TASK FORCE REPORT

FROM MINES TO MARKETS

Pathways for Ukraine's agricultural recovery

Rapporteur
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CEPS is an independent think tank based in Brussels. Its mission is to produce sound policy research leading to constructive solutions to the challenges facing Europe and the world.

This report builds on the debates of the CEPS Task Force on 'Ukraine's agricultural recovery'. It brought together a broad range of stakeholders, including international organisations, development banks, EU institutions and Member States, private sector representatives, NGOs, and experts. A list of Task Force members is in Appendix A.

The members of the Task Force participated in extensive discussions over the course of several meetings between July and November 2025, and submitted comments on earlier drafts of the report.

The recommendations of this report do not necessarily reflect a common position reached by all members of the Task Force. Nor do they represent, in any manner, the views of their respective institutions. The content of the report and any remaining errors are solely attributable to the rapporteur.

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EXECUTIVE SUMMARY

Before the full-scale invasion of Ukraine, agriculture was one of the most dynamic and structurally important sectors of its economy, contributing significantly to exports and employment. Despite the ongoing war, the sector has remained a backbone of the Ukrainian economy and continues to be deeply embedded in global food supply chains, while also sustaining food security across multiple regions within Ukraine.

Even so, the scale of war-related damage to the agricultural sector is substantial. According to the latest Rapid Damage and Needs Assessment, direct damage is estimated at USD 12.1 billion, with economic losses reaching approximately USD 78 billion. Reconstruction and recovery needs for the agricultural sector are projected at USD 55.3 billion over the next decade (2025–35), underscoring the scale of both the challenge and the investment required.

Against this backdrop, this Task Force report adopts an integrated 'from mines to markets' perspective. It addresses the full recovery chain – from ensuring safe and productive land, to improving access to finance, unlocking digital and technological solutions, and rebuilding critical infrastructure. These enabling factors are deeply intertwined and should be understood as a sequential yet overlapping recovery chain, requiring coordinated sequencing of interventions.

At the same time, Ukraine's agricultural recovery must be closely aligned with its EU accession pathway. Regulatory alignment and integration into the EU market should not be seen as an endpoint, but as a means to upgrade production standards, improve sustainability, and enhance overall competitiveness. This in turn will strengthen Ukraine's capacity to operate as a reliable global supplier, ensuring that EU integration goes hand in hand with maintaining and expanding its role in global food security.

While land clearance and basic infrastructure restoration are immediate priorities, investment is needed in digitalisation, institutional capacity, and market integration. These are requisites for securing long-term resilience, competitiveness, and Ukraine's continued contribution to global agri-food systems.

In this report, each main section provides an analysis of these enabling factors, accompanied by policy recommendations. The report also identifies the following set of cross-cutting priorities and recommendations to guide Ukraine's agricultural recovery and long-term transformation.

- **Advance the large-scale recovery of agricultural land through a coordinated demining system that is based on standards and driven by innovation.**

  Ukraine should establish a national soil and contamination assessment protocol supported by a centralised database of accredited operators to guide prioritisation and provide transparency. Expanding regulated commercial demining alongside humanitarian clearance, combined with enlarged schemes for farmer compensation, is crucial for reducing reliance on informal practices and accelerating the return of land to production.

  Investment is needed in innovative technologies – such as drone-based detection, AI mapping and autonomous clearance systems. Together with improved coordination among public, private and international actors, this will be fundamental to scaling up safe and efficient land restoration and to reintegrating agricultural land into productive use and EU-aligned markets.

- **Improve access to finance through a predictable policy environment and risk-sharing instruments tailored to Ukraine's dual agricultural structure.**

  Ukraine's system for agricultural financing must reflect the coexistence of large agribusinesses integrated into global value chains and SMEs that underpin domestic food security and rural livelihoods. Increasing access to finance therefore requires stable and credible policies on agriculture and trade – particularly regarding export regimes, taxation, and state support measures – to strengthen bankability and reduce policy risk for both types of enterprises.

  This should be complemented by expanded platforms for public–private co-financing, and scaled-up agricultural and war-risk insurance schemes. More assistance with project preparation is also needed to increase the pipeline of investment-ready SME projects. Improved financial infrastructure, including land registration and collateral systems, would help broaden access to credit and mobilise long-term investment across the sector.

- **Embed digitalisation and AI into agricultural recovery through inclusive access and EU-aligned data governance.**

  Ukraine should integrate digital and AI tools, such as precision agriculture, data-driven resource management, and AI-supported mapping, into reconstruction efforts from the outset, so that technological and physical investments progress in parallel. This transformation must be inclusive, bridging the gap between large agribusinesses and SMEs through improved access to affordable technologies, rural connectivity, and targeted training. Enhancing agricultural advisory services

is central to translating innovation into practical use, especially for smaller producers.

Simultaneously, Ukraine should adopt EU-aligned digital and data governance frameworks. Creating a national agricultural data space, modelled on the EU's emerging Common Agricultural Data Space, will support competitiveness, resilience, and Ukraine's integration into European digital and agricultural ecosystems.

- **Rebuild and protect resilient agricultural infrastructure and export corridors for uninterrupted production and trade.**

  Ukraine should prioritise the coordinated repair and modernisation of the transport, energy, storage, water, and logistics systems essential for agriculture, while strengthening rapid-repair capacities and aligning infrastructure with EU standards.

  Safeguarding these assets through enhanced air defence is vital to protecting reconstruction investment. So too is maintaining diversified export routes, including the Black Sea, Danube, and EU land corridors. These efforts, combined with expanded war-risk insurance and improved trade facilitation (e.g. customs digitalisation and border capacity), are necessary for stable, efficient, and resilient agricultural exports under continued security risks.

- **Position Ukraine as a complementary and globally integrated agri-food partner to the EU through a dual-track and market-diversified strategy.**

  EU–Ukraine agricultural integration should be anchored in structural complementarities. This involves leveraging Ukraine's strengths in feed, protein crops, and lower value-chain production. Meanwhile, the strategy will need to manage localised market pressures from neighbouring EU countries through improved transit and infrastructure.

  Ukraine's global export orientation must be preserved by supporting diversified trade flows to Asia, the Middle East, and Africa. This requires a dual-track policy approach of helping large agribusiness to integrate into EU and global value chains while not excluding SMEs. That can be achieved through sequenced regulatory alignment and targeted support. Strengthening institutional capacity and promoting innovation in bioeconomy, agri-tech, and climate adaptation will be critical to ensuring that integration enhances competitiveness, resilience, and sustainable growth.

INTRODUCTION

Prior to the full-scale invasion, agriculture was one of the fastest-growing sectors in Ukraine, expanding at an annual rate of 5–6%, contributing 10.9% of GDP, and providing 17% of total employment by 2021 (Mamonova, Borodina and Kuns, 2023). The sector has remained a cornerstone of Ukraine's economy in spite of the war, accounting for approximately 14% of GDP and around 60% of exports in 2024 (Nivievskyi, 2025). Beyond its domestic importance, Ukrainian agriculture continues to play a prominent role in global food supply chains, supplying food commodities that, before the war, reached an estimated 400 million people worldwide (UkrAgroConsult, 2025).

The war has nonetheless significantly damaged the agricultural sector. The World Bank's Fifth Rapid Damage and Needs Assessment (RDNA5) of December 2025 assesses direct damage at USD 12.1 billion (World Bank, 2026a). This largely reflects the destruction of machinery, storage and logistics infrastructure, livestock, and perennial crops, as well as the loss and theft of inputs and outputs. The most severe impacts are concentrated in frontline and near-frontline oblasts, including Luhansk, Donetsk, Kharkiv, Zaporizhzhia, Kherson, Sumy, and Dnipropetrovsk.

The broader economic losses are significantly higher, reaching approximately USD 78 billion, equivalent to roughly 39% of Ukraine's GDP before the outbreak of the full-scale war. These losses stem from reduced production, unharvested crops, increased input costs, and depressed farm-gate prices owing to persistent export disruptions.

As a result, the estimated reconstruction and recovery needs of the agricultural sector amount to USD 55.3 billion over the next decade (2025–35), equivalent to approximately 28% of Ukraine's pre-war GDP. This also represents roughly 10% of Ukraine's total reconstruction needs, which stood at approximately USD 588 billion by the end of 2025 nearly three times Ukraine's pre-war GDP (World Bank, 2026a).

Amid this setting, this Task Force report brings together the perspectives of a broad range of stakeholders, including international organisations, development banks, EU institutions and Member States, private sector representatives, NGOs, and experts. It takes an integrated mines-to-markets approach that addresses the full recovery chain, from clearing land and restoring production capacity to rebuilding logistics and ensuring access to global markets. Each aspect is fundamental to enabling Ukraine's agricultural sector to transition from survival under war conditions to long-term resilience and growth.

Building on this approach, the report explores agricultural recovery through a comprehensive lens:

- ensuring safe and productive land;
- improving access to finance;
- unlocking digital and technological solutions;
- rebuilding critical infrastructure; and
- strengthening Ukraine's role within European and global food systems.

These factors are deeply interdependent and should be understood as a sequential yet overlapping recovery chain.

Land clearance constitutes the foundational precondition: without safe and productive land, neither agricultural output nor investment can be sustainably restored. Delays in demining directly constrain access to finance, as contaminated land cannot serve as collateral, and increase operational risks for both farmers and investors. In turn, limited financing slows the adoption of modern technologies and digital tools, which are important for restoring productivity and improving efficiency. Infrastructure reconstruction and logistics systems further determine whether production gains can be translated into effective market access, both within the EU and globally.

Each section of the report identifies the main challenges and opportunities in these areas and puts forward actionable policy recommendations.

1. SAFE AND FERTILE LAND FOR AGRICULTURAL RECOVERY

The full-scale Russian invasion has transformed Ukraine's productive land into a battlefield, posing a staggering challenge for recovery. The scale of the issue is immense: according to the RDNA5, an estimated 132 076 km² of Ukraine's land (roughly 23% of the total)[1], and 14 000 km² of water (around 58% of the total water area)[2], are at risk of contamination and require a survey (World Bank, 2026a).

