



What if Ukraine joins the EU? An exploration of the impact on European food and agriculture

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Food & Agribusiness
knowledge.rabobank.com

[Barend Bekamp](#)

Senior Specialist Food & Agriculture
+31 6 4107 0455

[Maartje Wijffelaars](#)

Senior Economist Eurozone
+31 6 2257 0569

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Summary

Ukraine's accession to the EU will have significant implications for EU food and agriculture. Despite war-related damage, Ukraine will add a large production base, particularly in grains, oilseeds, and poultry, while remaining less competitive in higher value-added products. Increased supply from Ukraine could put pressure on prices in existing EU markets such as grains, sugar, and poultry, while lower feed costs would benefit EU livestock sectors. Traders and processors could also gain from greater availability of grains and oilseeds.

Ukraine's entry will expand the EU population by roughly 40 million people – an increase of around 8%. However, in the near term, the limited purchasing power of Ukrainian households will constrain export opportunities. At the same time, increased investment flows into Ukrainian food and agriculture could create opportunities for suppliers of technology, farm inputs, and knowledge. From a strategic perspective, accession could also enhance EU food autonomy, although reducing reliance on imported soybean products would not be simple.

The policy implications are substantial, as Ukraine's scale will likely make the current hectare-based CAP model unsustainable, thereby triggering reforms and transition measures. Overall, Ukraine's accession to the EU will not be determined solely by its impact on food and agriculture; these effects will likely be weighed against broader considerations, including defense, critical minerals, and geopolitics.

Russia's invasion accelerates Ukraine's accession to the EU, but the mooted 2027 date seems unlikely

Ukraine's path toward EU membership predates Russia's full-scale invasion. In 2014, Ukraine [signed an Association Agreement](#) with the EU after years of talks, followed by gradual integration. Fast-forward to 2022, when Ukraine's integration gained momentum as it was rapidly granted candidate status after Russia's invasion. Peace plan proposals floated since November of last year mention 2027 as the accession date, creating expectations Ukraine may join the EU soon.

However, EU membership cannot be imposed or tied to a fixed timeline. Accession depends on Ukraine meeting the Copenhagen criteria and on the EU's absorption capacity – and requires unanimous approval of current member states. Historically, accession has taken between a few years to over a decade. Under existing rules and progress, Ukraine arguably wouldn't join until the next decade.

The war has altered the context, however, and we know political pressure can reshape constraints. To accelerate integration, the European Commission is exploring a two-tier membership model that would allow earlier entry with [reduced rights](#). However, there is significant [resistance](#) to a fast-tracked and incomplete accession process – to which all member states would have to agree.

This paper analyzes the implications of Ukraine's EU accession for the European food and agriculture sector. It begins by assessing the impact of Russia's invasion of Ukraine, as understanding Ukraine's current situation is essential for evaluating the effects of its potential EU membership.

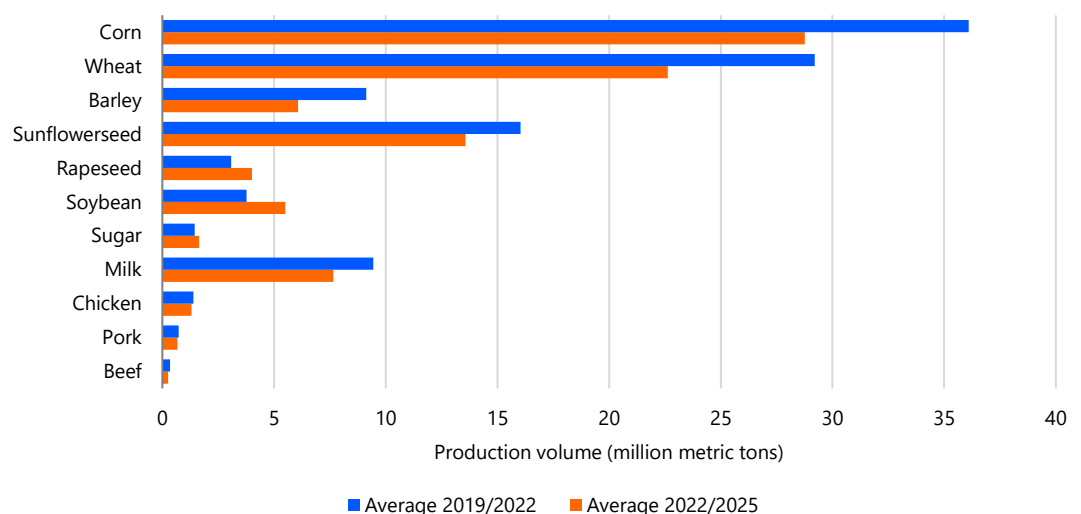
Russia's invasion of Ukraine has inflicted severe damage on the country's agricultural sector

