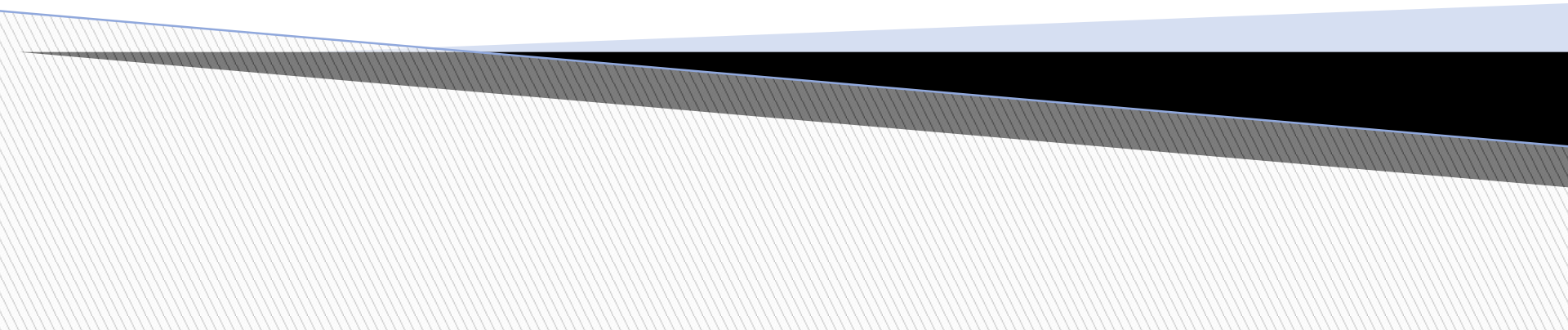


# Ukrainian agriculture



# Content

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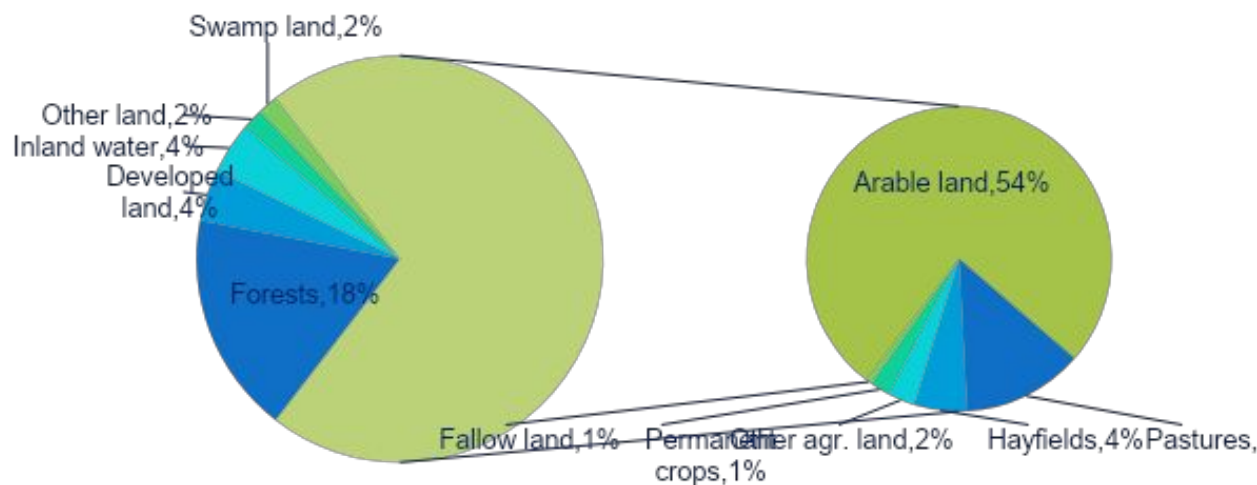
1. Land structure
2. Grains
3. Oilseeds & Sugarbeet
4. Horticulture
5. Agriholdings

# Land structure

Ukraine's area, on January'11

Structure of Ukraine's area, ths ha

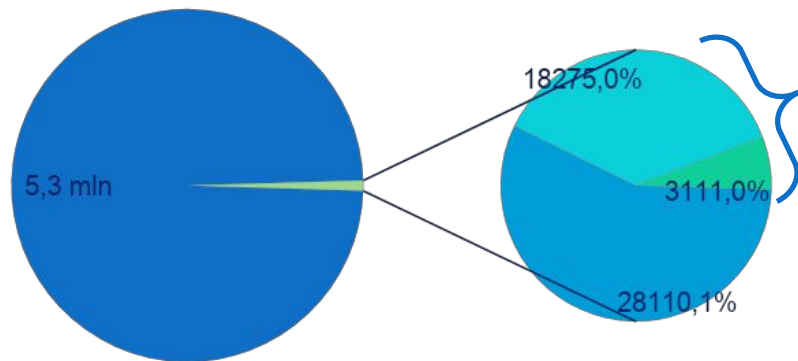
	Area, ths ha
<b>Total area</b>	<b>60 355</b>
<b>Forests</b>	<b>10 601</b>
<b>Developed land</b>	<b>2 513</b>
<b>Inland water</b>	<b>2 424</b>
<b>Other land</b>	<b>1 046</b>
<b>Swamp land</b>	<b>980</b>
<b>Agricultural land</b>	<b>42 792</b>
Arable land	32 477
Pastures	5 482
Hayfields	2 411
Other agr. land	1 216
Permanent crops	897
Fallow land	310



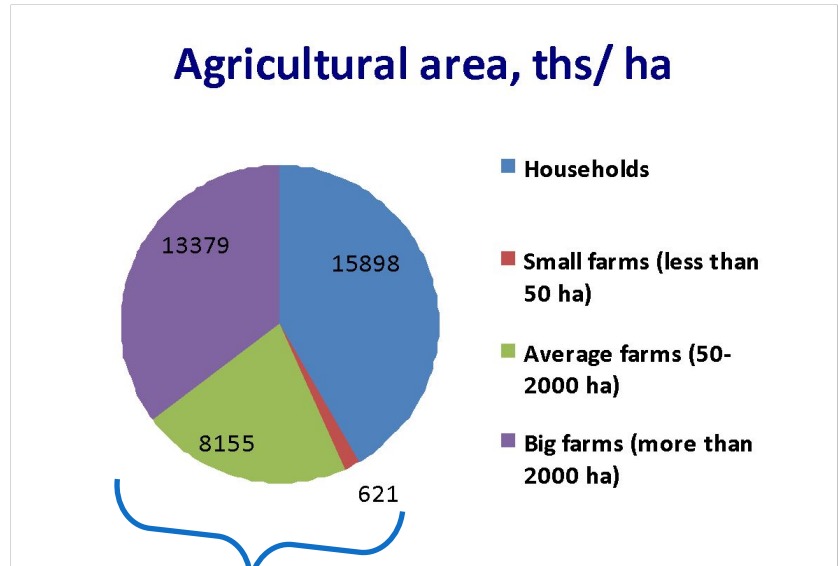
# Land users

Number of land users

- Households
- Small farms (less than 50 ha)
- Average farms (50-2000 ha)
- Big farms (more than 2000 ha)



Agricultural area, ths/ ha



**Around 70 huge agriholdings with total land bank of 5 mln ha**

# Typical farmers

	Households	Farms	Agr enterprises	Agriholdings
Size	0.1-10 ha	5-1000 ha	0.5-10 ths ha	20-400 ths ha
Main directions	Potato, vegetables, milk	Cash crops	Cash crops, animal farming	Cash crops, animal farming
Production orientation	Self consumption	Market	Market	Market

# Households

- ▣ Peasant families who grow crops and have some chickens, pigs and cows for own consumption and to sell surplus

