at risk of hunger

~15%

the average increase in global food prices in 2022 compared to the previous year. Prices reached a historic peak in March, rising by 27% relative to December 2021 levels

This sharp surge was primarily driven by the full-scale war in Ukraine and its impact on global markets



over **295 million**

people across 53 countries and territories faced acute hunger as of 2024, while the number of those experiencing catastrophic levels of hunger reached a record high



Black Sea Grain Initiative is an agreement signed on 22 July 2022 by **Turkey, Ukraine** and **russia** with the support of the **UN**, establishing sea corridors for the export of Ukrainian grain through three ports. **russia** withdrew from the agreement a year after it was signed. The **blockade of Black Sea ports** caused significant challenges for grain exports to global markets, resulting in decreased revenues and growing stocks of unsold grain in Ukraine

In 2024, the military successfully facilitated the passage of 9,061 civilian vessels through the maritime corridor, enabling the export of over **70 million tonnes of cargo, including agricultural products**



The "**Grain from Ukraine**" initiative, launched in 2022 in cooperation with the UN World Food Programme, delivers Ukrainian grain to countries in Africa, Asia, and the Middle East facing severe food insecurity

As of the end of March 2025, Ukraine had delivered over **280 thousand tonnes** of food under the initiative. "Grain from Ukraine" has already helped protect more than **20 million people** in the most vulnerable countries from hunger



In 2024, the Government of Ukraine approved the **Food Security Strategy of Ukraine** until 2027

The strategy aims to stimulate the development of agricultural production, fill the food market and ensure the availability of food for all groups of the population

AGRICULTURAL SECTOR OF UKRAINE



Agricultural potential

THE SHARE OF OF BLACK SOIL IN UKRAINE



~60%
~35 mln ha of Ukraine's territory

UKRAINE IS RANKED BY THE AMOUNT OF BLACK SOIL

6th position
in the world top (2022)

