

# **BULK TERMINALS LISBON - 2023**

Grain markets 20 months on  
from the conflict in Ukraine



A person is pouring oil from a clear plastic bottle into a dark frying pan on a stove. The scene is overlaid with a semi-transparent blue filter. The text 'Relevance of Ukraine in the world agri supply' is written in white, sans-serif font across the middle of the image. A thick white vertical bar is positioned to the left of the text.

# Relevance of Ukraine in the world agri supply

# Major Crops

## Ukraine Major Crops

million MT	20/21	21/22	22/23	23/24	World 23/24
<b>Soya</b>					
Production	3	4	4	5	Production 400
Export	1	1	3	3	Ukraine
%	47%	34%	80%	65%	1%
Ukraine % of World Exports	1%	1%	2%	2%	

# Major Crops

## Ukraine Major Crops

million MT	20/21	21/22	22/23	23/24
<b>Soya</b>				
Production	3	4	4	5
Export	1	1	3	3
%	47%	34%	80%	65%
Ukraine % of World Exports	1%	1%	2%	2%
<b>Corn</b>				
Production	30	42	27	30
Export	24	25	29	20
%	78%	59%	109%	67%
Ukraine % of World Exports	13%	14%	17%	11%

World 23/24
Production
400
Ukraine
1%
Production
1214
Ukraine
2%

# Major Crops

## Ukraine Major Crops

million MT	20/21	21/22	22/23	23/24	World 23/24
<b>Soya</b>					Production
Production	3	4	4	5	400
Export	1	1	3	3	Ukraine
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Ukraine % of World Exports	1%	1%	2%	2%	
<b>Corn</b>					Production
Production	30	42	27	30	1214
Export	24	25	29	20	Ukraine
%	78%	59%	109%	67%	2%
Ukraine % of World Exports	13%	14%	17%	11%	
<b>Wheat</b>					Production
Production	25	33	24	25	783
Export	17	19	19	13	Ukraine
%	67%	58%	77%	51%	3%
Ukraine % of World Exports	10%	11%	10%	7%	

