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From: Secretary-General of the European Commission, signed by Ms Martine
DEPREZ, Director

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To: Ms Thérèse BLANCHET, Secretary-General of the Council of the
European Union

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Subject: COMMISSION STAFF WORKING DOCUMENT
Bi-monthly report to the Member States
Impact of the trade liberalisation measures for Ukraine on the EU
market – January 2025

Delegations will find attached document SWD(2025) 57 final - PART 1/2.

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Brussels, 21.2.2025
SWD(2025) 57 final

PART 1/2

COMMISSION STAFF WORKING DOCUMENT

Bi-monthly report to the Member States

**Impact of the trade liberalisation measures
for Ukraine on the EU market – January 2025**

Introduction

In June 2022 the EU granted Ukraine duty free and quota free access to the Union market for one year with the first Regulation on temporary trade-liberalisation measures applicable to Ukrainian products, the so-called ATM Regulation ⁽¹⁾, in order to support Ukraine's economy in the face of Russia's unprovoked and unjustified war of aggression. These measures supplement the trade concessions already applicable to Ukrainian products under the Association Agreement. They were prolonged with the second ATM Regulation ⁽²⁾ and were prolonged again with the third ATM Regulation, which entered into force on 6 June 2024 and will expire on 5 June 2025 ⁽³⁾.

Thanks to the combined effect of these measures (which include a reinforced safeguard mechanism and an emergency break), and efforts to increase capacity of the Solidarity Lanes and reopening the Black Sea corridor, Ukraine's imports and exports continue to flow. At the same time, it is necessary to be mindful of the consequences this may have for certain sectors in the European Union.

Therefore, the Commission committed under the third ATM Regulation (article 4.2) to continue the regular monitoring of EU imports from Ukraine, subject to the trade liberalisation measures, and to present the results of this monitoring every two months. In particular, it is necessary to take into account information on exports, imports, prices on the Union market and Union production of the products subject to the ATM Regulation.

As regards products subject to automatic safeguards under the new ATM Regulation, i.e. eggs, poultry, sugar, oats, maize, groats and honey, the Commission follows the development of imports on a daily basis, and publishes it on the following website, available to the public: [Tariff quota consultation \(europa.eu\)](https://europa.eu/tariff-quota-consultation).

Furthermore, in a statement on the occasion of the adoption of Regulation (EU) 2024/1392⁴ (the Statement) the Commission committed to pay particular attention to the monitoring of imports of grain from Ukraine, in particular wheat, and notably on the concentration of such imports in Member States neighbouring Ukraine.

⁽¹⁾ Regulation (EU) 2022/870 of the European Parliament and of the Council of 30.5.2022, OJ L 152, 3.6.2022, p. 103.

⁽²⁾ Regulation (EU) 2023/1077 of the European Parliament and of the Council of 31.5.2023, OJ L 144, 5.6.2023, p.1.

⁽³⁾ Regulation (EU) 2024/1392 of the European Parliament and the Council of 14.5.2024, OJ L 29.5.2024. p.1.

⁴ Statement by the Commission on the monitoring of imports of grain from Ukraine on the occasion of the adoption of Regulation (EU) 2024/1392 of the European Parliament and of the Council on temporary trade-liberalisation measures supplementing trade concessions applicable to Ukrainian products under the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part OJ C/2024/3357, 29.5.2024.

The Report

Part A

This report is the ninth under the monitoring exercise. The table on page 3 gives an overview of imports from Ukraine from July 2023 to November 2024 of all the products covered by the ATM Regulation. A more detailed analysis for most important products is also provided in the report.

As regards imports, the data analysed are import volumes from Ukraine and total EU import volumes from January 2021 until November 2024. The analysis of the situation on the Union market takes into account the EU production and EU price levels. Data is provided on a monthly basis, where available. It should be noted that for some products not all the data is readily available (sometimes not provided by the Member States), or delays may occur in the data collection, which may result in incomplete data for the most recent periods. For example, production data for 2023 and 2024 will only become available later in the year. For other products, due to their nature and harvesting patterns, production figures are only available on a yearly basis. The import and export data are based on Eurostat figures.

The monitoring is based on the ATM Regulation and consequently on the tariff rate quotas (TRQs) established in the Association Agreement. The product categories, CN codes and TARIC codes covered match the established TRQs. Therefore, data in this report may differ from other publications such as the Animal Newsletter or the Sugar Balance, also issued by the Commission services but which may cover different tariff lines and reporting periods.

Exports and production in the graphs are expressed yearly and for the current year the yearly area chart represents only the sum of the months available to the date of creation of this report.

The services of the Commission will continue to monitor imports from Ukraine very closely and all the information received will be carefully analysed as part of the regular monitoring pursuant to Article 4 of the ATM Regulation.

Part B

The second part of the report is provided in accordance with the Statement. The product scope of this part is wider than the monitoring provided for under Article 4.2 of the ATM Regulation to the extent that it also covers grain products not covered by the ATM Regulation (since already fully liberalised under the Deep and Comprehensive Free Trade Area - DCFTA), notably oil seeds such as rapeseed and sunflower seed.

