

# **PROSPECTIVE STUDY UKRAINE'S INTEGRATION INTO THE EUROPEAN UNION**

Challenges for the maize sector in Europe



**AGPM**  
maiz'EUROP'

# PROSPECTIVE SCENARIO FOR UKRAINE'S INTEGRATION INTO THE EU IN 2030

## A “new agricultural France” at the gates of the European Union

In the EU integration scenario, Ukrainian maize production could gain more than 1 million hectares and reach **39 million tons by 2030**, an increase equivalent to French production. With **nearly half of European maize production**, Ukraine could develop powerful processing industries.

## Accelerated industrialization

Thanks to foreign investment, Ukraine could **process 40% of its maize production** locally by 2030. This would create a direct competitor in strategic segments such as starch, seeds, and poultry.

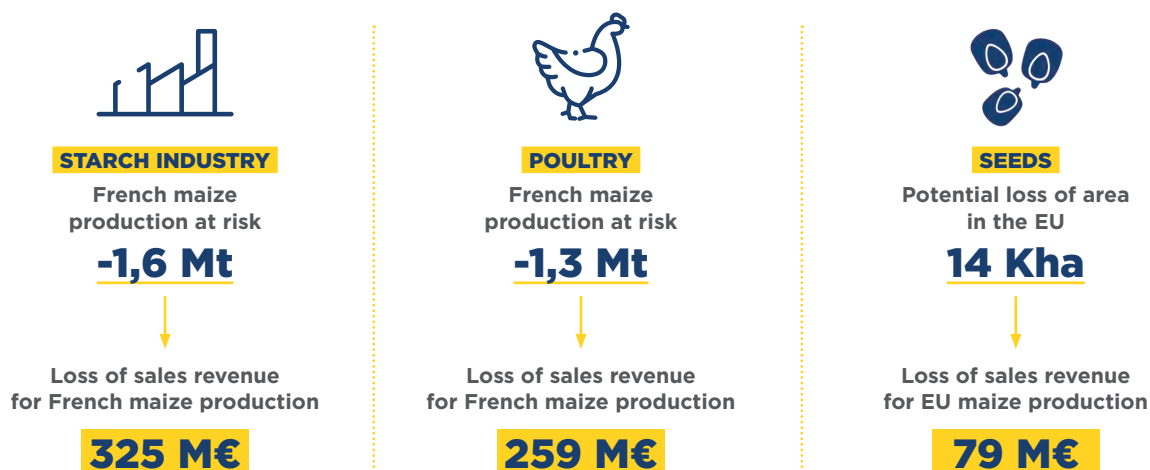
## A major risk for European maize sector

An uncontrolled opening of the market would expose the EU to an influx of agricultural products, including even more competitive grain maize ! The impact would be immediate for French producers, who would lose many outlets:

- **Starch industry:** up to 1.6 million tons of French maize at risk (11% of national production);
- **Seeds:** imports up 133%, threatening nearly 14,000 hectares;
- **Standard poultry:** up to 68% of French production could be replaced.



## IMPACT OF UKRAINIAN PRODUCTION CHANGES IN 2030 Prospective scenario for 2030



Ukraine's integration into the European Union would change the agricultural landscape of the continent. The question of Europe's ambitions for its maize sector arises. The European Union must choose between carefully managed integration or destabilization of its own maize sector.

