



UKRAINE
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UKRAINE AS SEEN BY EBRD: GROWTH AMID WAR AND DEPENDENCE ON FOREIGN SUPPORT

Ukraine's economy may grow by about 4% in 2025, but the outlook remains fragile and depends entirely on external factors. This is stated in the latest report of the European Bank for Reconstruction and Development (EBRD) Regional Economic Prospects: Under Pressure. According to the document, the main source of support for the Ukrainian economy is international financial aid, which is used to cover budget expenditures, social payments and defense. An additional driver of growth is the export of agricultural products through the EU "solidarity corridors" and alternative routes along the Danube and overland, which partially compensates for restrictions on maritime transportation.

There has also been a gradual recovery of infrastructure, including roads, bridges and the power grid, which is supporting economic activity.

However, the EBRD warns of high risks. Among them are a protracted war, high levels of public debt and inflation, as well as the vulnerability of export flows, which could be sharply reduced if sea routes are blocked.

At the end of 2024, Ukraine's GDP was estimated at around \$160 bln. More than 60% of exports were agro-products (grain, oilseeds and processed products). The metallurgy, IT and energy sectors also retain potential for recovery. The EBRD emphasizes that the Ukrainian economy is "under pressure", but with continued international support and access to external markets, it can grow rapidly, laying the foundations for post-war transformation.

HEADLINES

07 October 2025



CHINA, POLAND, AND
GERMANY REMAIN UKRAINE'S
KEY TRADING PARTNERS –
EXPERTS CLUB



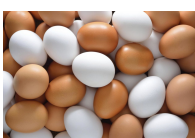
EGYPT, SPAIN, AND MOLDOVA
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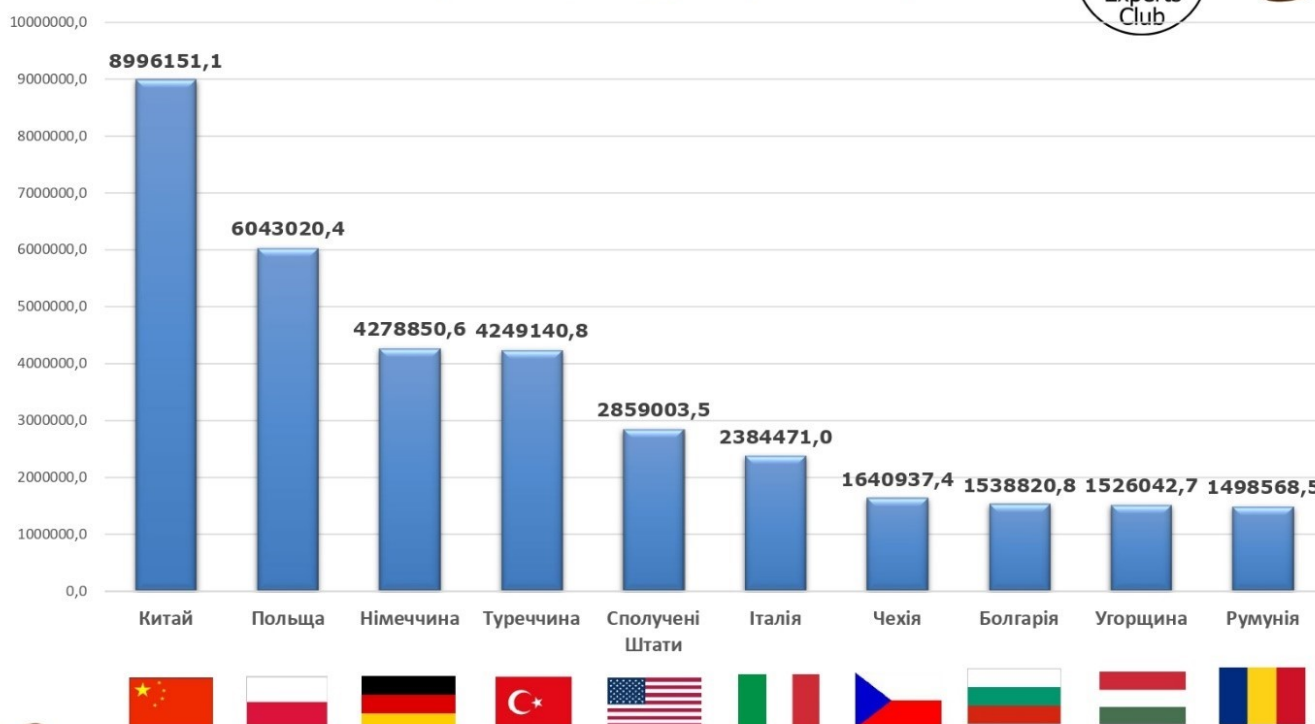
IMPORTS OF
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CHINA, POLAND, AND GERMANY REMAIN UKRAINE'S KEY TRADING PARTNERS – EXPERTS CLUB