Automatic safeguard implementation

Regarding the products covered in Part A, the trigger level for the automatic safeguard for eggs⁵ and sugar⁶ was reached in June 2024 and the DCFTA TRQs were re-introduced on 2 July 2024, and the trigger level for honey was reached in August 2024, with the DCFTA TRQ re-introduced on 21 August 2024⁷. As for products covered in Part B, the trigger level for oats was reached in June 2024 and the DCFTA TRQ was re-introduced on 19 June 2024.⁸ The trigger level for groats was reached in July 2024 and the DCFTA TRQ was re-introduced on 22 July 2024.⁹

⁵ <http://data.europa.eu/eli/reg/2024/1827/oj>

⁶ <http://data.europa.eu/eli/reg/2024/1825/oj>

⁷ <http://data.europa.eu/eli/reg/2024/2166/oj>

⁸ <http://data.europa.eu/eli/reg/2024/1726/oj>

⁹ <http://data.europa.eu/eli/reg/2024/1999/oj>

Imports in tonnes from Ukraine per TRQ category (order number)

EU27 imports from Ukraine of agricultural products subject to Tariff Rate Quotas applicable to imports from Ukraine as from 1 October 2023 in tonnes

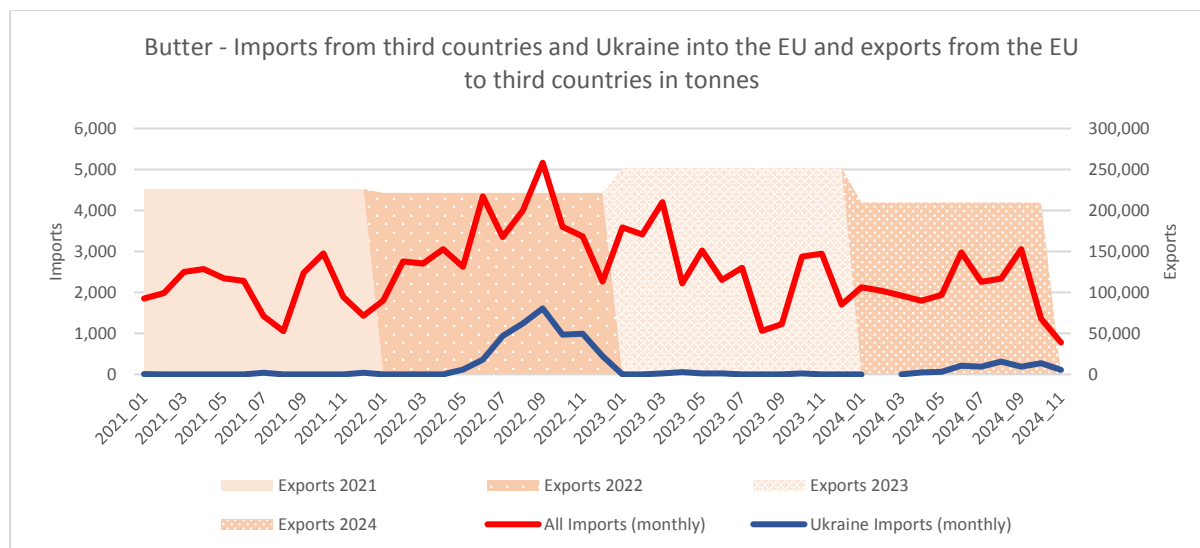
Description / year_month	2023_10	2023_11	2023_12	2024_01	2024_02	2024_03	2024_04	2024_05	2024_06	2024_07	2024_08	2024_09	2024_10	2024_11	Order no.
Beef Meat	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4270
Pork Meat (TRQ 1)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4271
Pork Meat (TRQ 2)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4272
Poultry meat (TRQ 1)	13,135	11,121	9,421	14,793	14,448	12,304	15,247	12,568	10,848	10,148	9,870	9,661	9,656	10,044	09.4273
Poultry meat (TRQ 2)	1,008	934	903	1,364	883	1,155	1,407	954	482	219	262	246	140	107	09.4274
Eggs and albumins (TRQ 1)	3,025	2,878	2,708	4,132	3,532	4,821	4,444	6,042	4,694	5,745	3,688	4,908	6,113	5,777	09.4275
Eggs and albumins (TRQ 2)	2,104	2,252	2,172	3,403	2,882	4,273	3,666	5,544	3,999	5,341	3,312	4,352	5,475	5,468	09.4276
Common wheat, flour and pellets	608,630	517,686	597,728	781,855	575,363	612,021	538,112	626,147	322,970	361,431	338,377	773,443	722,040	361,970	09.4306
Barley, flour and pellets	43,627	43,410	88,297	84,479	13,901	24,460	18,429	35,774	80,692	133,372	22,103	18,220	113,528	60,159	09.4307
Maize, flour and pellets	416,170	1,223,560	1,211,097	1,700,402	1,432,887	1,045,508	1,201,572	1,264,997	1,465,094	1,663,284	668,831	341,675	870,944	1,072,558	09.4308
Milk, cream, condensed milk and yogurts	67	411	85	370	101	153	270	332	131	227	165	340	386	557	09.4600
Milk powder	786	690	644	608	783	1,098	1,430	1,919	2,730	1,966	1,320	1,000	1,081	880	09.4601
Butter and diary spreads	24	1	0	0	0	0	44	63	209	187	312	187	274	108	09.4602
Sheep meat	0	0	0	0	0	0	0	0	0	0	0	0	0	442	09.6700
Honey	4,566	5,072	4,232	7,194	6,091	5,447	5,643	9,407	6,838	6,160	2,429	1,199	1,533	1,492	09.6701
Garlic		5								3	106	75	82	18	09.6702
Oats	479	302	228	747	1,510	618	1,010	1,791	749	231	69	92	114	442	09.6703
Sugar	56,499	70,025	65,567	49,899	50,608	47,372	77,357	87,370	11,989	277	429	222	496	279	09.6704
Glucose and fructose	109	167	215	294	248	214	400	389	415	257	225	91	177	172	09.6705
Flavoured sugar syrup	0	3	2	1	3	5	3	3	1	1	2	3	1	1	09.6706
Groats, pellets, grains	2,803	2,578	3,259	3,648	2,918	3,176	3,102	3,905	3,345	2,382	473	787	905	813	09.6707
Malt and gluten	1,102	640	396	968	311	464	513	328	416	2,058	3,323	2,155	1,790	1,385	09.6708
Starches	1,333	893	1,090	1,142	1,109	833	2,055	2,458	1,167	1,731	688	1,137	2,290	1,530	09.6709
Starch processed (PAPS)	418	536	53	572	818	375	161	66	44	22	16	1	1,167	1,011	09.6710
Residues	4,539	3,361	3,128	2,536	2,729	2,659	2,969	5,898	5,308	5,887	6,060	4,936	5,018	3,980	09.6711
Mushrooms			1											0	09.6712
Mushrooms	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6713
Preserved tomatoes	1,966	2,401	2,359	5,620	2,256	1,428	1,430	1,290	2,290	2,113	1,523	1,183	1,643	2,281	09.6714
Grape and apple juice	13,515	11,357	7,854	6,838	5,787	4,913	6,467	4,260	1,684	1,797	4,715	14,131	15,660	7,381	09.6715
Fermented milk (PAPS)		1	1	1			1				0		2	6	09.6716
Processed butter (PAPS)							2		2		3		2	5	09.6717
Sweetcorn (PAPS)	459	271	65	42	97	11	69	76	46	82	125	226	198	55	09.6718
Sugar processed products (PAPS)	39	97	76	55	69	88	191	175	303	555	360	519	390	415	09.6719
Cereal processed products (PAPS)	1	45	24	44	45	24	111	49	177	66	0	68	113	91	09.6720
Milk Cream Processed (PAPS)	5	2	53	17	21	11	22	13	17	0	0	8	6	14	09.6721
Food preparations (PAPS)	7	9	9	6	15	13	9	23	11	46	9	47	38	18	09.6722
Ethyl alcohol	6,016	5,398	3,372	996	2,049	4,288	10,060	7,517	7,543	4,776	4,203	9,960	9,982	4,744	09.6723
Cigars, cigarettes (PAPS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6724
Mannitol, sorbitol (PAPS)								0	0	0	0			0	09.6725
Malt-starch processed products (PAPS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6726