AGRICULTURAL POTENTIAL OF THE LAND

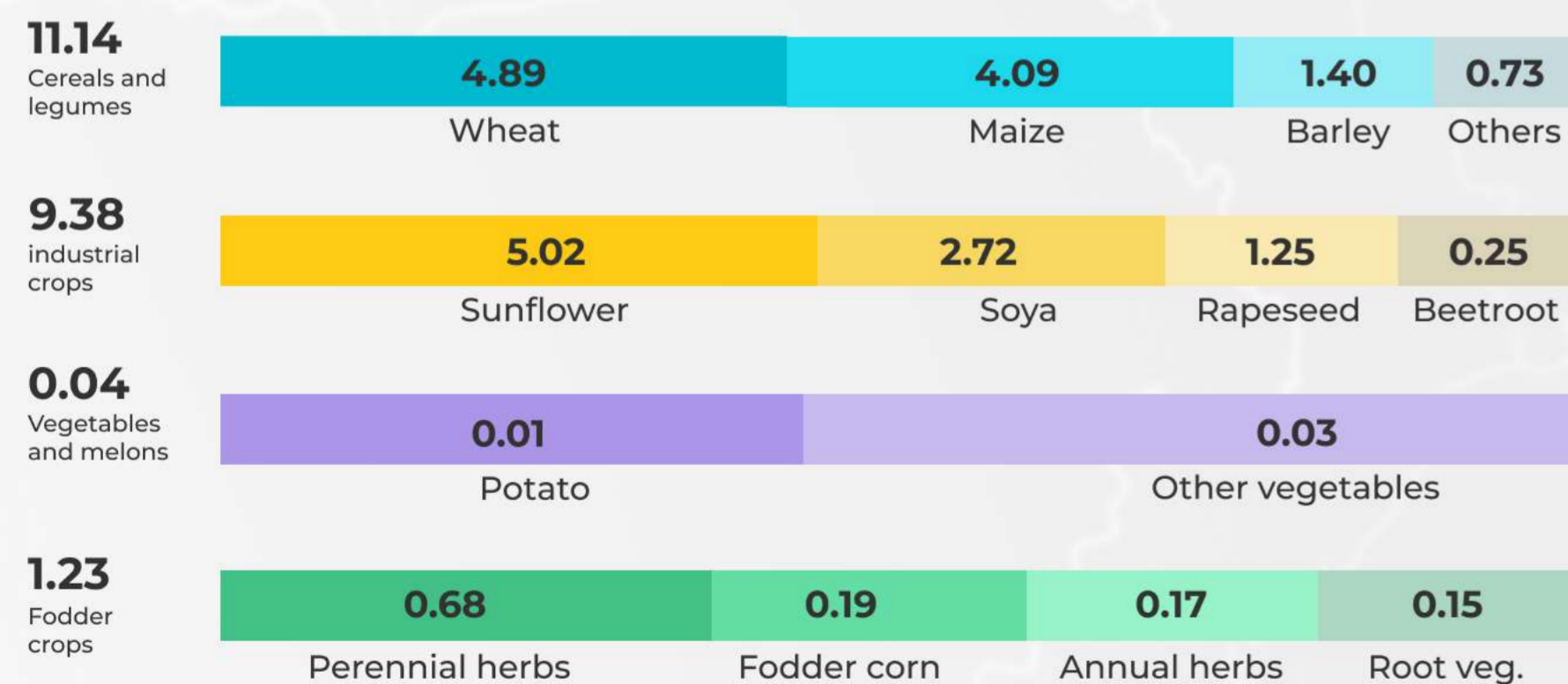


41.5 mln ha
of which **20.6 mln ha** of agricultural land

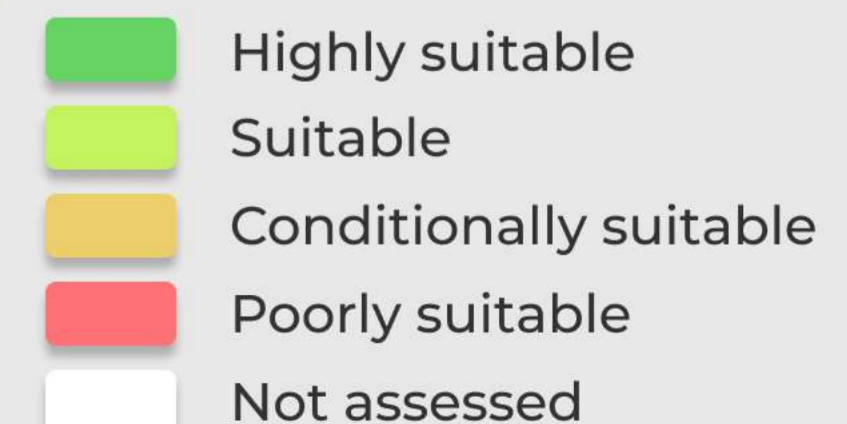
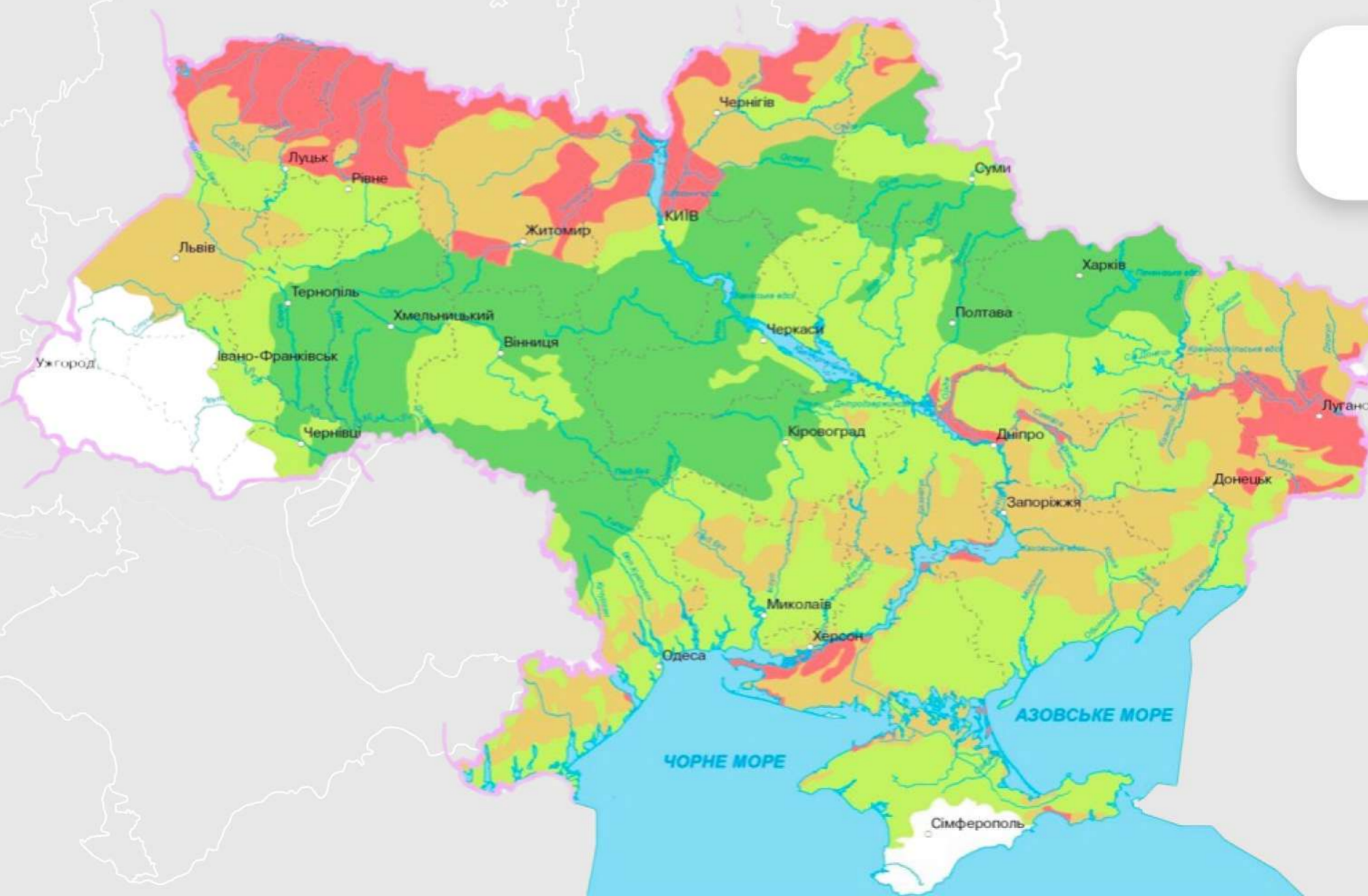
SHARE OF AGRICULTURAL LAND

~70%
of the total amount of land in Ukraine

Sown areas of major crops, million ha, 2024



Soil suitability for organic farming



AGRICULTURAL SECTOR OF UKRAINE



Agricultural potential

FOOD SUPPLY POTENTIAL



0.6 bln
people Ukraine can feed

HARVEST OF GRAINS AND OILSEEDS



~70 mln t
in 2024

AGRI-CULTURAL EMPLOYEES



456 thsd
people in 2023

AVERAGE SALARY



~600* USD
per month
in the category agriculture, agribusiness as of July 2025

5 987

Total number of graduates with a **bachelor's** degree in **Agricultural Sciences and Food Technologies 2023/2024**

