

Russia's war on Ukraine: Impact on food security and EU response

Russia's unprovoked invasion of Ukraine, a country known as the 'breadbasket of Europe', is raising fears of a global food crisis, further exacerbating existing food security challenges worldwide. Much depends on the response of the international community, including the EU, to a number of rapidly evolving scenarios.

Impact on global food supplies and food security

There is [widespread international concern](#) that Russia's war will provoke a global food crisis similar to, or worse than, that faced in [2007 and 2008](#). The war comes at a time when the [global food system](#) was already struggling to feed its growing population in a sustainable way, under the pressure caused by [climate change](#) and the [Covid-19 pandemic](#).

Russia and Ukraine are [key agricultural players](#), together exporting nearly 12 % of food calories traded globally. They are major providers of basic agro-commodities, including wheat, maize and sunflower oil, and Russia is the world's top exporter of fertilisers.

Several regions are highly dependent on imports from these two countries for their basic food supply. Russia and Ukraine, combined, supply over 50 % of [cereal imports](#) in North Africa and the Middle East, while Eastern African countries import 72 % of their cereals from Russia and 18 % from Ukraine.

The war's impact on global food supply will depend on its duration and the evolution of various [scenarios](#), centred on three factors:

- a significant reduction in exports and production of essential commodities from both countries, caused by the war and not the economic [sanctions](#) imposed on Russia, which, intentionally, did not target the agricultural sector. Overall, the European Commission [estimates](#) that 'up to 25 million tonnes of wheat would need to be substituted to meet worldwide food needs in the current and the next season';
- a global spike in prices of food supplies and inputs needed for agri-food production ([fertilisers](#) and [energy](#)), which were already at [record levels](#) before the war;
- the international response to the above, which could either amplify the effects of the crisis (mainly by uncoordinated export bans or speculative measures) or mitigate them (applying [lessons learnt](#) from the 2007-2008 food crisis). A number of countries, other than Russia and Ukraine, have already imposed or announced their intention to impose some control over [exports of essential agricultural commodities](#), including [Egypt](#), [Argentina](#), [Indonesia](#), [Serbia](#), [Turkey](#) and, in the EU, [Hungary](#).

Percentage share of global exports in 2021			
Commodity	Ukraine	Russia	Russia and Ukraine
Wheat	10 %	24 %	34 %
Maize	15 %	2 %	17 %
Barley	13 %	14 %	27 %
Sunflower oil	31 %	24 %	55 %
Sunflower cake	61 %	20 %	81 %
Vegetable oils	–	–	10 %
White fish (Alaska Pollock)	–	16 %	–
Fertiliser mineral intermediates*		13 %	
Finished fertilisers		16 %	
Food calories traded globally	6 %	5.8 %	11.8 %

* ammonia, phosphate rock, sulphur

Data sources: UN FAO ([March](#) and [April](#)); [AMIS Market monitor](#).

Expected impact on EU food security

Food availability is [not currently at stake](#) in the EU. The block is largely [self-sufficient](#) in key agricultural products, as well as in most animal products. However, the EU is a considerable net importer of specific [products](#) that may be difficult to substitute in the short term, such as [sunflower oil](#) and seafood. Moreover, the crisis has exposed the [dependency](#) of EU agricultural production on a number of key imported inputs: [energy](#), animal feed and feed additives, and also agricultural [fertilisers](#). The EU's vulnerability to market distortions in fertiliser trade might be particularly acute, since fertilisers represent 18 % of input costs for arable crops. The EU relies on Belarus and Russia for 59 % of its potassium fertiliser imports, while 31 % of EU nitrogen fertiliser imports (for which the natural gas price is the main factor) come from Russia. Furthermore, **food affordability** for low-income households, already affected by the [pandemic](#), will be further [jeopardised](#). Already in 2020, [8.6 %](#) of the overall EU population were unable to afford a meal with meat, fish or a vegetarian equivalent every second day.

Expected impact on global food security

According to [FAO estimates](#), in addition to the 720 to 811 million people already [facing chronic hunger](#) in 2020, Russia's war in Ukraine risks raising – by [7.6 to 13.1 million](#) – the number of undernourished people in 2022 and 2023. Jordan, Yemen, Israel and Lebanon are among the countries most at risk, as they [rely heavily](#) on basic commodities imports, with significant shares from Russia and Ukraine. [African countries](#) will also have difficulties facing market disruptions and rising prices. Meanwhile, the higher prices and shortages will have a serious [impact on food assistance](#) for fragile countries. In Ukraine itself, the United Nations World Food Programme [estimates](#) that 45 % of the population are already 'worried about finding enough to eat'.

Food security at the top of the EU political agenda: Swift EU responses

The EU leaders' [10-11 March Versailles declaration](#) urged the Commission to present options to address the rising food and input prices and enhance global food security in the light of Russia's war. Drawing on [lessons learned](#) from the pandemic, the Commission swiftly presented a package of measures. These were set out in a 23 March [communication](#) 'Safeguarding food security and reinforcing the resilience of food systems', including short-term and medium-term proposals, at both EU and Member State level. Most measures can be implemented within existing instruments, mainly through the [common agricultural policy](#) (CAP). In parallel, the Commission announced the [postponement](#) of two highly-anticipated Green Deal legislative proposals: on the sustainable use of pesticides and nature restoration targets in the EU.

On 24 March 2022, the European Parliament adopted a comprehensive [resolution](#) calling for an 'urgent EU action plan to ensure food security inside and outside the EU in light of the Russian invasion of Ukraine', supporting many actions proposed in the Commission's package. Members emphasised the need to maintain security of food supplies, in both the EU and vulnerable countries, when analysing the objectives set in the biodiversity and 'farm to fork' strategies. Parliament also called for safe food corridors to and from Ukraine to deliver aid and goods.

Safeguarding food security and reinforcing food system resilience: Immediate EU response

- €500 million support package for EU farmers most affected by the crisis (up to €1.5 billion if complemented by Member States' national envelopes);
- Market safety net measures to support specific markets (e.g. the pigmeat sector) and increased levels of direct payment advances, later in 2022;
- New self standing [Temporary Crisis Framework](#) for State aid;
- Possibility for Member States to derogate from certain greening obligations in 2022 to bring additional agricultural land into production (i.e. cultivation of fallow land under the [ecological focus areas](#));
- Preservation of the EU single market, avoiding export restrictions and bans;
- Support through the Fund for European Aid to the Most Deprived ([FEAD](#)): complementing Member States' action to provide those most deprived with food and/or basic material assistance;
- Possibility for Member States to apply reduced rates of value added tax and encourage economic operators to contain retail prices;
- Use the new [CAP strategic plans](#) to prioritise investments that reduce dependency on gas and fuel and inputs such as pesticides and fertilisers;
- €330 million EU [emergency support programme for Ukraine](#).