In terms of total trade volume, Ukraine cooperates most closely with China, Poland, and Germany. These countries form the basis of the state's foreign economic relations, exerting a critical influence on imports and exports.

China remains the leader with a total trade volume of \$8.99 billion. Poland ranks second with \$6.04 billion, while Germany and Turkey are almost equal with \$4.28 billion and \$4.25 billion, respectively. The United States ranks fifth with \$2.86 billion.

ТОП-10 торговельних партнерів України за загальним обсягом торгівлі (тис доларів США)



Дослідження здійснено компанією «Active Group» за допомогою онлайн-панелі «SunFlower Sociology». Метод: самозаповнення анкет громадянами України віком 18 та більше років. Вибірка 800 анкет (репрезентативна за віком, статтю і регіоном України). Період збору даних: серпень 2025 р.



SunFlower Sociology

The top 10 also includes Italy (\$2.38 billion), the Czech Republic (\$1.64 billion), Bulgaria (\$1.54 billion), Hungary (\$1.53 billion), and Romania (\$1.50 billion).



“The top ten partners form the basis of Ukraine's foreign trade balance. China and the EU countries account for the largest volumes of trade, but it is important to take into account the significant negative balance in relations with these countries,” said Maksim Urakin, founder of Experts Club and economist.

He added that although the large volume of trade indicates Ukraine's integration into global supply chains, dependence on imports from China and Europe creates strategic risks.

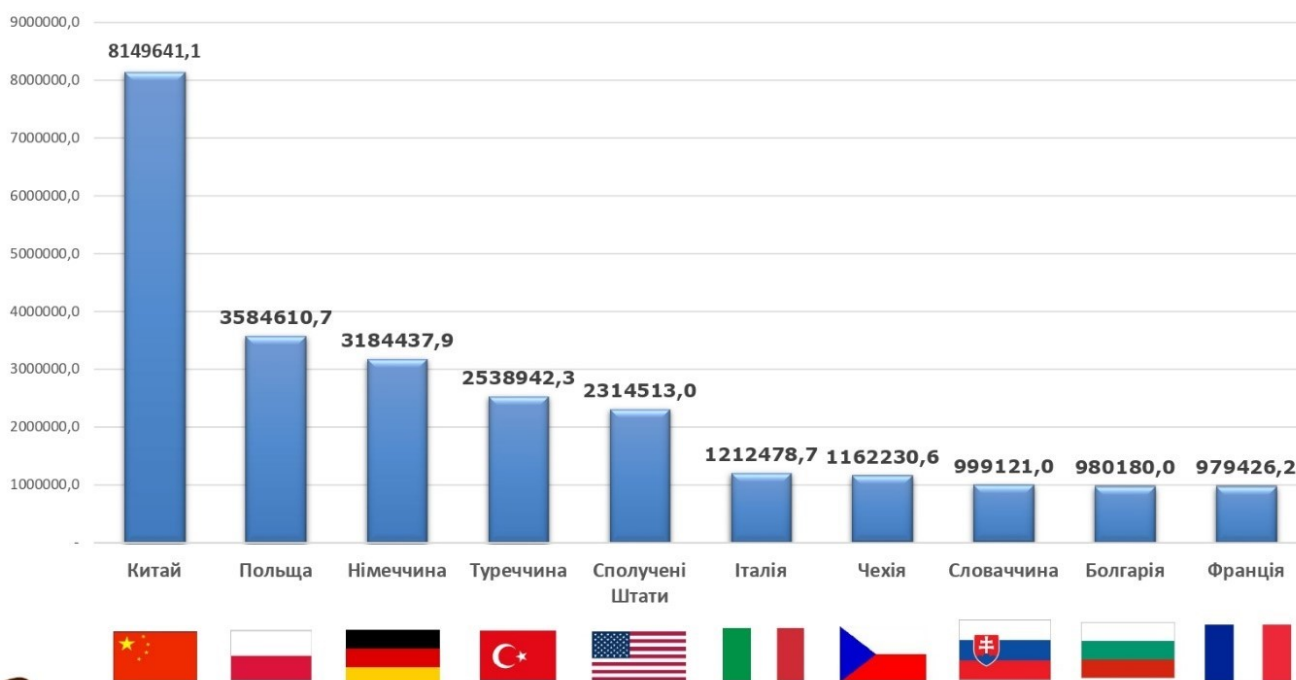
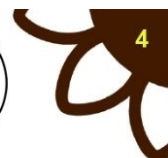
“Poland and Germany are key hubs for Ukrainian exports, but at the same time they are significant sources of imports. Therefore, it is critically important to balance trade flows, preserving positive sectors such as agriculture and metallurgy, and reducing dependence on critical imports,” Urakin noted.

