

UA Agro at war time

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Role of Ukraine in global food supply

Wheat

#5 export country

Export – 24 MMT

World export - **12%**

Corn

#4 export country

Export – 33 MMT

World export - **16%**

Barley

#3 export country

Export – 6 MMT

World export - **18%**

Rapeseed

#3 export country

Export – 2.7 MMT

World export - **20%**

Ukraine's contribution is equivalent to feeding about **400 million people**, not counting UA population. Every second to third piece of bread there produced from Ukrainian wheat in Africa and Middle East.

Sunflower oil

#1 export country

Export – 6.6 MMT

World export - **50%**

Chicken meat

#7 export country

Export – 0.43 MMT

World export - **3%**

Honey

#2 export country

Export – 81 KMT

World export - **12%**

Walnuts

#5 export country

Export – 39 KMT

World export - **5%**

UA food supply to countries

Wheat

Country	Export from UA to country, 2021, k t	Total country imports, 2021/22, k t	% of UA in country imports
EG Egypt	3 314	12 500	27%
ID Indonesia	3 060	11 000	28%
TR Turkey	1 766	10 000	18%
PK Pakistan*	1 344	2 000	67%
BD Bangladesh	849	7 500	11%
MA Morocco	847	5 000	17%
YE Yemen*	797	3 400	23%
SA Saudi Arabia	712	3 600	20%
TN Tunisia	646	1 800	36%
LB Lebanon	630	1 250	50%
ET Ethiopia	607	1 700	36%
LY Libya	570	1 400	41%
PH Philippines	413	6 500	6%
KR Korea, Republic of	396	4 500	9%
IL Israel	362	1 800	20%
KE Kenya*	355	2 000	18%

Sunflower oil

Country	Export from UA to country, 2021, k t	Total country imports, 2021/22, k t	% of UA in country imports
IN India*	1 569	2 400	65%
European Union	1 447	1 775	82%
CN China	785	1 970	40%
IQ Iraq*	263	575	46%
GB United Kingdom	132	340	39%
SA Saudi Arabia	90	90	100%
EG Egypt	69	360	19%
TR Turkey	63	800	8%
IR Iran, Islamic Republic of	60	670	9%
LB Lebanon	53	140	38%
US United States	38	125	31%
LY Libya	29	60	48%
IL Israel	26	65	39%
JO Jordan	24	72	33%
AU Australia	18	80	22%