First and foremost, the Russian invasion of Ukraine in 2022 has caused immense human suffering. Beyond these devastating humanitarian consequences, it has also severely disrupted Ukraine's agriculture and port infrastructure.

Agricultural production of major crops and livestock sectors dropped 20% while production of minor crops increased

Comparing three-year average production before and after the 2022 invasion shows a sharp decline in most Ukrainian agricultural outputs (see figure 1). Output fell markedly for major crops, including corn (-20%), wheat (-22%), barley (-33%), and sunflower (-15%). Livestock production also declined, with milk down 19% and beef 28%, while smaller reductions were seen in pork (-8%) and poultry (-5%). In contrast, production of soybeans, rapeseed, and sugar beet increased. These shifts reflect the impacts of war – such as land loss and disrupted farming – as well as weather conditions and farmers' choices in response to market developments.

Figure 1: Yearly production volumes Ukrainian agriculture



Source: USDA, RaboResearch 2026

The war has made farming extremely challenging across Ukraine. [Production in frontline areas has fallen](#) due to loss of land, temporary shutdowns, destruction of farm machinery, barns, stables, and silos, contamination by unexploded ordnance (in Kharkiv alone over [160,000 hectares](#) of land have been damaged by the war), and the absence or death of farm owners. Because frontline oblasts are predominantly home to crop farms, whereas livestock and mixed farming are more common in western and central Ukraine, crop production has suffered the greatest direct war-related damage. Beyond the frontline regions, farmers nationwide face limited and costly access to fertilizers, pesticides, and seeds. Revenues are also under pressure due to low market prices, difficulties in finding buyers, and insecure transport routes.

Despite damage to Ukrainian logistics infrastructure, exports are doing quite well

The Russian invasion has also severely damaged Ukraine’s storage and port infrastructure. In 2022, [Ukraine lost a quarter of its grain storage capacity](#): 10% was damaged or destroyed, and another 14% fell under Russian occupation. Russian attacks have also severely damaged Ukraine’s port infrastructure and brought several ports under Russian control (see figure 2), hampering Ukraine’s export potential. While the full extent is hard to determine, [Ukrainian officials cited by Reuters](#) estimate that around 400 port facilities have been hit, with reconstruction costs of roughly EUR 0.5 billion.

Focusing on the status of individual ports, the deep-water ports of Odesa, Chornomorsk, and Yuzhne have largely compensated for the loss of the major port of Mykolaiv. The [Danube ports](#) at the border with Romania and Moldova are a critical alternative in the event of an escalation of the war. Smaller ports in the Sea of Azov – Berdyansk and Mariupol – are under Russian control. The port of Sevastopol has not been under Ukrainian control since the Russian invasion of Crimea in 2014.

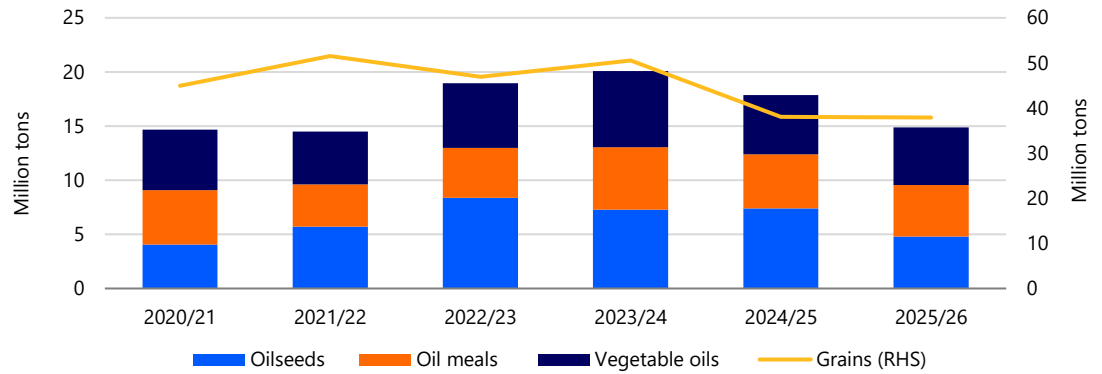
Figure 2: Current operational status of ports in the Black Sea region