UKRAINE INCREASES IMPORTS FROM CHINA AND EU: EXPERTS CLUB ANALYSTS WARN OF IMBALANCE

China remains the undisputed leader among Ukraine's trading partners in terms of import volume. In the first six months of 2025, Ukraine imported Chinese goods worth US\$8.15 billion. This is more than twice the figures for Poland (\$3.58 billion) and Germany (\$3.18 billion), which ranked second and third, respectively.

High import volumes were also recorded from Turkey (\$2.53 billion) and the United States (\$2.31 billion). Italy, the Czech Republic, Slovakia, Bulgaria, and France round out the top ten key suppliers with volumes ranging from \$1.2 billion to \$979 million.

ТОП-10 торговельних партнерів України за обсягом імпорту (тис доларів США)



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“The formation of such an import structure indicates Ukraine's excessive dependence on Chinese goods, especially in the electronics, technology, and industrial products segments. Such an imbalance poses risks to economic stability, as any political or logistical restrictions will immediately affect the domestic market,” emphasized Maksim Urakin, founder of Experts Club and economist.

At the same time, experts point to the diversification of supplies from European Union countries. Poland, Germany, Italy, and France together account for more than \$8.5 billion in imports, forming a significant segment of the domestic consumer and industrial market.

Economists predict that, provided the hryvnia exchange rate remains stable and import flows continue at current levels, the trade deficit with China will continue to grow. This will require an adjustment of state trade policy towards stimulating domestic production and searching for alternative markets.



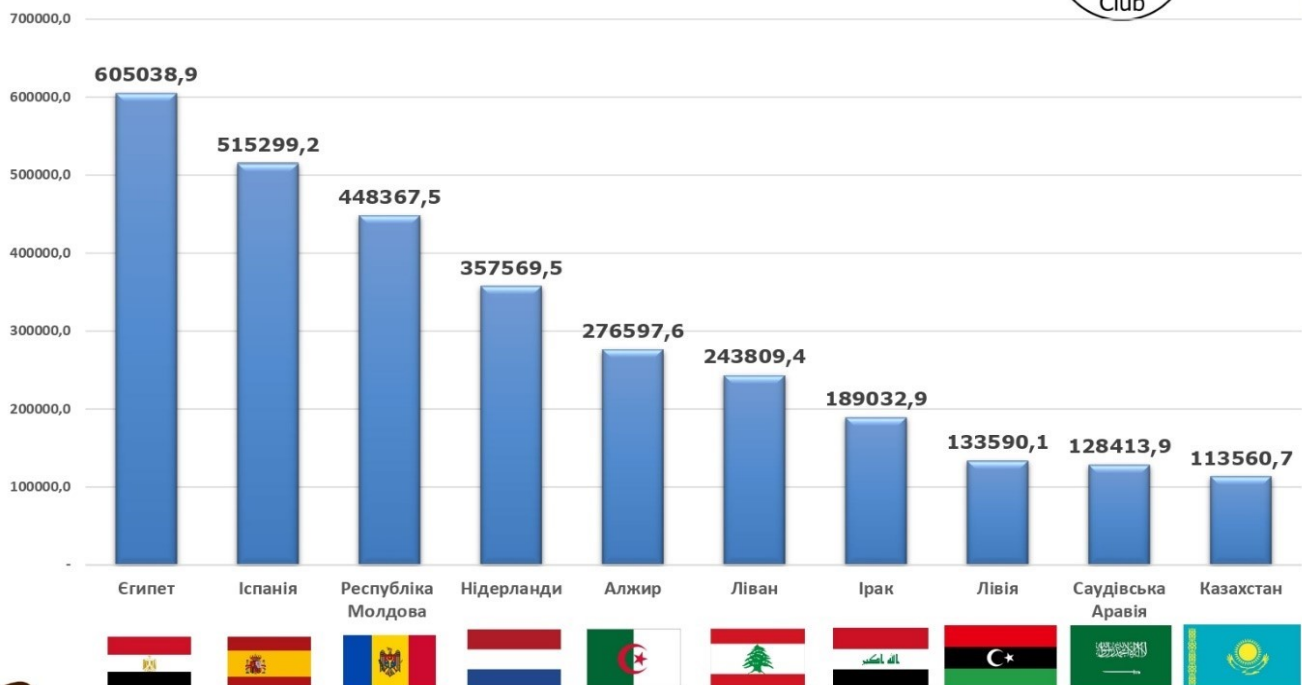
EGYPT, SPAIN, AND MOLDOVA UKRAINE'S LEADING TRADING PARTNERS IN TERMS OF POSITIVE TRADE BALANCE

