



**SWISS
NETWORK
WITH
UKRAINE**

ETH zürich



Analysis Center
Agrarian Union of Ukraine

Ukrainian agriculture under war conditions: disruptions, coping strategies and lessons learned



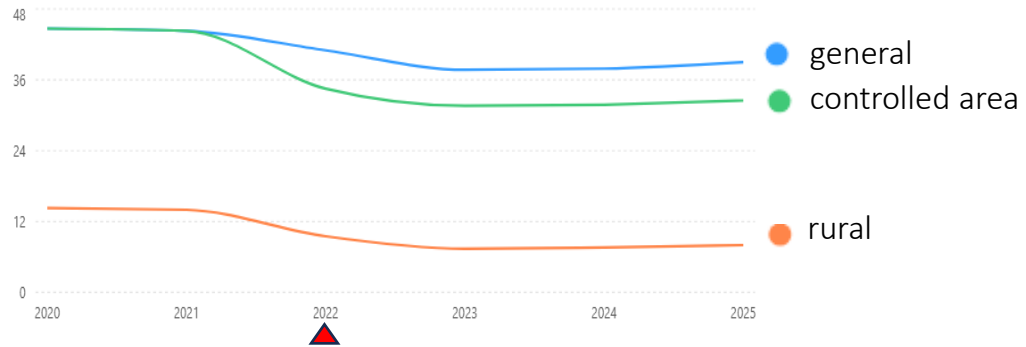
Dr. Larysa STARIKOVA

PO 'Analysis Centre of
Agrarian Union of Ukraine'