The UN Mine Action Service finds that Ukraine is now the most heavily contaminated country since the end of World War II, where more than 6 million people live in or near contaminated areas.

The primary problem for the use of agricultural land is the extensive presence of mines, unexploded ordnance, and other remnants of war. Mines and explosive remnants of war have rendered large areas of farmland unsafe or inaccessible, particularly in heavily affected oblasts such as Kharkiv, Donetsk, Luhansk, Kherson, Zaporizhzhia, Chernihiv, and Mykolaiv.

Meanwhile, the human toll of explosive hazards remains significant. Between 24 February 2022 and December 2025, landmines and explosive remnants of war killed 472 people and injured 1 188[3].

The direct damage from explosive hazard management was estimated to be USD 10.6 million by the end of December 2025. The resulting losses reached USD 26.7 billion. The total 10-year recovery and reconstruction needs for explosive hazard management are estimated at USD 27.6 billion for 2026–35 (World Bank, 2026a).

The immediate priorities are non-technical surveys and clearance of high-impact areas, including transport routes, agricultural land, and residential zones. Demining capacity needs to be strengthened and education on explosive ordnance risk expanded. Explosive hazard management must be embedded within broader reconstruction efforts. The eastern and southern oblasts face the most urgent needs, with response efforts led by coordinated state initiatives – such as the mechanism for agricultural land compensation – and supported by international partners. These funding sources enable operations across the sector, assisting state institutions, humanitarian actors, and commercial

[1] The total land area is taken to be 579 400 km², from the latest data point provided by the World Bank for the year of 2023.

[2] The total water area is taken to be 24 200 km², sourced from Stelmakh, et al. (2023).

[3] See OHCHR (2026), *Ukraine: Protection of Civilians in Armed Conflict – December 2025 Update*, quoted in World Bank (2026).

operators, though considerable financing gaps persist for large-scale clearance and long-term capacity building.

1.1. CONTAMINATED LAND AS A BARRIER TO AGRICULTURAL RECOVERY

For the agricultural sector, contamination has constrained access to agricultural land, hampered farming activities, lowered productivity, limited mobility, and undermined livelihoods in frontline and rural communities. The gendered effects are evident, with women facing higher risks while performing agricultural work and men exposed during debris clearance or informal safety tasks (World Bank, 2026a).

Beyond the immediate explosive threat, the war has caused severe environmental damage.

- **Soil degradation.** Explosion of munitions burns out the organic compounds and mixes fertile soil with non-fertile layers. Soil compaction from the movement of heavy military vehicles reduces soil aeration and water infiltration, and further degrades the fertility.
- **Chemical contamination.** While widespread heavy metal pollution from munitions is not currently seen as the most prominent concern, the toxic chemical residue from unexploded ordnance, such as nitrate compounds, poses a substantial risk to soil and human health. The chemical residue may remain in the soil for a number of years.
- **Ecological disruption.** Abandoned fields have surrendered to wilderness, with fields overrun by wild grass and weeds depleting the soil nutrients. This calls for more intensive and costly farming practices to reclaim the land.

The land contamination not only limits agricultural activities, but also creates a profound risk for Ukrainian agriculture and its products on the global market, making testing and certification essential for future exports.

1.2. POLICY RESPONSES AND PRIVATE-SECTOR ENGAGEMENT

Ukraine's Ministry of Economy is spearheading a prioritisation strategy to return land to productive use as efficiently as possible. This involves focusing on the 'easiest' areas first to clear land and return it to use, in order to stimulate economic activity.

A key government policy is that demining should be free for farmers. A national programme has been established to provide 100% reimbursement for humanitarian demining costs to farmers who apply. However, several shortcomings have been identified.

First, the compensation rates under the programme are not well aligned with commercial market prices for demining services. In practice, this creates distortions: reimbursement ceilings may be perceived as either too low to attract certified operators or insufficiently flexible to reflect varying field conditions, leading to differences between actual service costs and reimbursed amounts. Second, some small farmers opt to rely on cheaper, uncertified 'grey market' operators, which raises safety and quality concerns. Third, regulatory gaps remain – for example, insufficient safeguards to prevent misuse of the programme or to ensure consistent standards across providers. Finally, awareness of the programme is still limited among farmers, reducing uptake.

The government is also developing a national mine action strategy. It plans to complete a non-technical survey of all de-occupied territories by the end of 2026 to accurately assess the scale of the problem.

The EU is a central partner, providing financial support through the Ukraine Facility to assist the government's farmer compensation programme. The EU's Foreign Policy Instrument is also actively supporting demining with a focus on tangible outcomes, such as the amount of land returned to use and the resulting economic impact.

Humanitarian organisations are on the ground, conducting surveys, clearance, and risk education. They work across multiple oblasts, clearing both minefields and battlefield areas, and have reached millions of people with digital risk-education campaigns. These organisations emphasise the importance of adhering to strict quality control standards and working under the accreditation of the Ukrainian government to build confidence and ensure land is cleared correctly the first time.

The private sector plays a significant role by leveraging its networks for farmer education, and investing in research. There is growing interest in developing commercial solutions, such as paying farmers for ecosystem services like improving soil health, which could be integrated into the restoration process. Research collaborations are underway with institutions like the Kyiv School of Economics and the UN Food and Agriculture Organization (FAO), to establish protocols for soil sampling and build a national database on soil contamination for guiding remediation efforts and ensuring food safety.

1.3. KEY IMPEDIMENTS

Despite significant efforts, the path towards agricultural recovery remains constrained by several structural obstacles. One of the most immediate is the sheer scale of land contamination. Large areas of Ukraine's territory remain affected by mines and unexploded ordnance, and the ongoing nature of the conflict further complicates the situation. Areas that have been cleared can be re-contaminated by renewed hostilities, making it difficult to establish a definitive timeline or reliable cost estimates for

nationwide clearance. This fluid and unpredictable environment greatly complicates long-term planning for agricultural restoration.

Economic and financial constraints present an additional layer of difficulty. A 'grey market' of uncertified demining operators has emerged (Demine Ukraine, 2024), often offering lower-cost services but without the requisite technical standards or oversight. Such practices risk substandard clearance operations that could result in future accidents and require costly re-clearance of land. Although the government has introduced programmes offering full compensation for certified demining services, farmer participation has remained lower than expected, suggesting persistent barriers related to awareness, administrative complexity, or limited access to information.

Progress is also slowed by operational snags. Current clearance standards require land to be completely 'metal-free', obliging demining teams to remove every fragment of scrap metal. While designed to ensure safety, this approach significantly slows the clearance process, particularly across large agricultural areas where metal debris is widespread. In parallel, the lack of standardised protocols for soil sampling and environmental data collection limits the ability to compare results across different organisations. Without consistent methodologies, building a comprehensive national assessment of soil conditions and contamination remains difficult.

Finally, effective coordination remains a major challenge. Demining involves a wide range of actors, including state authorities, international and local NGOs, and commercial operators. Coordination among these stakeholders is essential for efficient operations and resource allocation. So too is maintaining farmers' trust in the safety and reliability of clearance processes for restoring agricultural activity in affected regions.

1.4. OPPORTUNITIES FOR INNOVATION

The scale of contamination in Ukraine also creates a powerful catalyst for innovation in mine action. New technologies offer opportunities to significantly accelerate the detection and clearance of explosive hazards while reducing risks for personnel.

One promising area is the use of drones equipped with advanced sensors to conduct large-scale aerial surveys of contaminated land. Data collected through these surveys can then be analysed by AI algorithms capable of identifying potential mines and distinguishing them from other metallic objects. Such approaches can substantially speed up the initial survey process, allowing demining teams to prioritise high-risk areas more efficiently.

Ukraine is already well positioned to leverage these technological solutions. The country has become a global leader in the development and deployment of drones, with a

domestic industrial capacity estimated at up to 10 million drones annually (UNN, 2025). Ukrainian manufacturers are also capable of producing specialised demining equipment. With targeted financial investment, this domestic industrial base could play a critical role in supplying the tools required for large-scale clearance operations, creating a virtuous cycle of innovation, production, and operational deployment.

Automation also holds much potential for accelerating the demining process itself. Given the vast scale of Ukraine's agricultural lands, the use of armoured and autonomous demining vehicles will be crucial to increasing the speed and safety of clearance operations, helping to restore farmland to productive use more rapidly.

1.5. POLICY RECOMMENDATIONS

1) **Establish a national soil health and contamination protocol.**

   Ukraine should introduce a nationally endorsed protocol for soil sampling and contamination assessment to guide land remediation and ensure long-term soil and food safety. A standardised methodology would enable authorities to systematically assess the impact of explosive remnants of war on agricultural land and prioritise restoration efforts.

   This process should be supported by a centralised national database to which all accredited clearance operators contribute as part of their reporting obligations. Such a system would improve coordination among stakeholders while providing farmers, regulators and international partners with reliable information on land safety and agricultural viability.

2) **Foster a competitive and safe commercial demining sector.**

   Given the vast scale of contamination, Ukraine must complement humanitarian mine action with a well-regulated commercial demining market. Establishing a robust licensing and quality assurance framework for private providers would ensure compliance with international standards. Incentives should encourage certified operators to coordinate with humanitarian organisations, especially in regions that are economically vital.

   At the same time, stricter enforcement and penalties for the use of non-accredited operators are needed to deter unsafe practices and build confidence among farmers and investors. Tailored insurance programmes could further support responsible commercial activity in the sector.

3) Scale up farmer support, compensation, and risk awareness.

Ukraine should expand its existing farmer compensation schemes for demining services to reduce reliance on informal and unsafe clearance practices. Funding and outreach should be increased, particularly in frontline and recently de-occupied areas where awareness of the programme remains limited. Compensation should reflect real market costs and be delivered in a timely manner, while simplified and digitised application procedures would improve access for smaller farms.

Alongside financial support, farmers should receive targeted training on safe agricultural practices after clearance, risk identification and land rehabilitation. Expanding digital advisory tools and mobile outreach services would help reach farmers in remote or high-risk areas.

4) Align agricultural recovery with EU standards and market integration.

