

Country Profile

UKRAINE

Access to Land · Land Markets · War Impact · EU Integration · Peasant Farming

Prepared by: ADRI (Association for Democratic Rural Initiatives) & A2LN

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Note: Ukraine is not an EU member state and is not covered by the JRC Land Market Regulation report. Data are pre-war unless otherwise indicated. War conditions affect all figures. Ukraine applied for EU membership in February 2022 and received candidate status in June 2022.

Sources: State Statistics Service of Ukraine; FAO; World Bank RDNA3 (2023); European Parliament (2024); KSE Agrocenter; OECD Agricultural Policy Monitoring 2025; ADRI / A2LN profile (June 2025)

42.7M ha Total Agricultural Land (70.8% of territory)	~3.9M Personal Peasant Farms (pre-war)	~1/3 World's black soil (chernozem) reserves	\$80bn Agricultural sector war damage (by end 2023)
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Ukraine is at war — all data must be read in this context

- Russia's full-scale invasion (February 24, 2022) has caused catastrophic damage to Ukrainian agriculture. By end 2023, estimated sector losses reached \$80 billion. Rebuilding will cost an additional \$56.1 billion; demining alone \$32 billion (World Bank RDNA3, 2023).
- Agricultural land available for productive use has decreased by 20.3% as of early 2024. Between 2.1 and 2.8 million hectares have been abandoned due to proximity to combat zones (6.5–8.5% of total arable land).
- Grain production in 2023 was 30% below the five-year average. Combined grain and industrial crop output fell from a record 106 million tonnes in 2021 to approximately 77 million tonnes in 2024.
- 25% of agricultural households have halted or reduced production; in frontline regions this figure reaches 38%.

I. GENERAL AGRICULTURAL CONTEXT

Ukraine possesses one of the largest and most fertile agricultural land endowments on earth. With 42.7 million hectares of agricultural land — 70.8% of its territory — and approximately one third of global chernozem (black soil) reserves, Ukraine's agrarian potential is extraordinary. Before the war, it was a globally decisive food exporter: responsible for approximately 10–12% of global grain production and 50% of global sunflower oil exports. This is now a country where farmland is simultaneously a strategic food resource, an active war zone, and the central question of post-war reconstruction and democratic land governance.

Farm Structure — Pre-War

Farm Category	% of Farms	% of UAA	Notes
Small-scale (<100 ha)	~98%	~16%	Peasant & family farms; subsistence

Farm Category	% of Farms	% of UAA	Notes
			focus
Medium (100-500 ha)	~1.5%	~34%	Farming households & private farms
Large (>500 ha)	<0.5%	>50%	Agricultural enterprises & agroholdings
Mega (>50,000 ha)	Dozens	Dominant %	Kernel, MHP, Nibulon, Astarta and similar

Sources: State Statistics Service of Ukraine; FAO; KSE Agrocenter; ADRI profile 2025

The Ukrainian farm structure is deeply dualistic. Some 3.9 million personal peasant farms — averaging under 2 ha — coexist with a small number of massive agroholdings that control millions of hectares through lease. Kernel, the largest pre-war agroholding, held over 0.5 million hectares in its land bank as of 2021. Between 2000 and 2021, LandMatrix recorded 310 land deals with investors from 29 countries covering approximately 4.2 million hectares — 200 deals (2.8 million ha) with European investors.

Land Resource Structure (Pre-War)

Indicator	Value / Description
Total agricultural land	42.7 million ha (70.8% of territory)
Arable land	32.5 million ha (78.3% of agricultural land)
Perennial plantations	879,400 ha (2.1%)
Meadows & pastures	5.4 million ha (13.1%)
Hayfields	2.4 million ha (5.8%)
Fallow land	233,700 ha (0.6%)
Chernozem coverage	~28 million ha (~68% of agricultural land); 6.7-8.7% of global chernozem reserves
Per capita arable land	0.71 ha/person (vs world average 0.19 ha/person)
Soil degradation (pre-war)	10-15 million ha affected; 19% acidic soils; ~10 million ha eroded arable land in steppe zones

Source: State Statistics Service of Ukraine; Institute of State Governance 2020

Land Use Distribution

Indicator	Value / Description
Cereals (wheat, maize, barley)	~60% of agricultural area — dominant export crops
Industrial crops (sunflower, soybean, rapeseed)	~24% — especially sunflower; Ukraine = ~50% of global sunflower oil exports pre-war
Fodder crops	~10% — declining as livestock sector contracts
Vegetables, potatoes, legumes	~3-5% — predominantly grown by peasant and household farms
Other (fallow, pasture, permanent crops)	~1-3%

Organic & Agroecological Farming

Organic farming in Ukraine is structurally underdeveloped and heavily export-oriented. Pre-war, approximately 422,300 ha (0.99% of UAA) was under organic certification, operated by 361 certified producers and 110 operators. Over 96% of organic production was exported — 82% to EU countries. Large-scale enterprises dominate: organic certification in Ukraine favours cereal and industrial crop producers with hundreds or thousands of hectares, making it practically impossible for small producers to participate. The National Economic Strategy to 2030 sets a target of 3% organic area (1.26 million ha) by 2030.