Source: EUROSTAT, extracted on 14.01.2025

PART A

BUTTER

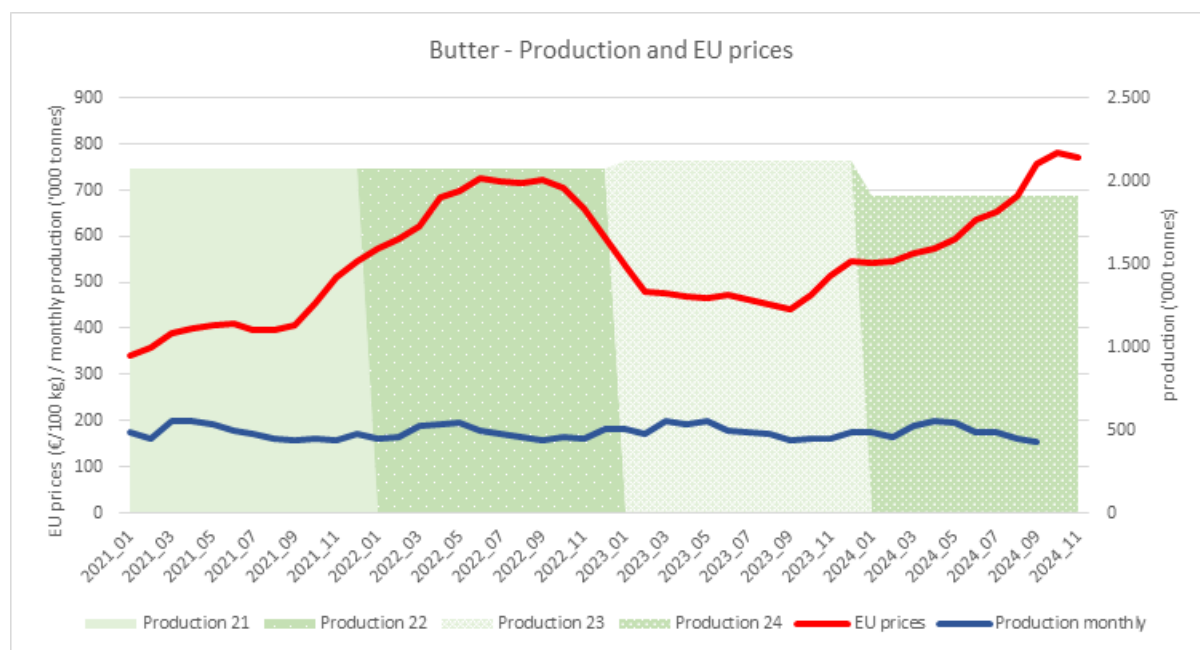
EU imports of butter from Ukraine (1385 tonnes) between January 2024 and November 2024 were 790.5% higher than in the same period of 2023 and these represented 6.1% of total EU imports. **EU exports** of butter between January 2024 and October 2024 decreased by 1% as compared to the same period of 2023.



Source: EUROSTAT

EU butter price in November 2024 was 2% lower than in November 2023.