Source: RaboResearch 2026

While port infrastructure and grain storage capacity took severe blows, Ukrainian exports have shown remarkable resilience (see figure 3). After the start of the war in February 2022, the Russian military blocked Ukraine’s Black Sea ports and brought exports to a virtual standstill. In July 2022, the Black Sea Grain Initiative negotiated by the EU, UN, and Turkey unblocked Ukrainian ports, after which exports climbed back to their previous levels.

Figure 3: Ukrainian exports of grains, oilseeds, and oilseed products



Source: USDA, RaboResearch 2026

Ukraine’s EU accession will boost EU agricultural production, bringing both risks and opportunities

Once Ukraine joins the EU, it will enter the single market with full mutual market access – unless explicitly agreed otherwise. This will substantially increase the EU’s agricultural output.

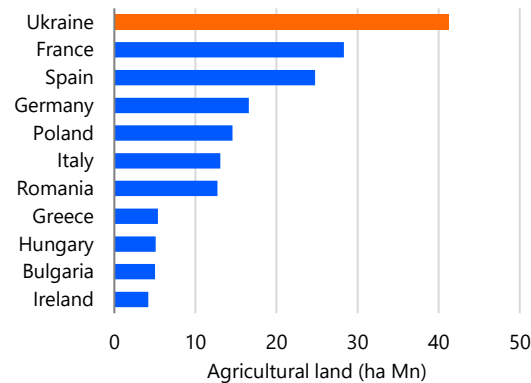
Box 1. A brief history of EU–Ukrainian trade deals

From an agricultural markets perspective, EU–Ukraine integration has unfolded in three main steps. The 2014 Association Agreement and its Deep and Comprehensive Free Trade Area (DCFTA) enabled bilateral trade. Following Russia’s 2022 invasion, Ukraine received EU candidate status and multiple temporary autonomous trade measures (ATMs) removing EU import tariffs, thereby boosting agricultural exports to the EU to record levels. Eventually this triggered safeguard measures on products such as oats, eggs, sugar, groats, and honey because export thresholds were surpassed. A third step followed when the EU and Ukraine renewed their free trade agreement in October 2025, setting quotas for sensitive products – including sugar, poultry, eggs, wheat, maize, and honey – higher than under the original DCFTA but below ATM levels.

Agricultural production capacity in the EU will increase substantially

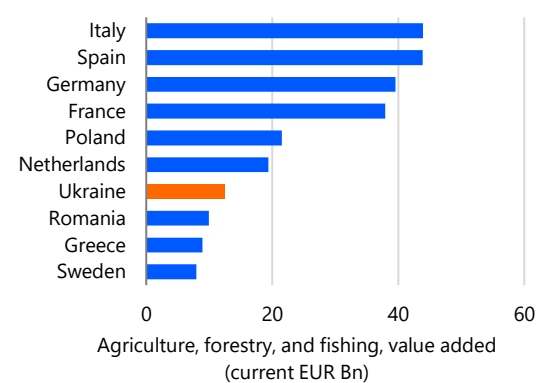
When Ukraine joins the EU, it will be the largest member state in terms of agricultural land. Using data from after the Russian invasion, Ukraine’s EU accession will add 41 million hectares of farmland to the Union (see figure 4), expanding the EU’s agricultural area by about 25%. Yet agricultural value added should rise by only 4%, as Ukraine ranks much lower in agricultural economic output than most of the agricultural top 10 member states (see figure 5). This is because Ukraine produces mainly lower-value commodity crops rather than higher-value food and beverage products. It should be noted that a large share of Ukraine’s agricultural land consists of chernozem (“black earth”), a very fertile type of soil.