As Ukraine advances towards EU membership, agricultural recovery should be closely aligned with European regulatory and food safety frameworks. Cooperation with EU institutions could facilitate fast-track certification and export procedures for agricultural goods produced on demined land, ensuring compliance with sanitary and phytosanitary standards while restoring market access. An EU–Ukraine certification label for products originating from reclaimed farmland could further increase consumer trust and highlight the link between reconstruction and Ukraine's EU accession.

5) Accelerate innovation and coordination in mine action.

Technological innovation and closer coordination will be key to scaling up land clearance. Ukraine should prioritise investment in drone-based detection systems, advanced sensors, and AI to improve the identification and mapping of contaminated areas. Greater deployment of armoured and autonomous clearance equipment could accelerate operations across large agricultural zones.

A central coordination platform involving government institutions, international partners, NGOs and private actors could improve transparency, track progress and make sure that resources are directed where they are most needed. A dedicated public–private innovation fund could further support Ukrainian startups in developing scalable mine-action technologies.

2. ACCESS TO FINANCE

Ukraine's agricultural sector remains fundamentally private-led and characterised by strong entrepreneurial dynamism. This dynamism reflects the long-term structural transformation of Ukrainian agriculture following the privatisation process that began after the Soviet period.

The sector has also seen a rapid increase in individual entrepreneurial activity: registrations of individual entrepreneurs active in agribusiness rose by 52% in a single year, from 934 to 1 500 by August 2025. This highlights the continued interest in small-scale agricultural ventures despite wartime conditions (Finway, 2025).

The agricultural sector furthermore has a 'bimodal' structure, where large agribusiness enterprises coexist alongside numerous smaller family farms and rural households. The number of large agricultural companies amounts around 15 600, around 40% of which are incorporated into agroholdings, which are the biggest land holders in Ukraine. In terms of small farmers, there are around 31 800 registered family farmers and an estimated 3.9 million rural households (although the actual number may be higher) (Mamonova, Borodina and Kuns, 2023).

Before the outbreak of the full-scale war, agribusiness controlled just over half the arable land (53.9%) and produced 54.5% of total agricultural output, specialising mainly in grain and oilseeds for exports. By contrast, family farms and rural households cultivated 45.5% of the land, producing a diverse set of crops and livestock for domestic consumption and providing the remaining 46.1% of total agricultural production (Mamonova, Borodina and Kuns, 2023).

This dual structure has important policy implications. While agribusiness dominates export revenues and industrial value chains, family farms remain a mainstay of domestic food security. Yet historically, Ukrainian policy has prioritised large-scale agribusiness, which receives the majority of state subsidies and dominates industrial agri-food infrastructure, leaving smaller producers under-supported.

Russia's full-scale invasion has further stressed this bimodal system. Export-oriented agribusiness suffered the heaviest losses from attacks on infrastructure, landmines, port blockades, and environmental destruction. Family farms have had to face the limited availability of fuel, seeds, feed, and fertilisers, high electricity costs and restricted access, as well as obstacles in marketing and selling their products.

Despite severe challenges, both large companies and small farmers (FAO, 2022) have adapted to sustain their operations. Government and international measures – including tax relief, development of storage facilities, and overland export routes – have mitigated

some disruption. But there is concern that these interventions mostly benefit large agribusiness, leaving smaller farms at the margins (Mamonova, Borodina and Kuns, 2023).

2.1. WARTIME FINANCE

Despite this entrepreneurial dynamism, access to finance has become a pressing constraint on agricultural recovery. Wartime risks, damaged infrastructure and macroeconomic uncertainty have markedly reduced the availability of affordable credit. As a result, international financial institutions and donor-backed programmes now play a crucial role in sustaining lending to the sector.

The OECD notes that Ukraine's government supports business lending through the Affordable Loans at 5–7–9% programme, which subsidises interest rates for eligible borrowers. Since its launch in 2020, more than 100 000 loans totalling UAH 389 billion have been issued, with around UAH 300 billion granted in the wake of Russia's full-scale invasion. Agriculture has been the largest beneficiary, accounting for 46% of programme loans (OECD, 2025).

Complementing these measures, international partners have expanded credit guarantees to maintain lending flows. The Partial Credit Guarantee Fund, established by the World Bank and the EU, covers up to 50% of farm loans for small farmers cultivating up to 500 hectares. The facility supports both working capital and investment loans, with maturities of up to seven years for investments and up to ten years for land purchases, with a maximum loan size equivalent to EUR 800 000 per borrower (World Bank, 2024).

These instruments have proven essential in stabilising agricultural production during wartime. However, they also raise important long-term policy questions. Ukraine's reliance on subsidised credit, donor-backed guarantees, and concessional programmes, while necessary under current conditions, will need to be gradually transitioned from emergency financial support to market-compatible financing mechanisms aligned with EU regulatory frameworks.

The Ukraine Facility, which secures EUR 50 billion from the EU's multiannual financial framework for 2024–27, provides a major opportunity to support Ukraine's reconstruction. The Facility has allocated two thirds for loans (EUR 33 billion) and a third for grants (EUR 17 billion). These funds are intended to support Ukraine's reconstruction in line with its EU accession. Therefore, they come with conditions attached: disbursement depends on the implementation of reforms as outlined in the Ukraine Plan. These cover a wide range of areas, including public administration, good governance, the rule of law, sound financial management, anti-corruption and anti-fraud efforts, and

other reforms to modernise the economy and accelerate Ukraine's reconstruction in line with its EU accession.

The Facility covers all sectors of the economy, not just agriculture, though its scale remains modest compared with the overall financing needs. According to the latest RDNA, the country requires around USD 588 billion for its reconstruction over the next decade. Given the vast need, the Ukraine Facility represents only a fraction (roughly less than a tenth) of the resources required to rebuild the country's economy and modernise leading sectors such as agriculture.

Beyond the shortfall in financial support provided by Ukraine's donors is another persistent challenge: the limited pipeline of bankable investment projects. While international donors and financial institutions have expressed strong interest in supporting Ukraine's recovery, smaller enterprises often struggle to translate opportunities into credible investment proposals. Many small to medium-sized agricultural producers lack the technical capacity to prepare investment plans that meet the requirements of international lenders, development banks, or private investors. As a result, a significant portion of potential funding remains underutilised.

2.2. PRIVATE CAPITAL IN WARTIME

Wartime risks remain a major deterrent to investment. Ongoing hostilities and uncertainty about future security conditions continue to suppress investor appetite, particularly for capital-intensive projects such as storage infrastructure, irrigation systems, and logistics facilities. The most recent RDNA holds that roughly 40% of Ukraine's reconstruction financing, which is roughly equivalent to USD 235 billion, will need to come from private capital. This estimate points to a structural financing gap that cannot be addressed by public funding alone.

However, since the outbreak of the full-scale war, private investment in Ukraine has remained extremely limited. New projects have amounted to about EUR 1.6 billion – far below the level required for large-scale reconstruction – while foreign capital remains limited. While inward FDI reached USD 8.3 billion between 2022 and 2024, annual inflows averaged only 1.6% of GDP over the period. This reflects a degree of investor confidence in Ukraine's long-term economic potential, but the annual inflow of FDI is well below both pre-war levels and the scale needed to support economic recovery. Meanwhile, many Ukrainian firms face structural constraints in accessing finance, often due to insufficient collateral for conventional lending, with persistent security risks continuing to deter foreign investors.

A substantial share of future investment – potentially up to 80% of expected FDI and private capital flows – will require risk mitigation through insurance mechanisms. Yet,

developing such instruments in a wartime context is inherently difficult. Uncertainty over the scale and likelihood of losses translates into high insurance premiums. This in turn discourages investment, including in the agricultural sector, particularly in the areas where capital investment is required, such as production, irrigation, storage, and transportation of agricultural produce.

Some progress has been made in supporting ongoing trade. Export credit agencies in countries such as Germany, Poland, and Denmark have extended insurance and guarantees covering both commercial and political risks, enabling European firms to continue trading with Ukraine. While these instruments have proven effective in sustaining economic ties, they are insufficient to unlock new, large-scale investment.

Mobilising private capital for reconstruction will therefore require the development of systemic war-risk insurance mechanisms that extend beyond trade finance and short-term contracts. International financial institutions have begun to address this need, albeit on a limited scale. Since the start of the full-scale invasion, the World Bank's Multilateral Investment Guarantee Agency has issued approximately USD 195 million in political-risk insurance guarantees and established the SURE Trust Fund to expand coverage. Similarly, the European Bank for Reconstruction and Development (EBRD) announced a pilot war-risk insurance scheme at the Ukraine Recovery Conference in London in 2023, though implementation has yet to reach scale.

Further initiatives were launched at the 2024 Ukraine Recovery Conference in Berlin, where Aon, in partnership with the US International Development Finance Corporation, introduced a USD 350 million insurance programme, including a USD 50 million reinsurance facility and USD 300 million in war-risk coverage targeting sectors such as agriculture and healthcare.

Given the scale of Ukraine's reconstruction challenge, however, these initiatives are only a starting point. Without a seriously expanded system of risk-sharing instruments – including war-risk insurance, investment guarantees, and blended finance mechanisms – the country will struggle to mobilise the private capital required for recovery.

In meeting the reconstruction needs, public–private partnerships (PPPs) have the potential to develop scalable solutions for war-risk insurance. But as scaling up war insurance mechanisms remains challenging, a substantial share of private capital is likely to materialise only once the war ends with credible security guarantees in place.

Another dimension concerns the visibility of investment opportunities. International events like the Ukraine Recovery Conference and other investment forums have played a constructive role in raising global awareness. Still, their impact could be strengthened by translating these international events into concrete business partnerships. Increasing

direct business-to-business engagement and improving information flows about market opportunities in Ukraine would help European and international companies better understand the long-term potential of the Ukrainian agricultural sector.

Beyond traditional banking channels, Ukraine's recovery could also benefit from diversified sources of capital, including diaspora investment funds, blended finance platforms, and private equity participation in agricultural infrastructure. Such instruments could help bridge the gap between public reconstruction funds and large-scale private investment.