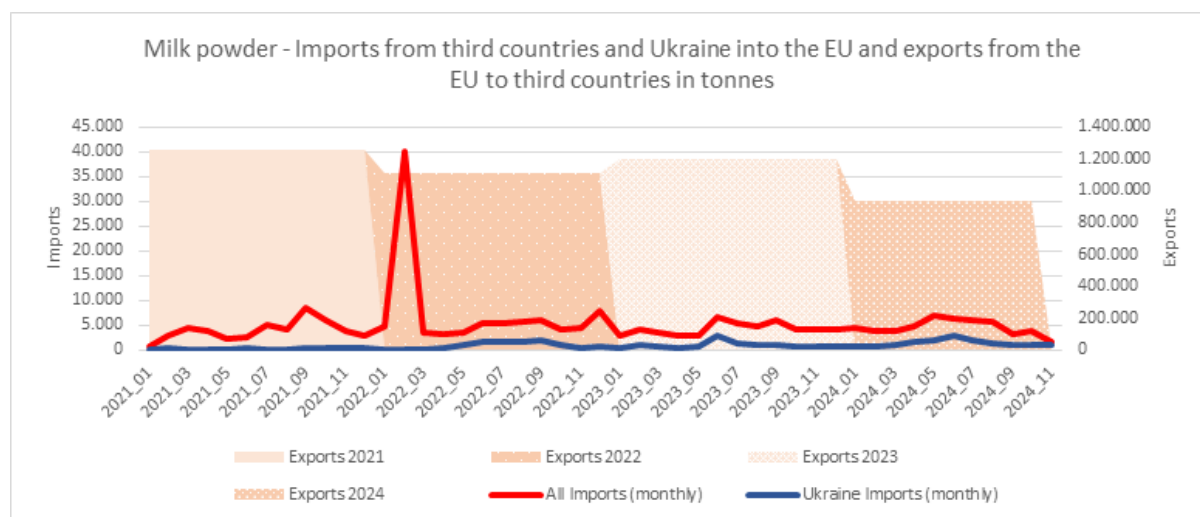
EU butter production between January 2024 to November 2024 decreased by 1% compared to the same period of 2023. **Imports** of butter from Ukraine represented 0.07% of **EU butter production** between January 2024 to November 2024.



Source: European Commission

MILK POWDER

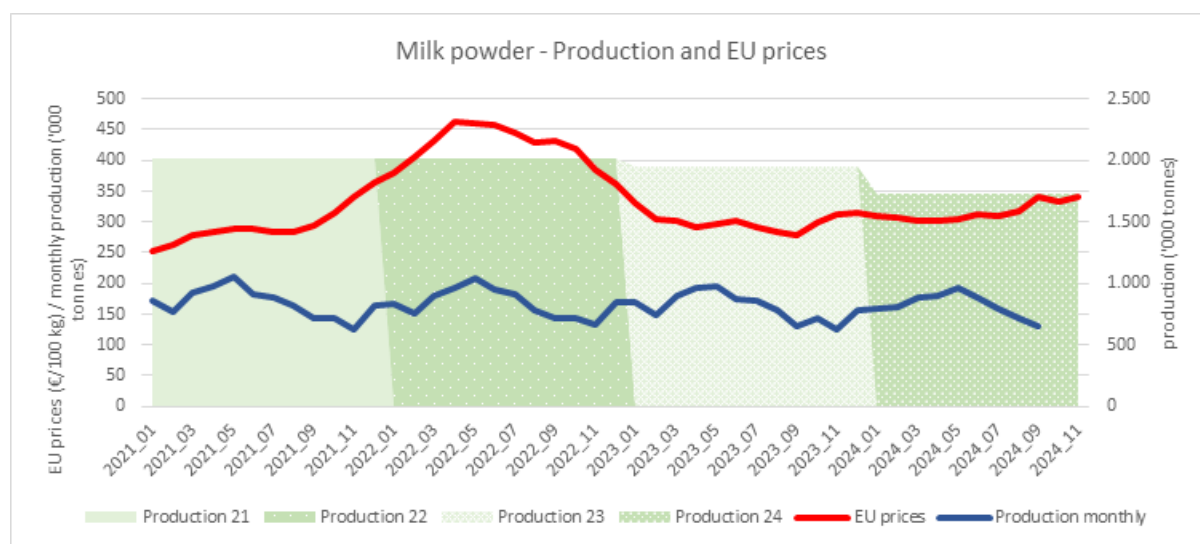
EU imports of milk powder from Ukraine between January 2024 and November 2024 were 42.8% higher than in the same period of 2023 and these represented 29.6% of total EU imports. **EU exports** of milk powder between January 2024 and October 2024 decreased by 10% as compared to the same period of 2023.



Source: EUROSTAT

EU milk powder price in November 2024 was 9% higher than in November 2023.

EU milk powder production between January 2024 and November 2024 was 3% lower than in the same period of 2023. **Imports of milk powder from Ukraine** represented 0.9% of **EU milk powder production** between January 2024 to November 2024.

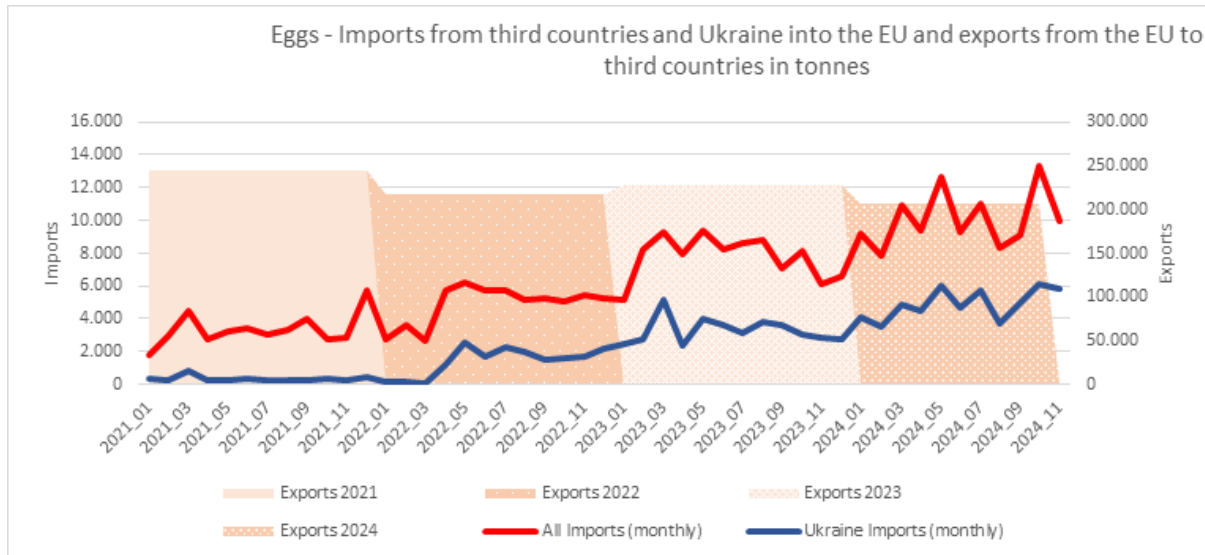


Source: European Commission, based on Whole Milk Powder and Skimmed Milk Powder data