North Africa, Middle East and Asia are highly dependent from UA food supply

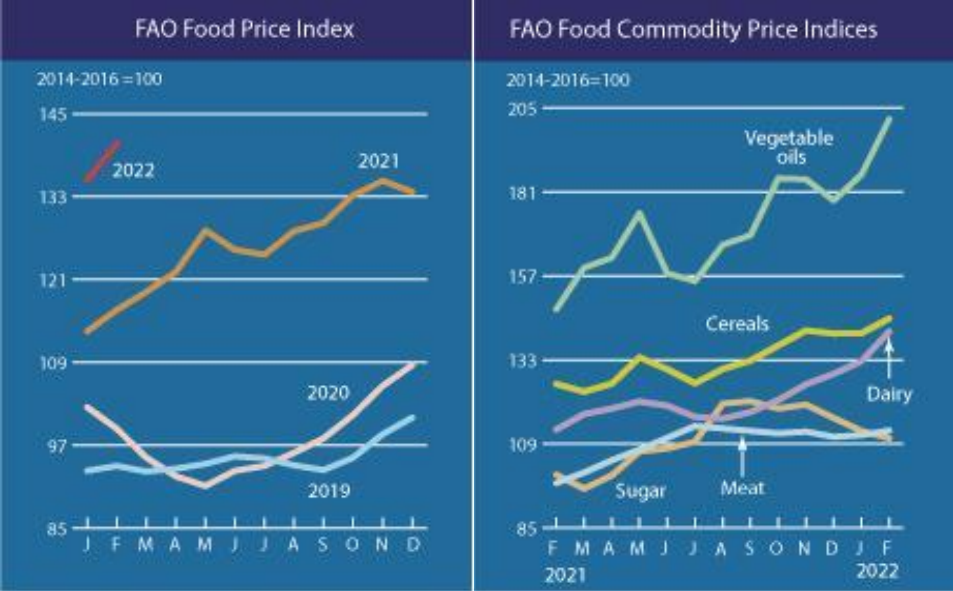
Global Hunger Threat

- 811 million people worldwide go to bed hungry each night in 2021
- According to Global Hunger Index **47 countries** have high levels of hunger in 2021. **The war in Ukraine is estimated to bring this number to more than 60 countries in 2022.**
- **3.1 million children die** from undernutrition each year
- Hunger riots, wars and refugee migration in Africa and Asia are inevitable.



Food and general price (hyper)inflation

The FAO Food Price Index rises to a new all-time high in February.



Wheat price added 50% after Russia invasion



Further price increase is looming as long-term blockade of Ukrainian ports and food export is not yet priced by the markets.

Ukrainian ports

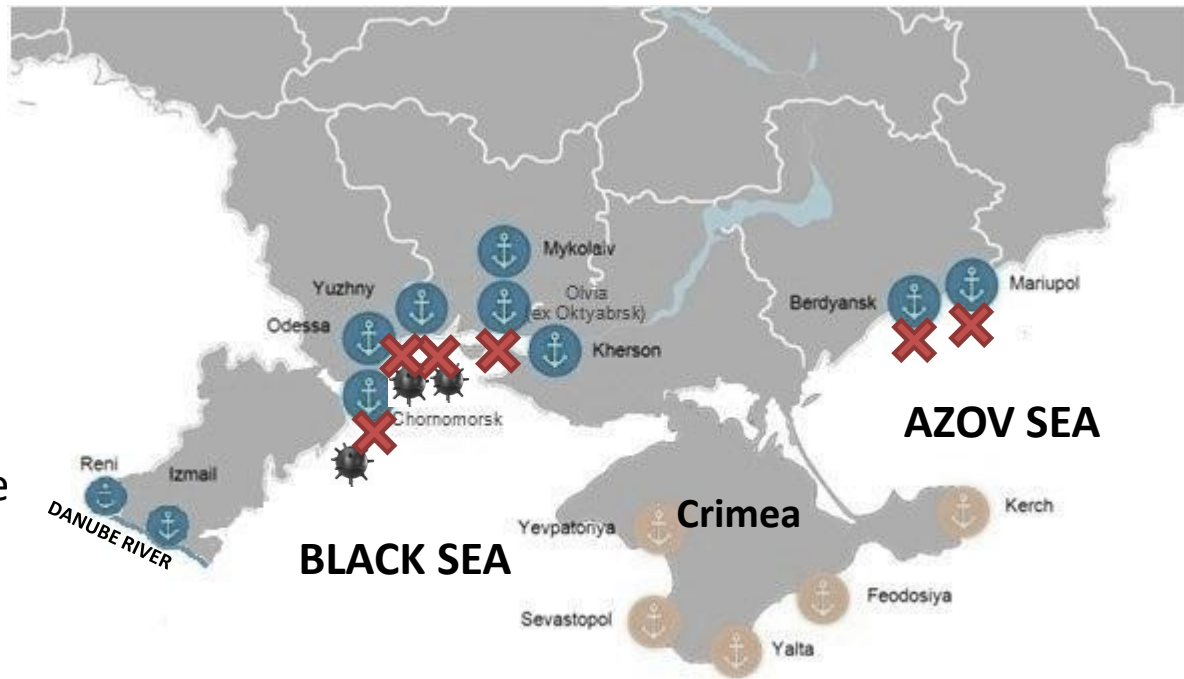
UA sea ports are blocked by Russian Navy

UA exported 5-6 MMT/month of grains through sea ports and 500-700 KMT/month of sunoil before the war.

Seaborn export accounts for 95% of Ukrainian food export.