In all cases, the management of large financial inflows under wartime and post-war conditions creates significant risks of misuse, rent-seeking and weak oversight, particularly given the pressure to deliver reconstruction rapidly. Effective anti-corruption safeguards will be essential not only for good governance, but also for economic recovery and improving investor confidence. In line with Ukraine's reform commitments for its EU accession, strengthening anti-corruption institutions and public procurement systems, along with improving judicial independence and financial transparency, will be critical to ensuring that reconstruction funds are used effectively and reach their intended beneficiaries. Sustained progress in this area together with the progress on Ukraine's EU accession will significantly improve avenues for attracting long-term international investment.

2.3. POLICY RECOMMENDATIONS

1) **Expand PPPs and co-financing mechanisms tailored to Ukraine's dual agricultural structure.**

   PPPs and blended finance mechanisms can help transform donor commitments into viable investment projects. These instruments should be designed to support two parallel pathways: the integration of large agribusinesses into European and global value chains, and targeted support for small to medium-sized farms that underpin domestic food security and rural livelihoods. Co-financing platforms involving development banks (such as the European Investment Bank (EIB) and EBRD), private investors, and Ukrainian institutions could support strategic investment in agricultural technology, logistics infrastructure, storage, and irrigation. Such platforms should make certain that smaller producers are not excluded from access to finance.

2) Build a predictable and credible policy environment to improve bankability and unlock investment.

Access to finance in Ukraine's agricultural sector is constricted not only by wartime risks, but also by policy unpredictability, which directly affects the creditworthiness of farmers and agribusinesses. Sudden policy shifts, such as export restrictions or taxes on principal commodities, can reduce profitability and undermine the financial viability of producers, especially smaller farms. Ad hoc support measures perceived as fiscally uncertain or politically driven may weaken confidence in the government's ability to sustain long-term support programmes.

To address this, Ukraine should prioritise stable, transparent, and rules-based agricultural and trade policies. These should ensure consistency in export regimes, subsidy frameworks, and regulatory commitments. Enhancing fiscal credibility and clearly communicating medium-term policy directions will be meaningful to reducing perceived policy risk, improving the bankability of agricultural actors, and creating predictable conditions for both domestic and international investment.

3) Expand agricultural insurance and risk-sharing instruments.

The development of crop insurance schemes, investment guarantees, and other risk-sharing mechanisms could dramatically reduce financial risks for both farmers and lenders. Scaling up such instruments would support longer-term financing for agricultural modernisation while helping the sector to transition from emergency credit programmes towards a sustainable financial ecosystem. Expanding war-risk insurance and blending it with public guarantees would help unlock private investment under conditions of continued uncertainty. Well-designed risk-sharing frameworks could also lower the cost of capital, improve access to credit for small to medium-sized producers, and create more predictable conditions for investment across the agricultural value chain.

4) Increase project preparation and investment readiness across the agricultural sector.

A major constraint on mobilising available financing is the limited pipeline of bankable investment projects. Ukraine and its international partners should therefore expand project preparation facilities, advisory services, and investment accelerators that support agricultural enterprises in designing viable business plans and navigating complex financing instruments. Such support should target small to medium-sized farms in particular, which often lack the technical capacity

to prepare investment proposals but are a mainstay of domestic food production and rural livelihoods.

5) Strengthen financial governance and collateral frameworks.

Improvements in financial governance are vital to expanding access to credit. Better land-ownership documentation and land registries and clearer collateral frameworks would enable farmers – especially small to medium-sized producers – to leverage land assets more effectively when seeking finance.

Enhancing financial transparency, strengthening anti-corruption institutions, public procurement systems and judicial independence, as well as improving predictability in regulatory frameworks would also raise overall creditworthiness and reduce lending risks. These measures would not only expand access to finance at the farm level but also boost investor confidence in Ukraine's agricultural sector more broadly, supporting the mobilisation of both domestic and international capital.

3. ACCESS TO TECHNOLOGY

The latest RDNA estimates that as of December 2025, the total physical damage to the telecommunications and digital sector is estimated at around USD 2.5 billion (World Bank, 2026b). Cumulative economic losses – including forgone revenues, higher operating costs, and emergency backup measures – reach USD 2.7 billion. The critical infrastructure affected includes mobile and fixed broadband networks, broadcasting facilities, postal services, and media outlets.

The damage and losses are heavily concentrated in frontline and densely populated oblasts. Donetsk, Zaporizhzhia, Kherson, Kharkiv, and Kyiv account for the majority of both the physical destruction and financial impact (World Bank, 2026a).

According to the RDNA5, the total reconstruction and recovery needs are USD 7.1 billion over 2026–35, encompassing the restoration of damaged infrastructure, investment in service continuity, and rebuilding to pre-war operational levels. Immediate priorities include the rapid repair of partially damaged telecom, broadcasting, and postal networks, implementation of temporary continuity solutions, and expansion of redundancy systems such as backup electricity and satellite connectivity. Addressing these needs is necessary not only for overall digital resilience but also for unlocking access to technology and digital innovation for Ukraine's agricultural recovery.

3.1. AI AND DIGITAL TOOLS IN AGRICULTURE

AI and advanced digital tools are already transforming agriculture globally. Their applications range from genomic analysis and selective breeding to crop disease detection, yield prediction, precision irrigation, robotic harvesting, seed placement, supply-chain optimisation, and scenario modelling. Ukraine's reconstruction offers a rare opportunity to embed these digital technologies directly into the rebuilding process, avoiding many of the legacy inefficiencies that constrain lagging-behind economies.

For Ukraine's agricultural sector, digital innovation and AI could therefore enable the country to do more than simply restore pre-war structures; they could help it to 'bounce forward' rather than merely 'bounce back'. Agriculture has already been identified as a priority sector for AI deployment, with adoption rates advancing rapidly alongside the growth of industries such as robotics, defence, and aerospace. Applications of AI-enabled agriculture range from drone-assisted mine detection and land reclamation to yield forecasting and digital agronomy advisory services. Ukraine's growing startup ecosystem and deep scientific knowledge further amplify this potential.

At the same time, technological ambition must be grounded in institutional and socio-economic realities. Digital technologies and AI are tools rather than a panacea; their

effectiveness depends on local needs, supportive policies, and the capacity of both large and small farmers to adopt these technologies in their daily operations and thus to capture the benefits of digitalisation.

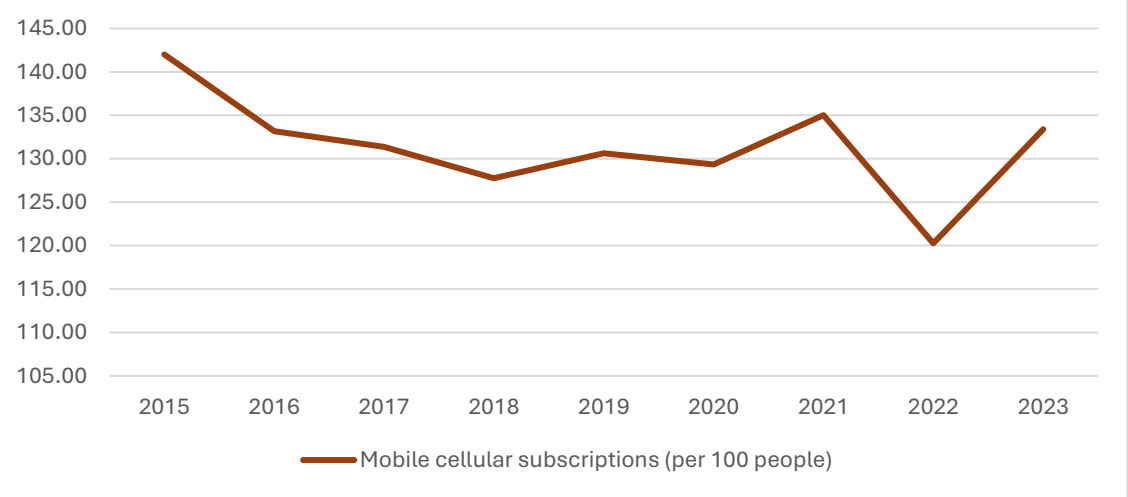
3.2. THE DIGITAL DIVIDE

Limited digital connectivity and uneven use of online services are among the main structural barriers to adopting digital and AI tools in the agricultural sector.

Internet usage has increased steadily since the outbreak of the Covid-19 pandemic, and this trend has continued despite the full-scale war. While around 70% of the population used the internet in 2019, this figure had risen to approximately 83% by 2024[4]. This growth reflects not only expanding access, but also heightened demand for connectivity in an emergency context, where continuous access to information and real-time updates have become indispensable.

Mobile cellular subscriptions shot up after 2022, reinforcing the role of mobile connectivity as a primary access point. By contrast, fixed broadband penetration remained relatively limited, with around 22 subscriptions per 100 people in 2023. This highlights both the need for and the challenges of expanding high-quality, stable internet infrastructure – particularly in rural areas. Meanwhile, fixed-line telephone usage has declined sharply, reflecting its diminishing relevance in an increasingly digital communication environment.