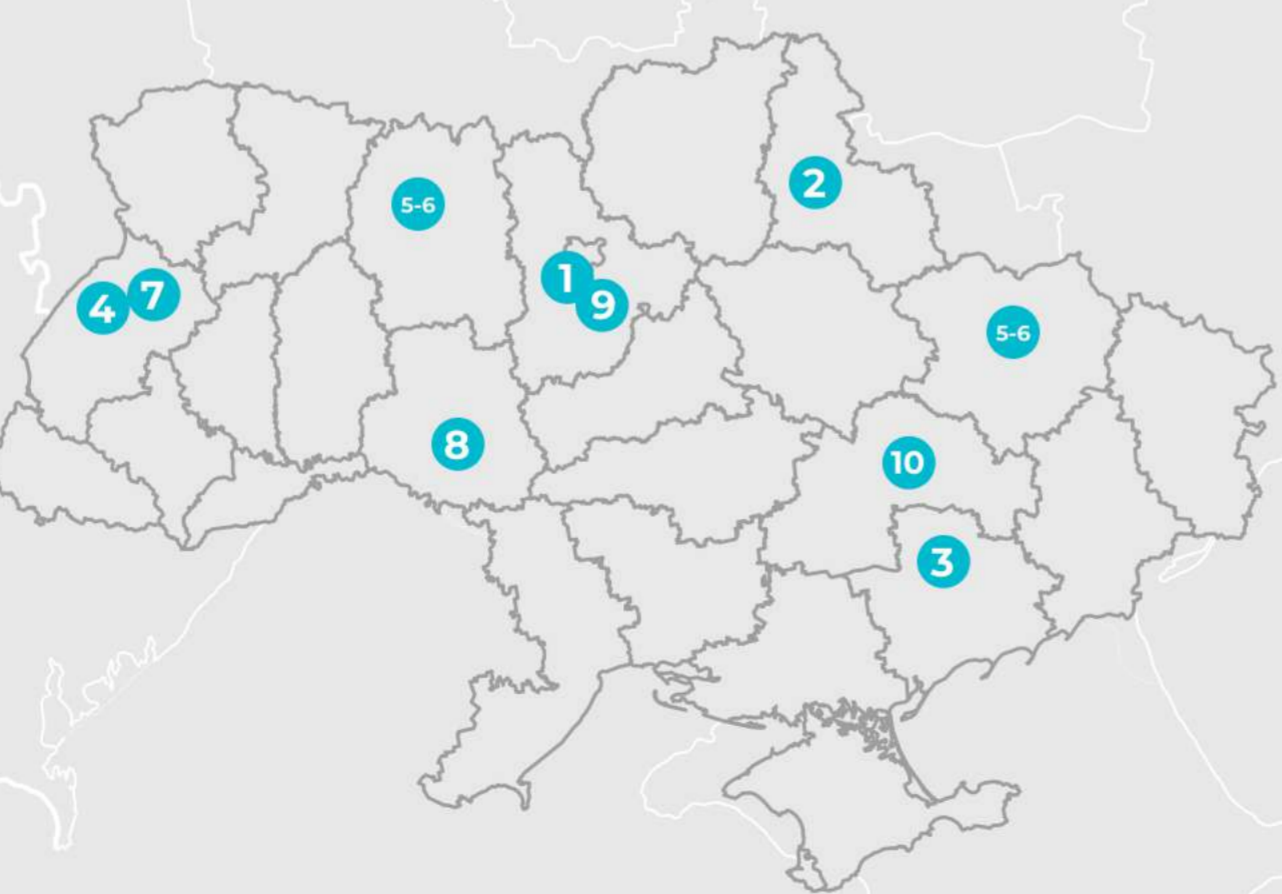
650

Total number of graduates with a **master's** degree in **Agricultural Sciences and Food Technologies 2023/2024**



Agricultural universities of Ukraine, 2025

- | | | | | | |
|----------|--|---|-----------|--|---|
| 1 | | National University of Life and Environmental Sciences of Ukraine | 5 | | State Biotechnological University |
| 2 | | Sumy National Agrarian University | 6 | | Polissia National University |
| 3 | | Dmytro Motornyi Tavria State Agrotechnological University | 7 | | Lviv National University of Nature Management |
| 4 | | Stepan Gzhytskyi National University of Veterinary Medicine and Biotechnology of Lviv | 8 | | Vinnytsia National Agrarian University |
| | | | 9 | | Bila Tserkva National Agrarian University |
| | | | 10 | | Dnipro state agrarian and economic university |




AGRICULTURAL SECTOR OF UKRAINE








Animal husbandry

Amount of farm animals, mln. heads, 2025*

Cattle, incl. cows		2.0
		1.1
Pigs		4.5
Sheep and goats		0.8
Poultry		187.6

Livestock production by main product types, 2024

Category	Production
 Eggs	11.6 billion units
 Milk	7.2 million t
Cattle	7.1 million t
Goats	146.4 thsd t
Sheep	10.9 thsd t
 Wool	1119 t
 Meat (in slaughter weight)	2.3 million t
Poultry	1.4 million t
Pigs	672.1 thsd t
Cattle	244.5 thsd t
Sheep and goats	11.7 thsd t
Rabbits	8.0 thsd t
Horses	5.7 thsd t
 Honey	53.5 thsd t