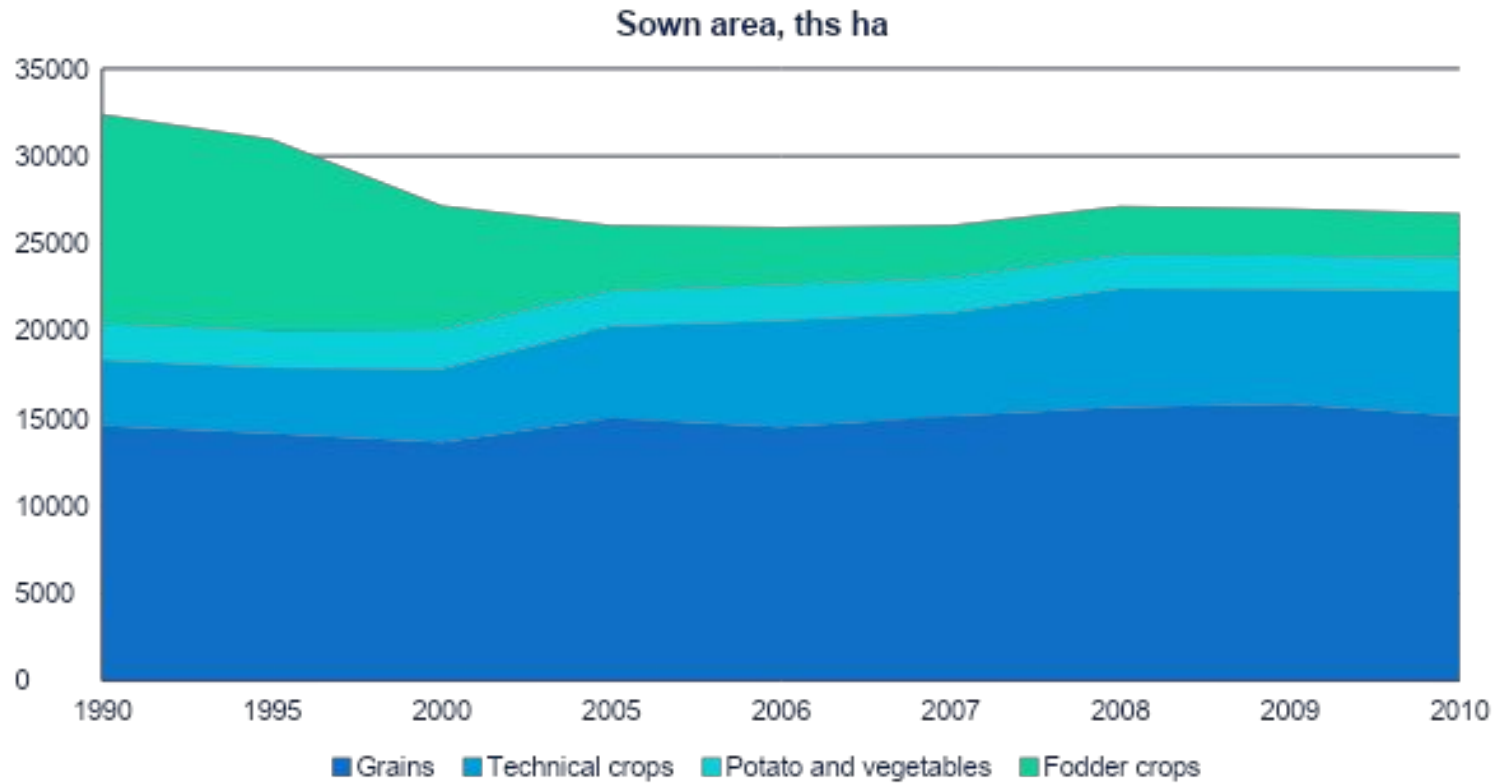


# Farms

- ▣ Peasants who get land after privatization process and decided to farm



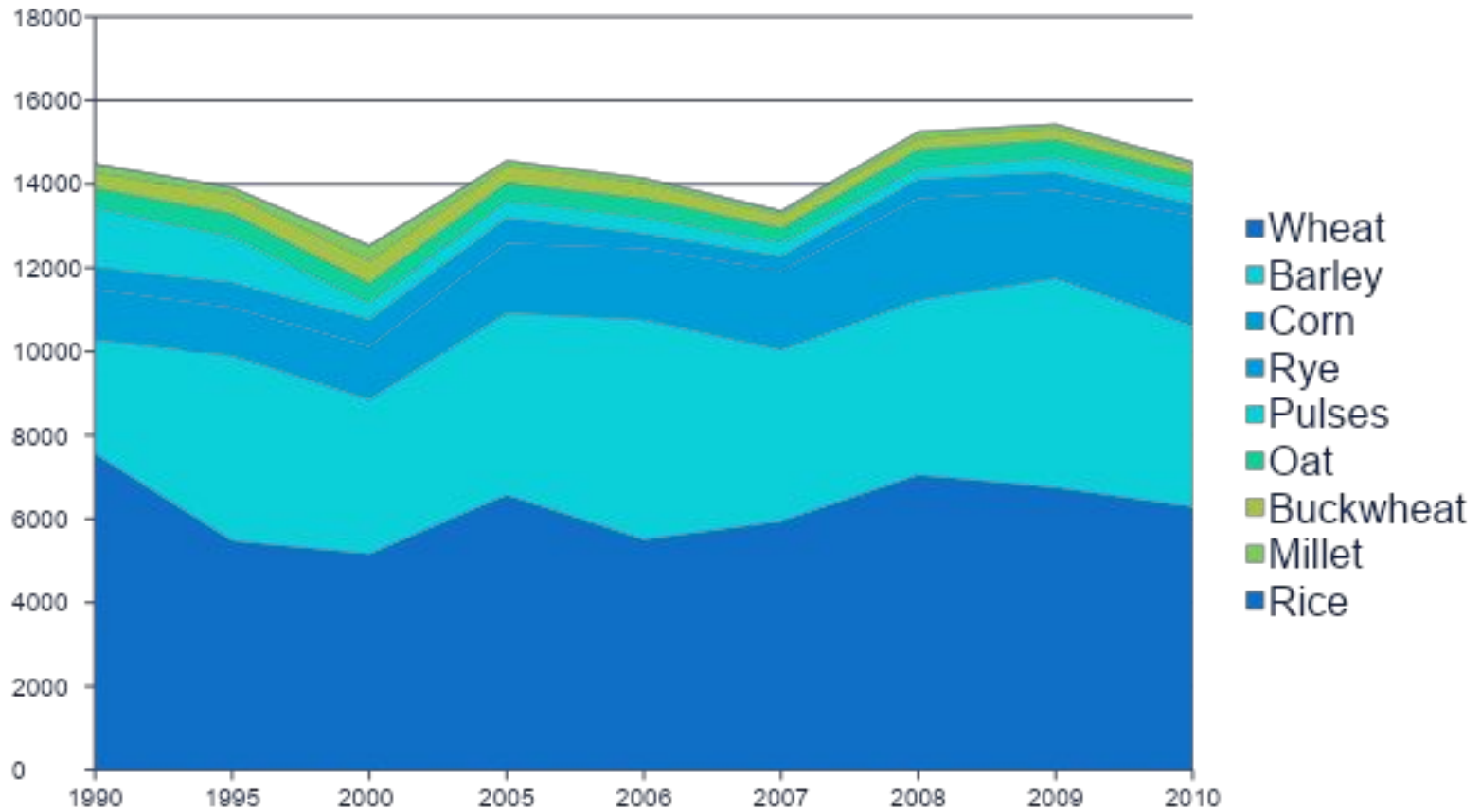
# Sown area



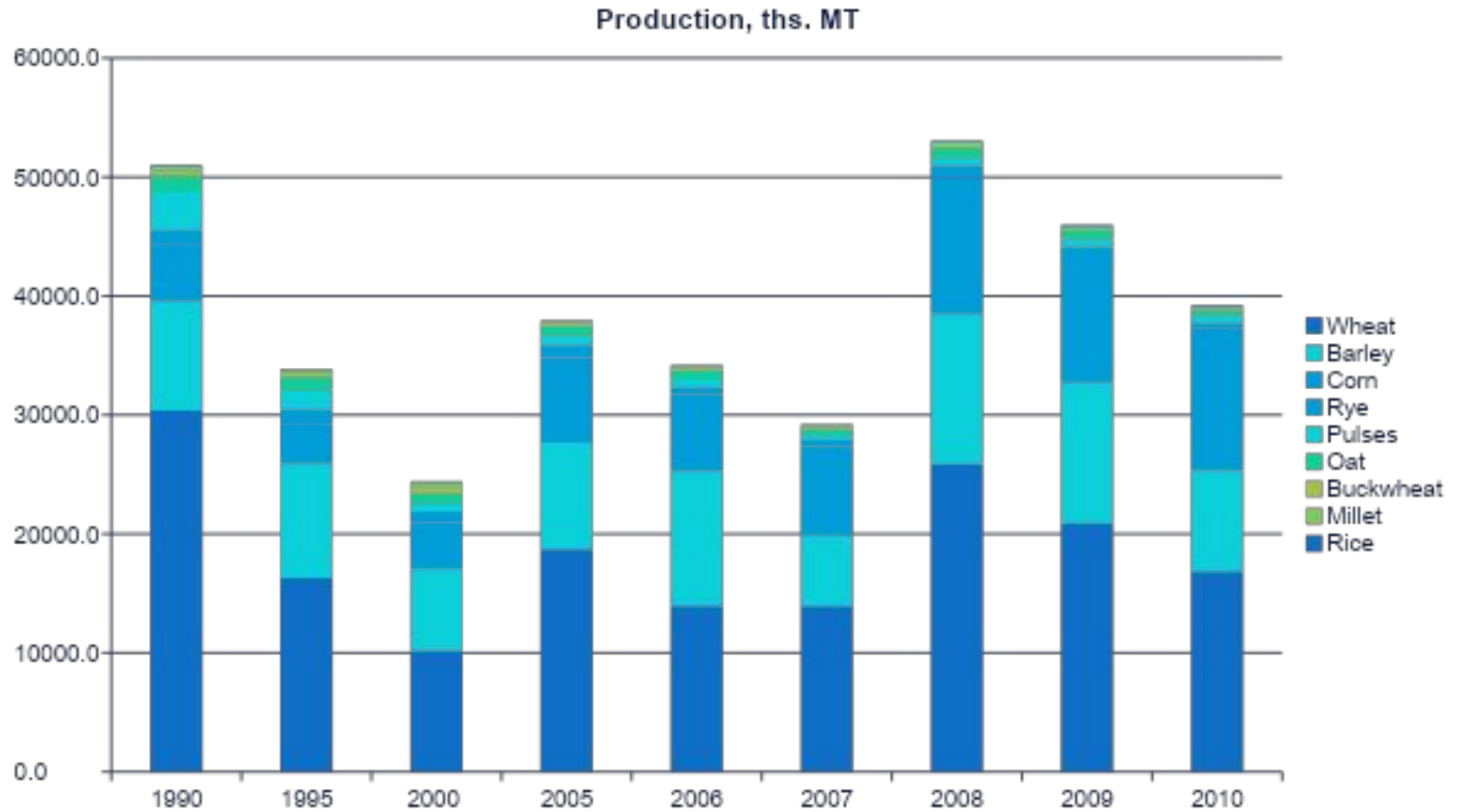


# Grains

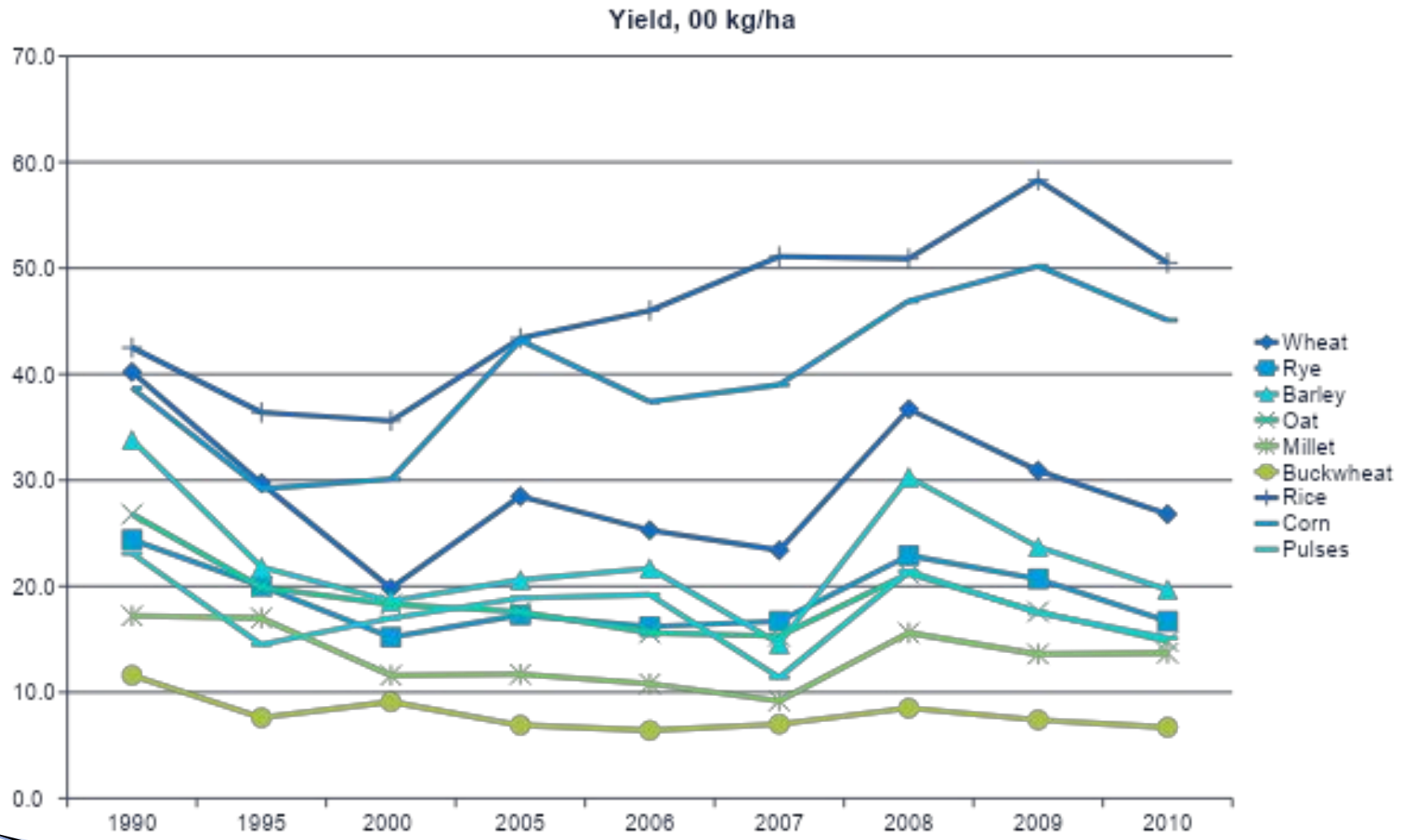
Harvested area, ths ha



# Grains



# Grains



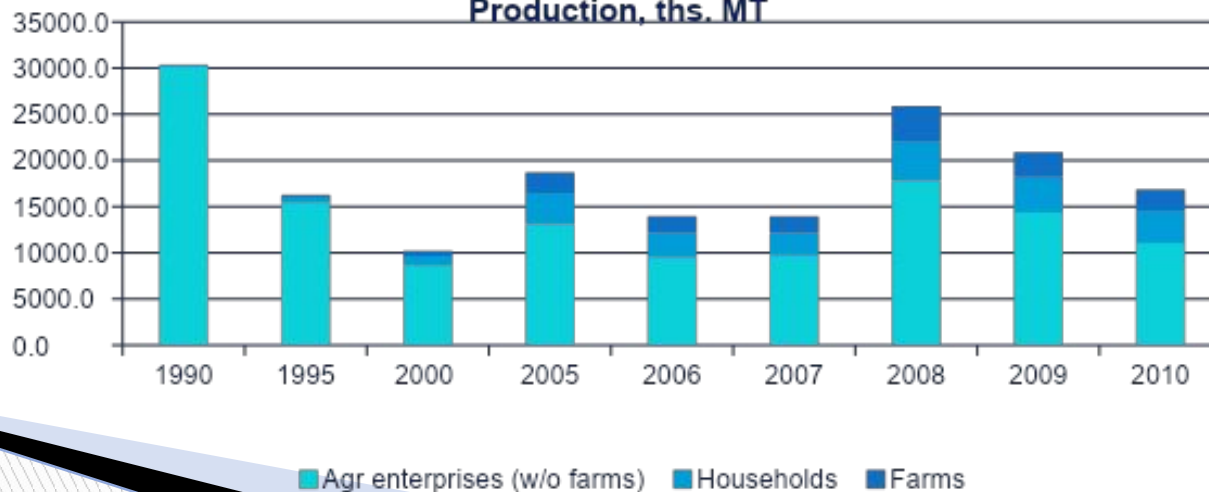
# Wheat

	Winter wheat	Spring wheat
Sown area, ths. ha	5940.7	369.86
% of total wheat area	94%	6%
Yield, MT/ha	2.9	2.3