# Major Crops

## Ukraine Major Crops

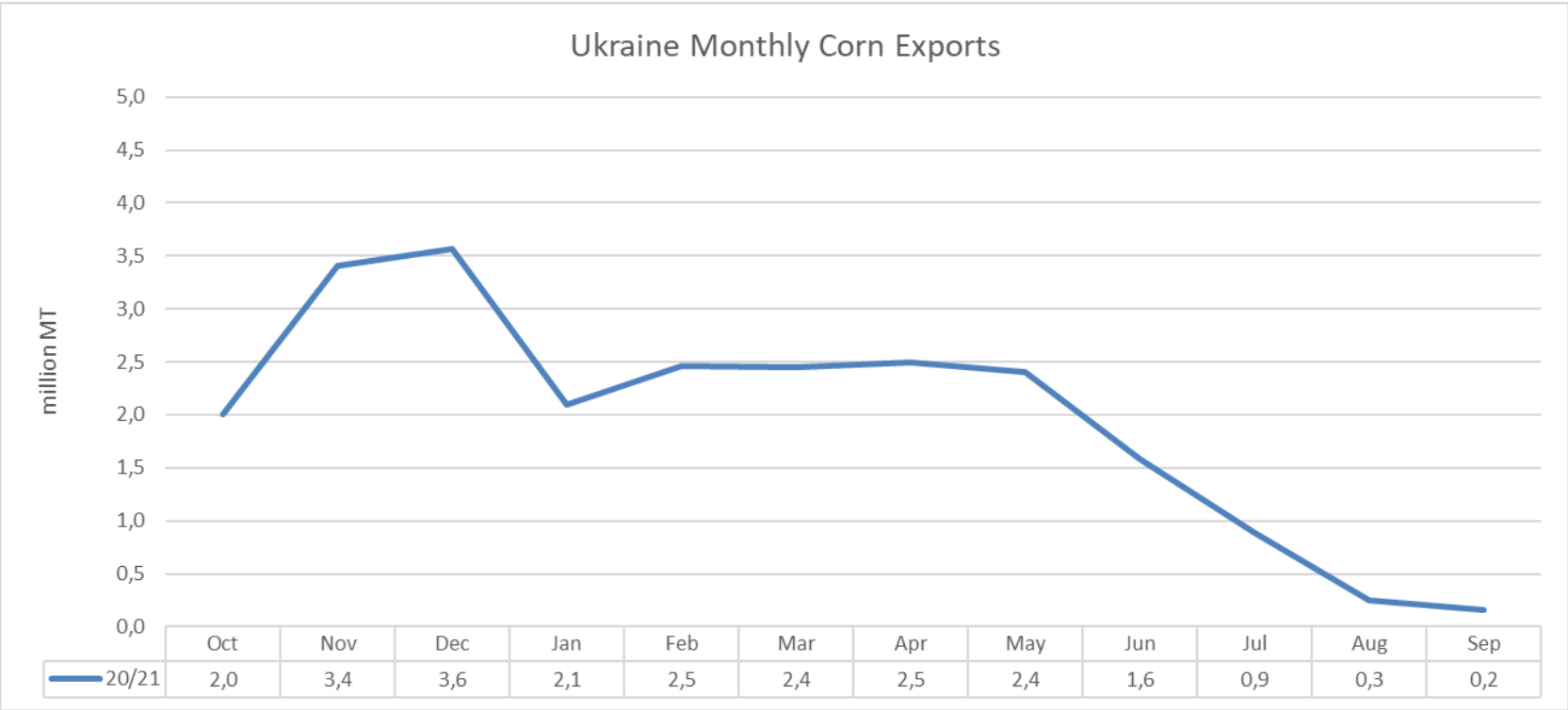
million MT	20/21	21/22	22/23	23/24	World 23/24
<b>Soya</b>					Production
Production	3	4	4	5	400
Export	1	1	3	3	Ukraine
%	47%	34%	80%	65%	1%
Ukraine % of World Exports	1%	1%	2%	2%	
<b>Corn</b>					Production
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Export	17	19	19	13	Ukraine
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Ukraine % of World Exports	10%	11%	10%	7%	
<b>Sunseed</b>					Production
Ukraine Production	14	17	13	15	56
World Production	50	57	54	56	Ukraine
% Ucrânia	28%	30%	23%	26%	26%

Source: USDA s&d Oct

A person is shown from the waist down, wearing a patterned top, pouring oil from a clear plastic bottle into a dark frying pan on a stovetop. The scene is overlaid with a semi-transparent blue filter. The text 'When the Conflict Started' is written in white, sans-serif font, positioned to the right of a vertical white bar.