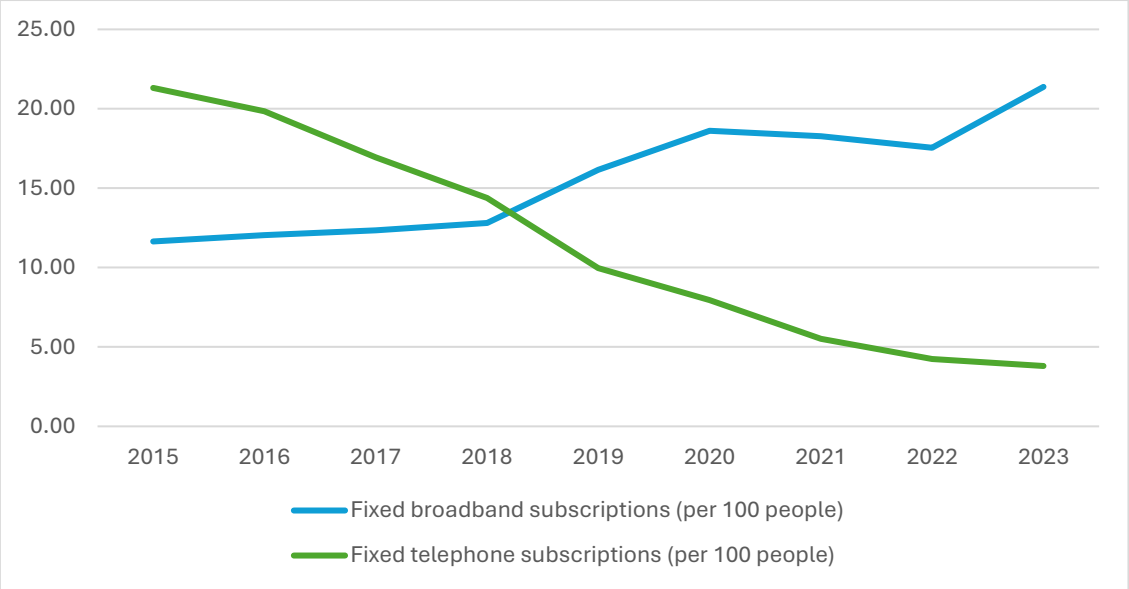
Figure 1. Mobile cellular subscriptions (per 100 people)



Source: own compilation of data from the World Development Indicators, World Bank.

[4] World Development Indicators, World Bank.

Figure 2. Fixed broadband and telephone subscriptions (per 100 people)



Source: own compilation of data from the World Development Indicators, World Bank.

Even before the full-scale war, internet access in Ukraine showed a clear urban–rural divide. In 2019, internet penetration exceeded 74% in cities but was only around 58% in rural areas (Balytska and Vyhovska, 2025). Moreover, around a third (37%) of the population lacked internet access at home (Akhvlediani, 2024). Despite the outbreak of the full-scale war, the government of Ukraine implemented an Internet Subvention programme to expand access to high-speed internet in rural areas. Thanks to this programme, as of 2024, around 89% of social facilities in over 3 000 villages gained access to high-speed internet[5], although there are still gaps to close.

This digital divide is also reflected in the use of digital services. In 2024, around 69% of urban residents used e-services, compared with only 57% of the rural population. Age differences widen this division. More than 70% of young people regularly use digital services, while adoption among older adults – particularly those aged 70 and above – remains very limited, at only about 22% (Balytska and Vyhovska, 2025). Given that much of Ukraine's agricultural sector is managed by older farmers, this generational gap represents an additional obstacle to the widespread adoption of digital and AI-based farming tools. Limited connectivity, lower smartphone penetration, and uneven digital literacy further inhibit technology adoption.

A significant digital divide also separates large agribusinesses from the country's numerous smallholder farmers. Research on digital agriculture confirms that smallholder

[5] Ministry of Digital Transformation, Telegram post, 4 May 2023.

participation in technology-driven markets is hampered by a combination of technological, financial, knowledge-based, and structural barriers[6]. In addition, digital tools are often designed for large-scale farms, reducing their relevance for smaller producers. As a result, small farms typically adopt only basic precision agriculture tools – such as guidance and steering systems – rather than more advanced data-intensive technologies (Gumbi, Gumbi and Twinomurinzi, 2023).

Large agricultural enterprises, by contrast, are generally well positioned to adopt these innovations more rapidly, particularly given persistent labour shortages in the sector (UNIDO, 2024). Financial constraints remain a major obstacle for smaller producers. High upfront costs for equipment such as drones, sensors, and data-management platforms can be prohibitive, while wartime uncertainty makes returns on investment difficult to assess. Shortfalls in technical capacity, limited access to training and insufficient advisory support further hinder the adoption.

An expansion in the use of digital tools and AI – notably among smallholders – is more likely when technologies clearly reduce operational costs and are supported by targeted financial incentives and enabling regulatory frameworks. Equally important is the need for a broader shift in mindset. Bridging the divide between Ukraine's dynamic technology sector and its traditionally conservative agricultural practices will require training, advisory services, and demonstration projects that illustrate the practical benefits of AI-enabled farming.

Without deliberate inclusion policies, AI-driven modernisation risks reinforcing existing inequalities between large agribusinesses and smaller rural producers.

3.3. DIGITAL RESILIENCE AND SOVEREIGNTY FOR UKRAINE'S AGRICULTURAL RECOVERY

In the digital age, agricultural sovereignty increasingly extends beyond land and water to data and algorithms. Control over agricultural data will play a pivotal role in shaping competitiveness, innovation, and long-term productivity in the sector.

Ukraine has already demonstrated considerable resilience in the digital domain during the war. Faced with simultaneous physical and cyber threats to critical infrastructure, the government has relocated servers, decentralised data storage, and strengthened cybersecurity systems to maintain essential public services. Partnerships with global cloud providers such as Microsoft, Amazon Web Services, and Google have enabled the

[6] See also the Farmtopia Horizon Project.

rapid migration and backup of sensitive government data, ensuring operational continuity despite sustained cyberattacks and physical destruction (Morato, 2025).

While these measures have proven effective in maintaining short-term resilience, they give rise to longer-term questions related to digital sovereignty. Reliance on foreign cloud providers can create strategic dependencies that may affect Ukraine's control over public and economic data. Providers subject to US jurisdiction, for example, may be required to disclose data under the US Cloud Act even when the data are stored on servers outside the US, with judicial procedures and legal safeguards.

More broadly, however, the issue extends beyond specific legal instruments. In practice, states with advanced technical and legal capabilities may be able to access data held by companies under their jurisdiction through a range of mechanisms, including those not fully transparent or governed by formal legal frameworks. This reveals an inherent asymmetry in data governance and adds to the importance of reducing strategic dependencies. For Ukraine, it underscores the need to gradually develop domestic or European-based cloud capacities, strengthen control over critical data infrastructure, and align with EU data governance frameworks. Such measures would not only enhance cybersecurity, but also support long-term technological sovereignty and resilience.

Ukraine has achieved a remarkable leap in digital transformation – rising from 102nd in the global index of digital development of public services in 2018 to 5th place by 2024 (Ukraine Digital Transformation Ministry, 2024). But public trust in electronic services has been eroded by periodic data scandals, especially since the outbreak of the full-scale war. Survey data show that the share of respondents expressing distrust in digital services increased from 16% in 2021 to 26% in 2024 (Balytska and Vyhovska, 2025). This points to the urgent need for stronger personal data protection, proactive public communication, and initiatives to improve digital literacy.

These vulnerabilities are even more visible among small to medium-sized enterprises. SMEs remain exposed to digital security risks, partly due to their continued dependence on Russian-origin business software such as 1C, at a time when Ukraine faces persistent cyberattacks attributed to Russian and suspected Belarusian actors (OECD, 2024). Ukraine currently lacks a domestic alternative to 1C, making the development of replacement software a decisive step towards reducing technological dependence.

Additional concerns arise from imported agricultural machinery, which often transmits operational data to foreign manufacturers. Modern agricultural equipment generates large volumes of data on soil conditions, yields, machinery performance, and farm management practices. When these data are transmitted to external platforms,

questions arise regarding ownership, storage, and the potential strategic use of these datasets.

As Ukraine moves closer towards European integration, alignment with the EU's digital legislation and regulatory framework will become increasingly relevant. This includes legislation governing data protection, digital markets, and cybersecurity – such as the GDPR, Digital Services Act, Digital Markets Act (DMA)[7], NIS2 Directive, Data Governance Act, Data Act, and Artificial Intelligence Act.

For the agricultural sector, the EU is developing a Common European Agricultural Data Space, as part of the broader European strategy to create sectoral data spaces that enable trusted data sharing across borders and industries. This initiative aims to enable the secure exchange of farm-level data – such as satellite imagery, soil conditions, crop performance, and machinery data – between farmers, agribusinesses, researchers and policymakers. In doing so, it seeks to ensure clear rules on ownership, access, and data protection (AgriDataSpace, 2024).

Developing a comparable data space for Ukraine's agricultural sector would facilitate its future integration into the EU's agricultural data space as the country advances along its EU accession path. Participation in the EU's common space would help Ukrainian agricultural producers to connect more easily to European value chains, access digital services and research networks, and benefit from advanced, data-driven agricultural technologies.

3.4. POLICY RECOMMENDATIONS

1) **Integrate digital technologies and AI into agricultural reconstruction.**

   Technological investment should complement – rather than compete with – urgent physical recovery efforts. This requires coordinated sequencing between Ukrainian ministries, the EU, and international financial institutions to ensure that digital infrastructure and innovation are embedded within broader reconstruction programmes. Digital and physical rebuilding should therefore progress in parallel.

   Agricultural recovery projects should systematically incorporate tools such as AI-supported land mapping, precision agriculture, data-driven irrigation, and digital monitoring systems. Embedding these technologies at the design stage would ensure that investment in infrastructure, land reclamation, and demining also

[7] The DMA primarily targets large digital platforms designated as 'gatekeepers', based on their size and market power within the EU. As such, its relevance for Ukraine would materialise only if Ukrainian firms reach such thresholds, and would apply irrespective of EU membership if these firms operate in the EU market.

contributes to long-term productivity gains, along with environmental sustainability and more efficient resource management.

2) **Bridge the digital divide.**

Closing the gap between large agribusinesses and smaller farms is essential for an inclusive agricultural transformation in Ukraine. Small to medium-sized farmers should be supported in adopting precision agriculture and digital management systems through improved access to affordable technologies and specific credit programmes. Furthermore, an expansion in rural broadband connectivity, digital literacy, and targeted training will be necessary to enable farmers to effectively use these tools. Cooperative models – such as shared access to machinery, drones, and digital platforms – could reduce costs for smallholders while helping them to address the main production challenges and thus participate more competitively in modern agricultural value chains.

3) **Strengthen agricultural advisory systems to encourage the adoption of digital and AI tools.**

Agricultural advisory services are needed to translate complex digital technologies into practical farming solutions. More comprehensive public, private, or hybrid advisory systems could provide farmers with targeted training, digital extension services, and peer-learning networks that support the adoption of AI-based tools and precision agriculture. By linking farmers with technology providers, research institutions, and the private sector, advisory services could accelerate the diffusion of innovation across Ukraine's agricultural sector.