II. FARM SUCCESSION & GENERATIONAL RENEWAL

Age Profile

45.8 yrs Mean farmer age (2019 field survey, 3 oblasts)	38% Agricultural operations managed by 60+ (2021)	6.7% Managed by 18–29 year olds (2021)	Unknown Succession rate — no systematic data
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Ukraine's farmer age profile is relatively younger than EU averages — 60% of Ukrainian farmers in a 2019 survey were under 50 — but this must be contextualised: the survey covered private farmers, not the millions of older subsistence peasant farm households. State statistics for 2021 show that 38% of agricultural operations were managed by individuals aged 60 and above, with only 6.7% managed by those aged 18–29.

No systematic data exists on succession rates or successor identification. The war has dramatically disrupted rural demographics: deaths, injury, displacement, and mobilisation have removed large numbers of working-age farmers from agricultural activity, particularly in frontline regions.

Support Mechanisms for New Entrants

Pre-war Ukraine had no dedicated national farm succession or new entrant policy comparable to EU CAP young farmer top-ups. Support structures were:

- Land ownership transfer: enhanced ability to transfer land via sale, lease, or inheritance under land market reforms.
- Access to state credit programmes: limited effectiveness for small farms due to credit access barriers.
- Digital cadastre development: improving legal certainty for land succession, though only 74% of land plots registered pre-war.
- No farm matching platforms, land banks, or starter farm programmes at national scale.

As Ukraine moves toward EU accession, CAP-aligned young farmer support instruments are under discussion as part of agricultural policy harmonisation.

III. ACCESS TO LAND

Tenure Structure

Ukraine's land tenure system is defined by the profound historical legacy of 1990s land reform. Over 20 million hectares of agricultural land were distributed among approximately 7 million former collective farm workers as "land share certificates." Without the financial capital, knowledge, or infrastructure to farm independently, around 80% of these peasant land owners immediately leased their plots — typically

back to successor entities of the former collective farms, without knowing who they were leasing to or having any ability to negotiate rent.

Indicator	Value / Description
Privately owned land (individuals)	~48.5% of agricultural land as of 2016
State-owned agricultural land	~2.2% (~937,000 ha, state enterprises)
Non-state enterprises (lease)	Major users via lease — control majority of UAA operationally
Land leased to companies	~80% of distributed land — peasants rarely negotiate terms
Typical lease price (2017)	~€40/ha/year — 6× below Bulgaria, 10× below Netherlands
Lease price trend (recent)	Tripled in competitive zones; state land auction prices reached ~€290/ha
Foreign investment (LandMatrix)	310 land deals, 29 countries, ~4.2M ha (2000–2021)

Source: State Statistics Service of Ukraine; Country profile PDF; LandMatrix

The Agroholding Problem

The absence of civilised lease legislation and systematic exclusion of peasants from meaningful land governance created conditions for extreme land concentration. Agroholdings — corporate farm structures — accumulated enormous land banks through lease-based control, exploiting political connections, economies of scale, and informational advantages.

Ukraine's Largest Pre-War Agroholdings

- Kernel (founded 2002): over 500,000 ha in land bank as of 2021 — the largest agricultural land user in Ukraine. Primarily wheat, sunflower, soybean.
- MHP (Myronivsky Hliboproduct): ~350,000–400,000 ha — poultry and grain integration.
- Nibulon: major grain trader and infrastructure operator — significant land bank.
- Astarta: ~250,000 ha — sugar, grain, livestock integration.
- European corporate investors: French, Austrian, Swedish, Danish, Dutch, and German companies control significant Ukrainian land through LandMatrix-registered deals.

Land Prices & Market Trends

Year	Event	Impact
2001	Moratorium introduced	Parliamentary ban on buying/selling agricultural land; leasing becomes the only legal access mechanism.
2021 (July)	Partial market opening	Citizens may buy/sell land; cap of 100 ha per individual; legal entities excluded.
Feb 2022	War begins	Market temporarily suspended; most transactions halted; land abandonment in frontline zones begins.
Jan 2024	Full liberalisation	Citizen cap removed; Ukrainian legal entities now allowed to purchase up to 10,000 ha total. Foreign ownership remains banned.
2024+	Market concentration risk	IT-sector buyers dominate early transactions; agroholdings acquiring via legal entities;

Year	Event	Impact
		smallholders remain excluded.