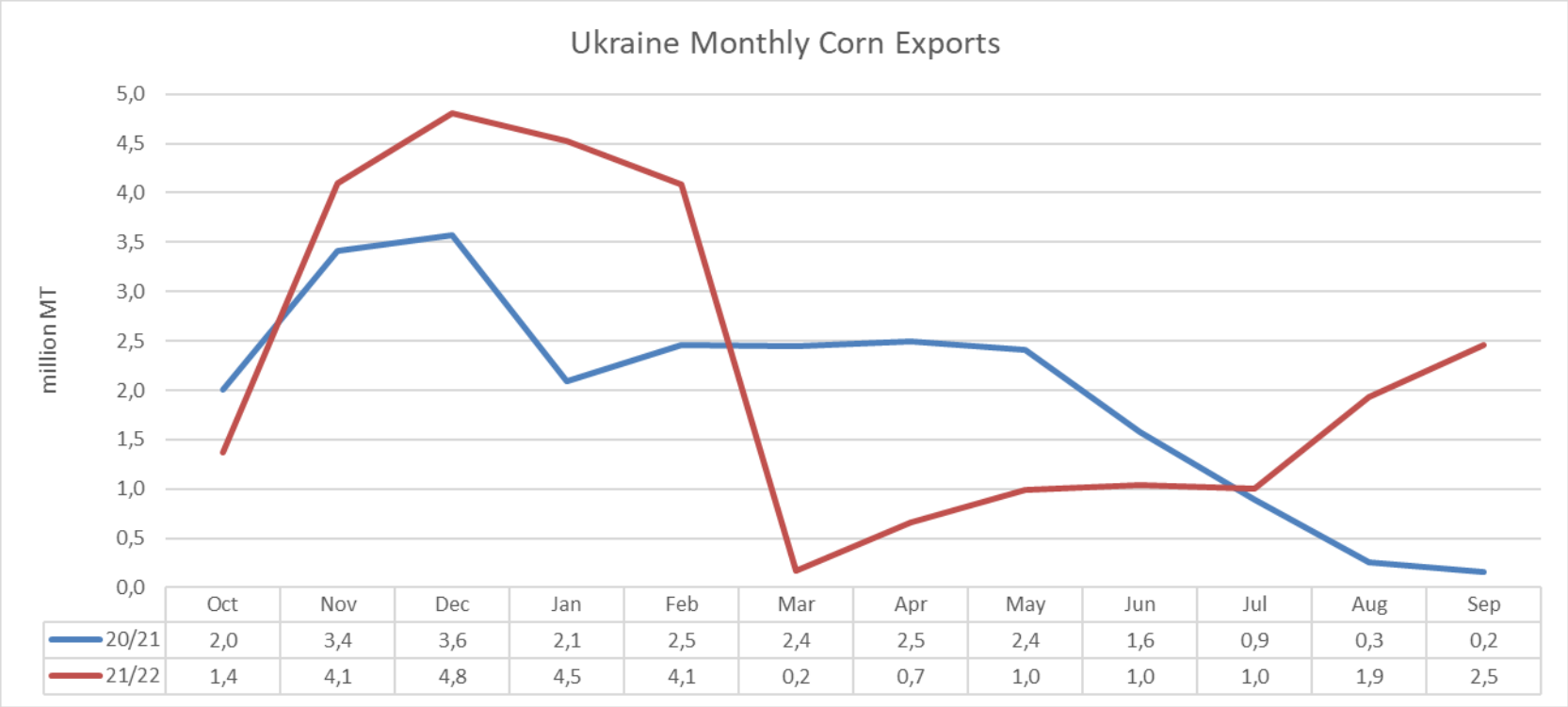
# When the Conflict Started

# Corn Monthly Exports

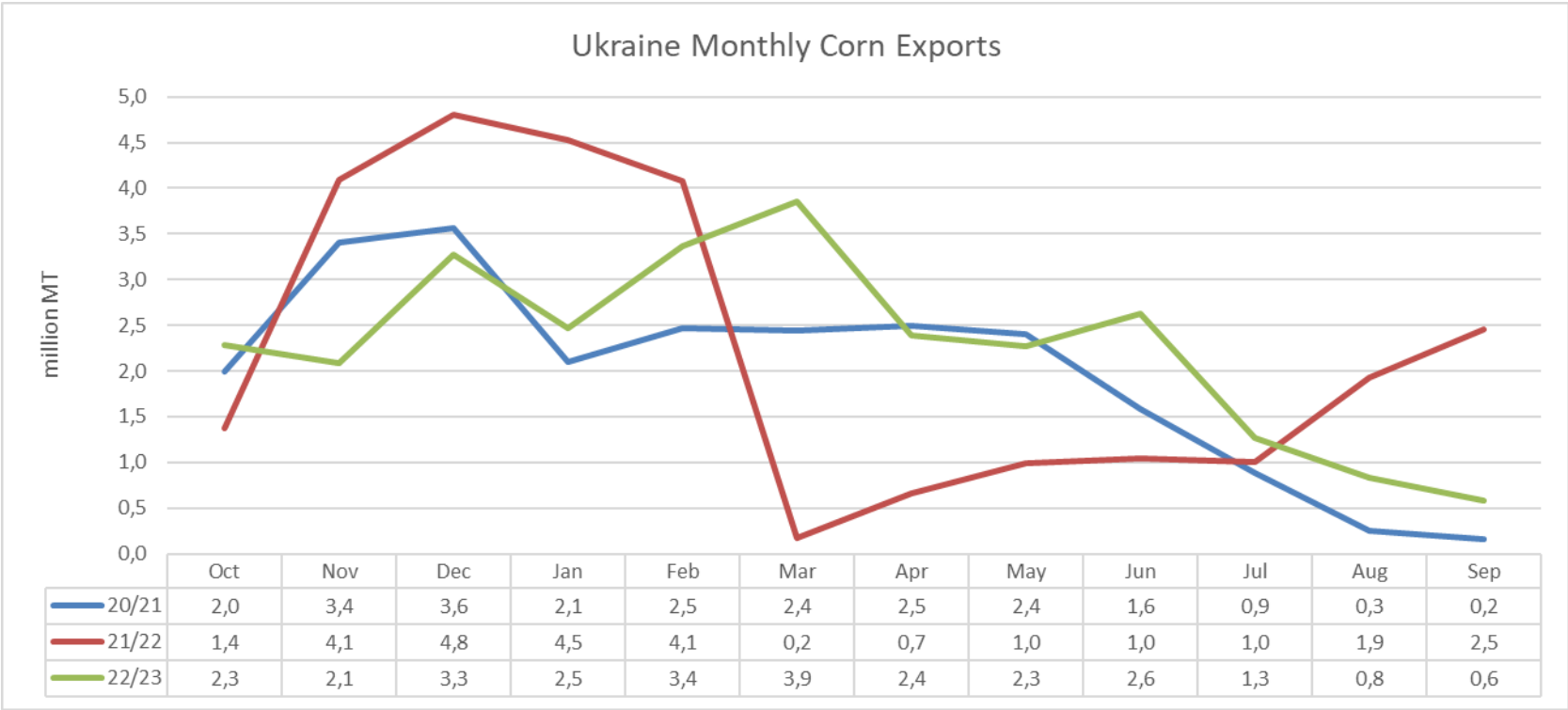




# Corn Monthly Exports



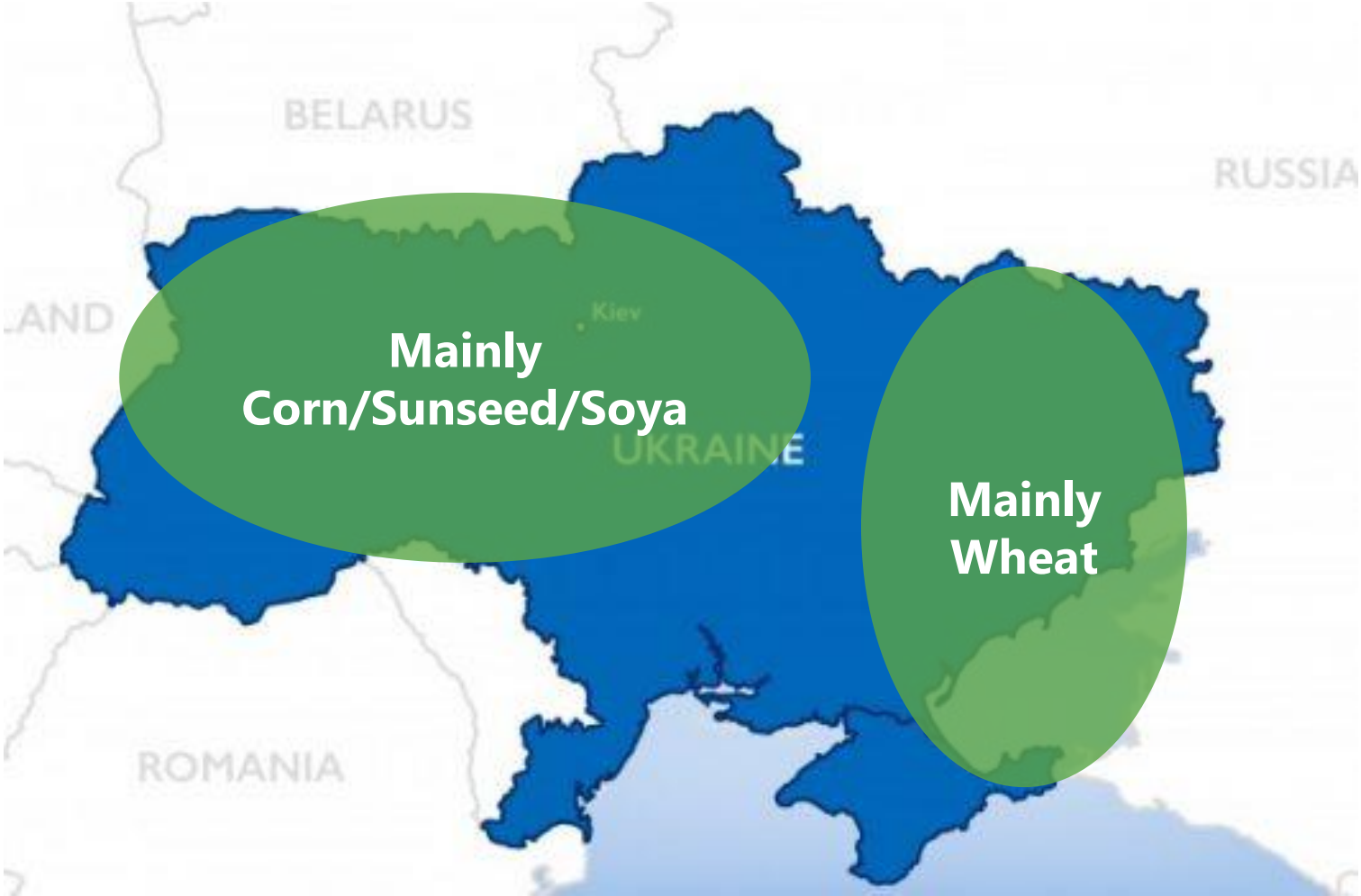
# Corn Monthly Exports



A person is pouring water from a clear plastic bottle into a dark pan on a stove. The scene is overlaid with a semi-transparent blue filter. In the background, there are plates of food on a table.

| Where is what!

# Crops



# Danube Ports



A person is pouring water from a clear plastic bottle into a dark pan on a stove. The scene is overlaid with a semi-transparent blue filter. In the background, there are plates of food on a table.