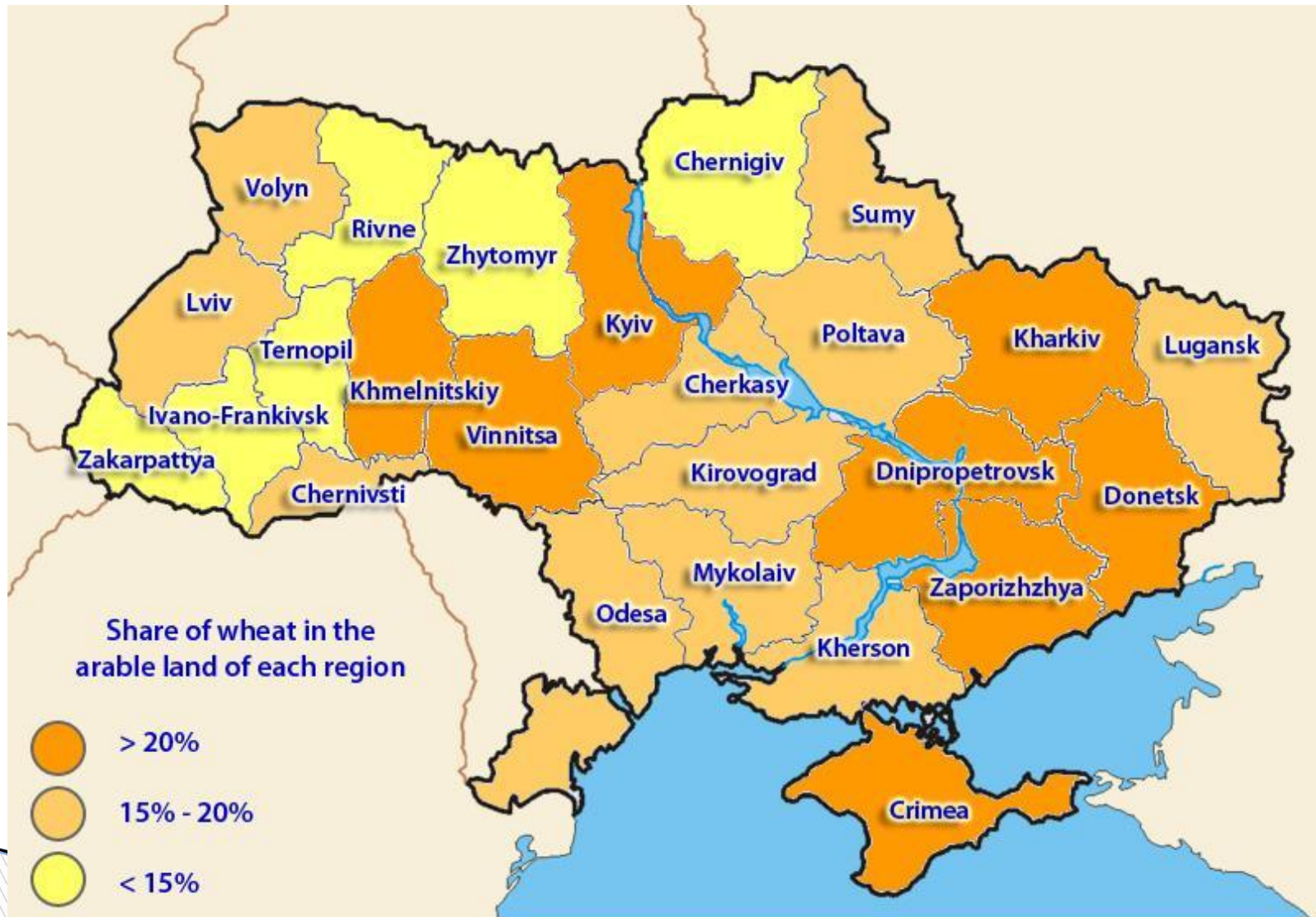
Yield, 00 kg/ha



Production, ths. MT

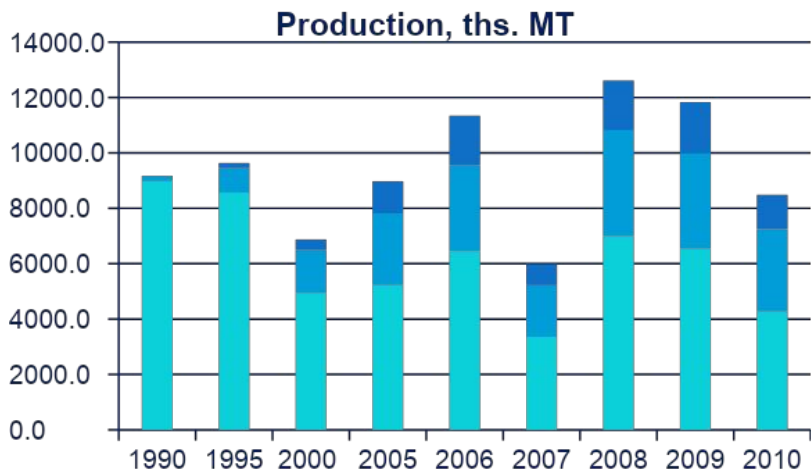


# Wheat

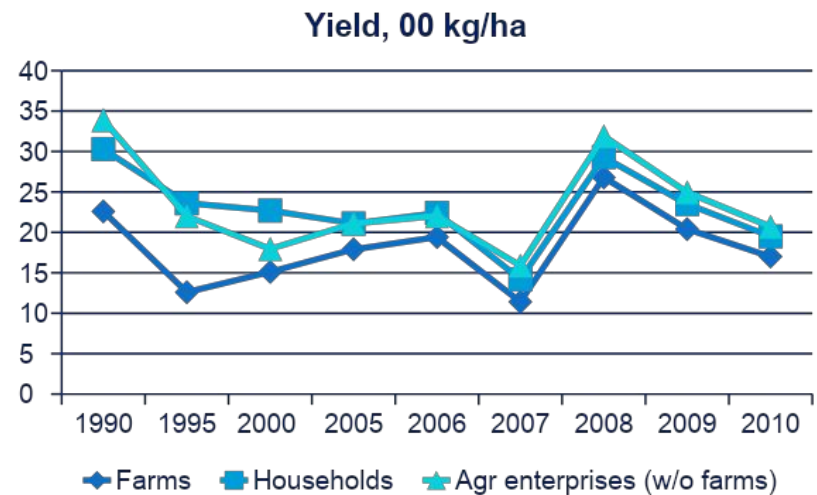
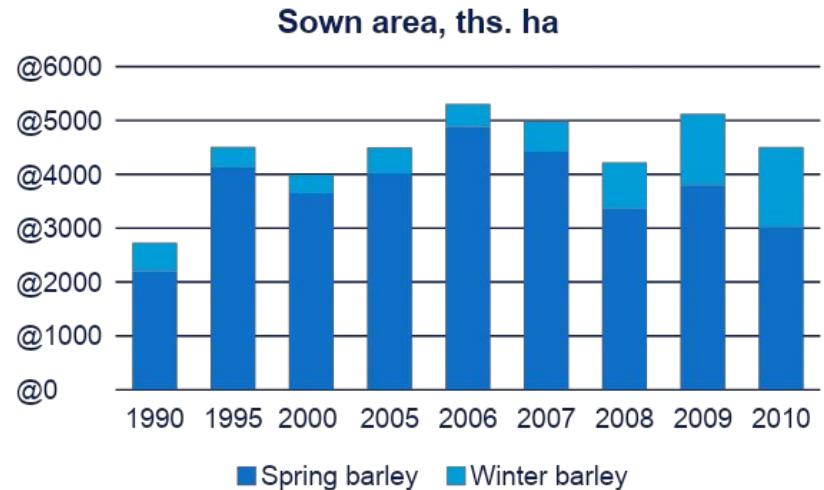


# Barley

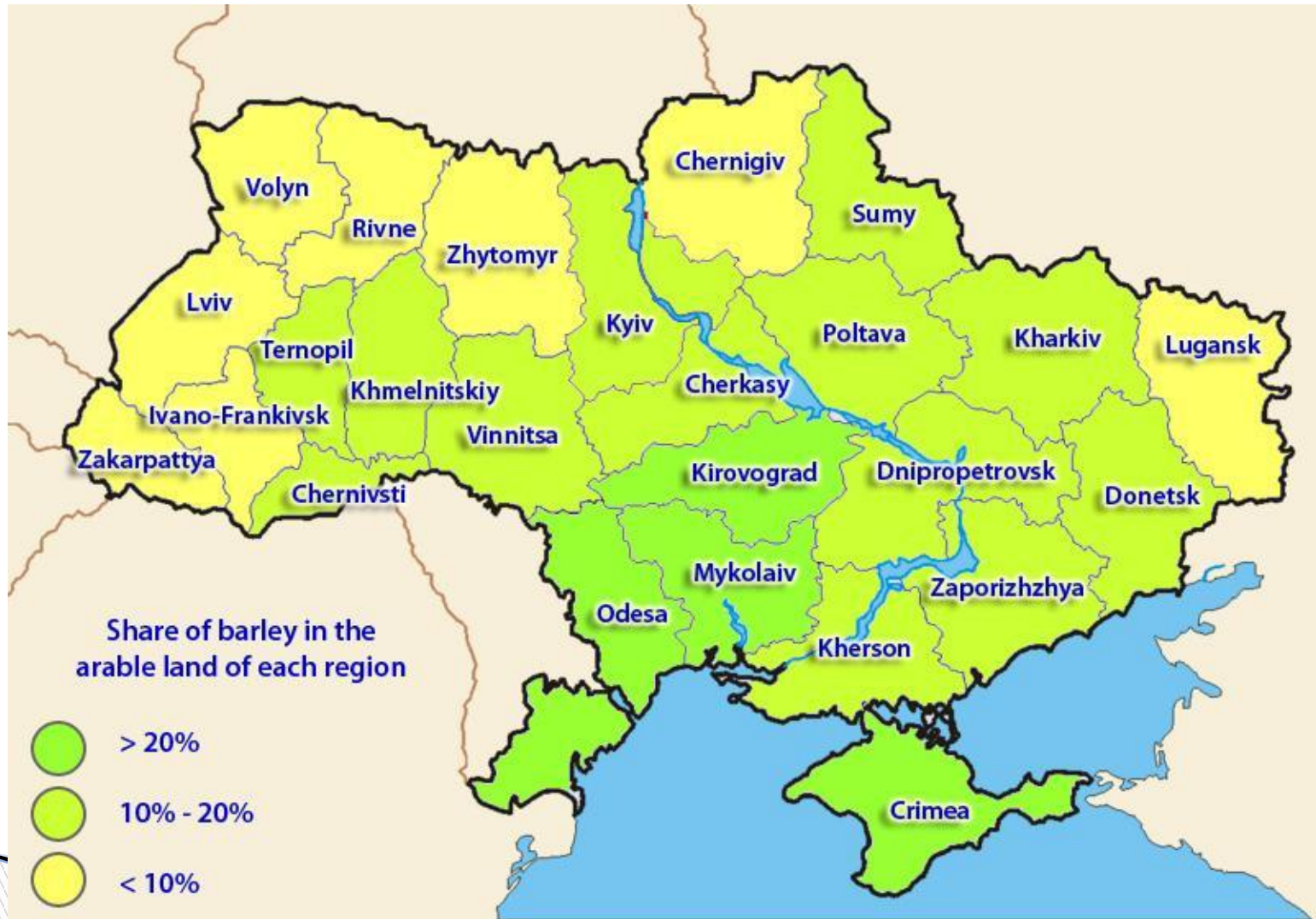
	Spring barley	Winter barley
Sown area, ths. ha	3661	899
% of total wheat area	80%	20%
Yield, MT/ha	2.1	2.5