EGGS

The trigger level for the automatic safeguard was reached in June 2024 and the DCFTA TRQ was re-introduced on 2 July 2024.¹⁰

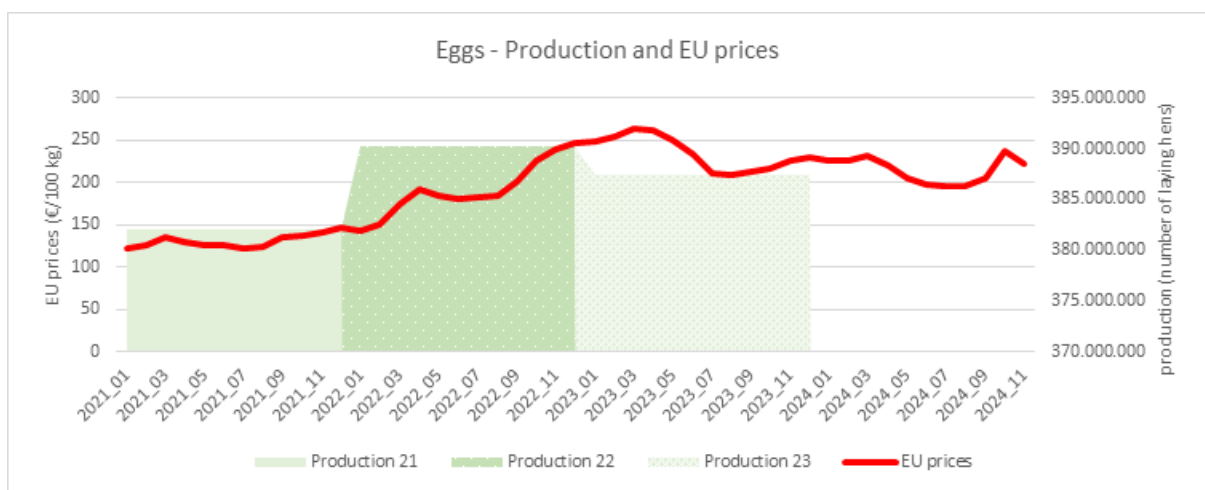
EU imports of eggs from Ukraine between January 2024 and November 2024 were 46.7% higher than in the same period of 2023 and these represented 48.6% of total EU imports. **EU exports** between January 2024 and October 2024 increased by 7% as compared to the same period of 2023.



Source: EUROSTAT

EU eggs price in November 2024 was 2% lower than in November 2023.

EU eggs production is not yet part of the regular market monitoring conducted by the Commission. The best data available from the Member States is the number of laying hens per farming method.