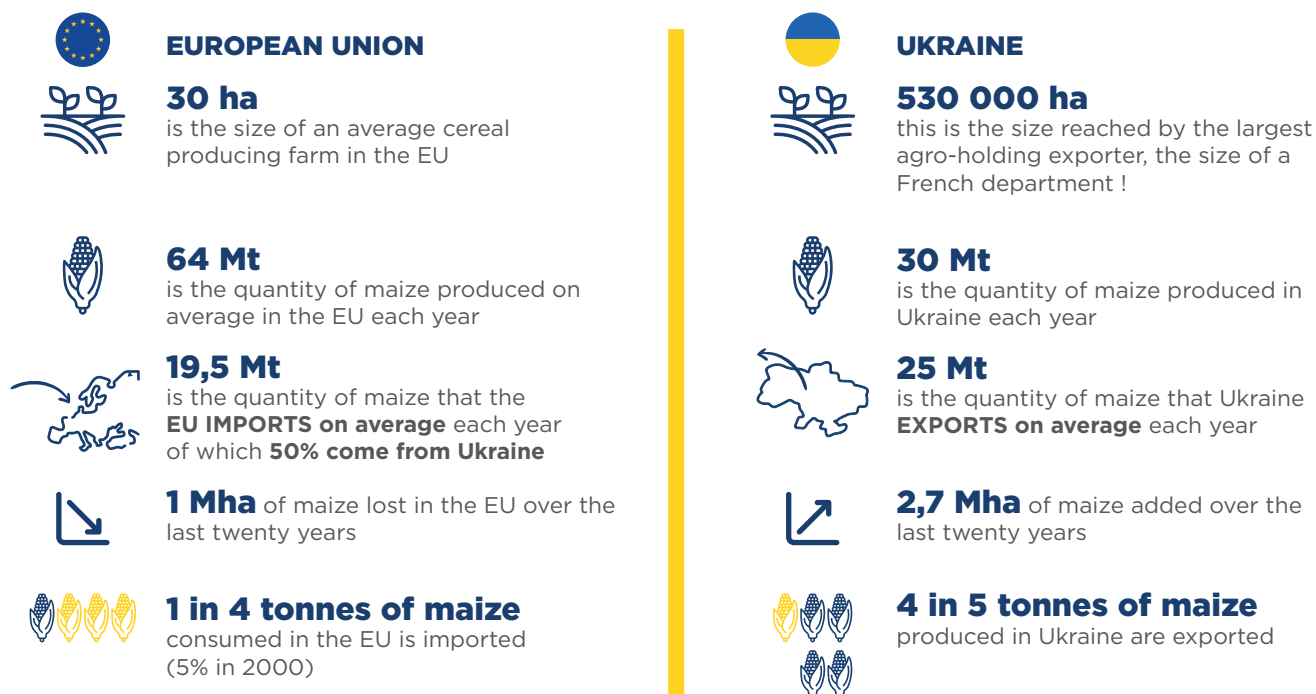
# EDITORIAL



“Thinking about the future of European maize means anticipating the profound changes that lie ahead. The potential integration of Ukraine into the European Union is among them. With this prospective study, AGPM sought to objectively assess the challenges facing the maize sector by 2030 in order to measure their concrete consequences. Our approach is based on lucidity and responsibility. Ukraine is a great nation that deserves Europe’s political, economic, and human support. But support for this great agricultural country must not result in unfair competition for French and European maize producers. The differences in costs, standards, and structures are such that uncontrolled integration would threaten French and European maize producers with the inevitable disappearance of a large number of our farms. Europe can only support Ukraine by establishing a clear, fair, and sustainable framework for its agricultural sectors and farmers. That is the purpose of this study: to identify the risks, inform decision-makers, and above all, emphasise that there can be no strong Europe without a strong agricultural ambition.”

**Franck Laborde, President of AGPM**

## MAIZE SECTOR IN THE EU VS. MAIZE SECTOR IN UKRAINE Key figures



Of 114 active substances authorized for use on maize in Ukraine

47%

unauthorized in the EU

62%

unauthorized in France

### Europe falls behind, Ukraine takes the lead

In twenty years, the EU has lost a million hectares of maize and has become one of the world’s leading importers of maize. At the same time, Ukraine has established itself as the world’s 4<sup>th</sup> largest exporter of maize and the EU’s 1<sup>st</sup> supplier, with **production costs half those of the EU.**

### More and more trade concessions

The EU-Ukraine Association Agreement, revised in June 2025, increases the zero-duty quota for maize from 650,000 to 1 million tons. It also covers maize outlets (poultry, ethanol, starch, etc.). In total, **it represents a concession equivalent to 1.8 million tons of grain maize !** This is in addition to numerous trade concessions on grain maize (CETA, Mercosur, etc.).

### Major distortions of competition

Nearly **one in two plant protection products used on corn in Ukraine is not authorized in the EU, and nearly two out of three are not authorized in France.** This regulatory gap, combined with lower costs, creates a major distortion of competition to the detriment of European producers.

### Entirely different structures

While the average size of a cereal farm in Europe is 30 hectares, **agro-holdings in Ukraine cultivate up to 530,000 hectares !** These differences in agricultural models make Ukrainian corn more competitive.

# OUR DEMANDS

The gradual integration of Ukraine into the European market is a source of major instability for the French and European maize sectors. Ensuring reciprocal standards, protecting maize producers' incomes, and consolidating European production capacity is imperative ! That is why AGPM is calling for strong measures to be implemented :

## IN THE SHORT TERM

- > **Condition trade concessions with Ukraine on maize to strict reciprocity with EU production standards**, ensuring the traceability of Ukrainian imports, the alignment of local maize production with European production standards and conditions, and their on-site controls by the European Commission.
- > **Implement immediate safeguard measures on imports of Ukrainian maize seeds** into the EU. The opening of the European market to Ukrainian maize seeds in 2020 led to an explosion in imports into France and the EU. In 5 years, these imports increased 72-fold at the European level and more than 2,000-fold in France, leading to a historic decline in maize seed multiplication areas.
- > **Renovate the customs duty mechanism for grain maize** to effectively protect producers' income and European production capacities.

## IN THE LONG TERM

**French maize producers reject the scenario of direct competition between European and Ukrainian production. They demand real ambition for European maize production. There can be no strong Europe without strong agriculture !**



**AGPM**  
maiz'EUROP'

### Head office

21 chemin de Pau  
64121 MONTARDON  
Phone: +33 (0)5 59 12 67 00  
Fax: +33 (0)5 59 12 67 10

### Paris office

23-25 avenue de Neuilly  
75116 PARIS  
Phone : +33 (0)1 47 23 48 32  
Mail: [contact@agpm.com](mailto:contact@agpm.com)

[www.agpm.com](http://www.agpm.com)