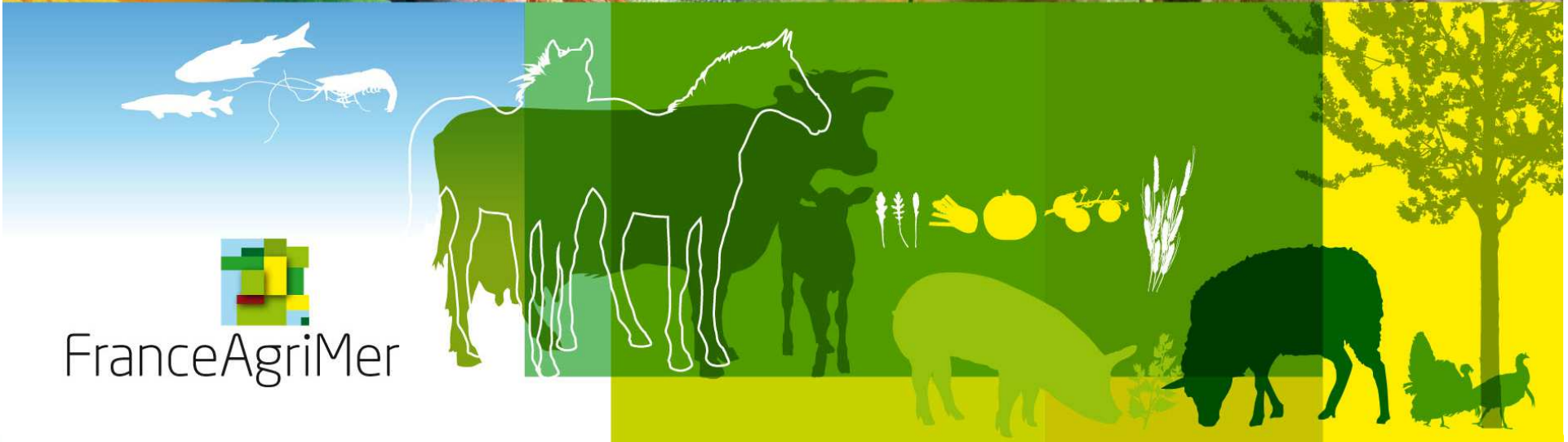


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Situation en Ukraine

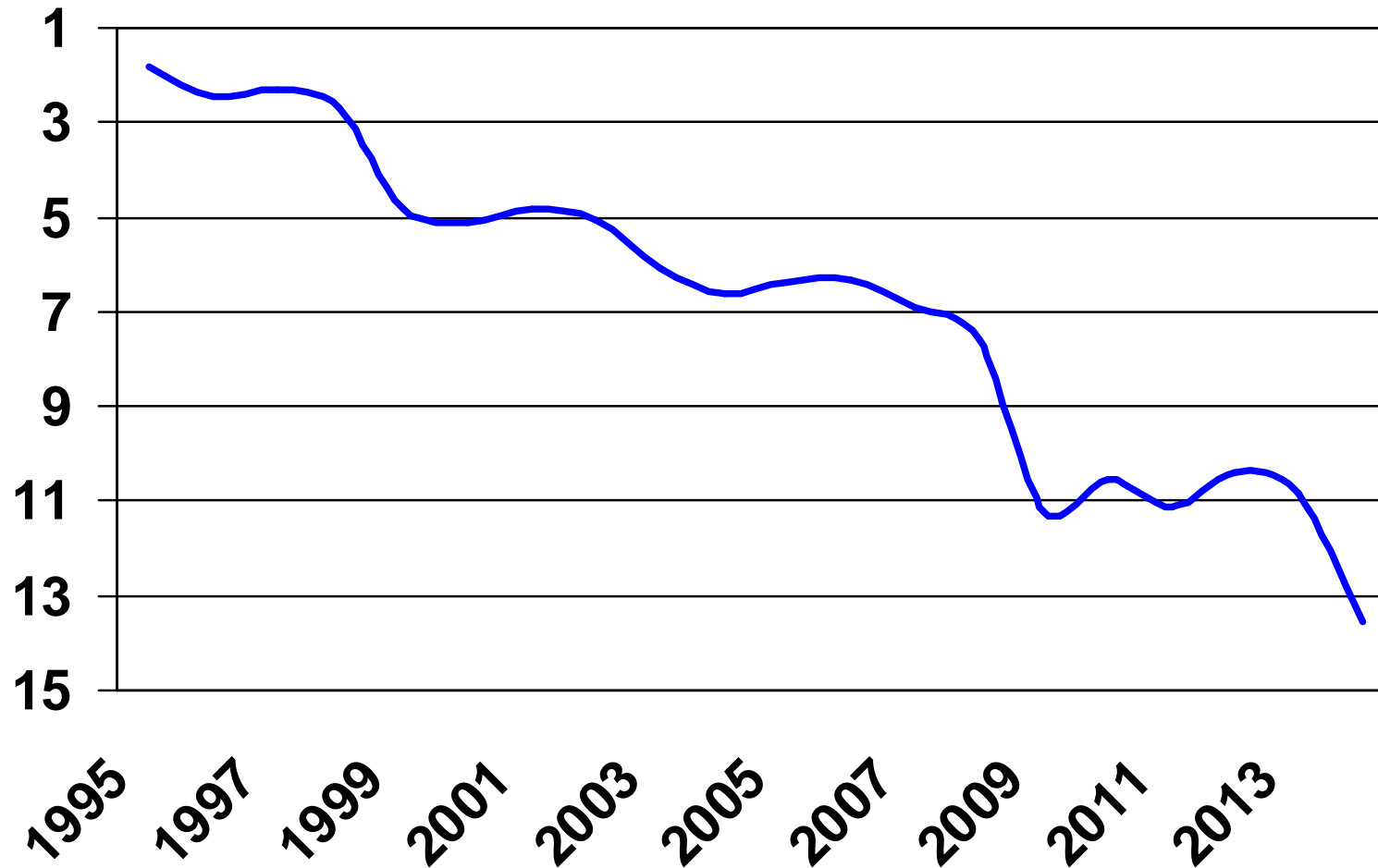