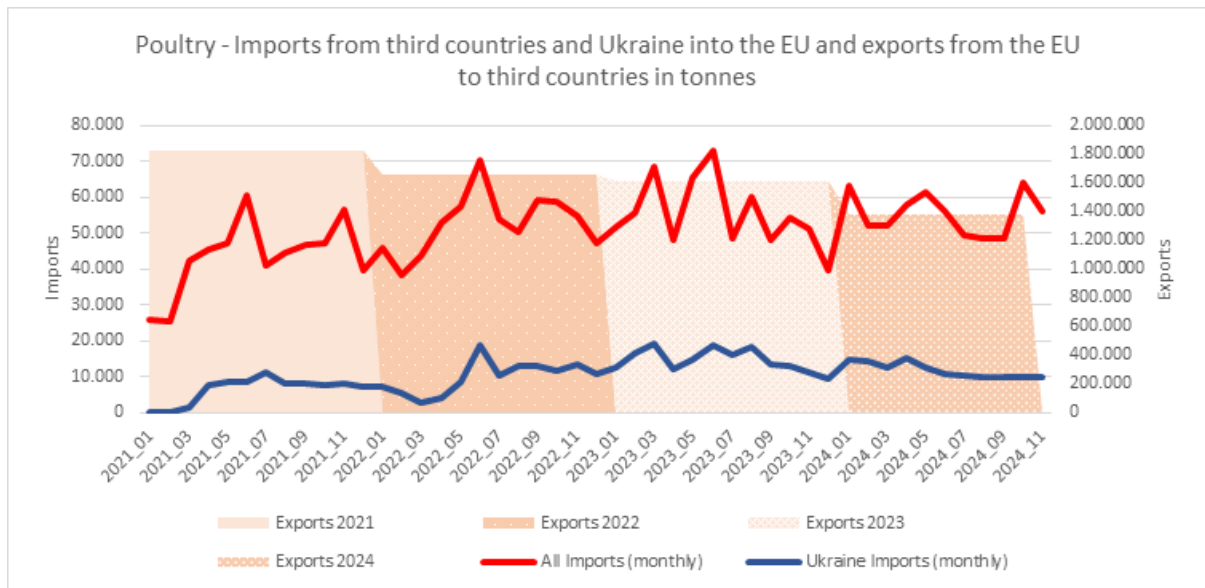


Source: European Commission

POULTRY

¹⁰ <https://eur-lex.europa.eu/eli/reg/2024/1827/oj>

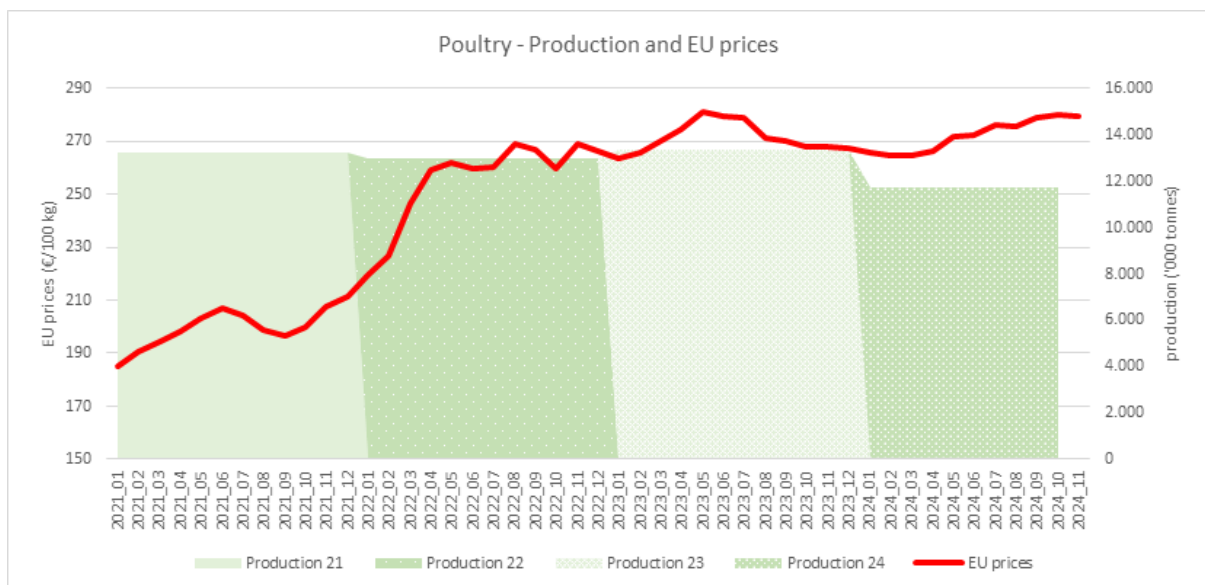
EU imports of poultry from Ukraine between January 2024 and November 2024 were 21.4% lower than in the same period of 2023 and these represented 21.3% of total EU imports. **EU exports** of poultry between January 2024 and October 2024 increased by 3% as compared to the same period of 2023.



Source: EUROSTAT

EU poultry prices in November 2024 were 4% higher to the November 2023.

EU poultry production between January 2024 to October 2024 was 6% higher than in the same period of 2023. It is underlined that EU production data covers the whole broiler carcass, (while imports from Ukraine are mainly breasts). This hampers a direct comparability.