Pilot programmes and farmer-centred innovation initiatives, including projects supported under Horizon Europe, could further help develop scalable solutions tailored to the needs of smaller producers.

4) **Adopt a framework of digital legislation and data governance aligned with that of the EU.**

Ukraine should implement a comprehensive digital and data governance framework fully aligned with EU legislation. This includes phasing out reliance on Russian-origin software and adopting secure European alternatives. The country should also adopt legislation aligned with the EU's on data protection, digital governance, and cybersecurity. This will help ensure that its technological development enhances economic competitiveness, resilience, and sovereignty across its agricultural sector, in line with its EU accession aspirations. Creating a national agricultural data space, modelled on the EU's emerging Common Agricultural Data Space, would foster integration into European digital and agricultural networks and fast-track Ukraine's EU accession.

4. REPAIR OF INFRASTRUCTURE

The RDNA5 estimated that by the end of 2025, total damage to Ukraine's infrastructure would amount to USD 195.1 billion. Frontline oblasts, such as Donetsk, Kharkiv, Zaporizhzhia, Luhansk and Kherson, and metropolitan areas, especially Kyiv City and Kyivska, are the most damaged because of attacks on infrastructure and exposure to frontlines.

The sector most affected by direct damage is housing, followed by transport and energy. The latter two have the greatest need for reconstruction due to their widespread destruction, together requiring USD 186.9 billion (31.8% of total needs) over 10 years. Some of this need has been met through early action, with USD 2.1 billion provided for transport, but this is small in relation to the demand.

Damage to the energy sector has had cascading effects across the entire economy, including agriculture. Attacks on electricity generation and transmission facilities, gas infrastructure, district heating systems, oil facilities, and coal mining operations have resulted in unstable access to electricity, heating, and water supply. For the agricultural sector, unreliable energy access disrupts irrigation systems, grain storage and drying facilities, food processing operations, and cold-chain logistics.

The destruction of transport infrastructure has also had profound implications for agricultural production and trade. The war has disrupted access to Black Sea ports, forced the closure of Ukrainian airspace, and strained rail logistics, particularly in frontline and southern oblasts. Western border crossings have faced severe congestion amid the redirection of agricultural exports towards EU markets. These disruptions have increased transport costs, slowed export flows, and complicated the delivery of inputs such as fertilisers and machinery to farms.

Damage to water supply and sanitation systems has further undermined agricultural activity. Destruction of water supply infrastructure, wastewater networks, and treatment plants has reduced operational capacity and increased costs for service providers, especially in combat-affected regions. In some areas, communities and farms face unreliable access to safe water, which directly affects irrigation, livestock production, and food processing.

4.1. CURRENT STATE OF UKRAINE'S EXPORT ROUTES

Since the beginning of the full-scale war, agricultural trade has called for rapid adaptation and the development of alternative transport corridors. The resilience of the sector has depended on the ability to simultaneously diversify export routes and maintain multiple channels.

Today, Ukraine's agricultural exports rely on three parallel transport routes: maritime routes, land corridors and the Danube contingency.

Maritime route. Before the full-scale invasion around 90% of Ukraine's agricultural exports were shipped through Black Sea ports (World Bank, 2023; USDA, 2023). The outbreak of war disrupted these routes almost overnight, severely restricting export capacity. Although the maritime corridor has gradually resumed operations and remains the most efficient export route, it is also the most exposed to security risks. Missile and drone attacks on port infrastructure and vessels continue to threaten operations, while high insurance costs and limited vessel availability still constrain shipping volumes.

A key factor enabling the partial revival of maritime trade has been the Unity Facility, a war-risk insurance scheme launched by Marsh McLennan and Lloyd's in cooperation with the Ukrainian government and state banks in 2023 (Marsh, 2024). Initially, the insurance was introduced for shipping grain, covering both hull and protection-and-indemnity risks for 1 000 vessels per year operating in Ukrainian waters, with a maximum insured value of USD 50 million per vessel. Later on the insurance coverage was extended to industrial exports (Kolisnichenko, 2024).

Prior to its introduction, war-risk premiums had risen to several times the cost of standard tonnage insurance, effectively pricing many operators out of the market. By reducing insurance costs to roughly half the levels seen a year earlier, the programme helped restore the commercial viability of regular sailings. This has allowed a resumption in shipments of not only grain shipments but also fertilisers and containerised non-military cargo. The facility is open to both Ukrainian and foreign shipping operators.

Maritime exports through Black Sea ports have since rebounded and now handle around 80% of agricultural export flows, representing a remarkable recovery compared with the disruption experienced in 2022.

Solidarity Lanes. Land corridors established under the Solidarity Lanes put forward by the EU continue to play a prime role, accounting for roughly a fifth of exports while facilitating around 80% of imports entering Ukraine through Poland, Romania, Hungary, and Slovakia. These routes connect Ukrainian producers directly with European logistics networks (European Commission, 2026).

Danube contingency. The Danube ports of Izmail, Reni, and Kiliia served as contingency routes during the Black Sea blockade. Cargo volumes through these ports declined by 46% between 2023 and 2024, from 32 million tonnes to 17.3 million tonnes (Grigorenko, 2025). Following the reopening of maritime routes, they remain strategically valuable as a reserve export corridor in the event of renewed disruptions.

Together, these three channels have allowed Ukraine to maintain its role as a prominent agricultural exporter despite wartime strains. Each route nonetheless remains vulnerable to operational, logistical, or security disruptions, highlighting the continued need to strengthen redundancy and resilience across the country's export infrastructure.

4.2. MOST PRESSING BOTTLENECKS

4.2.1. Rail disruptions

Russia has intensified its strikes on rail power depots and even locomotives, causing cascading delays and forcing operators to replace damaged equipment. These attacks introduce a new layer of risk on top of existing structural constraints, such as gauge differences with the European rail network and limited terminal capacity at border crossings. As a result, the reliability of the main rail export corridors has come under increasing pressure.

Because rail capacity is already reduced, its share in agricultural exports is relatively low and has been declining. In this context, even localised disruptions can have amplified effects across the broader logistics system. Strengthening resilience therefore requires greater contingency capacity, including additional electric and diesel locomotives, mobile power substations, and rapid-repair equipment to restore damaged infrastructure and maintain the continuity of rail operations.

4.2.2. Border process

Despite recent improvements, customs procedures between Ukraine and the EU still result in operational bottlenecks. Manual re-entry of customs data and redundant documentation are common, slowing down border processing. The planned pilot exchanges for Phase 6 of the New Computerised Transit System could help address these inefficiencies by enabling automatic digital transit declarations between Ukraine and the EU. But implementation is incomplete and the system is not yet fully operational.

Joint customs controls at major border-crossing points have also been introduced but continue to function primarily as pilot initiatives rather than standard practice. In addition, the Authorised Economic Operator (AEO) status – which grants priority treatment to trusted traders – remains underutilised. Many companies involved in cross-border trade either do not hold AEO status or are insufficiently familiar with its benefits. Expanding participation will therefore require broader outreach, clearer guidance, and simplified procedures to ensure that more exporters can benefit from faster and more predictable border processing.

4.2.3. Insurance constraints and export route redundancy

The Unity Facility has helped reduce insurance-related cost barriers for vessels operating in the Black Sea, but its coverage is limited. In early 2025, only a small number of vessels used the scheme, suggesting hindrances in access and scale. Maintaining the viability of maritime exports therefore depends on keeping the sea corridor both secure and insurable. If risks or insurance costs rise sharply, shippers may again be forced to rely on longer and more expensive alternative routes.

During the blockade of Black Sea ports, Ukraine redirected a large share of grain exports through the Danube corridor, dramatically expanding demand for logistics capacity along the river. Private actors – including transport companies, grain operators, and traders – rapidly invested in vessels and infrastructure to accommodate this surge.

However, as maritime routes have reopened and cargo has shifted back to Black Sea ports, much of this newly expanded Danube capacity has become underutilised. For many big operators along the Lower Danube, this sudden decline in demand has created serious financial pressures, with some facing insolvency. These dynamics illustrate the broader economic consequences of rapidly shifting logistics patterns and underscore the need to balance efficiency with redundancy when designing Ukraine's long-term export infrastructure.

4.2.4. Challenges of public–private partnerships

PPPs have played an important role in financing infrastructure for storage and transport, including projects supported by the EIB. Even so, their impact has been dampened by a number of structural challenges. By 2024, 58% of all PPP projects had been suspended due to high risks or insufficient guarantees for private investors, 26% had seen contracts expire, and 5% had been terminated because of Russia's armed aggression. The unpredictability of long-term budgets and fiscal legislation is a major obstacle to reviving the PPP process in Ukraine (Lozynska et al., 2024).

Furthermore, the absorption capacity of Ukrainian government institutions and state enterprises has been low across sectors. The war has disrupted reform efforts, with ensuing regulatory hurdles, institutional weaknesses, and frequent leadership changes in state bodies (CEE Bankwatch Network, 2024). Increasing absorptive capacities is a prerequisite for an efficient and effective reconstruction process (OECD, 2026).

4.2.5. Security of repaired infrastructure

The sustainability of rebuilt infrastructure ultimately depends on security conditions. Once storage facilities, transport infrastructure, or energy systems are repaired, they become vulnerable again to missile and drone attacks. Russia has repeatedly targeted logistics infrastructure and production facilities linked to Ukraine's agri-food exports, recognising their importance for the country's economy and global food supply.

In this context, air defence plays a central role in protecting critical infrastructure. The resilience of grain storage facilities, rail hubs, ports, and energy networks depends not only on physical reconstruction but also on the availability and effectiveness of air-defence systems capable of intercepting missile and drone strikes. Similar vulnerabilities have been observed in the energy sector, where repeated attacks have disrupted the electricity supply required for agricultural production, processing, and storage.

4.3. POLICY RECOMMENDATIONS

1) **Prioritise and sequence the repair of critical infrastructure for agricultural production and trade.**

   Reconstruction should focus on restoring the transport, storage, energy, water, and communications infrastructure that is essential for agricultural production and trade. Rapid-repair capacities – such as pre-positioned spare parts, mobile repair teams, and modular infrastructure – should be strengthened to restore services quickly after attacks.