Source: KSE Land Market Report Q2 2024; Country profile; State Statistics Service of Ukraine

Following the market opening in July 2021, land prices approximately doubled within 12 months — from ~€1,070/ha to over €2,000/ha. Regional auction outliers showed prices reaching €8,500/ha in competitive zones. The primary buyers in the early market phase were IT-sector professionals (representing more than half of concluded transactions) — not farmers or agroholdings. Since January 2024, with legal entities now permitted to acquire up to 10,000 ha, concentration pressure from large corporate actors is expected to intensify significantly.

IV. LAND MARKET REGULATION

The Moratorium and Its Lifting

Ukraine's 20-year moratorium on agricultural land sales (2001–2021) was the most debated aspect of land policy in the country's post-Soviet history. The moratorium was introduced because the country lacked the necessary institutions — a reliable cadastre, land registry, land bank — to govern an open market. Its lifting in 2021 during COVID-19 pandemic restrictions, which prevented public mobilisation, was heavily criticised by civil society and peasant organisations who argued the process systematically excluded small farmers and peasants from meaningful participation.

Civil society organisations — including URDN and predecessor groups of ADRI — actively opposed liberalisation without adequate safeguards, arguing that the moratorium's lifting without redistribution mechanisms would lead directly to land concentration. This concern has proven well-founded: the land market as structured in 2024 systematically favours financially powerful actors.

Current Legal Framework (2024)

Indicator	Value / Description
Land purchase cap (from Jan 2024)	Natural and legal persons (excluding banks): max 10,000 ha combined
Foreign ownership	Prohibited — foreign citizens and legal entities may not own Ukrainian agricultural land
Pre-emptive rights	Long-term lessees have priority purchase rights (limited in practice by financial barriers)
Cadastre coverage	~74% of land plots registered pre-war; digitisation ongoing
Land control authority	None comparable to France's SAFER; no institutional pre-emption or price review mechanism
Land bank	State Land Bank (Derzhzembank) exists but limited in scope and reach
Lease registration	Required; many informal leases not formally registered

War-Time Land Governance Challenges

Land governance under active war (2022–present)

- Land transactions suspended briefly at war's start; market then resumed under martial law, creating a complex legal environment.

- Abandoned land in combat and frontline zones: 2.1–2.8 million ha — ownership and use rights in legal limbo.
- Mine contamination: 30%+ of Ukrainian territory has systemic damage or pollution risk. Agricultural recovery requires large-scale demining (estimated cost: \$32 billion).
- Land grabbing concerns in occupied territories: Russia has conducted illegal land seizures and redistribution in occupied Ukrainian regions.
- Displaced farmers: hundreds of thousands of rural Ukrainians displaced — rights to lease and ownership uncertain.
- Post-war reconstruction risk: if reconstruction aid flows primarily through agroholdings without smallholder safeguards, existing concentration will deepen further.

V. POLICY & POLITICAL CONTEXT

Ukraine's EU Accession Journey

Ukraine applied for EU membership on February 28, 2022 — four days after Russia's full-scale invasion. It received candidate status in June 2022. Agricultural policy harmonisation with EU standards is now a central element of accession negotiations. Key dimensions:

- EU agricultural screening: Ukraine completed the technical agricultural policy screening in September 2025 — a historic milestone in the accession process.
- CAP adaptation: Ukraine's agricultural structure (dominated by large agroholdings rather than family farms) is fundamentally mismatched with CAP's historic small-farm support architecture. EU accession would require significant restructuring.
- Export tensions: Ukraine's agricultural exports to the EU surged under wartime Solidarity Lanes trade preferences. This triggered farm protests in Poland, Hungary, and Slovakia. Trade preferences expired June 2025; quotas reinstated; emergency brake mechanisms now in effect for multiple products.
- EU market alignment: Ukrainian grain and oilseed exports to EU grew from 15.6% to over 52–56% of total agricultural exports during the war. This structural shift toward EU markets creates both integration opportunities and political friction.

Ukraine's agricultural sector contributed 7.1% of GDP in 2024 (down from 10.9% in 2021 and a peak of 8.8% in 2013) and €23 billion in exports in 2024 — approaching pre-war levels and providing over 60% of total export revenue in some months of 2024.

Subsidy & Support Distribution

Pre-war Ukrainian agricultural policy systematically favoured corporate enterprises. Key structural features:

- State support (subsidies, preferential taxation) primarily directed to large agricultural enterprises — agroholdings received disproportionate shares.
- Preferential agricultural taxation (single tax regime) generated significant revenue for agroholdings while "bleeding dry" local budgets.
- Peasant farms and small family operations received minimal state support; no meaningful extension services for subsistence farming transition.
- OECD (2025): Ukraine introduced wartime fiscal measures in 2024–2025, including a military fee on wages, targeted conflict-zone farm support, and increased demining programme funding.