AGRICULTURAL SECTOR OF UKRAINE



Crops-growing

Production of agricultural crops, thsd. t, 2024

Category	Production, million t	Yield, centners per ha of the harvested area
 Cereal and leguminous crops*	56.2	50.6
 Sugar beet	12.8	505
 Sunflower*	10.9	21.8
 Vegetables	1.0	372
 Potatoes	0.4	252
 Fruits and berries	0.3	93.1



Agricultural producers in the Odesa, Chernihiv, and Poltava regions lead in gross grain production

In terms of yield, Khmelnytskyi, Chernihiv, and Ternopil regions are in the lead

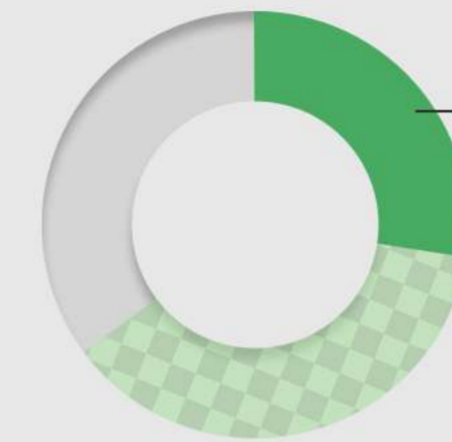
AGRICULTURAL SECTOR OF UKRAINE



Agroprocessing



The Law on State Support of Investment Projects with Significant Investments in Ukraine classifies **processing industry** as a **priority industry** and state support is envisaged of 30% of CAPEX



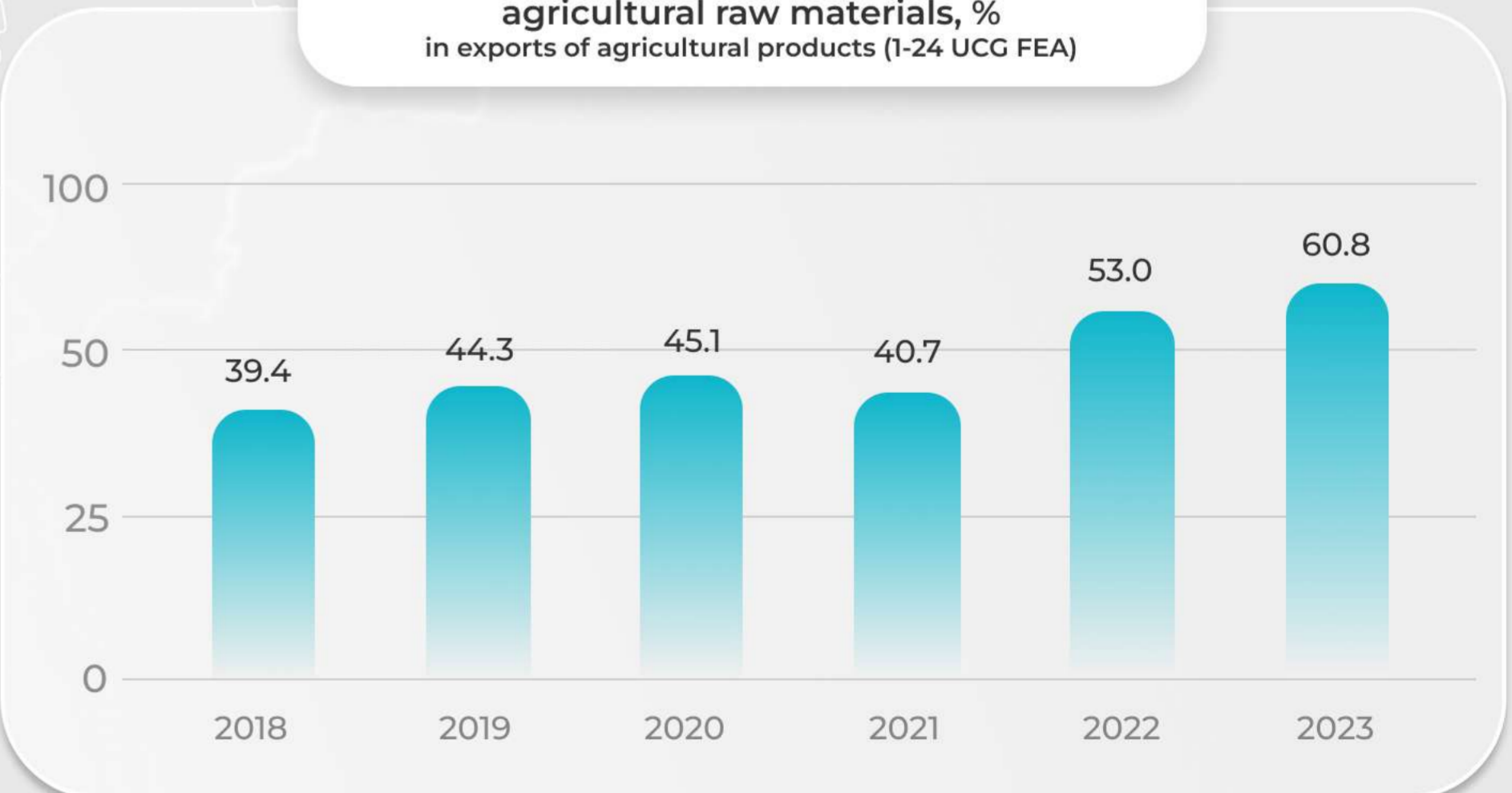
~26%

of agricultural products are processed in Ukraine, although the existing potential allows this figure to be increased to **68%**

Realizing this potential would contribute to a **GDP increase of at least 4%**, support the modernization of rural areas, stimulate infrastructure development, and create new jobs across the country.