Figure 4: Top 10 EU member states including Ukraine by agricultural land (2023)



Source: Worldbank, RaboResearch 2026

Figure 5: Top 10 EU member states including Ukraine by value added in agriculture (2024)

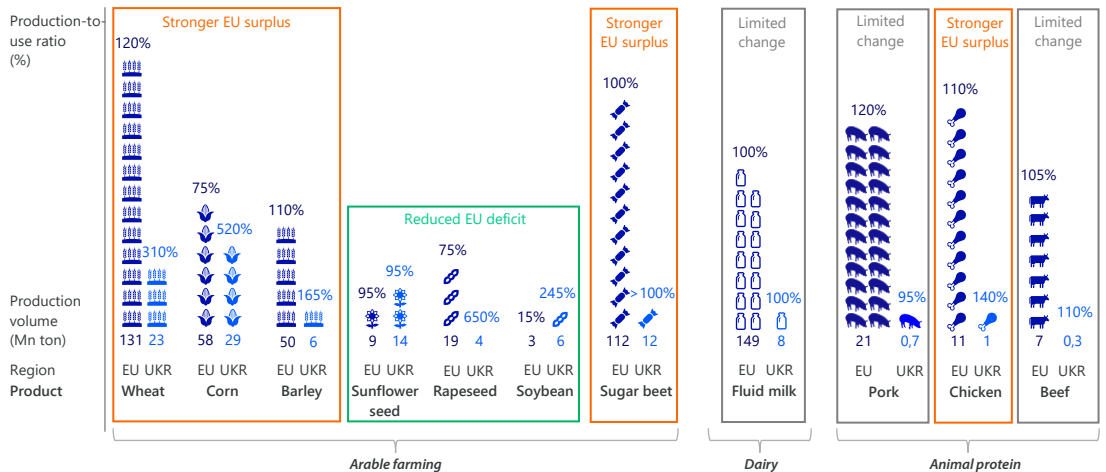


Source: Worldbank, RaboResearch 2026

Individual EU agricultural sectors will face risks and opportunities

When Ukraine joins the EU single market, supply–demand dynamics will shift. Based on post Russian invasion data, the figure below shows average production levels and production-to-use ratios for eleven basic agricultural products of Europe and Ukraine (see Appendix for a larger format of figure 6).

Figure 6: EU and Ukrainian agricultural production volumes and production-to-use ratios (average 2022-2025)



Note: This figure focuses on primary agricultural products and excludes processed products. For example, Ukraine is a major processor of sunflower seed. Consequently, its self-sufficiency in sunflower seed is close to 100%, while the country remains a significant exporter of sunflower oil. A comparable dynamic can be seen in the European dairy sector: while it is fully self-sufficient in fluid milk, self-sufficiency for processed products such as cheese and butter exceeds 100%, making the EU an important exporter of these goods. The figure therefore presents a partial picture of the overall situation.
Source: USDA 2022-2025, FAO 2022-2024, DG Agri/European Commission 2022-2025, RaboResearch 2026

The figure points to three likely outcomes when Ukraine joins the EU:

- **Strong(er) EU surplus** in grains (wheat, corn, barley), sugar, and poultry, production exceeds use, putting potential price pressure on current EU farmers. Though an expanded surplus could put pressure on grain farmers, lower grain prices may benefit the dairy and animal protein sectors that profit from lower feed costs – as well as EU (exporting) traders and processors of grain for consumer foods and subsequently consumers.

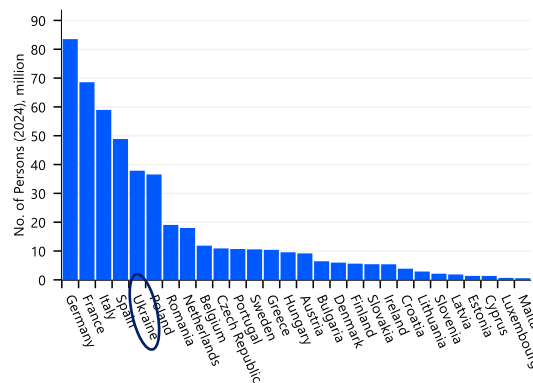
- **Reduced EU deficit** particularly for oilseeds such as sunflower seed, rapeseed, and soy, production is shifting closer to use, which strengthens Europe’s self-sufficiency. It should be noted that Ukraine is currently already Europe’s main supplier of sunflower seed oil and meals.
- **Limited change in EU** in sectors where Ukrainian production is small, such as dairy, pork, and beef, markets are expected to remain relatively stable.