Facteurs macro économiques



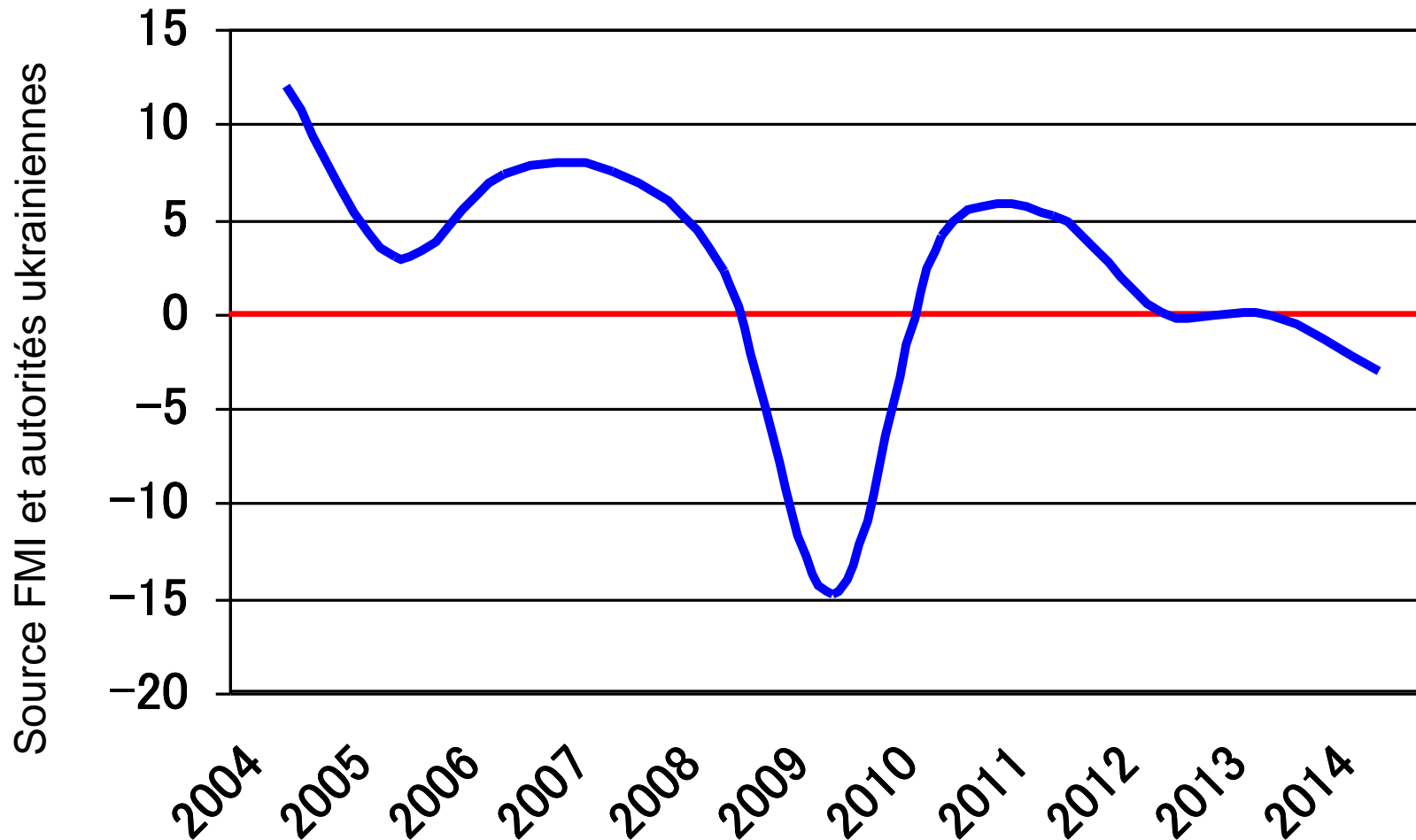
Cours de la grivna contre l'euro

(moyennes annuelles)