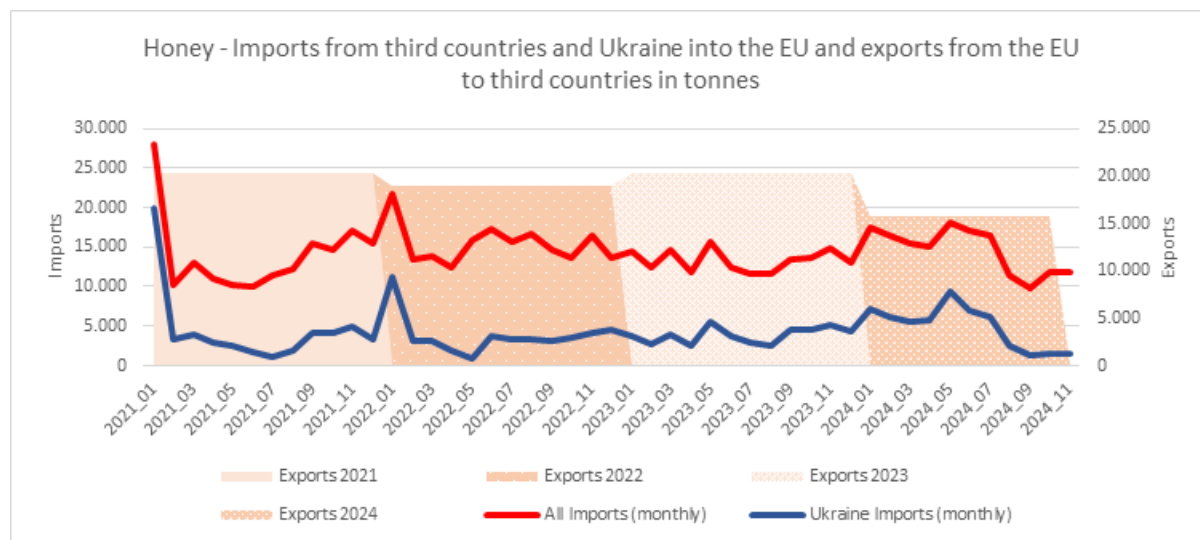


Source: European Commission

HONEY

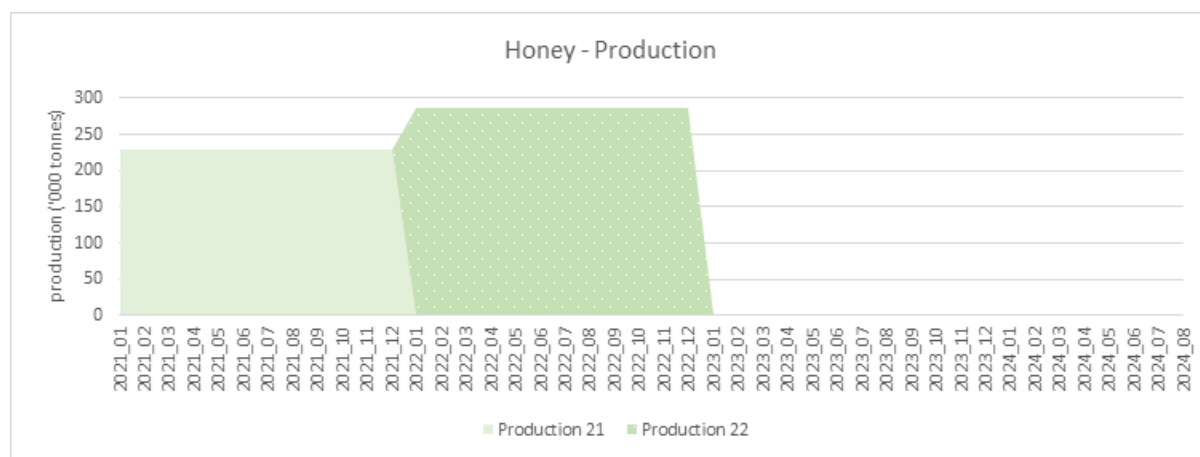
The trigger level for honey was reached in August 2024, and the DCFTA TRQ was re-introduced on 21 August 2024¹¹.

EU imports of honey from Ukraine between January 2024 and November 2024 were 28.5 % higher than in the same period of 2023 and these represented 33.3% of total EU imports. **EU exports** between January 2024 and October 2024 decreased by 5% as compared to the same period of 2023.



Source: EUROSTAT

Information on **production and prices of honey in the Union** is not part of regular market monitoring. Detailed data per Member State is only available within the framework of the reporting on Member State’s CAP strategic plans. The latest available data on production is from 2022 when EU honey production amounted to 285.7 thousand tonnes and therefore not relevant for evaluating the current market situation. Given this lack of data, it is not possible to evaluate the impact of imports from Ukraine on the Union market.



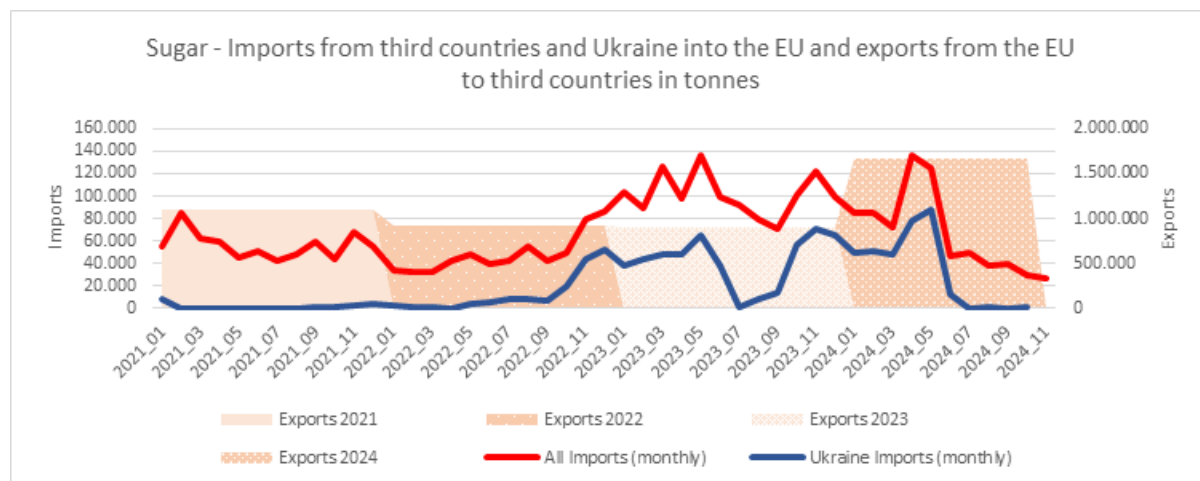
Source: European Commission

SUGAR

¹¹ <http://data.europa.eu/eli/reg/2024/2166/oj>

The trigger level for the automatic safeguard was reached in June 2024 and the DCFTA TRQ was re-introduced on 2 July 2024.¹²

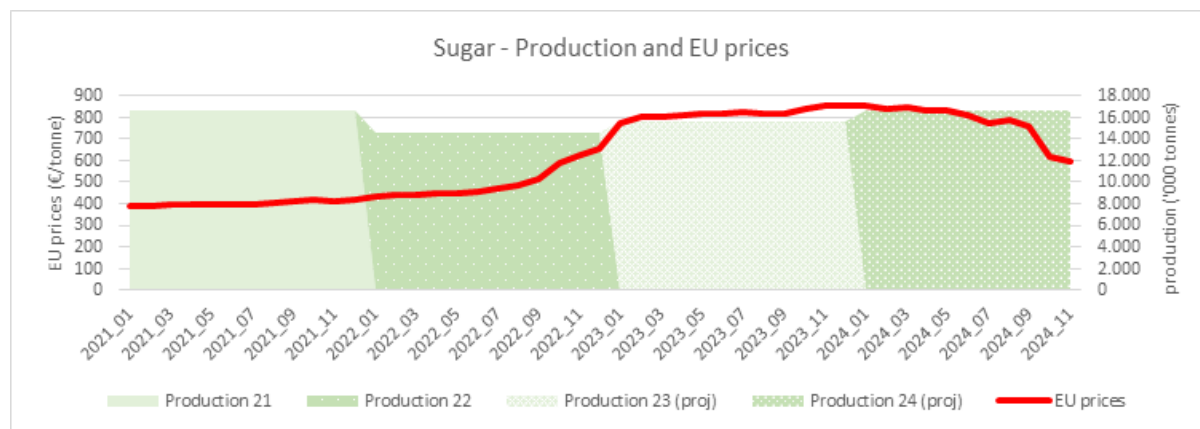
EU imports of sugar from Ukraine between January 2024 and November 2024 were 24.2% lower than in the same period of 2023 and these represented 44.5% of total EU imports. **EU exports** between January 2024 and October 2024 increased by 147% as compared to the same period of 2023.