■ Agr enterprises (w/o farms) ■ Households ■ Farms

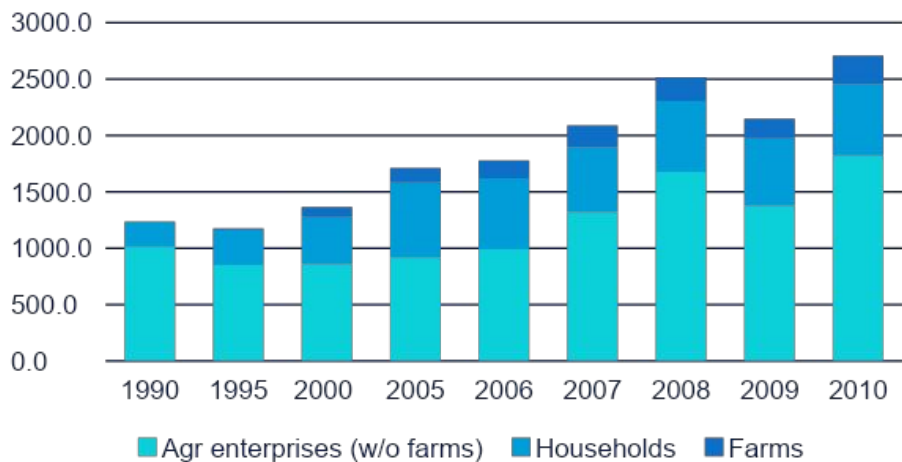


# Barley

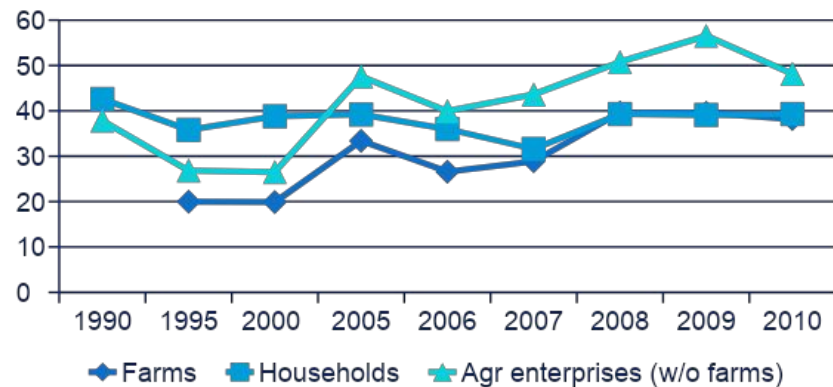


# Corn

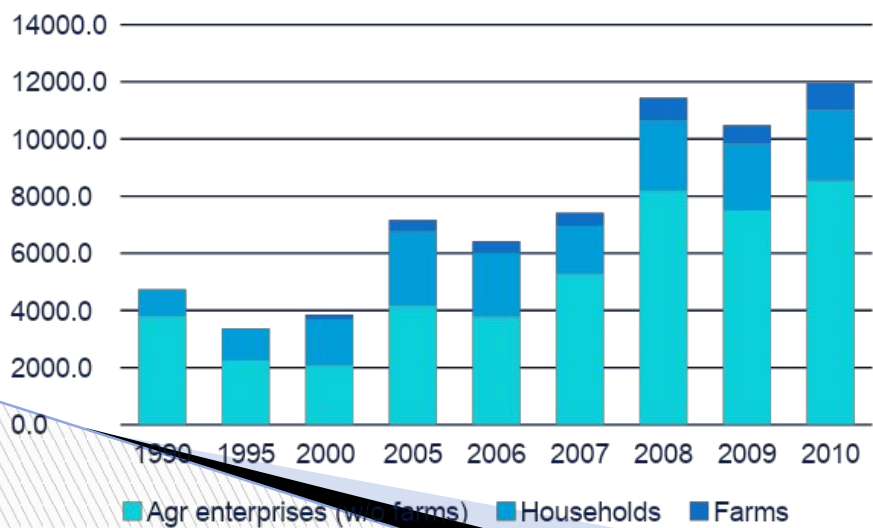
Sown area, ths. ha



Yield, 00 kg/ha



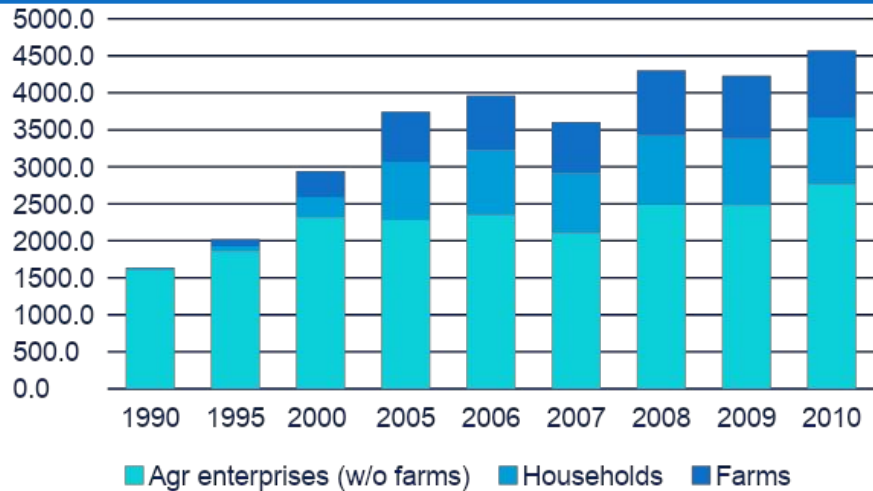
Production, ths. MT



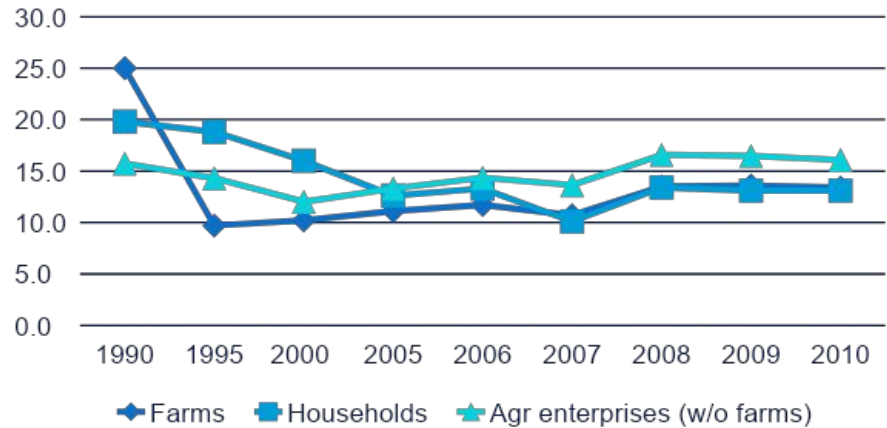


# Sunflower

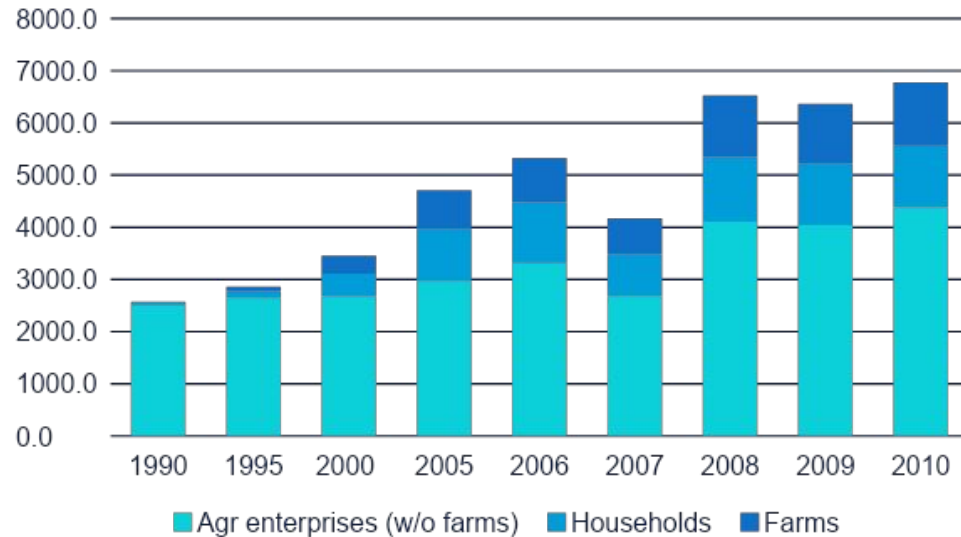
Sown area, ths. ha



## Yield

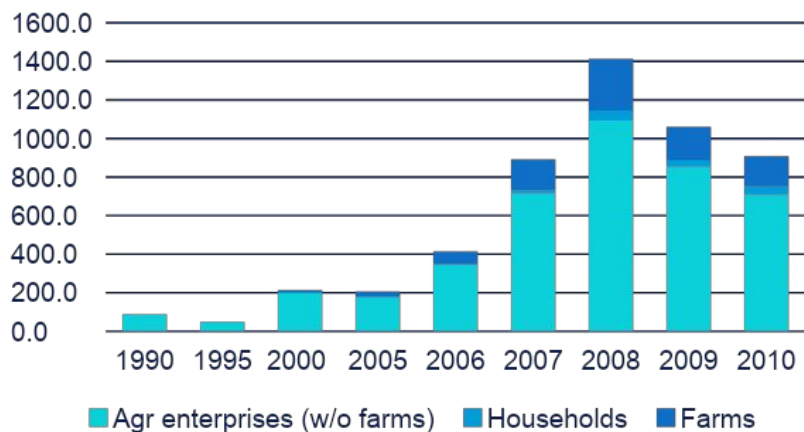


## Production, ths MT



# Rapeseed

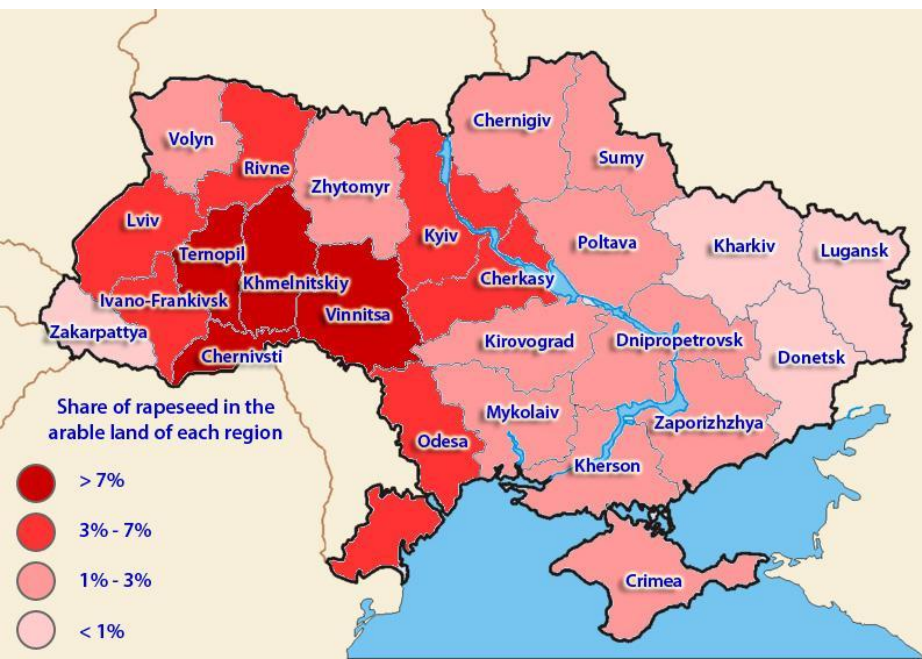
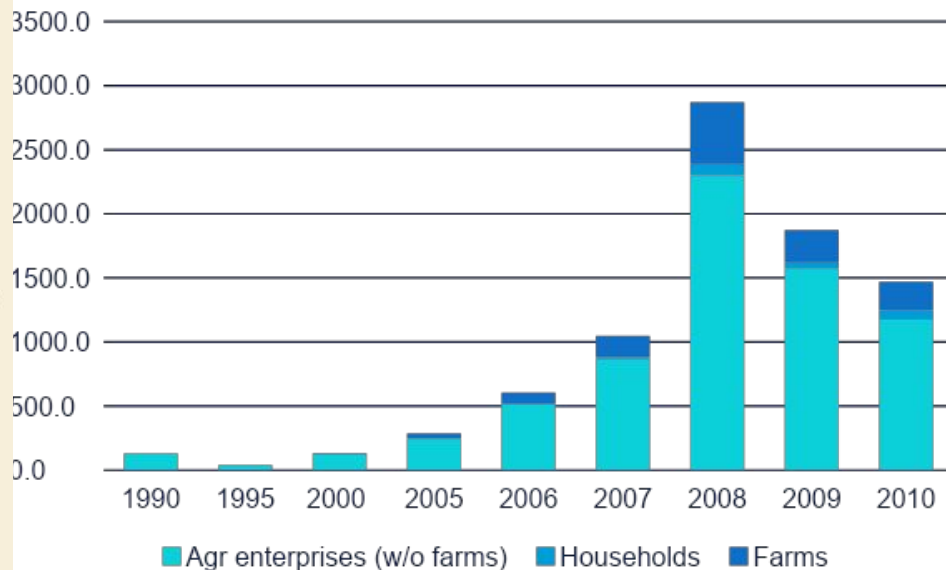
### Sown area