Raw materials		Increase in product costs	Processed products	
Category	Cost, 1 t/ USD thsd		Category	Cost, 1 t/ USD thsd
Meat	2.2	<ul style="list-style-type: none"> 45% 217% 40% 200% 160% 150% 	Meat products	3.2
Milk, whey	1.7		Butter, cheeses	5.4
Vegetables, fruits, nuts	1.0		Fruit & Veg products	1.4
Grains	0.2		Flour	0.6
Oil plants	0.5		Oils	1.3
Sugar	0.8		Sugar products	2.0

Food industry products and processing of agricultural raw materials, % in exports of agricultural products (1-24 UCG FEA)



AGRICULTURAL SECTOR OF UKRAINE



Exports of agroprocessed products



AGRICULTURAL SECTOR OF UKRAINE










Start-ups and innovations



AgroTech is one of the priority sectors of innovation in Ukraine according to the **official state strategy for digital development of innovations until 2030**

Innovative technologies of the Ukrainian agricultural sector

-  electronic field maps
-  heading indicators/ autopilots
-  GPS monitoring (trackers) and fuel control sensors
-  satellite maps
-  drones (sprayers, deminers, unmanned harvesters)
-  weather stations and soil moisture sensors
-  forecasting programs (pests, diseases), and farm management systems

+3% to GDP

Economic efficiency of the AgriTech sector
(up to 11.7% in 2022)

Top 1 or 40%

share of the Ukrainian market of spraying drones in Europe in 2012

Using Agrodrones in Ukraine 2021-2023



3.1 mln ha

was processed using agrodrones in 2021-2023



reduced the amount of **fuel** used by **17.05 mln l**



reduced **carbon** emissions by **43.4 thsd t**



increased the **harvest** by **486.7 thsd t**



reduced water consumption by **620 thsd t**

AGRICULTURAL SECTOR OF UKRAINE



Land management structure

In 2021, Ukraine launched an agricultural land market for the free sale and purchase of land plots

- for individuals who are **citizens of Ukraine** in the amount of no more than **100 ha** per person
- since 2024, as part of the second stage of the land reform, also for **legal entities**, and the permitted area has increased to **10 thsd ha** of land (legal entities account for 20% of all land market participants*)