Ukraine maintains a significant positive trade balance with a number of key partners, which partially offsets the deficit in relations with China and EU countries.

“The largest surplus in the first half of 2025 was recorded in trade with Egypt — \$605.0 million. Spain ranks second with a balance of \$515.3 million, followed by the Republic of Moldova — \$448.4 million. Positive dynamics are also observed in relations with the Netherlands (\$357.6 million), Algeria (\$276.6 million), and Lebanon (\$243.8 million).

Ukraine also has a high trade surplus with Iraq (\$189.0 million), Libya (\$133.6 million), Saudi Arabia (\$128.4 million), and Kazakhstan (\$113.6 million).

ТОП-10 торговельних партнерів України за позитивним сальдо (тис. доларів США)



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“The positive trade balance indicates that Ukraine is capable of competing effectively in international markets, especially in the agricultural sector and metallurgy. At the same time, it should be borne in mind that these markets are vulnerable to changes in the global economic situation, price fluctuations, and political factors,” emphasized **Maksim Urakin**, founder of **Experts Club** and economist.

According to him, maintaining a positive balance in relations with the countries of the Middle East and North Africa is a key element of Ukraine's foreign trade strategy.

“Egypt, Spain, and the countries of the Arab world are stable importers of Ukrainian agricultural products. This is a strategic direction that needs to be developed further, as it creates a safety cushion for the economy against the backdrop of significant import costs,” **Urakin emphasized**.

Analysts note that consolidating positions in the African and Middle Eastern markets could become a long-term factor in strengthening Ukraine's foreign economic balance.

UKRAINE'S STATE BUDGET REVENUES GREW BY 25% OVER NINE MONTHS

Taxes, fees, and mandatory payments to the general and special funds of Ukraine's state budget amounted to UAH 2.71 trillion over the first nine months of 2025, while cash expenditures amounted to UAH 3.63 trillion, which is approximately 25.0% and 22.1% higher than the corresponding figures for the first nine months of 2024. According to operational data from the State Treasury Service, which the **Ministry of Finance** published on its website, general fund revenues increased by 24.5% to UAH 1.92 trillion, while expenditures increased by 20.4% to UAH 2.82 trillion.

“*It is noted that the largest source of revenue in January-September this year remains VAT on goods imported into the customs territory of Ukraine – UAH 390.3 billion (UAH 342.3 billion in the first nine months of 2024).*”

After raising the military tax from 1.5% to 5% and introducing a condition for reserving a salary of UAH 20,000 this year, personal income tax and military tax moved from fourth to second place in terms of revenue for the first nine months of this year – UAH 260.9 billion compared to UAH 154.7 billion last year.

