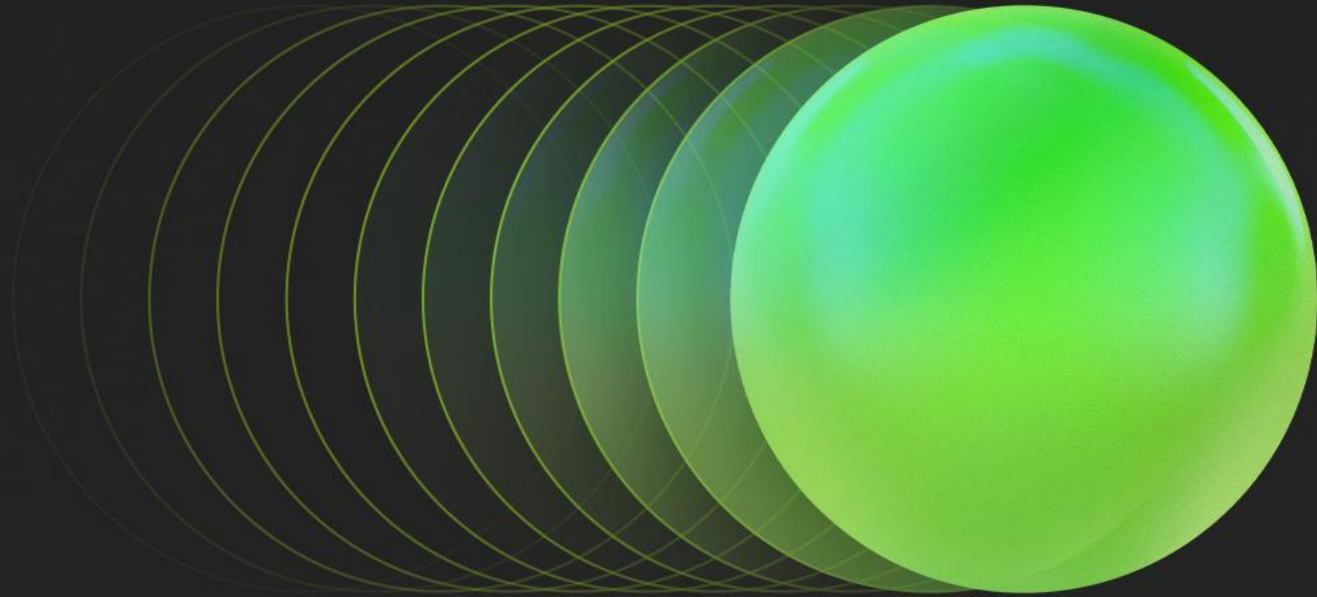




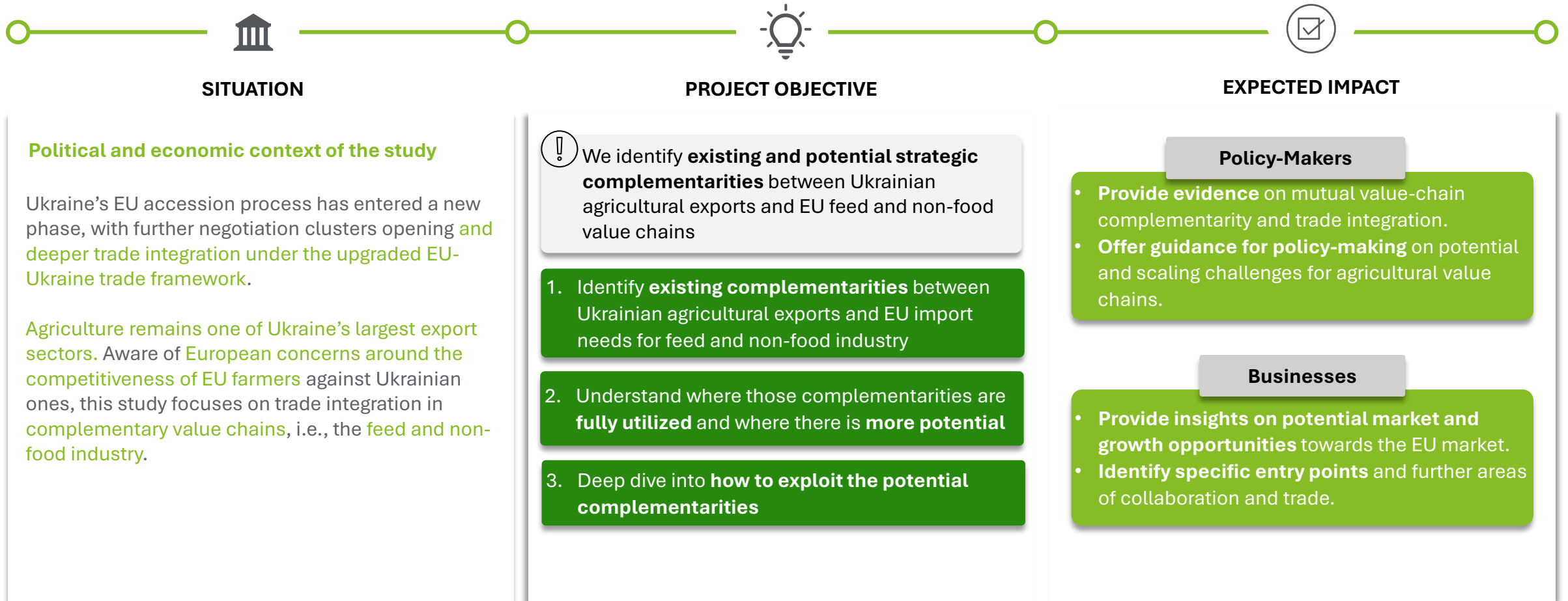
Strategic complementarity analysis

How can Ukraine's agricultural sector support EU value chains?

OCTOBER 2026

Introduction

Our study identifies strategic complementarities between relevant Ukrainian agricultural export goods and EU feed and non-feed value chains and highlights market potential for further trade integration



Summary of findings - utilized complementarities

Ukrainian exports already represent 6% of all EU agricultural imports, for almost half of those Ukraine is amongst the relevant suppliers holding a share in EU imports above 30%

Existing complementarities

Ukraine exports 330 agricultural raw materials or intermediate products to the EU that are used for processing in non-food value-chains.

These have a total value of USD

12.9bn representing 6%

of all EU agricultural imports.

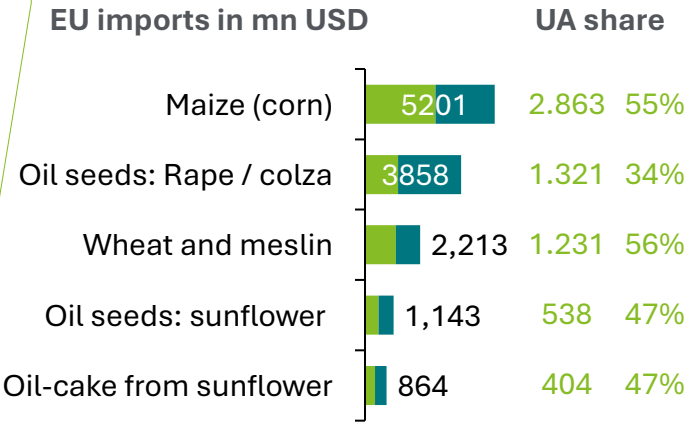
Ø 2022-24

Utilized complementarities

18 of these are utilized complementarities where UA's share of EU imports is >30%, in total worth USD

7.1bn representing 3%

of all EU agricultural imports.



Ø 2022-24

Key EU value chains processing these

The EU value chains that make most use of the selected Ukrainian agricultural input goods are animal feed, fertilizers and biofuels.

Product category	 Animal feed	 Fertilizer	 Biofuels
Cereals	✓	✓	✓
Oil seeds	✓	✓	✓
Oil-cake	✓	✓	✓