60.7 thsd UAH

Average cost per hectare as of June 2025

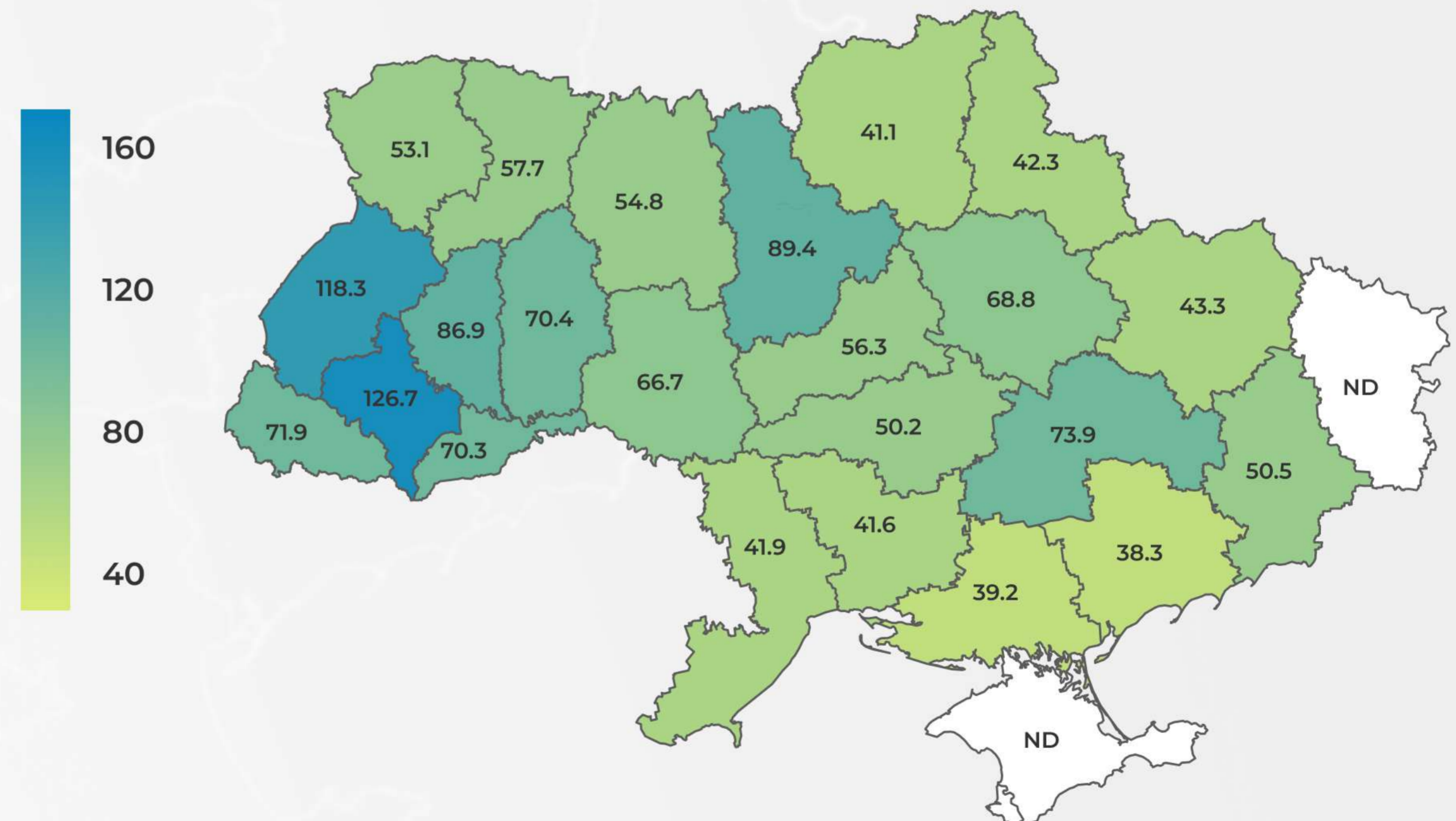
Agricultural land market statistics*

339.6
thsd transactions
land trade*

636
thsd ha
area*

30.4
billion UAH
sales amount

Cost of agricultural land, thsd UAH*



AGRICULTURAL SECTOR OF UKRAINE



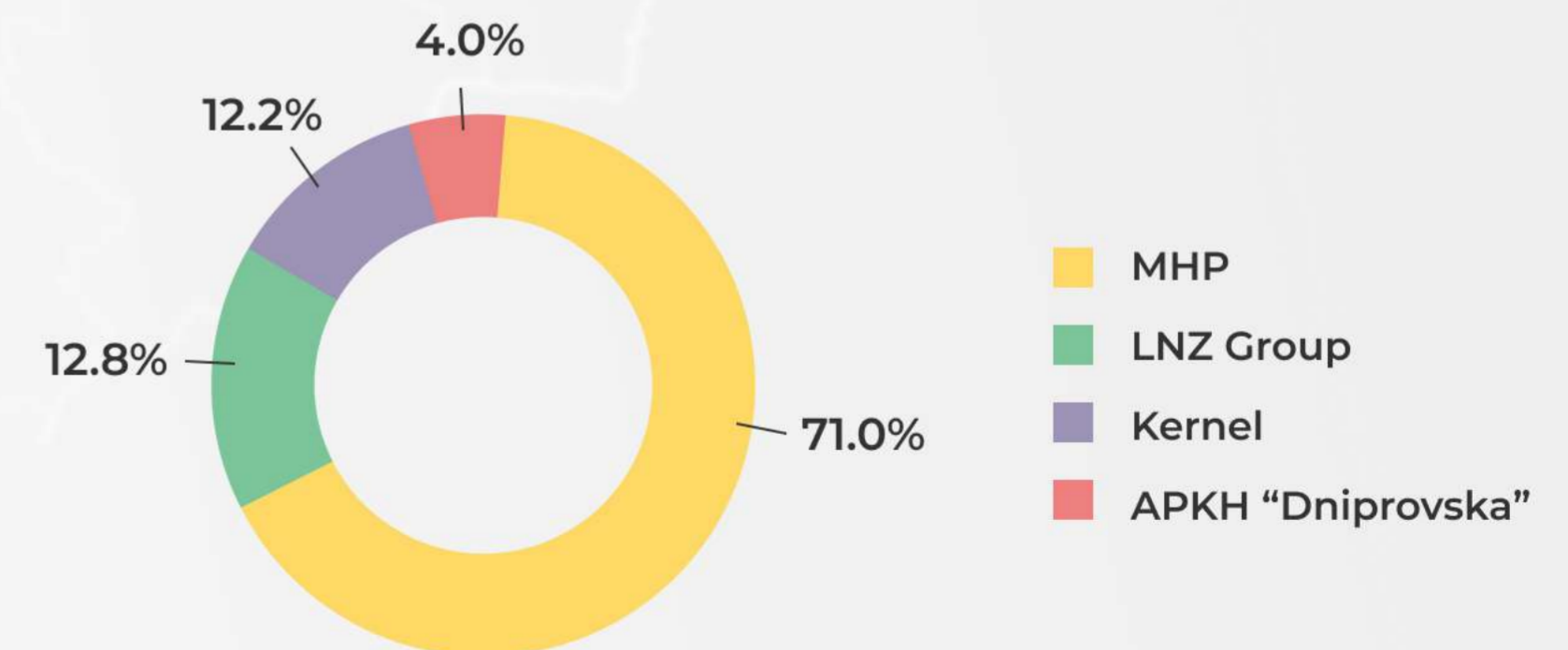
Investment climate

The largest private agricultural and food industry companies in Ukraine*



Top 10 Ukrainian agricultural companies by revenue, UAH billion, 2024**

Vinnytsia Poultry Farm / MHP	49.7
Myronivska Poultry Farm / MHP	24.97
Lebedyn Seed Plant / LNZ Group	18.7
Zernoprodukt MHP / MHP	9.98
Enselco Agro / Kernel	9.67
Druzhba-Nova / Kernel	8.16
NVF Urozhai / MHP	6.84
Starynska Poultry Farm / MHP	6.74
PK Dniprovskiy / APKH "Dniprovsk"	5.81
Oril-Leader / MHP	5.58



INVESTMENT INCENTIVES



State support

Forms of state support:

- special budgetary subsidies
- partial reimbursement of borrowed funds

State program 'Affordable Loans 5-7-9'

- simplified conditions for obtaining loans from banks for small and medium-sized businesses
- Loans of up to **UAH 90 mln** at an interest rate of **5-9%** per annum



Over
6 billion UAH

Allocated for **support of the agricultural sector** in the State Budget of Ukraine for 2025