In third place this year is VAT on goods produced in Ukraine – UAH 231.6 billion for refunds of UAH 131.2 billion (UAH 197.6 billion for refunds of UAH 109.7 billion), while corporate income tax amounted to UAH 219.7 billion (UAH 200.9 billion) and fell to fourth place, with excise tax almost catching up with it at UAH 210.5 billion (UAH 150.9 billion).

In addition, dividends and parts of the net profit of state-owned companies amounted to UAH 64.5 billion (UAH 66.6 billion), import and export duties – UAH 40.0 billion (UAH 35.7 billion), and rent payments for the use of subsoil resources – UAH 31.5 billion (UAH 36.3 billion).

State budget expenditures in 2024 increased by UAH 464.5 billion, or 11.6%, compared to 2023, to UAH 4 trillion 479.3 billion, in particular, under the general fund – by 15%, or UAH 454.5 billion – to UAH 3 trillion 488.8 billion.

BIOPHARMA COMPLETES CONSTRUCTION OF PLASMA PROCESSING PLANT IN UZHGOROD

Biopharmaceutical company Biopharma (Kyiv) has completed construction of a new pharmaceutical plant in Uzhgorod.

This was announced by Dmytro Kysilevsky, deputy chairman of the parliamentary committee on economic development.

“*“Biopharma Plasma has completed 80% of the construction of a plant for the production of blood plasma-based medicines in Uzhgorod. The industrial premises have already been fully built, the construction and connection of the energy infrastructure has been completed, and the installation of production equipment will begin in October,” he wrote on his Facebook page.*”

Kysilevsky specified that commissioning work at the plant is scheduled for late 2025-early 2026, with the launch of the first stage of production planned for the first half of 2026.

According to the plan, the volume of blood plasma-based drugs produced in Uzhgorod will be twice that of Bila Tserkva, amounting to 1.5 million liters of blood plasma per year.

Construction of the Biofarma Plasma plant in Uzhgorod began in the fall of 2024. The planned investment in the new production facility is approximately €80 million. The company's Uzhgorod plant will focus on exports.

UKRAINIAN CEMENT MARKET – EXPERTS CLUB STUDY

The Experts Club information and analytical center, with the assistance of the Ukrainian Cement Manufacturers Association (Ukrcement), has conducted an analysis of the Ukrainian cement industry.

“Over the past five years, the Ukrainian cement industry has experienced a peak in production in 2021, a sharp decline in 2022, a gradual recovery in 2023, and stabilization in 2024. However, the current level is still far from pre-war indicators.

According to trade union and industry reviews, output was about 11 million tons in 2021, fell to 5.4 million tons in 2022, recovered to 7.43 million tons in 2023, and reached 7.93 million tons in 2024. In 2025, manufacturers are talking about an actual “ceiling” — approximately 8 million tons under current risks and logistics, which is likely to be the maximum figure.

The dynamics of domestic cement consumption show a similar trend of “decline and normalization.” In 2021, before the full-scale invasion, consumption was around ~10.6 million tons. In 2022, the cement market fell sharply to approximately 4.5 million tons, rose to 6.2 million tons in 2023, and stabilized at around 6.3 million tons in 2024. Thus, the country approached a stable level of “war” demand, which is almost half of the pre-war level, within the range of 6–6.5 million tons.

The structure of demand has changed: the share of traditional residential and commercial construction has given way to infrastructure and defense projects. The key short-term drivers are fortification works, shelters, emergency repairs of roads and bridges, as well as targeted housing programs such as “єОселя,” which supported demand in 2023–2024, although they did not return it to the 2021 level. The market expects demand to remain stable in 2025, sensitive to the volume of budgetary and international financing.

Amid declining domestic demand, a natural step to support production capacity utilization was the gradual reorientation of part of the cement output to foreign markets. In 2021, cement exports amounted to about 971,000 tons (9% of production), and in 2024, about 1.7 million tons (21.3% of production). The main destinations remain neighboring countries—Poland, Romania, Hungary, and Moldova—as confirmed by both statistical data and industry estimates. The industry has repeatedly emphasized that as soon as domestic consumption begins to grow, the export share will decline in favor of Ukrainian construction sites.

Imports, on the contrary, have declined. After approximately 1 million tons in pre-crisis 2020, deliveries in 2024 decreased to ~40 thousand tons (including niche items such as white cement). This was also influenced by anti-dumping duties: against Turkey — 33–51% (in effect until September 2026), and against Russia/Belarus/Moldova, measures have been extended until 2030. Under the current conditions, when production capacities and logistics are adapted to the “military” level of consumption, demand is fully covered by domestic resources.