Key Organisations

Organisation	Type & Position
ADRI (Association for Democratic Rural Initiatives)	A2LN partner; advocacy for peasant rights, land governance democracy, and equitable land access in post-

Organisation	Type & Position
	war reconstruction
URDN (Ukrainian Rural Development Network)	Coordinates peasant self-governance organisations; organised major public forums on land rights; strong opposition to moratorium lifting without safeguards
AFPLOU	Private farmers and landowners; legal support, land reform advocacy, anti-land-grab stance
UAC (Ukrainian Agrarian Confederation)	Represents ~3.5 million ha; land market, taxation, and fertiliser reform advocacy
UCAB (Ukrainian Agri Council)	Agribusiness lobby; export-oriented large farms; advocates for market access and export stability
Agricultural Workers' Union	Trade union (~400,000 members, 2019); labour rights in agriculture and processing
EcoAction	Environmental NGO; soil contamination monitoring; post-war land pollution advocacy

VI. KEY BARRIERS & OPPORTUNITIES

Top Barriers to Land Access

- Lease dominance and peasant disempowerment: 80% of land distributed in the 1990s was immediately leased, mostly to corporate entities. Peasant landowners typically did not know their lessee, could not negotiate rent, and had no meaningful control over their land. This structural legacy persists.
- Land market liberalisation favouring large operators: the 2021 opening and especially the 2024 expansion to 10,000 ha for legal entities has so far primarily benefited IT-sector buyers and large corporate actors. Wartime financial precarity makes it impossible for most peasants and small farmers to compete.
- Absence of institutional safeguards: no SAFER-equivalent, no land bank for smallholder access, no farm matching platform, no starter farm programme. The land market has no equity-oriented governance mechanism.
- War damage and mined land: 20%+ of UAA unavailable for productive use; demining will take decades and billions of dollars. Access to frontline and occupied land is impossible or life-threatening.
- Post-war reconstruction risk: if international reconstruction aid — EU funds, IFI financing — flows primarily through large corporate structures without smallholder safeguards, structural inequality will deepen rather than improve.

Opportunities for Change

- EU accession as land governance reform lever: the accession process provides a unique historical window to embed equitable land governance standards — including smallholder protection, pre-emptive rights, and land market transparency — into Ukrainian law as part of EU alignment.
- Post-war reconstruction with redistribution: reconstruction plans offer an opportunity to redesign land governance from scratch in damaged areas, including land banking, starter farm programmes, and land allocation with agroecological criteria.
- Peasant farming role in food security: personal peasant farms produce 95% of potatoes, 85% of vegetables, 80% of fruits, and 75% of milk — feeding the domestic population. This proven food security function provides a strong political argument for dedicated support.
- Organic farming target (3% by 2030): the national organic area target provides a framework for investment and policy, but requires structural reform to enable small producers to access organic markets — currently almost entirely monopolised by large-scale exporters.

- International solidarity networks: ADRI's linkage to A2LN, ECVC, and Via Campesina provides access to European and global frameworks for peasant rights advocacy, relevant to both domestic policy and EU accession negotiations.

VII. ADVOCACY & ALLIANCE PRIORITIES

ADRI — Core Advocacy

- Equitable land governance in post-war reconstruction: ensuring that international reconstruction aid and policy frameworks include mandatory smallholder and peasant safeguards — not simply channelled through agroholdings.
- Peasant rights in the land market: implementation of meaningful pre-emptive rights, affordable lease terms, and transparent procedures that actually function for small landowners and family farms.
- EU accession as lever for land reform: engaging the accession process to introduce SAFER-type mechanisms, land control authority, and smallholder-friendly structures into Ukrainian law before market liberalisation deepens further.
- Demining and land restoration: advocacy for prioritising smallholder and community access in post-demining land allocation, not simply returning liberated land to pre-war agroholding lessees.
- Peasant agroecology and food sovereignty: linking Ukraine's enormous domestic food production role of peasant farms to policy arguments for targeted support, seed sovereignty, and agroecological transition.

A2LN-Level Strategic Note

Ukraine as an EU accession case: land governance at a crossroads

- Ukraine's EU accession process represents a rare historical opportunity — and an urgent risk. If accession proceeds without embedding equitable land governance, the world's most fertile farmland will likely consolidate further under corporate control, eliminating millions of peasant farming families.
- The A2LN and its European partners have a direct interest in shaping the accession agricultural chapter to include safeguards comparable to France's SAFER, Germany's GrdstVG, or Scotland's Land Reform Act 2025.
- Ukraine's reconstruction offers a further window: international donors and EU institutions should be engaged to condition reconstruction support on smallholder protection, transparent land governance, and agroecological transition — not on-scale agro-industrial rebuilding.
- The EU's political friction with Ukrainian grain exports (2023–2025) creates complex dynamics: European farmers fear competition, but European civil society and land organisations should be building bridges with Ukrainian peasant movements, not walls.

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