Beyond the quantitative perspective, it is important to note that when Ukraine joins the EU, it will need to comply with [European market regulations and standards](#) in areas such as farming practices, animal and plant health, certification, labelling, food safety, environmental protection, and animal welfare. Meeting these standards will require substantial investment in Ukrainian farming operations – before it is allowed to enter. This could provide opportunities for European technology and knowledge providers.

Ukraine’s accession will raise the population of the EU, but initially offer limited economic upside

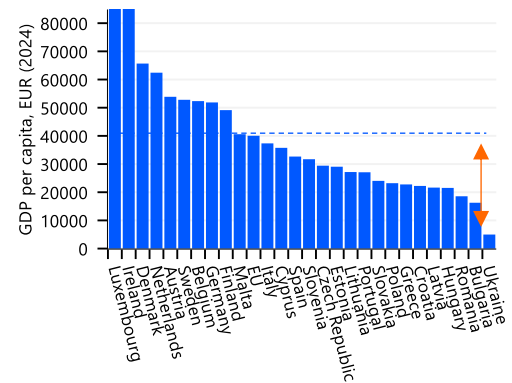
Ukraine’s accession will expand the EU population and by extension the consumer base from around 450 million to nearly 490 million (+8%). The exact impact will of course be subject to territorial outcomes of the war and patterns of return migration. The effect on EU GDP and actual consumer market size will initially remain limited, however, as Ukraine’s economy is relatively small and household purchasing power relatively low: Ukraine’s GDP/capita is EUR 4.983 compared to the EU average of EUR 40.038. So, Ukraine’s accession will raise EU GDP by only 1% and GDP per capita will in fact fall by 7%.

Figure 7: Ukraine will rank 5th in population size, just overtaking Poland (2024)



Source: Macrobond, RaboResearch 2026

Figure 8: GDP per capita is relatively low in Ukraine (2024)



Note: GDP per capita in Luxembourg was €127.387 and in Ireland €104.378

Source: Macrobond, RaboResearch 2026

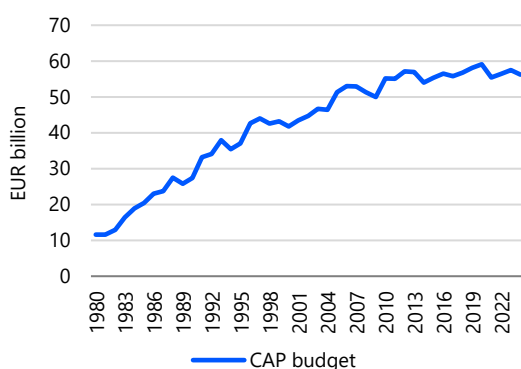
EU accession will likely boost long-run growth,¹ but Ukraine’s convergence is also likely to take a long time. The GDP per capita gap is very large (see figure 8) and [the war’s destruction](#) of infrastructure, supply chains, and human capital will leave [long-lasting scars](#). The EU’s growth dividend will therefore be back-loaded and hinge on the pace of reconstruction. For reconstruction to start, peace, credible security guarantees, and significant international financing are crucial.

¹ EU membership has previously boosted long-run growth in some poorer member states such as [Poland](#) and Romania, but recent years’ data is less convincing for countries such as Bulgaria, Hungary and Slovakia

The current CAP financing model is unable to accommodate Ukraine's accession to the EU

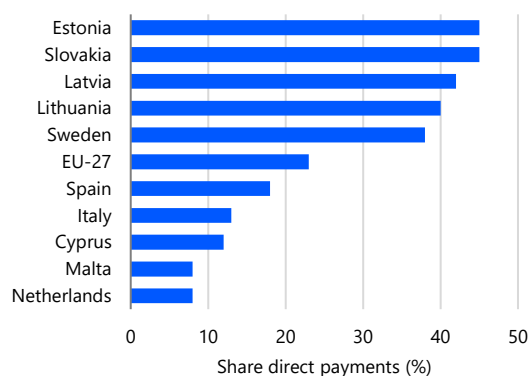
The Common Agricultural Policy (CAP) is the EU's primary instrument for supporting farmers, safeguarding food security, promoting environmentally friendly farming practices, and maintaining the vitality of rural areas. It has a budget of roughly EUR 55 billion a year (see figure 9), with a substantial share allocated as direct payments on a per-hectare basis. Generally, farmers in the Baltics and Eastern Europe rely more heavily on CAP subsidies than their counterparts in Western and Southern Europe (see figure 10).