Road construction is an important factor in economic and social development. The introduction of the latest technologies, the use of high-quality materials, and compliance with environmental requirements are key aspects of the successful development of this industry.

The development of the construction and repair of cement concrete roads based on cement mixtures can play a key role in stimulating stable cement consumption in conditions of war and reconstruction. This infrastructure direction makes it possible to maintain the production capacity of enterprises, jobs, and economic activity, despite a significant reduction in residential and commercial construction. Thanks to their durability and endurance, cement concrete pavements are the optimal solution for both military and civilian logistics. The implementation of such projects not only ensures constant demand in the industry, but also the development of related sectors, creating a multiplier effect for the economy even in crisis conditions. This issue will be the focus of a specialised seminar organised by NIRI and the Ukrcement Association on 15-16 October 2025, where the advantages and role of cement concrete solutions in the reconstruction of Ukraine will be discussed (details at ukrcement.com.ua).

The geography of foreign sales shows a stable “corridor” and proximity to the EU. According to trade statistics for 2023, Romania accounted for the largest value of supplies, followed by Poland and Hungary; in 2024, Romania, Poland, and Hungary remained in the lead.

HOTEL PROJECT MARKET IN UKRAINE IS AWAITING “SECOND WAVE OF BOOM,” ACCORDING TO EXPERT

If most hotel projects in Ukraine are completed in 2025–2026 and demonstrate financial stability, the market will see a “second wave of boom,” according to Apartel Resorts partner Yevgeny Kudryavchenko in an interview with **Interfax-Ukraine**.

“We saw the first boom in 2021-2022, but the war interrupted these processes. Now there is cautious growth, and if the facilities prove their effectiveness, there will be a new surge of interest and significantly more foreign investors,” he said.

Kudryavchenko emphasized that apart-hotels could become an important part of the infrastructure for future tourism and business travel in Ukraine.

Apartel resorts is a development company specializing in apart-hotel and hotel real estate projects in Ukraine.



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SEPTEMBER SALES OF NEW CARS IN UKRAINE INCREASED BY 20% TO 6,800

Ukrainians purchased more than 6,800 new passenger cars in September, which is 20% more than in September 2024 and 1% more than in August this year, UkrAvtoprom reported on its Telegram channel.

“For the first time, Chinese BYD took the lead in the market, exceeding its last year’s result by five times,” the message says.

“According to the association, BYD’s sales in September amounted to 989 units (5.4 times more than in September last year). The long-time sales leader, Toyota, took second place in the ranking with sales of 828 cars (-1%); Volkswagen came in third with 733 units (+118%).



Further down the ranking were Renault with 471 units (-13%); Skoda with 467 units (+5%); BMW with 366 units (-16%); Hyundai with 347 units (+47%); Zeekr with 248 units (+103%); Mazda with 244 units (+17%); and Honda with 216 units (+50%).

For the first time, the Volkswagen ID.Unyx electric car became the bestseller of the month.

UkrAvtoprom reports that 52,900 new passenger cars were registered in the country in January-September, which is 0.3% less than last year.

As reported, in 2024, initial registrations of new passenger cars in Ukraine, according to UkrAvtoprom, increased by 14% to 69,600 units.

ZAPORIZHSTAL INCREASED ITS ROLLED STEEL OUTPUT BY 14.1% IN JANUARY-SEPTEMBER 2025

In January-September of this year, the Zaporizhstal metallurgical plant increased its rolled steel production by 14.1% compared to the same period last year, from 1.829 million tons to 2.0866 million tons.

According to the plant's press release, steel production for the period amounted to 2 million 385.2 thousand tons (in January-September 2024 – 2 million 176.7 thousand tons), and 2 million 642.6 thousand tons of pig iron (2 million 297.5 thousand tons).

In September, Zaporizhstal produced 303.4 thousand tons of pig iron, 279.8 thousand tons of steel, and 247.3 thousand tons of rolled products, compared to 309 thousand tons of pig iron, 264 thousand tons of steel, and 231.2 thousand tons of rolled products in the previous month.