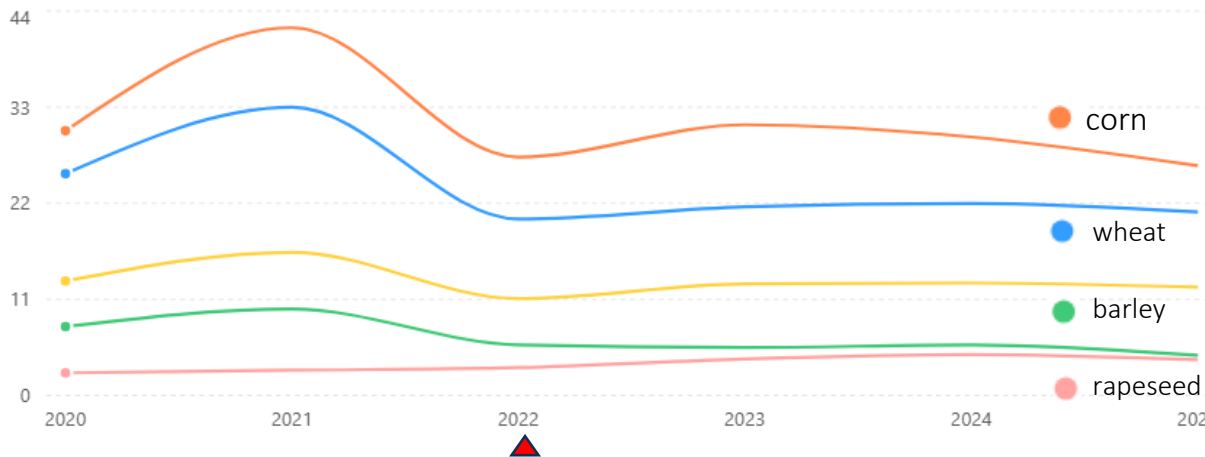


Disruptions

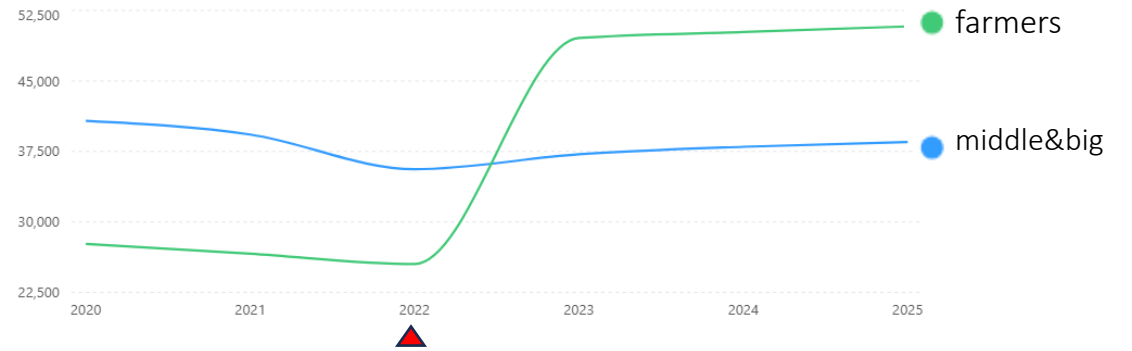
Population of Ukraine, mln



Agrarian production, mln ton



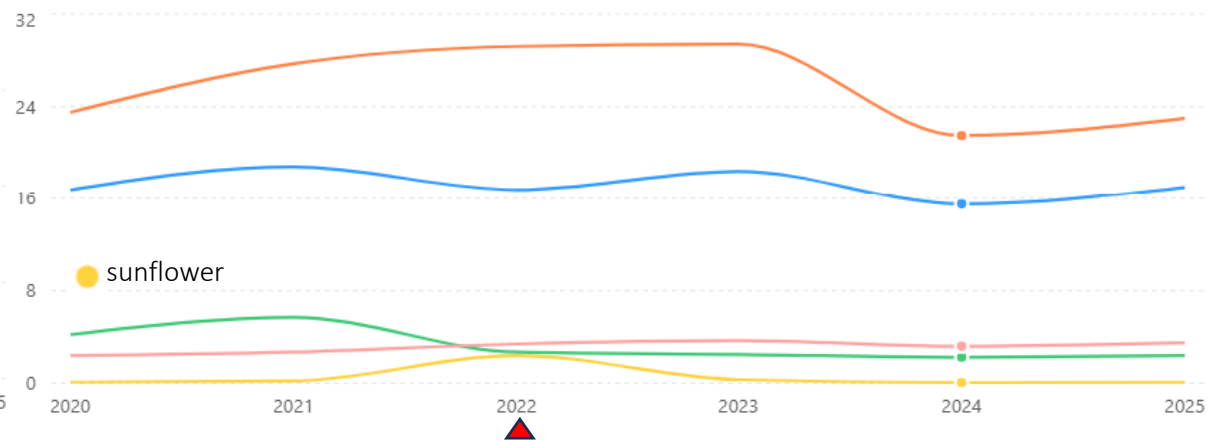
Number of agrarian producers



Land banks of agrarian producers

Land bank size	>15 000 ra	500–15 000 ra	<500 ra
Changes, % of the total	~12% → ~17%	~38% → ~42%	~50% → ~41%

Agrarian export, mln ton





Coping strategies → operational level

Land:



Demining

Demining system, state managed, €400mln,
certified operators, €1000/h



Consolidation

Silent, land market 10 000h, mortgage, racketeering,
accounting lease as intangible assets

Assets:



Real estate

Assurance,

Act 28.11.2025 on compensations via Export Credit Agency



Equipment

25–40% compensation for machinery, processing up to €160 000

New facilities, recovery (2026) up to €320 000

Technology disruptions:



Inputs/Outputs

Availability/Price (milk 2026)



Loss of assets

Fragmentation



Redundant assets

Sailing/Lease



Relocation

Equipment/Technique, local support with resources



Electricity

Additional expenditures



Logistics

Additional expenditures, EU solidarity lanes



Workforce

Reservation, common approach, €400→€500



Coping strategies → in question

National banking system

Finance:

Program 5-7-9

State compensation for banking rate

Return of credits

Irresponsible attitude, ignoring war circumstances, breaching law, ruining credit histories

Profit, € mln

2020 801,94

2021 1 504,85

2022 479,61

2023 1 679,61

2024 2 013,59

2025 2 462,13

April 2026 504,85

	Number of Entities → 40 000		
	5-7-9	total	%
01.06.2026	4 955	8 677	57,10%
25.05.2026	4 450	8 387	53,06%
31.12.2025	7 978	15 574	51,23%
01.06.2025	3 965	8 624	45,98%

	Credits, € mln		
	5-7-9	total	%
01.06.2026	597,6249	1 321,134	45,24%
25.05.2026	568,191	1 255,565	45,25%
31.12.2025	1 043,708	2 552,797	40,88%
01.06.2025	473,8122	1 060,721	44,67%

	State guaranteed credits (portfolio) € mln				
	total	80%	%	less than 80%	%
01.06.2026	311,97	68,60	21,99%	243,36	78,01%
25.05.2026	297,90	67,82	22,77%	230,08	77,23%
31.12.2025	557,49	119,47	21,43%	438,01	78,57%
01.06.2025	264,83	68,66	25,93%	196,17	74,07%



Ukraine Facility €7bln

'market rate' up to 30%, GUF experience, 2015, 5-7-9



State financial support €272mln (2026) is distributed in a clear, transparent way (ministry orders)



State donated assurance

the law of 2012 implementation not reviewed, situation turned into the mess, since 2020

Hybrid influence



Soybean export duty

'processing', dull procedure, summer 2025, lost € 57,5 mln during September-December 2025



Traceability

the last attempt, stopping logistics



Resilience

	Robustness	Adaptability	Transformability	Long term
Farm	● 2022–2025, stand still	● figures, evidence	relocation	best practices capitalization
Specific crops	yes, no changes	● yes (soy)	● bought innovations	bought innovations
Up/Downstream	no robustness	yes ('market arm')	'market arm'	optimization
Climate change	no official data	● land clearing	● in question, finances	EU approach
Market volatility	enough	traditional	traditional	traditional
Policy	● yes, no changes	● no	EU integration, slow	● EU integration, digital



Lessons learned

- (?) **State management** is to be transformed from operational to the strategic level
- (?) **Financial system** is to be bring to realities, financial markets harmonized and open
- (?) **EU support** for the after-war reconstruction is to be crucially revised
- (?) **Hybrid influence** in policy making and legislation is to be indicated

- Ukraine has a system for the **land demining and clearing**
- Agrarian sector is just the only sector distributing state **budget costs in a clear way**
- Agrarian sector of Ukraine appeared **resilient enough** but land banks are enlarging
- **Digitalization** in agrarian sphere give a hope for a fast and successful EU integration