Figure 9: CAP expenditures (current prices)



Source: European Commission, RaboResearch 2026

Figure 10: Top 5 and bottom 5 member states in terms of direct CAP payments in agricultural factor income (2018-22 average)



Note: Agricultural factor income reflects farm income used to remunerate both hired factors (capital, labor, and land rents) and own factors of production.

Source: European Commission, RaboResearch 2026

Ukraine's accession to the EU will expand the Union's agricultural area by around 25%, which means adjustments to the CAP will be inevitable. Theoretically, three possibilities exist:

- **Increasing CAP budget:** Different estimates suggest this would [cost EUR 7.6 to 13.4 billion per year](#). It's unlikely, as the CAP budget has been stable for years and faces pressure from other priorities, including financing the Draghi report's recommendations.
- **Tightening CAP eligibility:** This would exclude some farmers and align with Commissioner Hansen's focus on directing funds to those most in need. Western European farmers, being least dependent on subsidies, would see the biggest cuts.
- **Reducing per-hectare payments:** All farmers would receive equally less, with the biggest impact in the Baltics and Eastern Europe, where reliance on CAP support is highest.

In practice, it's likely that transitional arrangements for Ukraine will be made – a phase of direct payments, for example. However, this would only be a temporary fix that delays, rather than resolves, the financial impact of expansion. Therefore, [some have argued](#) for a wider CAP reform ahead of or parallel to enlargement.

The CAP allows EU member states to reallocate part of their funding from larger farms to smaller ones. Given that Ukraine's agricultural sector includes large agro-holdings managing several thousands of hectares, a similar redistribution of funds is likely to happen in Ukraine as well.

Ukraine's accession will result in less funding for current member states and requires a larger EU budget

Apart from CAP funding, Ukraine will also be eligible for a substantial amount of cohesion policy funds. Cohesion funds – around one-third of the EU budget – are mainly allocated based on regional Gross National Income (GNI) per capita (in PPS). Nearly 70% of those funds goes to regions with a per capita GNI level below 75% of the EU average. All of Ukraine's regions (likely [except Kiev](#)) will fall below the 75% threshold, while some regions in other countries are pushed above the threshold as the average drops. This means that upon accession, Ukraine will obtain these funds and some current beneficiaries will lose them.

In total, estimates from different institutions suggest that Ukraine would have qualified for about 10% to 16% (EUR 126bn to EUR 186bn) of the EU's current multi-annual budget over seven years. [Bruegel](#) estimates the largest percentage losses for Italy, Malta, Portugal, Spain, Finland, and Hungary. Whether current net contributors will become net recipients [remains disputed](#).

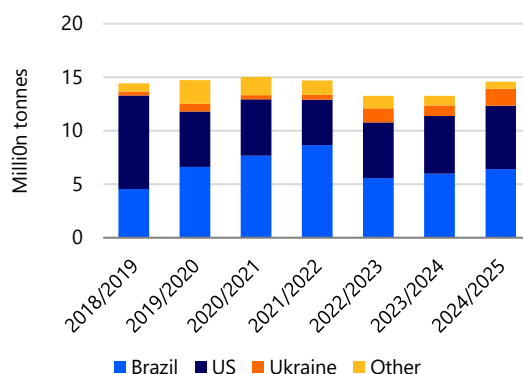
Beyond redistribution, the EU budget will need to expand by an estimated 10% to 25% ([Bruegel secretariat of the EU](#)). Fiscal hawks are unlikely to accept this (easily), increasing pressure for [difficult budget reforms](#) – beyond discussions about shifts in spending priorities. A [phased-in approach](#) is considered to increase Ukraine's funds eligibility in steps, just as in the 2004 enlargement of the EU with Eastern European countries.

Ukraine's accession will enhance the EU's food autonomy, although replacing soybean imports with Ukrainian production is not straightforward

In an increasingly volatile global environment, [food autonomy remains a central priority for Europe](#). As noted earlier, Ukraine's accession will significantly expand the EU's agricultural production capacity, thereby strengthening the Union's overall resilience.