As reported, in 2024, Zaporizhstal increased its rolled steel output by 18.1% compared to 2023, to 2 million 426.7 thousand tons from 2 million 54.7 thousand tons, and steel output by 17.2%, to 2 million 890.8 thousand tons, and pig iron by 14.2%, to 3 million 106.3 thousand tons.



DTEK ENERGY INVESTED UAH 4.9 BLN IN MINE DEVELOPMENT OVER 8 MONTHS

In January-August 2025, DTEK Energy allocated UAH 4.9 billion to the development of coal enterprises, which made it possible to maintain production capacity and introduce modern technologies.

“To maintain an adequate level of coal production, the company continues to prepare new longwalls. Since the beginning of the year, 14 new longwalls have been put into operation, which makes it possible to maintain the necessary volume of fuel production for Ukraine’s thermal power generation,” the company said in a press release.

Since the start of the full-scale war, the company’s investments in supporting mines, repairing and modernizing equipment, and improving staff safety have totaled nearly UAH 23 billion.

“We continue to invest in the restoration of generating capacities and coal enterprises, because our main goal on the eve of the new heating season is to maintain the reliability of thermal power generation and the energy system as a whole,” said DTEK Energy CEO Alexander Fomenko.



INTERNATIONAL CLAIMS REVIEW COMMISSION TO OPERATE ON BASIS OF LOSS REGISTRY – BARRISTERS

The International Commission for the Examination of Claims of Ukraine, established as a special body under the auspices of the Council of Europe, will consider claims for damage caused since February 24, 2022, by the unlawful actions of the Russian Federation, in particular its aggression against Ukraine in violation of the UN Charter, as well as violations of international humanitarian law and international human rights law.

“ *As explained to Interfax-Ukraine by Oleksiy Shevchuk, spokesperson for the Ukrainian National Bar Association (UNBA), partner and representative of Barristers JSC, the Commission will consider claims relating to damage, loss, or injury caused by internationally unlawful actions of the Russian Federation. The commission will consider claims relating to damage, loss, or injury caused by internationally wrongful acts of the Russian Federation.*

Claims may be submitted by individuals and legal entities, as well as by the state of Ukraine together with its authorities and state-owned or controlled enterprises.

The main task of the commission will be to consider, evaluate, and make decisions on claims for compensation for losses caused by internationally wrongful acts of the Russian Federation on the territory of Ukraine or against it. At the same time, the commission should become a key instrument in the international justice system aimed at documenting and compensating for losses caused by aggression.

One of the key steps in launching the commission's work will be the transfer of functions and materials from the Register of Losses to it, and the secretariat will be formed on the basis of the current secretariat of the Register.

It is expected that the commission will have a permanent location in one of the countries acceding to the Convention. “The commission's mandate clearly defines its main task: to review, evaluate, and decide on claims submitted, determining the amount of compensation to be paid in each specific case. The key principle of its activity is the initial position that Russia bears international legal responsibility for all losses, damages, and harm caused by its illegal actions against Ukraine,” Shevchuk noted.

He stressed that the commission will have the authority to consider all aspects related to the resolution of claims, from administrative and financial to legal and political. The commission's verdicts and decisions, in particular those concerning the amount of compensation, are final and not subject to appeal.

The concept was developed by the Council of Europe, which assumed the authority to develop a mechanism for compensation for damages. It was confirmed in the 2023 Reykjavik Summit Declaration and provides for three consecutive elements: the already established Register of Losses for Ukraine, which has received more than 60,000 applications; the future work of the International Claims Review Commission as a compensation body; and the establishment of a special compensation fund, which will serve as the financial basis for compensation.



UKRAINE HAS BECOME LARGEST SUPPLIER OF EGGS TO UK

Ukraine and Poland have overtaken the Netherlands to become the largest suppliers of eggs to the UK in 2025, prompting criticism of imports of “cage” eggs, which have been banned in the UK since 2012. This was reported by The Guardian newspaper.

“ According to the UK’s Animal and Plant Health Agency, Ukraine has exported 8 million kg of eggs to the country since the beginning of the year, Poland has exported almost 7 million kg, and Spain has exported about 5 million kg.

Despite the overall decline in tonnage, the number of shipments has increased — instead of large batches, many small batches began to be exported from countries where cage farming is still common.