Summary of findings - potential complementarities

The other half of Ukrainian complementary exports has scaling potential as their share in EU imports is below 10%

Identification of potential

Two categories of **potentially complementary goods** with scope for increased Ukrainian exports to the EU were identified:

- a) Goods with a **high EU import volume** for which **Ukraine** currently accounts for **less than 10%**, indicating untapped export potential.
- b) Goods recognized as **strategic priorities in both EU and UA policy documents**, indicating a convergence of sourcing needs and export objectives.

a) Top 5 potentials by EU import volume

EU imports in mn USD	UA share
Oil-cake from soya-bean	8,534 170 2%
Soya beans	7,366 516 7%
Other natural fats	2,524 25 1%
Ethyl alcohol (undenat.)	1,546 62 4%
Plants for pharma	695 21 3%

b) Top 5 strategic goods by EU import volume

EU imports in mn USD	UA share
Processed veget. fats	737 1 0%
Vegetable waste	389 6 1%
Oil-cake: other	295 0.5 0%
Wheat gluten	107 0 0%
Bran of legum. plants	46 1 2%

Ø 2022-24

Key EU value chains processing these

Potential **complementary goods** could be processed in EU value chains in **chemical, pharmaceutical, biofuel and feed sectors**.

Product category	 Animal feed	 Biofuels	 Chemicals / pharma
Fats & alcohols		✓	✓
Starches & glute	✓		✓
Oil-cake	✓	✓	
Biofibers			✓



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