### Yield

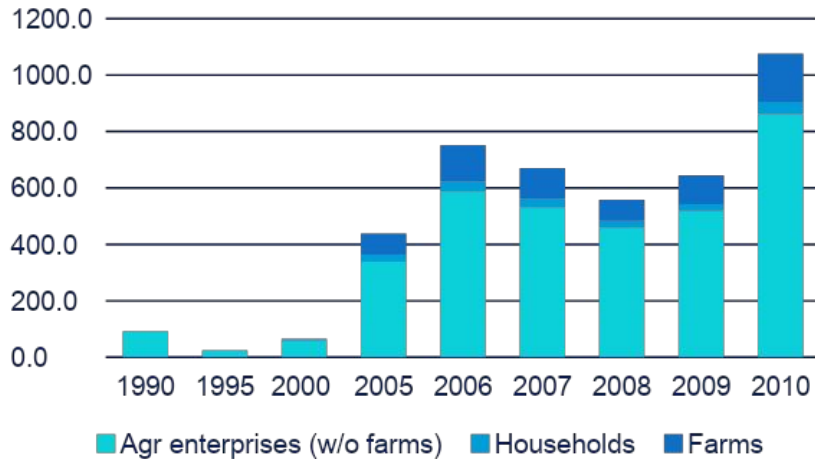


### Production, ths MT

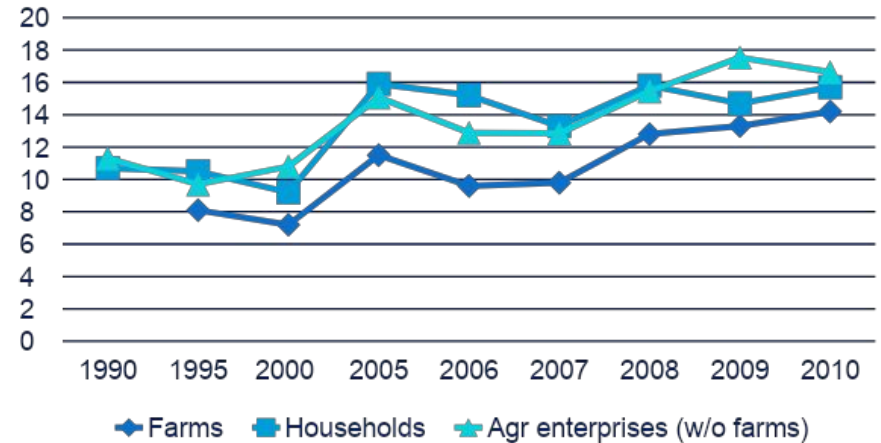


# Soybean

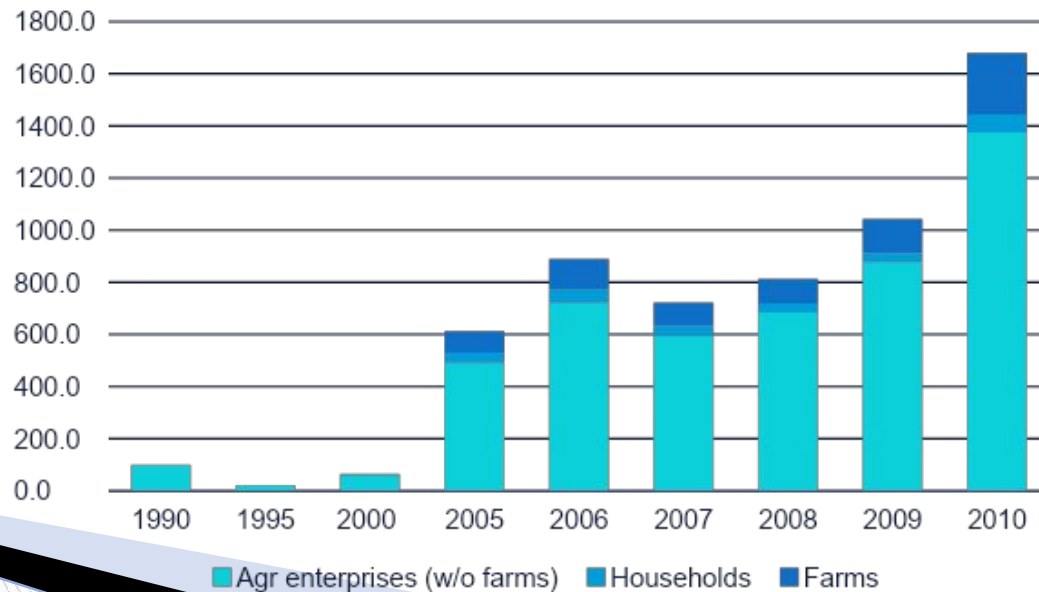
Sown area



Yield

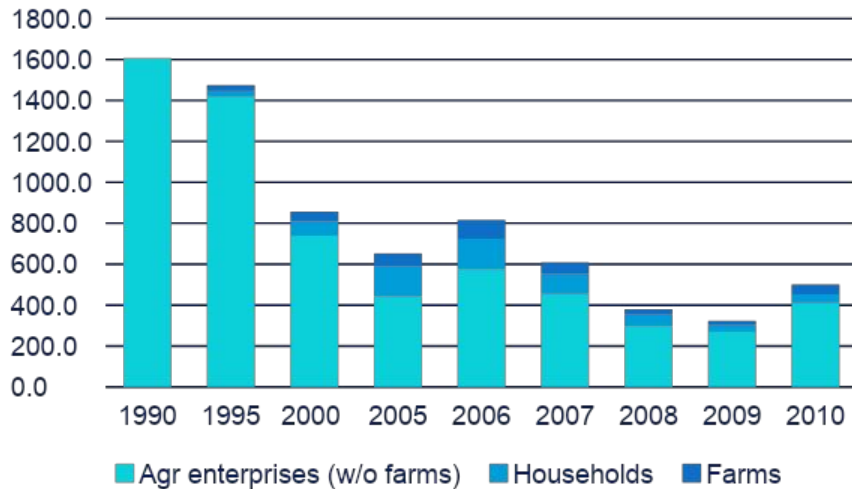


Production, ths. MT

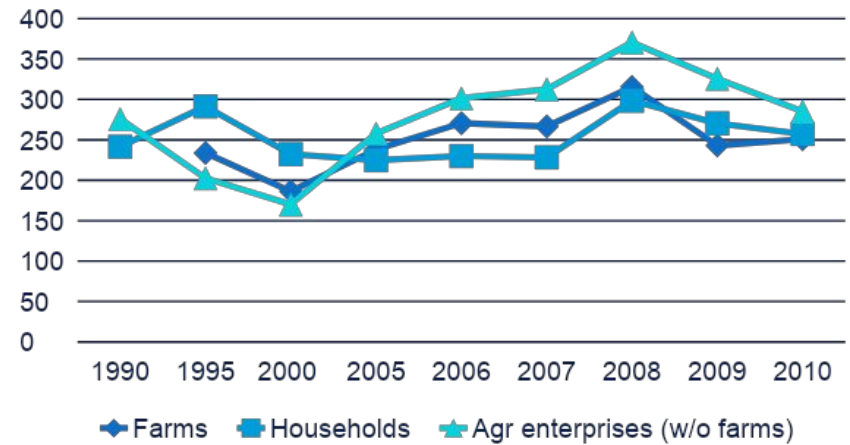