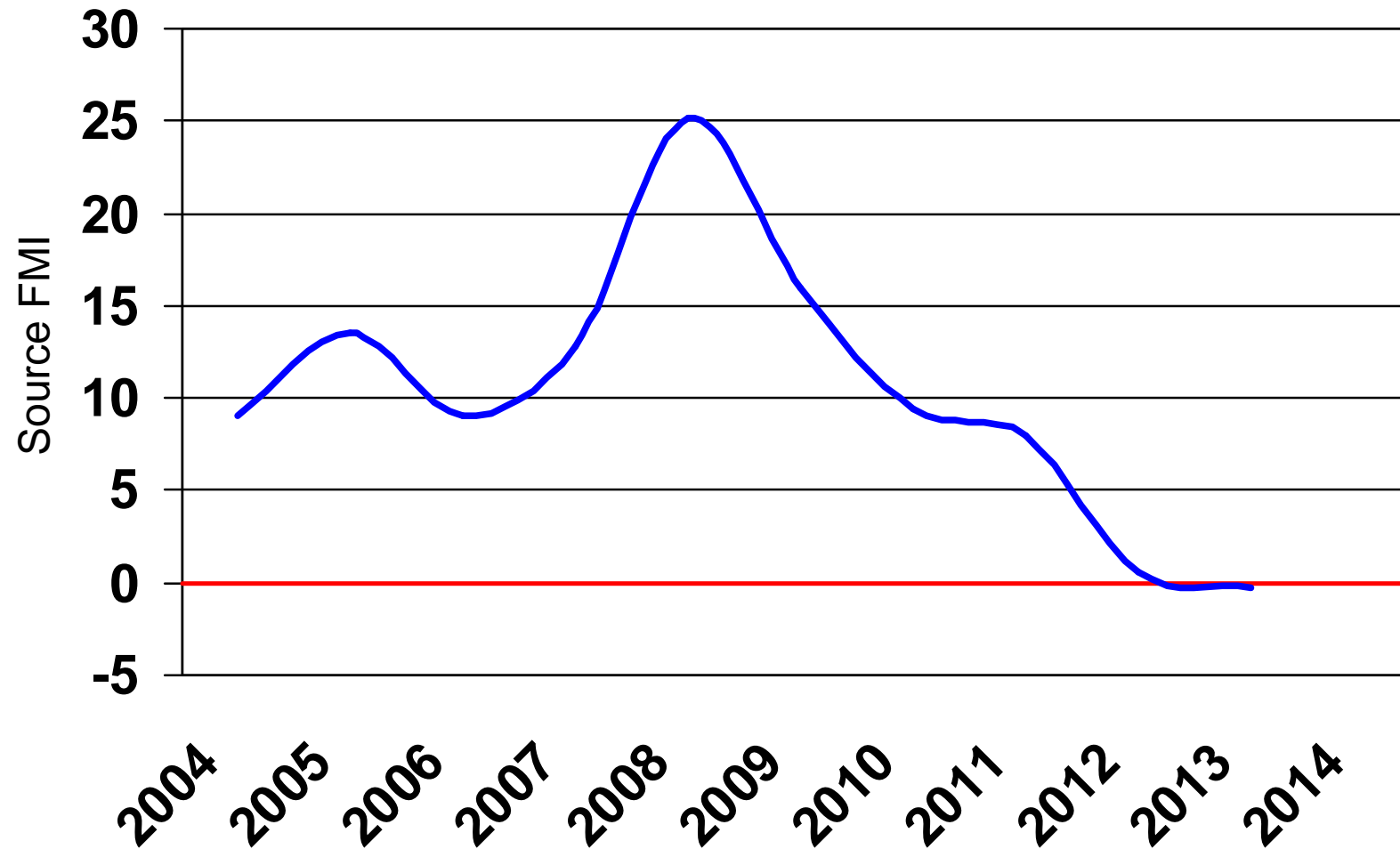


Taux de croissance du PIB de l'Ukraine

En %



Taux d'inflation de l'Ukraine



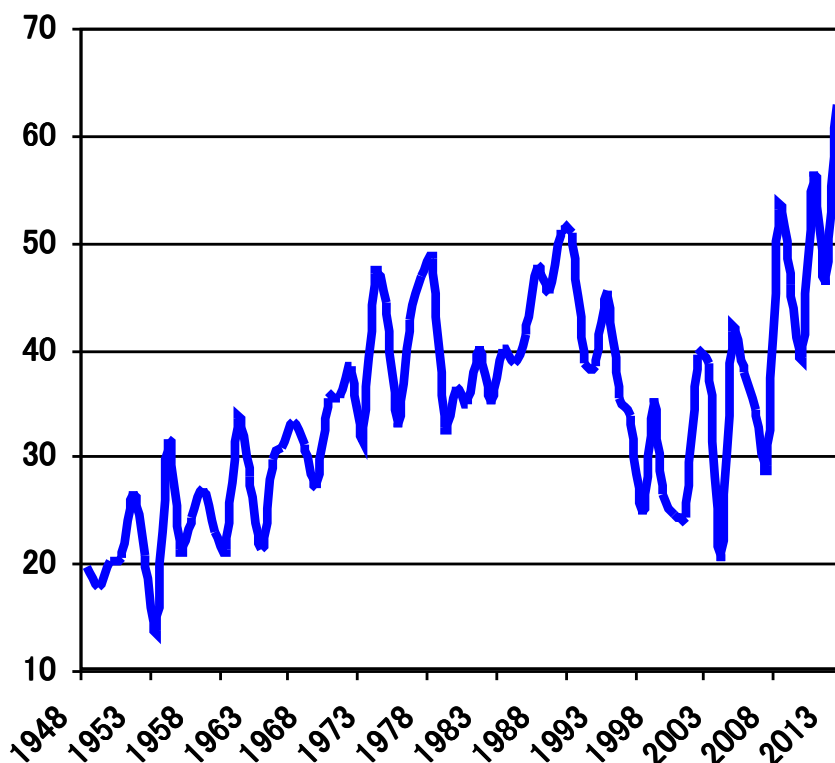