Source: EUROSTAT

EU sugar price in November 2024 was 30% lower than in November 2023.

EU sugar production projection for the current marketing year 2024/25 (that start on 1 October) is 6.8% higher than in 2023/24¹³. Sugar imports from Ukraine between January 2024 and November 2024 represented about 2% of total EU production of marketing year 2023/24.



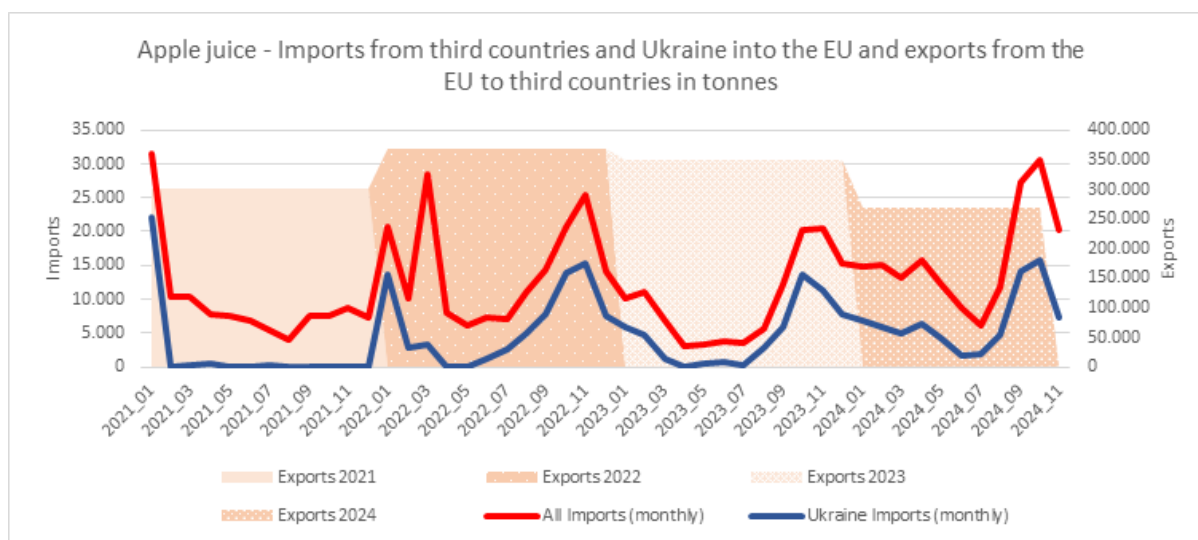
Source: European Commission

¹² <http://data.europa.eu/eli/reg/2024/1825/oj>

¹³ https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/sugar_en

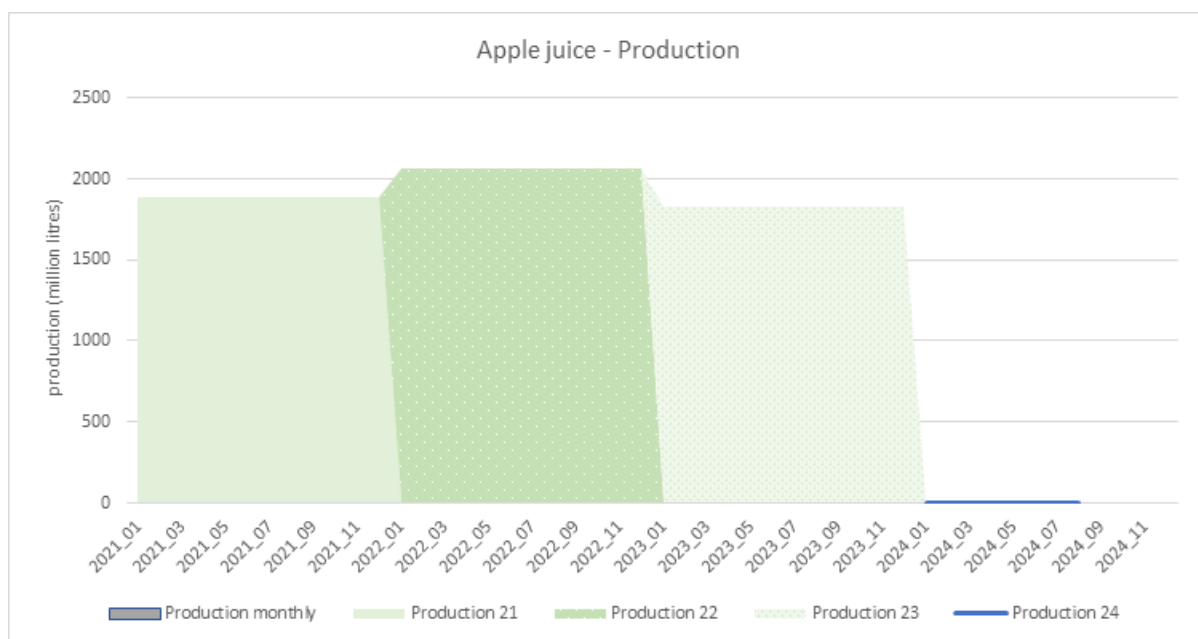
APPLE JUICE

EU imports of apple juice from Ukraine between January 2024 and November 2024 were 57.7% higher than in the same period of 2023 and these represented 41.9% of total EU imports. **EU exports** between January 2024 and October 2024 decreased by 11.1% as compared to the same period of 2023.



Source: Surveillance 3

The latest available data on **EU apple juice production** is from 2023 when it was 9.6% lower than in 2022. As price data is not part of the Commission’s regular monitoring there is a lack of complete data available, it is not possible to evaluate the impact of imports from Ukraine on the Union market.



Source: European Commission