# Sugar beet

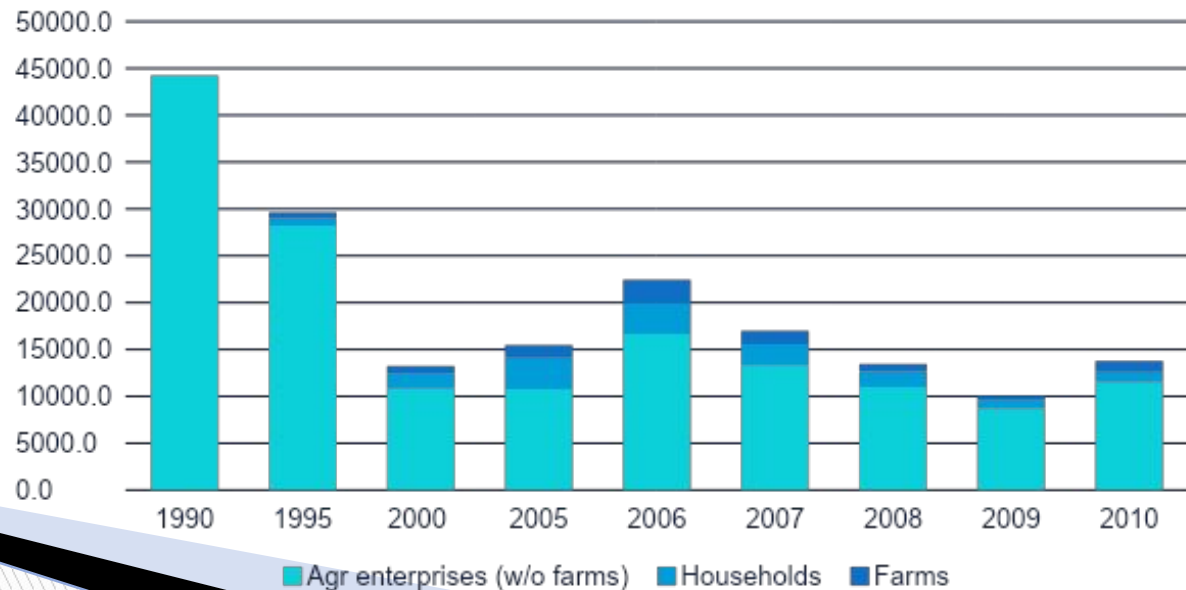
Sown area



Sugar beet

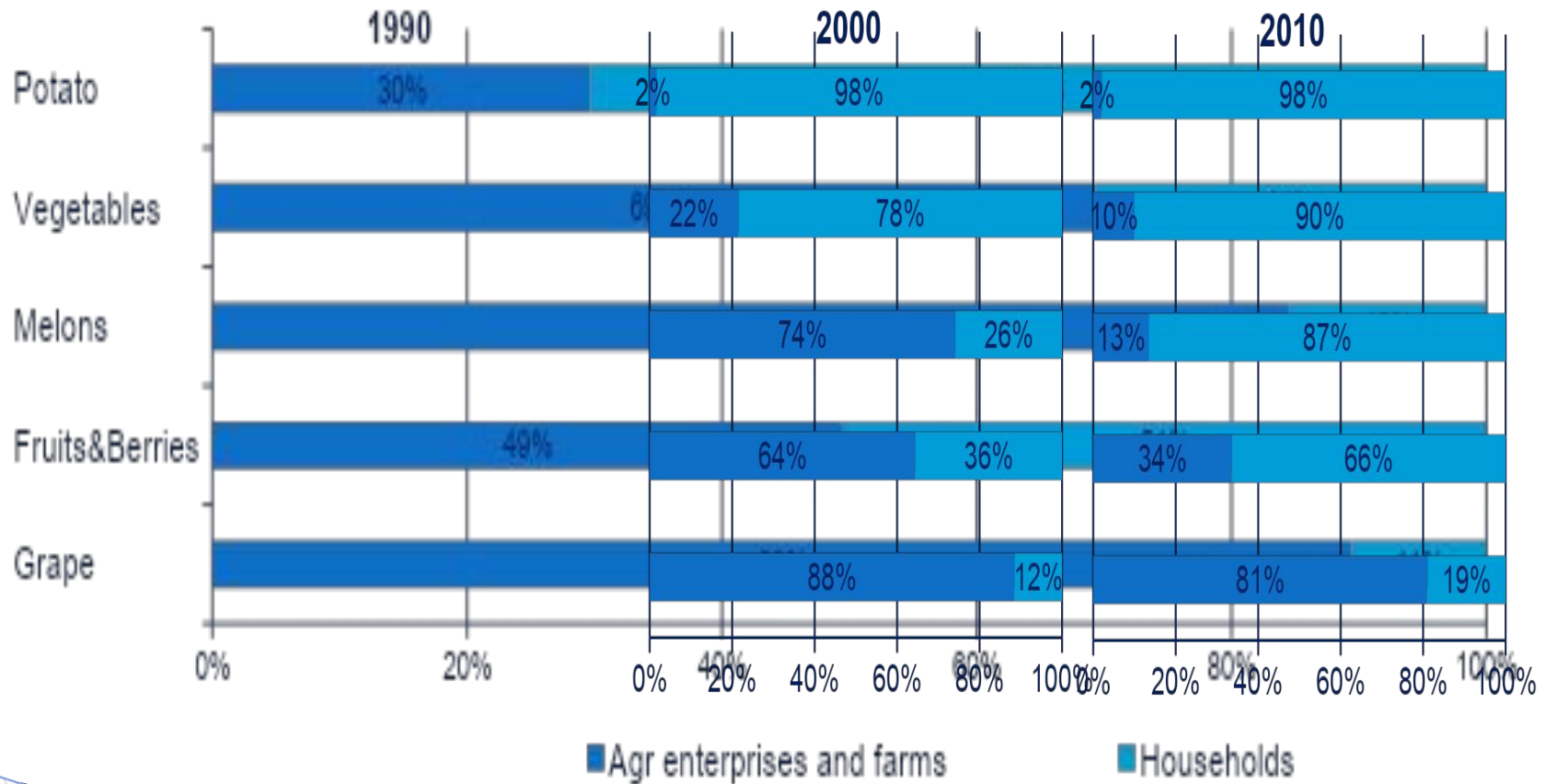


Production, ths. MT

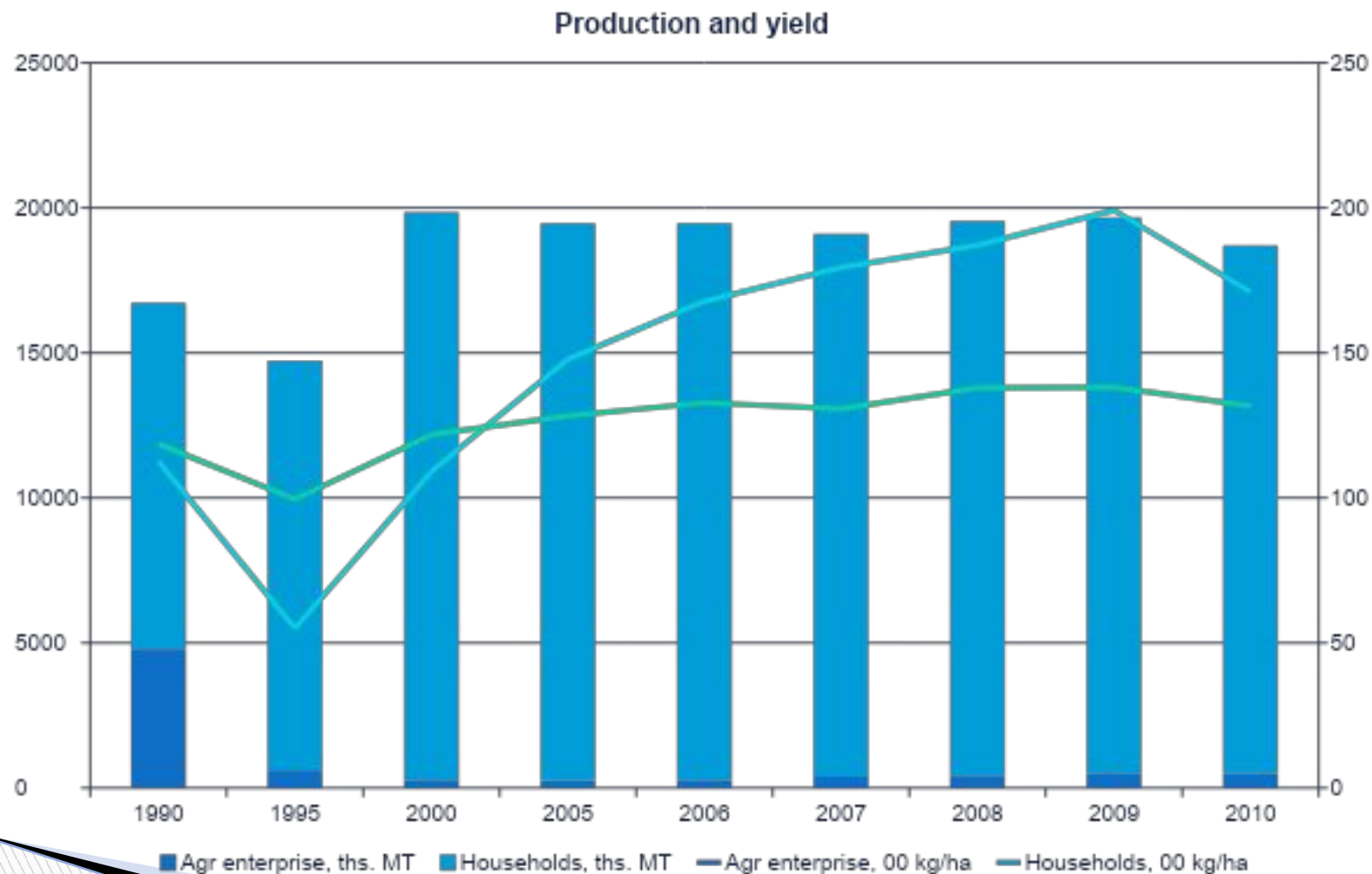


# Horticulture

Share in harvested area by producers

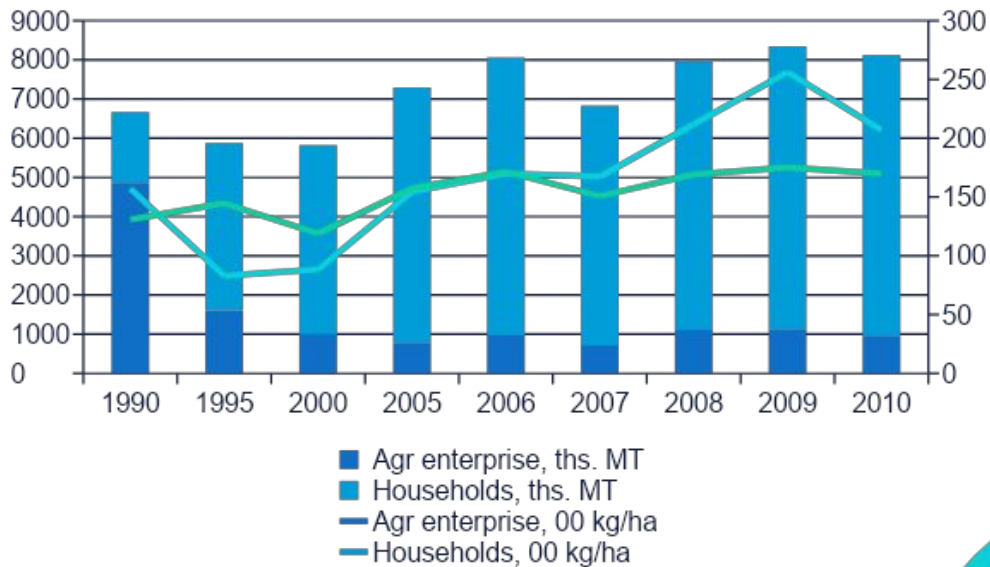


# Potato

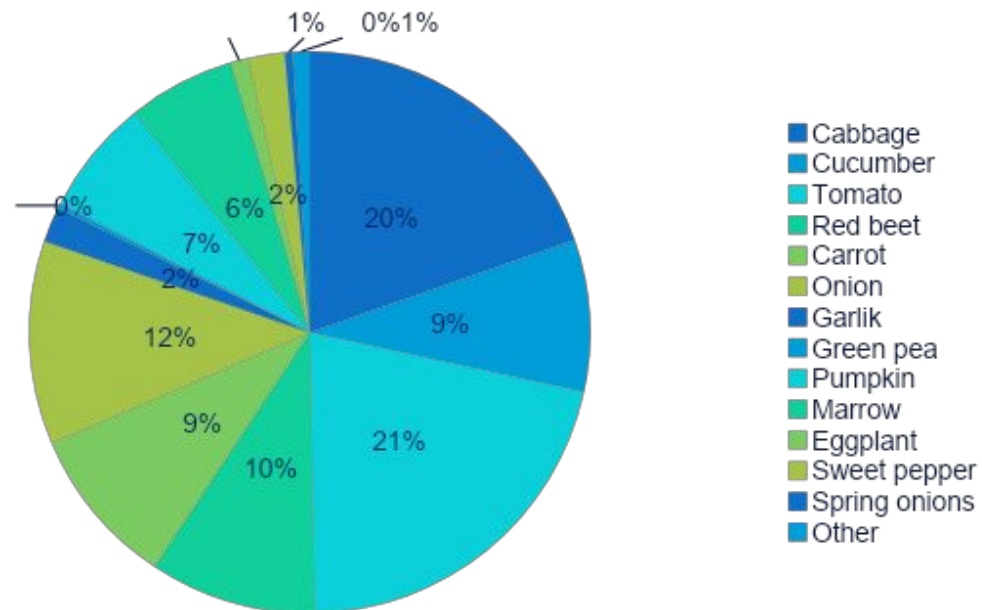