   Recovery efforts should also go beyond rebuilding pre-war capacity by improving resilience, efficiency, and consistency with EU standards in line with Ukraine's fast-track EU accession. This should include investing in decentralised energy generation and regulatory alignment with the EU. It should also involve infrastructure modernisation and close integration with European networks – particularly through upgrades to border infrastructure and the development of standard-gauge rail connections with the EU.

2) **Broaden air-defence coverage around key logistics and energy infrastructure.**

   The sustainability of reconstruction depends on protecting repaired infrastructure from continued missile and drone attacks. Russia has repeatedly targeted port facilities, grain storage sites, rail infrastructure, and energy systems that support agricultural production and exports. Expanding and prioritising air-defence coverage around major export corridors, ports, logistics hubs, and energy infrastructure should be prioritised to safeguard reconstruction investment and maintain stable agri-food export flows.

3) Maintain diversified and redundant export corridors.

Ukraine's wartime experience demonstrates the value of maintaining multiple export routes. While Black Sea ports are the most efficient channel for agricultural exports, the Danube corridor and land routes through the EU should continue to function as strategic alternatives. Investment in Danube ports, inland logistics, and border infrastructure should therefore continue even when maritime routes operate normally. Maintaining redundancy in export infrastructure will reduce vulnerability to future disruptions and enhance long-term trade resilience.

4) Expand war-risk insurance schemes for maritime transport.

The paucity of war-risk insurance continues to be a major constraint on maritime shipping. Expanding and stabilising insurance schemes such as the Unity Facility would help reduce uncertainty for shipping companies and encourage more participation by vessel operators. Multilateral backing, public guarantees, and risk-sharing arrangements could further lower premiums and keep maritime export routes commercially viable despite continued security risks.

5) Improve trade facilitation and logistics efficiency along EU–Ukraine corridors.

It is imperative to reduce bottlenecks along land export routes. This is true even as maritime trade recovers. Accelerating the implementation of the New Computerised Transit System and expanding digital-transit declarations between Ukraine and the EU would significantly reduce administrative delays. Joint customs controls should move from pilot initiatives to routine practice, while greater uptake of AEO status should be encouraged through simplified procedures and targeted outreach to exporters. Increasing rail interoperability and improving border terminal capacity would further enhance the efficiency of cross-border logistics.

5. UKRAINE'S ROLE IN EUROPEAN AND GLOBAL FOOD SECURITY

In an increasingly fragmented geopolitical environment, food security is once again central to debates on resilience, strategic autonomy, and economic stability. In this context, agricultural systems are no longer assessed solely in terms of efficiency or sustainability, but also in terms of their ability to withstand shocks and ensure stable supply.

Resilience has become as important as efficiency and sustainability in shaping economic and sectoral policies. For the agri-food sector, resilience is closely linked to secure access to the necessary inputs, diversified trade routes, and stable partnerships. This shift places Ukraine in a strategic position. As one of the world's major agricultural producers, Ukraine has the potential to contribute not only to global food security but also to strengthening the resilience of the EU's agri-food system.

Still, this opportunity is accompanied by significant structural hurdles. The sector is undergoing a generational transition, with ageing farming populations and the need to attract younger, more technologically skilled workers. Rapid technological change – driven by AI, robotics, and digitalisation – is reshaping agricultural production models, requiring substantial adaptation across the sector. In parallel, climate change is increasingly affecting agricultural output, with extreme weather conditions in 2025 highlighting the growing vulnerability of producers in Ukraine. These pressures are further compounded by the ongoing full-scale war, which continues to disrupt production, damage infrastructure, and deepen the sector's losses as the war persists.

These dynamics underline the need to view Ukraine's agricultural sector not just through the lens of recovery, but as part of a broader transformation towards a more resilient, technologically advanced, and globally integrated agri-food system.

5.1. PROMINENCE IN GLOBAL AGRICULTURAL MARKETS

Ukraine has long been a leading player in global food supply chains, exporting to over 170 countries prior to the full-scale invasion and contributing to food security for approximately 400 million people (World Food Programme, 2025). Its export portfolio spans grains, oilseeds and sunflower oil, as well as poultry, dairy, sugar and confectionery, oilseed meals, and fruit and vegetables. In 2021, Ukraine accounted for around half of global sunflower oil exports and was among the leading exporters of corn and wheat (Feingold, 2025).

This strong global position is underpinned by comparative advantages. Ukraine remains one of the most efficient producers of key commodities, particularly corn, where production costs are among the lowest globally, comparable only to South America.

Favourable climatic conditions and strong demand for non-GMO products have supported the prominence of corn in Ukraine's agricultural system. Production patterns are also gradually adjusting to climate pressures, with a renewed shift towards winter crops such as wheat and barley in central and southern regions to mitigate increasing summer heat risks. In the oilseed group, sunflower oil continues to dominate thanks to highly favourable agro-climatic conditions (FAO, 2002).

Prior to the full-scale invasion, a number of African countries were heavily reliant on Ukrainian agri-food imports, underscoring Ukraine's leading role in regional food security. Egypt stood out as the largest importer, accounting for 42% of Ukraine's total agri-food exports to Africa in 2021. Other prime destinations included Libya, Morocco, Tunisia, Ethiopia, Algeria, Nigeria, Kenya, Djibouti, and Sudan.

This dependence was pronounced for staple commodities. In the wheat market, Ethiopia sourced approximately 45% of its imports from Ukraine, followed by Tunisia (31%), Morocco (29%), and Egypt (25%). A similar pattern is observed in sunflower oil imports, where reliance on Ukraine was even more concentrated: Ethiopia imported around 95% of its sunflower oil from Ukraine, Tunisia 86%, Kenya 61%, Ghana 49%, and Egypt 20% (Martyshev et al., 2024). These figures reveal not only Ukraine's strong pre-war export footprint across African markets, but also the structural importance of its agricultural production for food supply stability in these countries.

The war has disrupted these patterns but not fundamentally altered Ukraine's global orientation. The EU has become a more prominent trading partner, largely due to the establishment of Solidarity Lanes and application of autonomous trade measures (ATMs) followed by review of the Deep and Comprehensive Free Trade Area (DCFTA). All the same, Ukrainian producers are still keen to expand their trade globally, particularly in Asia, the Middle East, and Africa (Chingoroth, 2025). In many cases, the EU could serve as a transit and logistical partner rather than the final destination.

Export patterns have also been reshaped by a combination of factors. Competition with Russia remains strong in key markets such as Egypt and India, especially in wheat and sunflower oil. More broadly, global trade dynamics are increasingly influenced by geopolitical tensions and shifting trade policies, including US trade wars launched by the Trump administration. Added to these are protectionist measures by major economies like China to increase food self-sufficiency (DCZ, 2026) and diversify import sources, for example through expanded agricultural trade with Brazil (Vasconcelos, Titley and Gardner, 2026, p. 8).

Macroeconomic conditions also play a determining role. Demand in several African markets is affected by currency volatility and broader economic fragility, as seen in cases

like Nigeria. Climate change is progressively shaping both supply and demand patterns as well, influencing production decisions as well as global price dynamics.

Despite these challenges, emerging markets – particularly in Africa – offer significant long-term opportunities. Countries such as Egypt, Algeria, Tanzania, Nigeria, South Africa, Ghana, and Kenya stand out for two characteristics: relatively good maritime access and growing middle-income populations capable of consuming higher value-added food products. Prior to the war, several of these countries were highly dependent on Ukrainian wheat and sunflower oil, underscoring Ukraine's strategic role in their food security.

In this context, the geographical distribution of Ukrainian agricultural exports is closely linked to the country's diplomatic presence, signalling the growing value of agrarian diplomacy. Strengthening trade relationships with emerging markets, while maintaining access to established ones, will be central to Ukraine's long-term positioning in global agri-food systems.

5.2. POTENTIAL TO STRENGTHEN THE EU'S AGRI-FOOD SECTOR

Ukraine's agricultural sector should be understood as largely complementary to the EU agri-food system, rather than purely competitive. Its production differs in meaningful ways. EU agriculture is predominantly oriented towards higher value-added, processed, and highly regulated products, often requiring strict compliance with sanitary and phytosanitary standards – such as in livestock and meat production. By contrast, Ukraine is a major producer of lower value-chain commodities, intermediate goods, and agricultural inputs, including grains and oilseeds, which play a foundational role in food and feed systems.

Certain segments – notably grains – can generate competitive pressures in specific EU markets, especially in border countries, where the EU's unilateral trade liberalisation under the ATMs resulted in farmers' protests, followed by unilateral bans on Ukrainian grain imports by these countries. But these tensions are geographically and sectorally concentrated; the trade dynamics can be managed by the EU, as foreseen under the DCFTA review and considering that these countries should serve as entry points and not the final destinations.

At the same time, many areas offer clear complementarities. Ukraine is well positioned to supply protein crops (such as soy), feed inputs, organic products, and protein isolates. It also holds significant potential in emerging segments like carbon farming, industrial crops (e.g. flax), and bioeconomy and circular economy value chains.

This complementarity is particularly advantageous given the EU's dependence on imports of protein crops and feed, currently sourced largely from South America (mainly Brazil

and Argentina) and the US (Loi et al., 2024). Ukraine, as one of Europe's largest producers of corn and soy, could help reduce these dependencies and shore up the EU's internal resilience and strategic autonomy.

Ukraine is also a major producer and exporter of fertilisers, making its integration into the EU market strategically important at a time of growing geopolitical and energy-related risks. Ukraine's accession could help reduce the EU's external dependencies, improve supply resilience and support more stable prices.

Beyond primary production, Ukraine's capabilities in agri-tech, biotech, and food-tech offer additional avenues for deeper cooperation. The war has demonstrated the adaptability of Ukrainian innovation ecosystems, where technologies originally developed for agriculture – such as logistics solutions, drones, and data-driven systems – have been rapidly repurposed for broader resilience and security needs. This experience provides a strong foundation for closer cooperation between Ukrainian and European actors, especially in areas where agricultural innovation intersects with digital and strategic technologies.