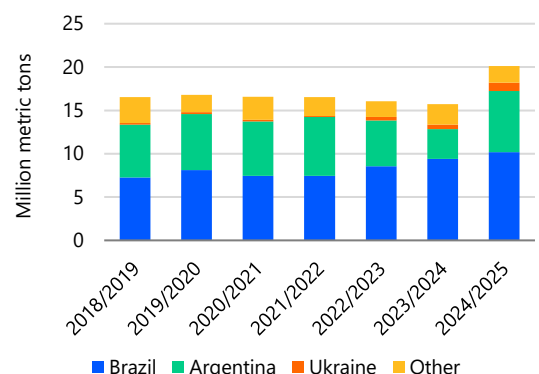
A key vulnerability of EU food autonomy is its strong dependence on imports of oilseeds and derived products (i.e. oilseed meals) for animal feed. As illustrated previously, EU soybean production currently covers only around 15% of its use, with the resulting shortfall of beans and meals largely met through imports from Brazil, the US, and Argentina (see figures 11 and 12).

Figure 11: EU imports of soybeans



Source: EU Commission/Eurostat, RaboResearch 2026

Figure 12: EU imports of soybean meals



Source: EU Commission/Eurostat, RaboResearch 2026

Ukraine's accession to the EU could partially mitigate this weakness by integrating substantial oilseed production capacity into the Union. However, in a hypothetical scenario where the EU replaced all soybean imports from Brazil and the US (12.3 million metric tons in 2025, excluding soybean meal) with Ukrainian production – assuming an average yield of 2.5 metric tons per hectare – this would require approximately 4.9 million hectares of Ukrainian farmland (over 10% of total Ukrainian agricultural land).

In a scenario where the EU takes decisive action in this area, the EU is likely to incentivize Ukrainian farmers to adopt cropping systems with a greater role for soybeans, supported by policies that make soybean cultivation financially attractive. This would require measures such as subsidies, import tariffs on soybeans and soybean meals (despite the potential tension with ambitions for closer trade relations with South America under the Mercosur agreement and with the US under the EU-US trade agreement of July 2025), and agronomic support to help farmers achieve reliable yields.

Beyond these economic incentives, soybeans can also provide advantages for farmers. As a nitrogen-fixing crop, soy enables subsequent crops to benefit from residual nitrogen. In addition, incorporating soybeans into predominantly grain-based rotations helps disrupt pest and disease cycles that depend on cereal hosts and wouldn't be sustained in soy-based systems.

There are suggestions that EU soybean (meal) imports could be substituted with domestically produced sunflower or rapeseed meals. However, it is important to recognize that soybeans have distinct nutritional properties, particularly their high protein content and favourable amino acid profile (most notably high lysine levels). These characteristics make soy difficult to replace, especially in feed formulations for pigs and poultry.