# Vegetables

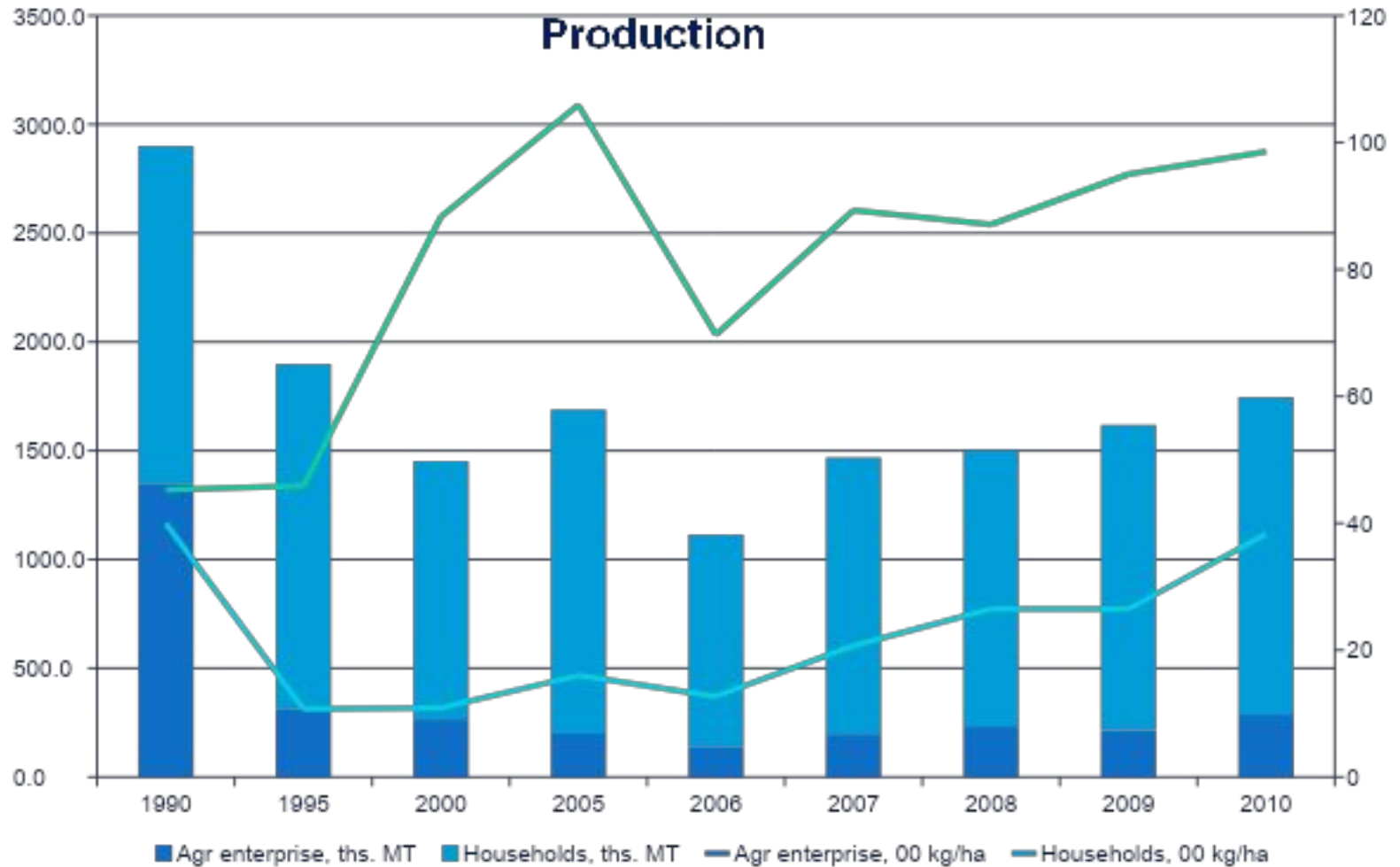
Production



Structure of vegetables production

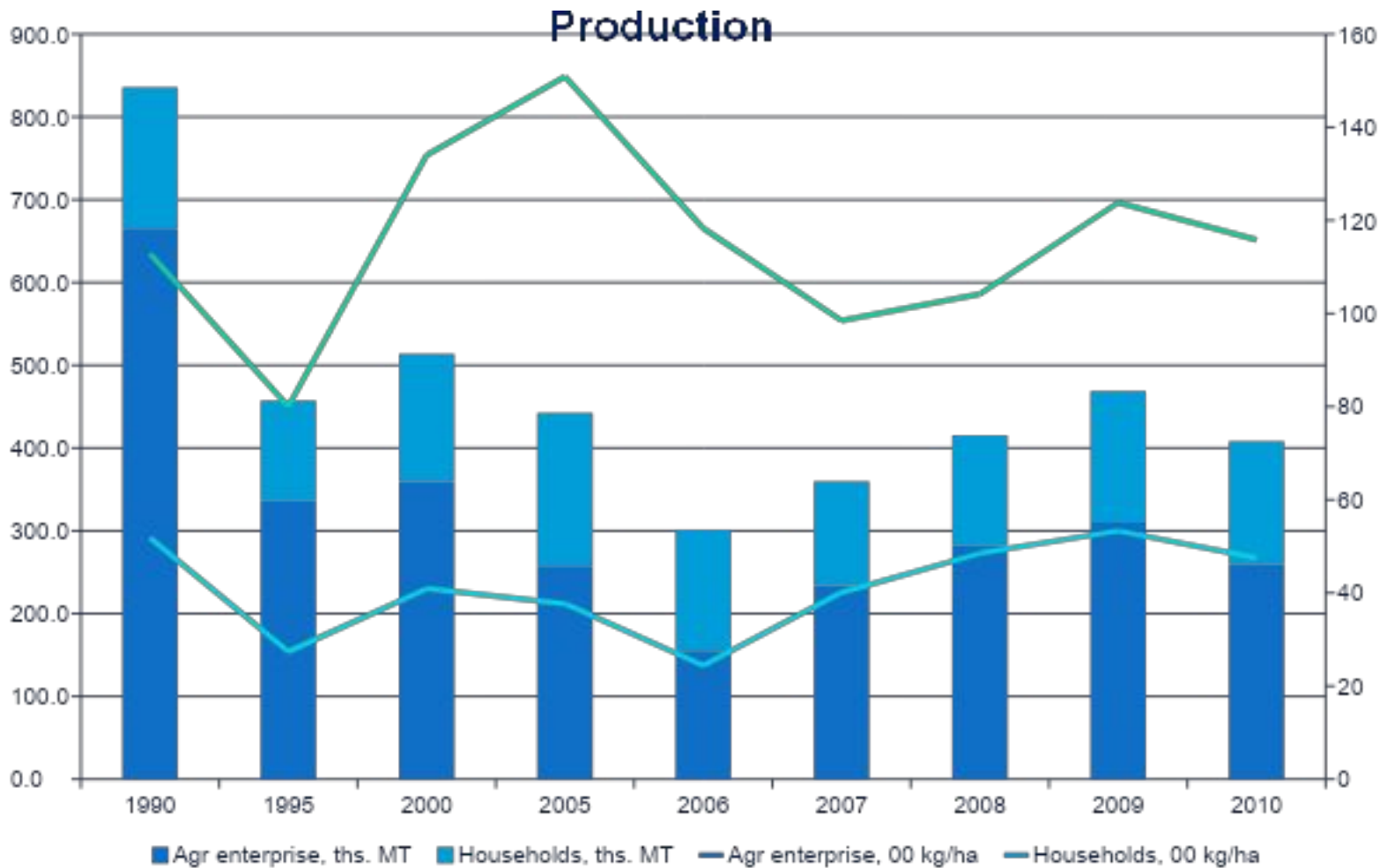


# Fruits&Berries





# Grape



# Structural change: Agriholding

## Agriholdings

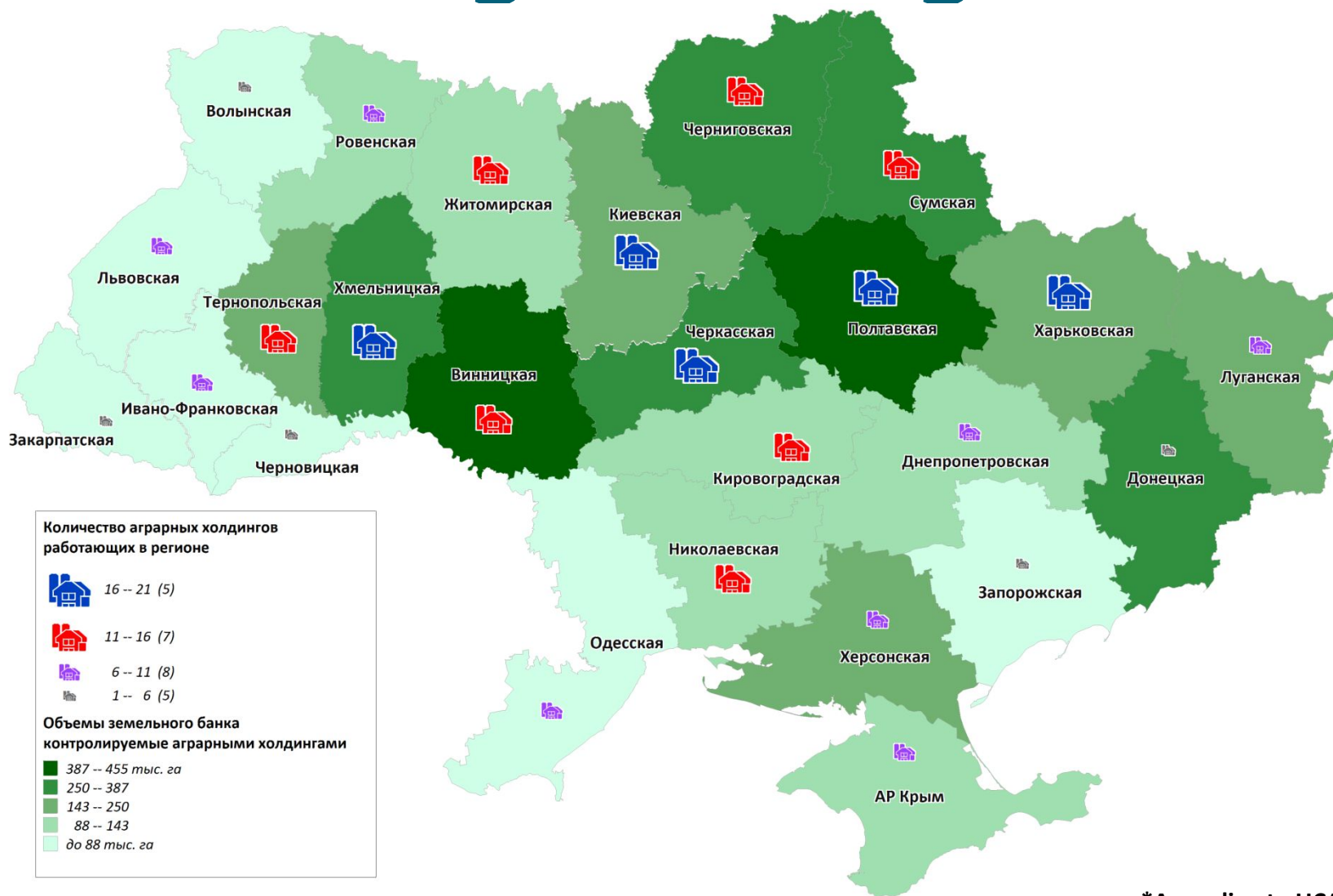
On June 2010	
Number	58
Land bank, ths ha	4005
Average size, ths ha	69