5.3. STRUCTURAL GAPS AND CHALLENGES

Despite its strengths, Ukraine's agricultural sector faces daunting challenges. One is the underrepresentation of SMEs in policy discussions and reform processes. While large agribusinesses dominate exports, they represent only a small share of producers. The majority of agricultural actors are SMEs, yet their engagement with EU accession processes remains limited.

Perception is a big barrier. Many smaller producers view EU accession primarily as an export opportunity – often seen as difficult to seize due to the costs and complexity of aligning with the EU *acquis* – rather than as a broader transformation process that can support long-term productivity, stability, and market integration. Others remain disengaged due to limited export ambitions, low awareness, or capacity constraints.

These challenges are visible in sectors like dairy. In 2024, small-scale (often subsistence-level) farms held around 67% of the total number of cows, producing approximately 58% of the country's milk (Litvinov, 2025, p. 7). This reflects far lower productivity per animal compared with industrial farms. The production model of household farms is characterised by low input use, with limited access to quality feed, veterinary services, and modern technologies. They also rely on seasonal grazing, resulting in lower efficiency and weaker sanitary standards.

These structural limitations are further compounded by restricted market access. Following the tightening of milk safety standards in 2019 to align with EU requirements –

including stricter thresholds for bacterial contamination and somatic cell counts – milk produced by households has faced ever-higher hurdles to formal market entry. As a result, many small producers have gradually been excluded from supply chains, contributing to a decline in micro and small-scale dairy farming (Litvinov, 2025, p. 7).

This segment is nonetheless vital for local food supply and food security, especially in rural and frontline areas where access to processed dairy products is limited. This creates a fundamental policy dilemma: how to advance regulatory alignment with EU standards while preserving rural livelihoods, maintaining local production systems, and ensuring domestic food security.

Moreover, institutional capacity remains a bottleneck. While Ukraine's private sector has demonstrated considerable resilience in adapting to wartime conditions and maintaining production and exports, public institutions face greater constraints. Effective EU integration requires not only legislative alignment, but also consistent implementation, regulatory enforcement, and policy coherence. Frequent policy changes, including the temporary nature of trade measures (for instance ATMs), along with the ongoing full-scale war in Ukraine, undermine predictability, investor confidence, and market access.

A further structural constraint relates to the cost of regulatory alignment with the EU *acquis* in agriculture, including production, food safety, animal and plant health measures, animal welfare, and environmental requirements. Preliminary estimates suggest that compliance could increase production costs by approximately 10–15%, placing a disproportionate burden on small to medium-sized farmers, which have less financial and administrative capacity (Nivievskyi, 2025). Without adequate support, this will risk accelerating concentration in the sector and undermining rural livelihoods.

To mitigate these effects, alignment should be gradual, predictable, and differentiated. This requires a clear, time-bound roadmap that sequences reforms across products, prioritising those of high economic relevance – such as grains, oilseeds, poultry, dairy, and fruit and vegetables – while providing interim compliance targets. Tailored financial and technical assistance is needed to support smaller producers in meeting EU standards, so that regulatory convergence promotes broad-based participation rather than exclusion (Nivievskyi, 2025).

Addressing these challenges will require sustained support from the EU and international partners. Beyond technical assistance, this includes facilitating the exchange of best practices between EU and Ukrainian farmers, producers, and business associations. Such cooperation can help bridge knowledge gaps, correct misperceptions, and promote a shared understanding of Ukraine's role as a complementary partner within the European agri-food system.

In addition, it will be crucial to support Ukraine's access to global markets, as envisaged in the DCFTA review. This will enable Ukraine to diversify export destinations and channel non-EU-complementary products to global markets, while deepening its integration into the EU where synergies are strongest.

5.4. POLICY RECOMMENDATIONS

1) **Anchor EU–Ukraine agri-food integration in complementarities while managing localised market pressures.**

   EU–Ukraine agricultural integration should be explicitly designed around complementarity rather than competition. Ukraine's comparative advantages in lower value-chain commodities, protein crops, feed inputs, and fertilisers can bolster the EU food system by reducing reliance on imports from South America and the US. At the same time, integration must address geographically concentrated pressures on sensitive products, like grains that can create competitive pressures in neighbouring EU Member States.

   The DCFTA review already provides safeguard mechanisms and a monitoring framework, but further action is needed. Improving transit systems and investing in infrastructure would enable Ukrainian goods to move efficiently beyond border regions into wider EU and global markets, preventing both bottlenecks and market distortions in neighbouring EU Member States.

2) **Expand Ukraine's global exports while enhancing trade with the EU.**

   Ukraine's agricultural model is inherently global, and its long-term resilience depends on maintaining diversified export markets. EU policy should avoid over-concentrating Ukrainian trade within the EU and actively support its continued access to Asia, the Middle East, and Africa. This requires targeted investment in export logistics, including the modernisation of ports, rail networks, and Danube transport corridors, as well as the alignment and digitalisation of customs and trade procedures to streamline cross-border flows.

   In parallel, coordinated EU–Ukraine trade diplomacy should assist Ukrainian producers in navigating geopolitical competition. Priority should be given to markets that combine accessible maritime connections with growing middle-class populations capable of consuming higher value-added food products, including Egypt, Algeria, Tanzania, Nigeria, South Africa, Ghana, and Kenya.

3) Take a dual-track approach to reforms.

As Ukraine's agricultural sector is structurally bimodal, effective policy must differentiate between large companies and SMEs rather than applying one-size-fits-all reforms. Large agribusinesses should be supported in meeting EU and global certification standards, and accessing capital for modernisation. Simultaneously, SMEs and smallholders, often the backbone of rural economies, require simplified regulatory pathways, targeted financial instruments, and tailored advisory services.

Regulatory convergence with the EU *acquis*, particularly on sanitary and phytosanitary standards and food safety, should be sequenced and adapted to structural realities. Phased timelines and differentiated compliance requirements, along with technical and financial support, could prevent the exclusion of smaller producers. Such measures could sustain their market participation and strengthen both domestic and export-oriented supply chains.

This dual-track approach would link competitiveness with inclusiveness, so that Ukraine's EU accession reinforces rather than undermines the country's rural livelihoods and domestic food systems.

4) Strengthen institutional and regulatory capacity through alignment and implementation of the EU acquis communautaire for resilient agricultural governance.

Ukraine's private sector has repeatedly demonstrated adaptability, yet public institutional capacity remains a critical bottleneck. EU accession requires not only legislative alignment with the EU acquis communautaire, but also its effective implementation, regulatory enforcement, coherent policy-making, and consistent application of EU standards.

To address this, the EU should put forward targeted capacity-building programmes to support Ukrainian authorities in alignment and implementation of the EU acquis, policy coordination across levels of government, and transparent regulatory processes. Investment in data infrastructure, digital monitoring, and sector-specific technical expertise should also increase to enhance oversight, reduce administrative bottlenecks, and improve access to financing for producers. Stronger institutions would be better able to ensure that EU-aligned reforms support sustainable growth, safeguard rural livelihoods, and maintain Ukraine's export competitiveness without creating domestic market distortions.

5) **Promote innovation and resilience in agri-tech by enhancing bioeconomy and climate adaptation.**

Ukraine should prioritise the development of circular economy and bioeconomy initiatives alongside the digitalisation of its agricultural sector. Investment in high-value, low-resource-intensive outputs, such as industrial crops (flax and cotton), protein isolates, and other bio-based products, could boost environmental sustainability, climate adaptation, and economic competitiveness.

EU support will be crucial, enabling knowledge exchange, joint R&D programmes, and pilot projects that embed innovative technologies in production, processing, and logistics. Policy design should capitalise on Ukraine's role as a complementary supplier to the EU market while leveraging its global comparative advantages. This includes promoting climate-resilient practices, sustainable input use, and data-driven decision-making to strengthen the sector's adaptability to extreme weather and other climate risks.

APPENDIX A. MEMBERS OF THE TASK FORCE

Rapporteur: Tinatin Akhvlediani

Members

- Centre for Economic Strategy (CES)
- Connecta Consulting
- DG ENEST, European Commission
- European Bank for Reconstruction and Development (EBRD)
- Ernst & Young (EY)
- HALO Trust
- Hans Siedel Stiftung (HSS)
- Institute for Economic Research and Policy Consulting (IER)
- Kyiv School of Economics (KSE)
- Martyniv Legal
- Mission of Ukraine to the European Union
- Permanent Representation of France to the European Union
- Permanent Representation of the Republic of Poland to the European Union
- SEO Amsterdam Economics
- Trade Up
- Ukrainian Agribusiness Club (UCAB)
- Ukraine Facility Platform

PRINCIPLES AND GUIDELINES FOR THE TASK FORCE

The Task Force process is a structured dialogue among experts, (former) politicians, diplomats, policymakers, NGOs, academia and think tanks who are brought together for several meetings. The Task Force report is the final output of the research carried out independently by CEPS and its partners, and in the context of the Task Force.

Participants in a Task Force

- The Chair is an expert who steers the dialogue during the meetings and advises CEPS as to the general conduct of the activities of the Task Force.
- Members provide input as independent experts.
- Rapporteurs are CEPS researchers who organise the Task Force, conduct the research independently and draft the final report.

Objectives of a Task Force report

- Task Force reports are meant to contribute to policy debates by presenting a balanced set of arguments, based on available data, literature, and views.
- Reports seek to provide readers with a constructive basis for discussion. They do not seek to advance a single position or misrepresent the complexity of any subject matter.
- Task Force reports also fulfil an educational purpose and are drafted in a manner that is easy to understand, without jargon, and with any technical terminology fully defined.

Drafting of the report

- Task Force reports reflect members' views.
- However, there does not need to be consensus or broad agreement among Task Force members for every recommendation that features in the report. Recommendations which triggered significant dissent are marked accordingly.
- Task Force reports feature data that are considered both relevant and accurate by the rapporteurs. After consultation with other Task Force members, the rapporteurs may decide either to exclude data or to mention these concerns in the main body of the text.

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