Now:

- Sea ports are blocked (Danube ports are insufficient)
- Commercial vessels are under attack of Russia
- Sea mines are deployed



Alternative export routes

- UA redirected export flows to western border with EU countries via railway and trucks to EU Baltic and Black Sea ports.
- Capacity – only 0.6-1 MMT/month
- Current stocks of grains for export – 20 MMT (18-24 months w/o sea ports!!!)
- New crop will have no available storage
- Years and billions of dollars will be wasted w/o Black sea ports
- No export = No money = No further crops

UA railway redirect cargo to western border with EU



Summary

- World will face starvation, hunger riots, refugee migration without UA food supply. There is no sufficient alternative to cover the gap.
- Inflation will escalate further due to high food prices.
- UA 2022 and further crops are under risk of failure.

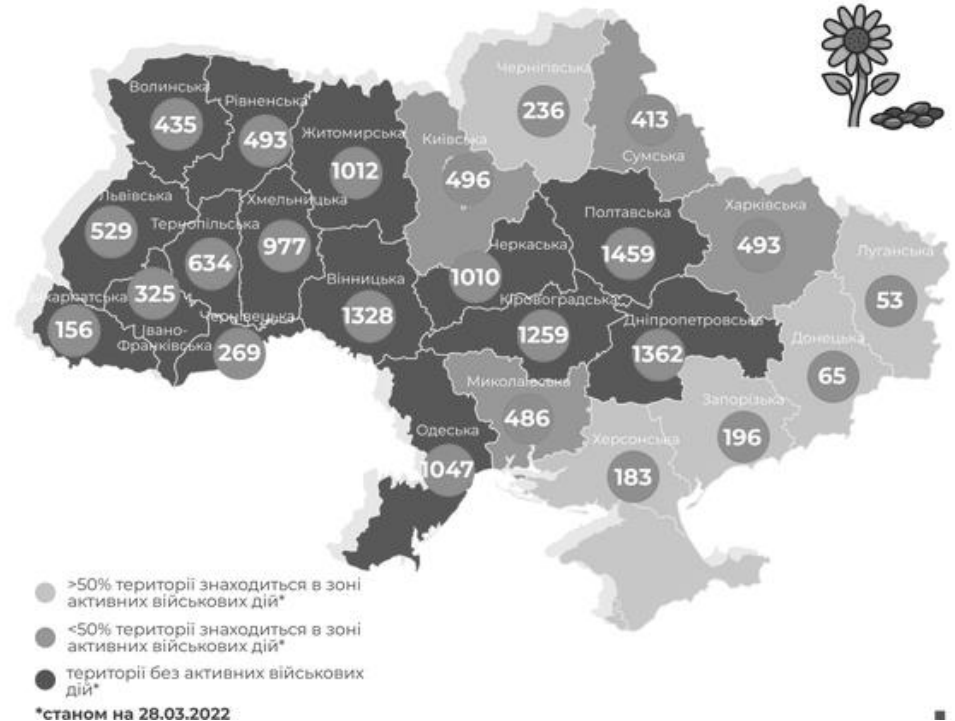
- Unblocking of UA sea ports - key for World food security.

Actions to be taken urgently:

- International pressure on russia, escalation of the problem via major food buyers (China, Turkey, Egypt, Saudi Arabia...)
- Embargo and blockade of russian sea exports
- Provision of powerful anti-ship weapons to Ukraine
- Support by US Navy and Royal Navy (UK) to clear Black sea from mines (minesweepers)

Spring planting campaign 2022

- UA is going to plant no more than 14 mln ha (70%) of spring crops area in 2022.
- Biggest loss in North-East, East and South.
- Farmers plan to seed less corn, more soybean and sunflower.



Spring planting campaign 2022

Ag inputs availability:

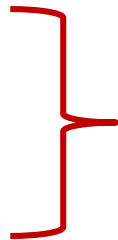
Fertilizers – 80%

Seeds – 75%

Pesticides – 60%

Diesel fuel – 40%

Finance – 40%



**Planting campaign under
risk of **failure** due to lack
of finance and fuel**