- 15 agriholding made IPO or private placement at International Stock Exchanges
- In January their total market capitalization reached \$5 bln



\*According to UCAB study on  
“Ukrainian Super-large Farms: efficiency and competitiveness”, 2010

# Agriholding

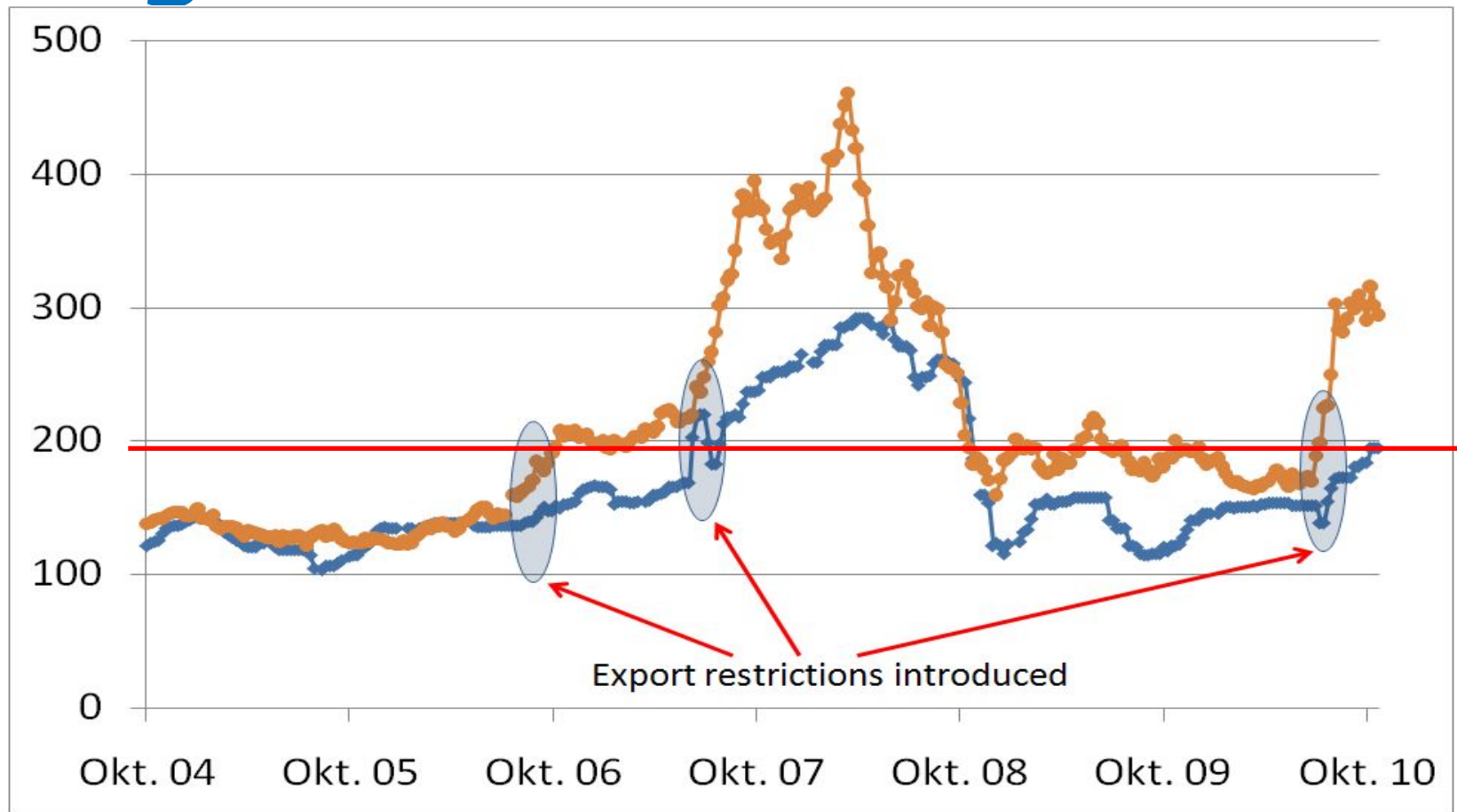


\*According to UCAB study on  
**“Ukrainian Super-large Farms: efficiency and competitiveness”, 2010**

# 60 agriholdings produce\*

- 22% wheat
- 35% corn
- 13% sunflower
- 55% sugar beet
- 27% soybean
- 30% rapeseed
- 64% poultry
- 20% pork
- 18% milk

# Regulations



# Land market: price of arable land in Ukraine

Average rent income in 2006-2010, \$/ha

Enterprise type	2006	2007	2008	2009	2010	Average 2006-10
All, sampled	22	82	45	70	97	63
15% of the most profitable	99	199	180	166	204	170
Profitable enterprises	67	144	137	124	145	123

Average arable land price

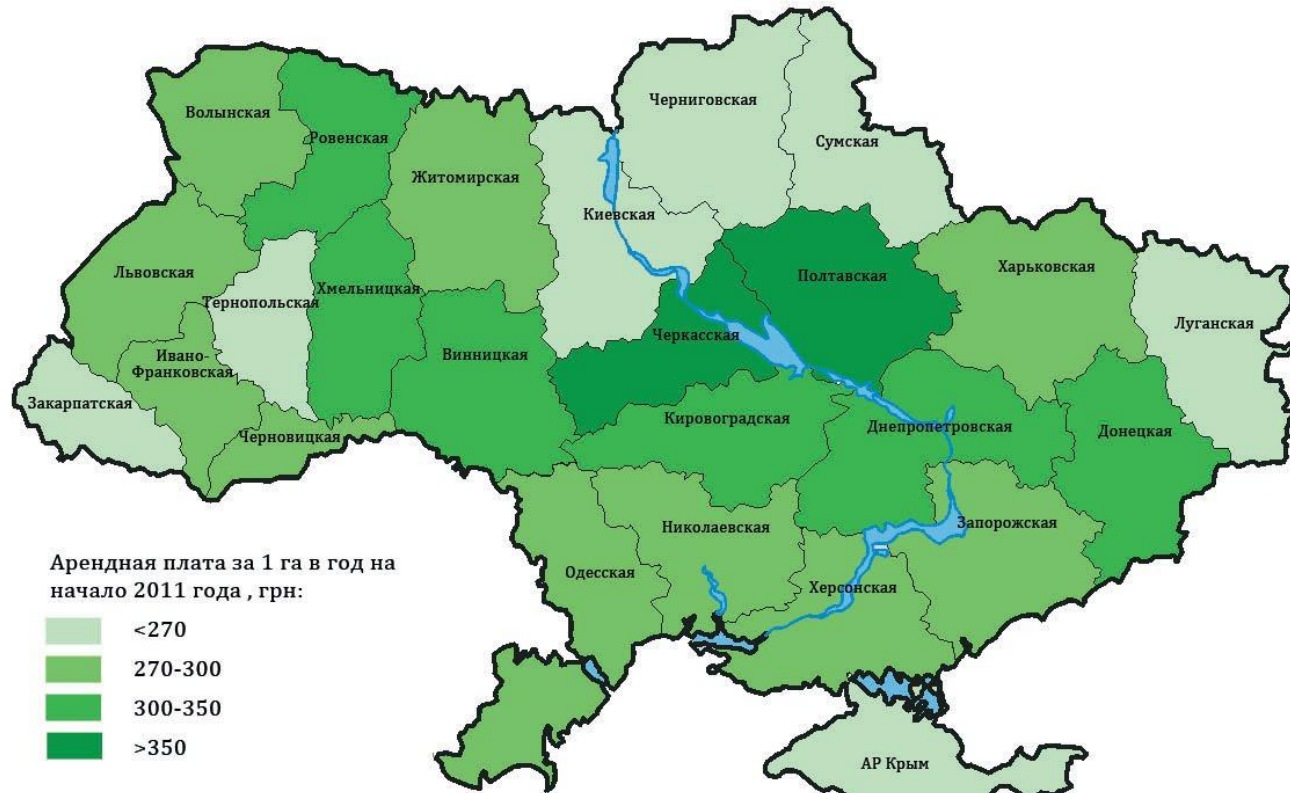
$$L = \frac{R}{r} = \frac{\$63}{0.10} = \$630$$

Arable land price for profitable enterprises

$$L = \frac{R}{r} = \frac{\$123}{0.10} = \$1230$$

Arable land price for 15% of most profitable

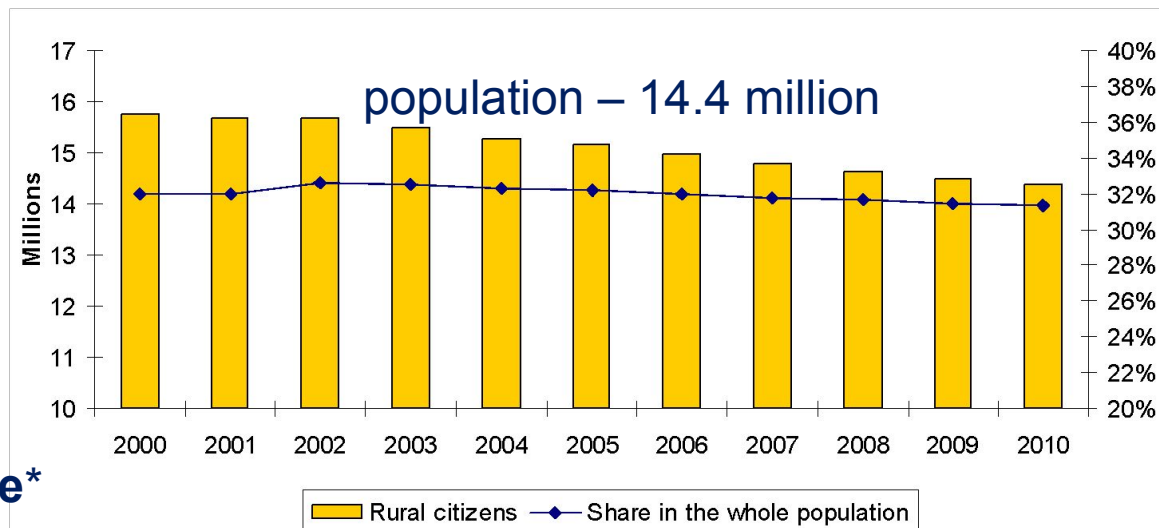
$$L = \frac{R}{r} = \frac{\$170}{0.10} = \$1700$$



По данным исследования УКАБ  
«Оценка рыночной стоимости пахотных земель в Украине»

# Rural population: socio-economic situation

- Current rural
- Main social group – **pensioner (33.2%)\***
- Main problem – **unemployment\***
- Main worry – **continuous price increase\***
- 14.8% of peasants have obtained higher education\*
- 69.0% of peasants aren't willing to leave their living place\*
- 75.0% of peasants aren't using Internet\*
- 71.4% of grown products isn't sold\*



\*According to survey results conducted by Gorshenin Institute, 2011