Balancing the risks and opportunities of Ukraine's EU accession

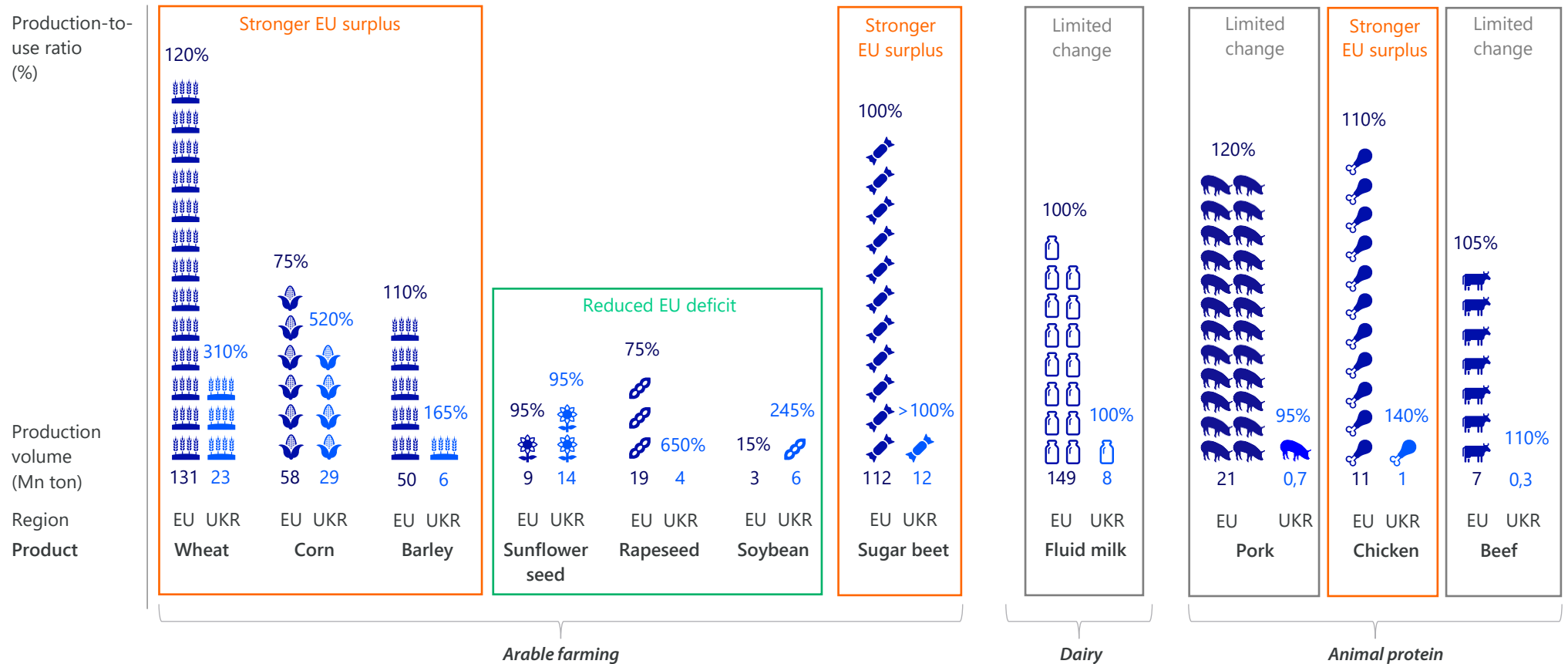
The debate on Ukraine's EU accession differs fundamentally from previous enlargement rounds, which occurred during periods of relative international stability. Today's far more volatile geopolitical context, in which the EU is committed to support Ukraine against Russian aggression, has made Brussels more open to a fast-track accession, whether through full or "light" membership. However, due to resistance from several member states, the 2027 timeline that was suggested during the peace plan discussions appears unlikely.

Ukraine's accession will integrate a vast agricultural sector into the EU, creating both opportunities and risks for European food and agriculture. EU arable farmers could face increased price pressure on grains and sugar, as well as tighter CAP funding. In contrast, livestock sectors could benefit from lower feed costs, while grain and oilseed traders and processors could gain from higher volumes and lower prices. The impact on the EU poultry sector will depend on the extent to which downward pressure on output prices is offset by reduced feed costs. Investments in reconstruction and development of Ukrainian food and agriculture could create opportunities for European suppliers of technology, farm inputs, and knowledge

Although Ukraine's accession will add a large population to the EU, short-term consumer impact will likely be limited due to low GDP per capita. Overall, Ukraine's accession should strengthen EU food autonomy, but replacing soybean imports from South America with Ukrainian production is not an easy switch. The sustainability of EU agriculture should not be adversely affected, as Ukraine will need to comply with EU regulations and standards upon accession.

These food- and agriculture-specific risks and opportunities will be assessed alongside the broader impact of Ukraine's accession, including in areas such as defence. The EU is likely to balance these dimensions in the debate on a potential fast-track accession for Ukraine.

Appendix: EU and Ukrainian agricultural production volumes and production-to-use ratios (average 2022-2025)



Imprint

RaboResearch
Food & Agribusiness
knowledge.rabobank.com

Barend Bekamp	Senior Specialist Food & Agriculture	barend.bekamp@rabobank.com +31 6 4107 0455
Maartje Wijffelaars	Senior Economist Eurozone	maartje.wijffelaars@rabobank.com +31 6 2257 0569
Michael Every	Global Strategist	michael.every@rabobank.com +852 2103 2616
Vito Martielli	Senior Analyst Grains & Oilseeds	vito.martielli@rabobank.com +31 6 1243 2479

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