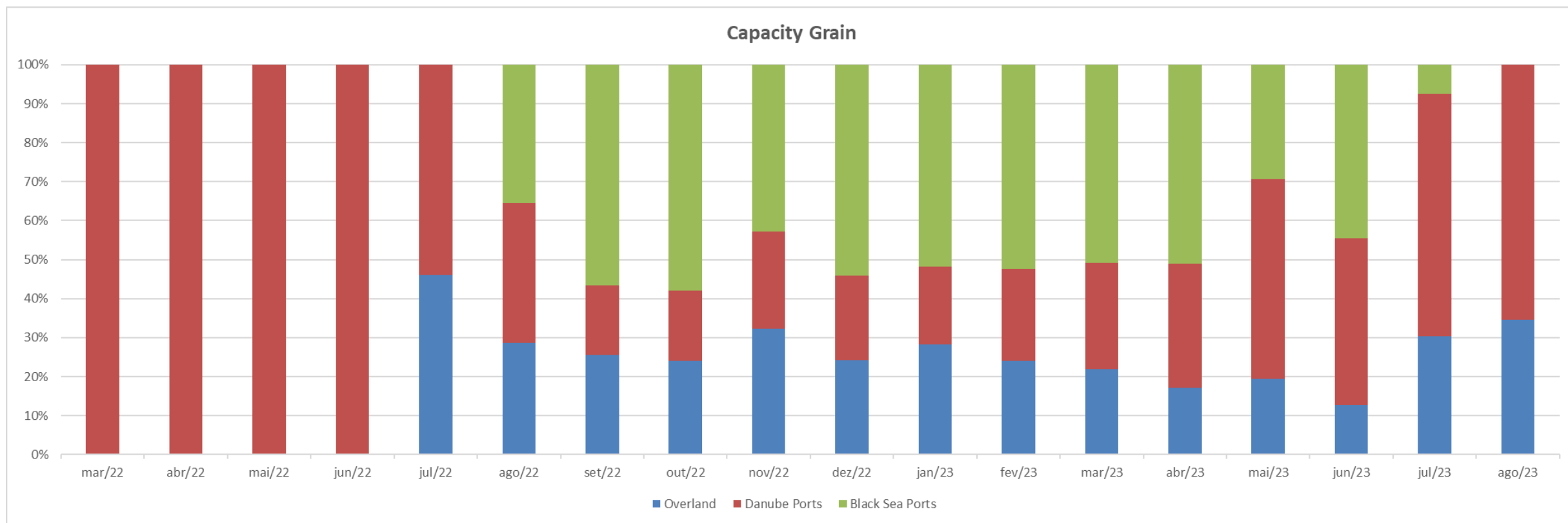
# How exports recovered

# All possible routes played it's part

## Capacity Grain

000 MT	mar/22	abr/22	mai/22	jun/22	jul/22	ago/22	set/22	out/22	nov/22	dez/22	jan/23	fev/23	mar/23	abr/23	mai/23	jun/23	jul/23	ago/23	Total yearly
Rail - Poland	176	268	313	280	389	313	499	528	530	505	533	444	401	224	289	186	363	352	4 755
Rail - Slovakia	32	43	56	74	93	74	135	96	169	160	139	135	86	62	48	37	73	200	2 053
Rail - Hungary	42	129	140	159	152	107	218	273	285	292	259	290	318	218	138	72	140	197	2 602
Rail - Romania	19	91	147	159	156	118	144	118	133	144	156	168	206	107	113	52	101	131	1 631
Rail - Moldova	2	38	30	39	15	14	37	21	32	33	25	24	32	19	31	3	5	33	356
Auto - Poland	75	86	46	57	80	147	188	223	257	165	178	172	172	33	21	31	54	70	1 243
Auto - Slovakia	19	22	4	8	14	25	22	25	28	30	15	14	15	12	12	11	9	16	192
Auto - Hungary	9	10	10	19	32	57	75	91	113	78	56	62	68	29	26	23	21	31	515
Auto - Romania	4	5	52	101	138	185	181	178	170	121	118	154	148	97	92	69	53	80	1 106
Auto - Moldova			48	76	110	150	120	85	91	53	37	57	61	26	22	14	9	19	411
Ferry - Romania					26	27	16	34	38	35	22	25	77	62	54	68	99	130	1 249
Overland					<b>1 205</b>	<b>1 215</b>	<b>1 635</b>	<b>1 671</b>	<b>1 846</b>	<b>1 615</b>	<b>1 537</b>	<b>1 545</b>	<b>1 585</b>	<b>888</b>	<b>847</b>	<b>567</b>	<b>927</b>	<b>1 259</b>	<b>16 114</b>
Danube Ports	<b>23</b>	<b>266</b>	<b>799</b>	<b>1 068</b>	<b>1 405</b>	<b>1 529</b>	<b>1 139</b>	<b>1 249</b>	<b>1 414</b>	<b>1 448</b>	<b>1 083</b>	<b>1 500</b>	<b>1 987</b>	<b>1 642</b>	<b>2 222</b>	<b>1 907</b>	<b>1 891</b>	<b>2 392</b>	<b>27 315</b>
Black Sea Ports	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1 511</b>	<b>3 621</b>	<b>4 018</b>	<b>2 447</b>	<b>3 601</b>	<b>2 818</b>	<b>3 362</b>	<b>3 687</b>	<b>2 632</b>	<b>1 279</b>	<b>1 978</b>	<b>228</b>	<b>0</b>	<b>21 456</b>
Azov Sea Ports	29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>430</b>	<b>957</b>	<b>1 644</b>	<b>2 042</b>	<b>2 610</b>	<b>4 255</b>	<b>6 395</b>	<b>6 939</b>	<b>5 708</b>	<b>6 665</b>	<b>5 438</b>	<b>6 407</b>	<b>7 258</b>	<b>5 163</b>	<b>4 348</b>	<b>4 452</b>	<b>3 047</b>	<b>3 651</b>	<b>64 885</b>

# All possible routes played it's part





A person is pouring water from a clear plastic bottle into a black frying pan on a stove. The scene is overlaid with a semi-transparent blue filter. In the background, there is a plate with some food items and a fork.

Q&A