

Blueprint for an Agricultural Recovery Plan for Ukraine

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KEY TAKEAWAYS

- Since launching its full-scale invasion, Russia has deliberately damaged all aspects of Ukraine's agriculture sector, resulting in at least **\$72.7 billion in losses**. Supporting Ukraine's agriculture sector can bolster Ukraine's economic recovery, and increased Ukrainian exports can counter Russia's influence in global agriculture markets.
- Many of Ukraine's partners are actively supporting Ukraine's agricultural recovery, though there is no official plan to guide Ukraine's partners' investments. In *Blueprint for an Agricultural Recovery Plan for Ukraine*, CSIS proposes a suite of priorities that could serve as a framework for a formal agricultural recovery plan when a ceasefire is reached.
- According to CSIS, near-term priorities include restoring infrastructure and farmland, providing financing to farmers, diversifying exports, and supporting the agriculture labor force. Medium-term priorities include supporting Ukraine's rural communities and livestock sector. Long-term priorities include integrating Ukraine's agriculture sector into the European Union, adapting agriculture to climate change, and developing the food-processing industry. Incentivizing foreign investment in the agriculture sector cuts across all priorities.

BACKGROUND AND CONTEXT

Ukraine's agriculture sector is a pillar of its economy, and Ukraine's agricultural exports are vital to global agriculture markets and food security. Since launching its full-scale invasion, Russia has deliberately attacked all aspects of Ukraine's agriculture sector, including farms, equipment, and storage, transportation, and export infrastructure, while threatening the safety of agricultural trade in the Black Sea. Attacking Ukraine's agriculture sector accomplishes numerous strategic goals for Russia: undermining Ukraine's agricultural economy, which comprised over **40 percent** of Ukraine's export revenue pre-war; disrupting European agriculture markets and threatening EU support for Ukraine; and reducing Ukraine's agricultural exports, which creates openings for Russia to expand its exports, and influence, in import-dependent countries. USDA **predicts** that Ukraine's 2024-2025 exports will be the lowest in over a decade, while Russia's agricultural production and exports have surged to historic highs. In Africa, for example, Ukraine's wheat exports have fallen to less than **1 percent** of its total exports, while Russia has expanded its food trade across Africa and delivered free food and fertilizer to numerous African countries.

The World Bank **estimates** the cost of rebuilding Ukraine's agriculture sector at \$55.5 billion over 10 years, and numerous partners, including the United States, are engaged in supporting Ukraine's agricultural recovery as the war continues. However, no comprehensive plan exists for rebuilding Ukraine's agriculture sector. As ceasefire negotiations continue, Ukraine and its partners could benefit from a plan to guide and maximize the impact of their investments. In "A Blueprint for an Agricultural Recovery Plan for Ukraine," CSIS proposes the essential elements of an agricultural recovery plan for the country, which could serve as the basis for a formal plan for agricultural recovery post-war.

LEGISLATIVE AND POLICY IMPLICATIONS

Since Russia's invasion in February 2022, the United States has played a key role in Ukraine's agricultural recovery and defense efforts writ large. Through the State Department's Office of Weapons Removal and Abatement, the United States has been the top bilateral supporter for humanitarian demining in Ukraine, the world's most mined country, including demining Ukraine's farmland. The USAID Agriculture Growth and Resilience Initiative for Ukraine (AGRI-Ukraine) and Ukraine Harvest Activity supplied millions of dollars and leveraged additional millions in private sector funding to support Ukraine's farmers. Funding for multilateral organizations, including the Food and Agriculture Organization of the United Nations, the UN International Fund for Agricultural Development, and the UN

RECOMMENDATIONS

- Continue funding for Ukraine's agricultural recovery alongside robust defense support necessary for Ukraine's maritime exports. Consider applying funds from the U.S.-Ukraine Reconstruction Investment Fund for Ukraine's agricultural recovery.
- Promote the adoption of a comprehensive plan for Ukraine's agricultural recovery to inform U.S. and other investments in Ukraine's agriculture sector.
- Support a ceasefire plan with minimal negative implications for Ukraine's agriculture sector.

Additional Resources

Antonina Broyaka, Vitalii Dankevych, Emma Dodd, and Caitlin Welsh, "Blueprint for an Agricultural Recovery Plan for Ukraine," CSIS, forthcoming.

Caitlin Welsh, Emma Dodd, and Joseph Glauber, "Ceasefire Talks: What's at Stake for Ukraine's Agriculture Sector and Global Food Security?" CSIS, *Critical Questions*, May 6, 2025, <https://www.csis.org/analysis/ceasefire-talks-whats-stake-ukraines-agriculture-sector-and-global-food-security>.

Emma Dodd, Joseph Glauber, and Caitlin Welsh, "Does Ukraine Need a New Black Sea Grain Initiative?" CSIS, *CSIS Charts*, March 28, 2025, <https://www.csis.org/analysis/does-ukraine-need-new-black-sea-grain-initiative>.

Caitlin Welsh, Joseph Glauber, and Emma Dodd, "Russia's Renewed Attacks on Ukraine's Grain Infrastructure: Why Now? What Next?" CSIS, *Critical Questions*, November 25, 2024, <https://www.csis.org/analysis/russias-renewed-attacks-ukraines-grain-infrastructure-why-now-what-next>.

Caitlin Welsh and Joseph Glauber, "Food as the 'Silent Weapon': Russia's Gains and Ukraine's Losses," CSIS, February 29, 2024, <https://www.csis.org/analysis/food-silent-weapon-russias-gains-and-ukraines-losses>.

World Food Programme, have provided additional support for Ukraine's agricultural production and exports. The U.S. International Development Finance Corporation has supplied millions of dollars in financing for Ukraine. Most importantly, support for robust naval defense has been critical for Ukraine's maritime exports: Only by successfully undermining Russia's naval capabilities has Ukraine regained access to its Black Sea ports, enabling Ukraine's continued agricultural exports in wartime.

CHALLENGES AND RISKS

U.S. support for Ukraine, including its agriculture sector, has been critical to its continued production and exports in wartime. Weakened U.S. support for Ukraine's military and its agriculture sector could slow Ukraine's economic recovery and result in long-term reductions in Ukraine's agriculture exports, with implications for global food security. Furthermore, reduced agricultural output from Ukraine widens openings for Russia to further expand its influence through increased exports of its own agricultural products.

Today, there is no plan for Ukraine to inform partners' support for its agricultural recovery. Without such a plan, support for Ukraine's agriculture sector may be uncoordinated and duplicative, and scarce funding may not be used for maximum impact.

Ceasefire plans published to date could have negative implications for Ukraine's agriculture sector, including transferring a significant proportion of Ukraine's farmland to Russia and enabling Russia to continue to threaten Ukraine's maritime agriculture exports.

Output and GDP from Agriculture in Ukraine (2021 constant UAH)