- **1 billion UAH** – livestock and agro-processing
- **4.7 billion UAH** – subsidies per hectare, for cows, sheep, and goats
- **200 million UAH** – land reclamation (melioration)
- **5 million UAH** – social security compensation (single social contribution) for family farms
- **80 million UAH** – concessional loans for farmers
- **1.37 billion UAH** – grants (orchards, greenhouses)
- **1 billion UAH** – demining of agricultural land

Types of state support by direction



special budget subsidy for existing **bee** colonies



partial reimbursement of the cost of breeding **animals** purchased for further reproduction



partial reimbursement of the cost of construction and/or reconstruction of **livestock farms and complexes**, fish farms, milking parlours, and agricultural processing enterprises



partial reimbursement of the cost of construction and/or reconstruction of **grain storage and processing** facilities



special budgetary subsidy for keeping **goats** and **sheep**



special budget subsidy for **cow** growth



repayment of **budgetary payables** under the programme 'State support for the development of livestock and agricultural processing'



25% compensation for agrarians for **agricultural machinery and equipment** of Ukrainian production, the share of localisation of which exceeds 60%

INVESTMENT INCENTIVES



Significant investments

REQUIREMENTS FOR INVESTMENT PROJECT



12+ EUR mln
of investment



10+
of new jobs



up to 5 years***
of project
implementation



**construction,
modernization**
technical and/or
technological
reequipment of objects

FORMS OF SUPPORT



CIT exemption*
(for 5 years by
choice)



**Exemption from
VAT**
for importing new
equipment and
components to it **



Exemption from **import
duties** for new
equipment
and components to it **



Construction/compensation
for built **engineering and
transport infrastructure**
(highways, communication
lines, utilities, etc.).



Lease of **state or
communal land
plots without
land auctions**



Compensation for **costs
of connection to
engineering and
transport networks**



**Land tax exemption/
reduced land tax
rates**



Exemption from
compensation **for
losses of forestry
production**

AMOUNT OF SUPPORT

up to **30%**
CAPEX



**For more detailed information,
we recommend paying
attention to the following
regulatory acts**



* Not applicable to projects in the field of extraction for the purpose of further processing and/or enrichment of natural resources.
** List and volume of equipment is approved by the CMU for each project.
*** The applicant, not earlier than 18 months before the date of submission of the application to the authorized body, may make investments in investment facilities in the amount not exceeding 30% of the total amount of significant investments required for the implementation of an investment project with significant investments

INVESTMENT INCENTIVES

Industrial parks

The implementation of investment projects on the territory of industrial parks does not exclude the opportunity to receive additional incentives, in particular, provided for by the Law of Ukraine "On State Support for Investment Projects with Significant Investments" or the legal regime of Diia.City.



non-refundable financing for arranging an industrial park and/or construction of related infrastructure facilities* **up to UAH 150 million****



exemption from compensation for losses of **forestry production*****



full or partial compensation of interest rates on loans for arranging an industrial park, carrying out economic activity****



compensation for connecting 1 to engineering and transport infrastructure **up to UAH 150 million** (during martial law - only to power grids 2)



exemption from **real estate tax** for industrial buildings



land tax exemption / **reduced** land tax rates



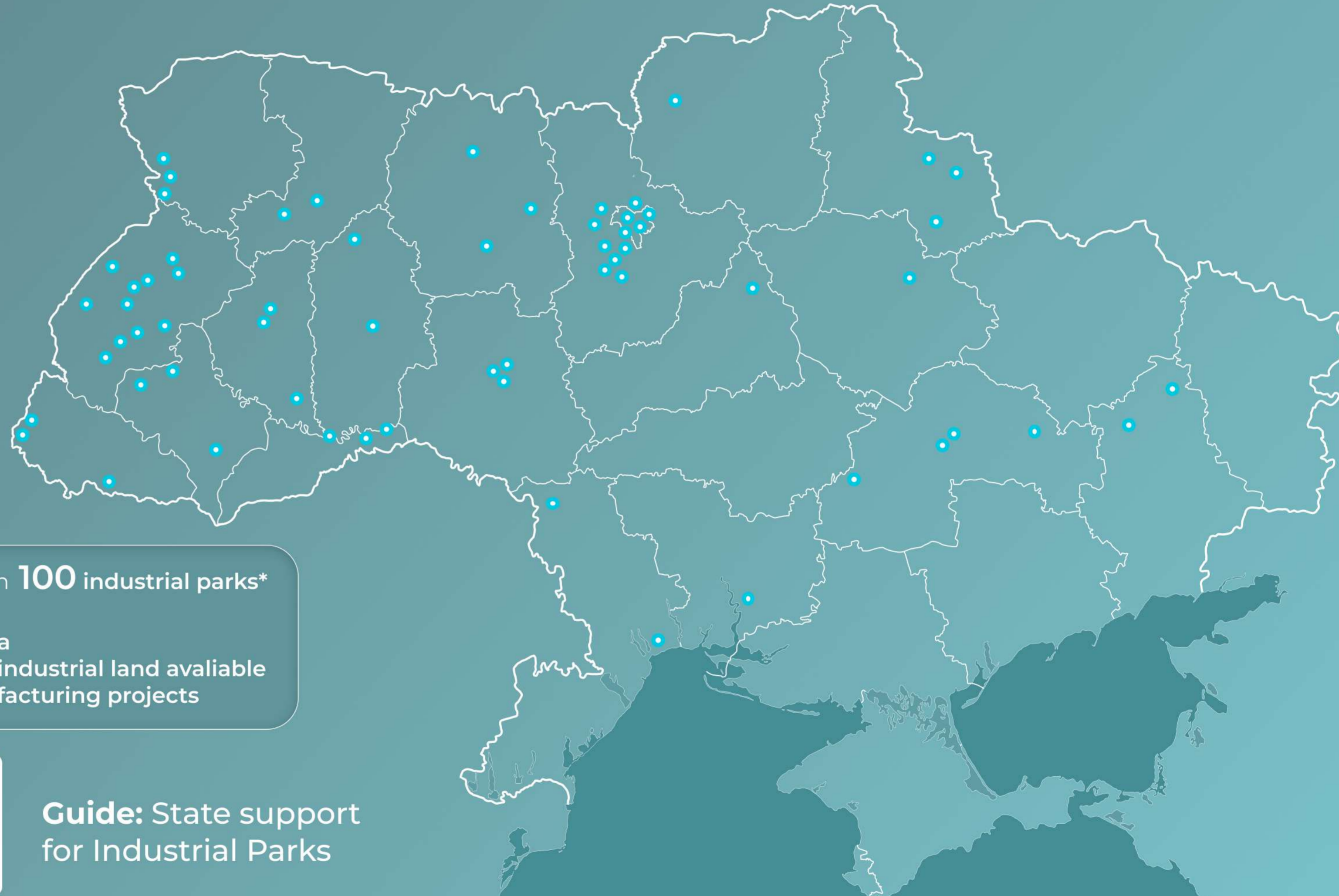
CIT exemption for 10 years (only if reinvestment)