Mark Williams, chairman of the British Egg Industry Council, said that British producers are at a disadvantage because they have to invest in stricter standards for keeping birds. At the same time, imported eggs from Ukraine and Poland come from systems that are banned in the UK. He called this “morally wrong” and called on the government to take measures to protect the domestic market.

Egg imports are mostly destined for the catering and food industry segments, rather than supermarkets (where British Lion-labeled eggs dominate). It is estimated that the UK produces about 88% of its own eggs, importing the remaining 12%.

The British government has stated that it is involved in working on new regulations to level the playing field for domestic producers. At the same time, tariff exemptions for Ukraine were extended for many goods after the start of the war, but the “eggs and poultry” category received only a short-term deferral.



UKRAINE DISCUSSES EXPANSION OF AGRICULTURAL TRADE WITH US, PARTICULARLY EXPORTS OF MEAT AND EGGS

Ukraine has the potential to expand bilateral agricultural trade with the US, particularly in the export of meat, eggs, corn, and queen bees, according to the State Service for Food Safety and Consumer Protection following a working visit to the US by the agency’s head, Serhiy Tkachuk.

The State Service noted that during the visit, Tkachuk held meetings with representatives of three departments of the US Department of Agriculture.

Together with the USDA Foreign Agricultural Service (FAS), the parties discussed increasing bilateral trade in agricultural products. Ukraine has the potential to replace Russian and Chinese products on the American market, the agency assured. Particular attention was paid to opening the US market for Ukrainian poultry and eggs.

Negotiations with the USDA Food Safety Inspection Service (FSIS) focused on access to the US market for Ukrainian poultry meat and eggs. The State Service of Ukraine for Food Safety and Consumer Protection has already provided all the necessary information and expressed its readiness to undergo inspections, including online. This practice has been successfully applied in cooperation with the United Kingdom, Canada, and the EU.

The Ukrainian side emphasized the importance of moving forward with applications for the export of pork and beef, and the FSIS confirmed its readiness to begin technical consultations.

ASTARTA TO INVEST EUR40 MLN IN COMPLETING SOY CONCENTRATE PLANT

Astarta, Ukraine's largest sugar producer, intends to continue investing in the construction of its soy protein concentrate plant in 2026. These investments will amount to approximately EUR40 million, said Vyacheslav Chuk, director of commercial operations and strategic marketing at the agricultural holding.

“Our budget process is not yet complete, but the agricultural holding will definitely invest in the completion of our new project to build a soy protein concentrate plant. This is about EUR40 million, and the rest is maintenance, which will vary depending on what we focus on,” he said at the Forbes Agro 2025 conference in Kyiv on Friday.

Responding to a follow-up question about how much Astarta will invest during the year to resolve current issues, Chuk said it could be tens of millions of dollars.

In 2024, Astarta began investing in the construction of a plant for processing soybean meal into soybean protein concentrate with a capacity of 500 tons/day (about 100,000 tons per year) in the Hlobyn industrial complex (Poltava region). The agricultural holding is investing more than EUR 76 million in the purchase of equipment and technologies and will create 110 new jobs.



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IMPORTS OF AGRICULTURAL PRODUCTS TO EU ROSE TO \$96.8 BLN, EXPORTS TO \$118.7 BLN

In January-July 2025, Ukraine exported agricultural and food products worth \$5.73 billion to the European Union, which is \$891 million, or 13%, less than in the same period last year, according to an EU report.

“ *At the same time, Ukraine managed to maintain its fourth place in the list of suppliers of agricultural products to the EU during this period. Ahead of it are Brazil (\$9.1 billion), the United Kingdom (\$7.8 billion), and the United States (\$6.9 billion).* ”



The ranking of the largest suppliers of agricultural products to the EU also includes China (\$5.24 billion), Côte d'Ivoire (\$5.05 billion), Turkey (\$3.68 billion), Vietnam (\$2.81 billion), Argentina (\$2.57 billion), and Switzerland (\$2.51 billion).

In total, agricultural imports to the EU in January-July 2025 are estimated at \$96.8 billion (+16%).

Agricultural exports from the EU during the same period amounted to \$118.7 billion (+2%). At the same time, \$2.1 billion (+17%) worth of goods were supplied to Ukraine.

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