exemption from **import duties** for new equipment



VAT exemption for importing new equipment



Guide: State support for Industrial Parks

* - Provided to managing companies and initiators of creation of industrial parks.

** - According to the Procedure for the provision of funds for the arrangement of industrial parks, approved by the Resolution of the Cabinet of Ministers of Ukraine dated June 4, 2024 No. 644.

*** - Regarding the use of land plots with a change in purpose for the establishment of industrial parks according to Article 208 of the Land Code..

**** - During the period of martial law and for six months after it ends or canceled, the Procedure for providing full or partial compensation of interest rates on loans for the establishment and/or implementation of economic activities within industrial parks has been suspended.

INVESTMENT INSURANCE



International Agency

Ukrainian agencies

Government agencies

1-3%

acceptable level of insurance rates

82%

businesses are ready to insure during of war



A formalized agreement on the implementation of the investment insurance mechanism for foreign investments: **2022**

Annual rate: **2-3%**

Insurance period: **10 years**

Coverage of the amount of losses: **up to 90%**

Sure Trust Fund: USD 110 mln, goal - USD 330 mln



Law No. 9015 "On Amendments to the Law of Ukraine "On financial mechanisms for stimulating export activity" regarding insurance of investments in Ukraine against military risks": **2023**

Annual rate: **0.49% - 8.05%**

Insurance amount: **UAH 200 mln**

Insured for 5 months in 2024: **UAH 2.93 bln**



Property insurance against war risks: **2024**

Implemented cases: **Grain elevators**



Ship insurance in the Black Sea: **2023**

Containers with grain, iron ore, and steel, electrical equipment, fodder

Annual rate: **0.75%**

Coverage amount: **USD 50 mln**



U.S. International Development Finance Corporation

Memorandum on coverage of American, international and Ukrainian investments in Ukraine: **2023**

Coverage of the amount of losses: **up to 85%**

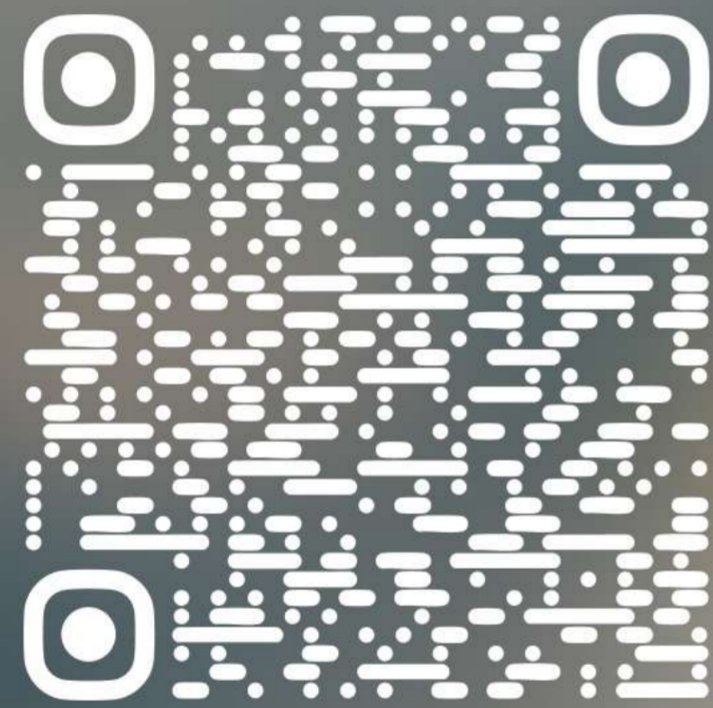
Insurance for SMEs: **USD 50 mln**

Insurance of the agricultural sector, manufacture: **USD 300 mln**



22 export-import agencies: Germany, WB, USA, Japan, Canada, Italy, Poland, Norway, Slovakia, France, Bulgaria, Estonia, Latvia, Lithuania, Czech Republic, Austria, UAE, Portugal, Spain, Sweden, Finland, Denmark

Volume of the collected fund: **EUR 1 bln**



Ukraine Invest
Guide

YOUR INVESTMENT MATTERS



+38 098 567 88 99



info@ukraineinvest.gov.ua



www.ukraineinvest.gov.ua/en



Muzeinyi Ln, 12 Kyiv, Ukraine, 01008