Les grandes cultures en Ukraine



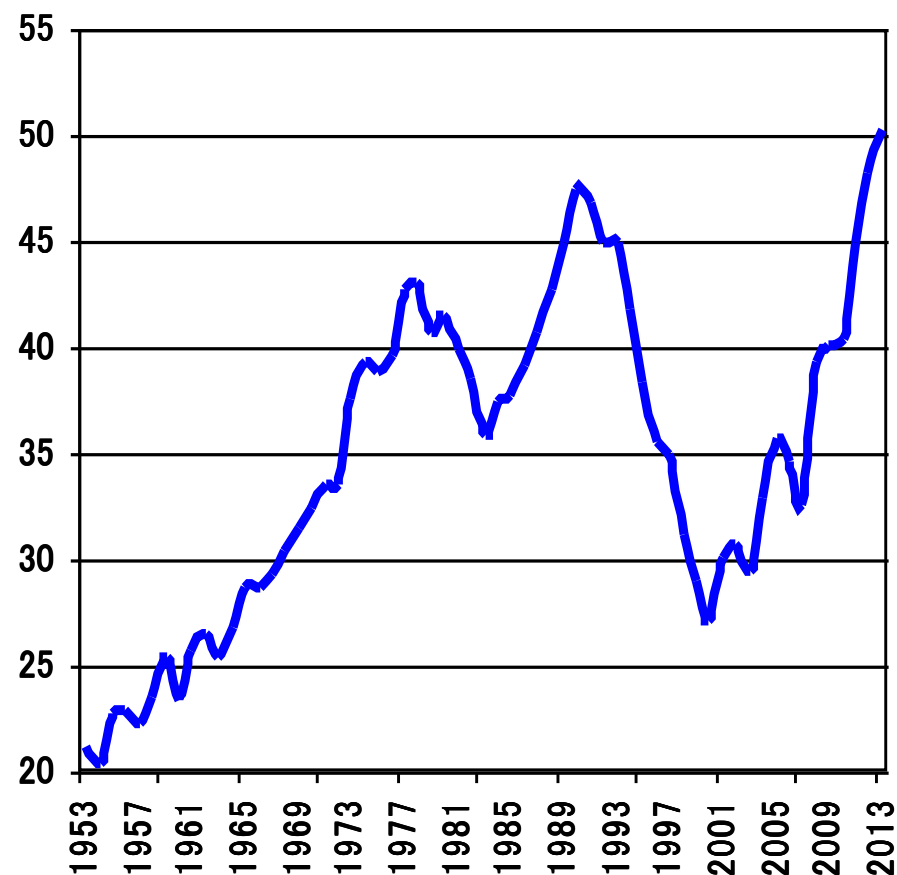
Production de céréales et de légumineuses

En Mt Source ministère de l'agriculture de l'Ukraine

Série annuelle

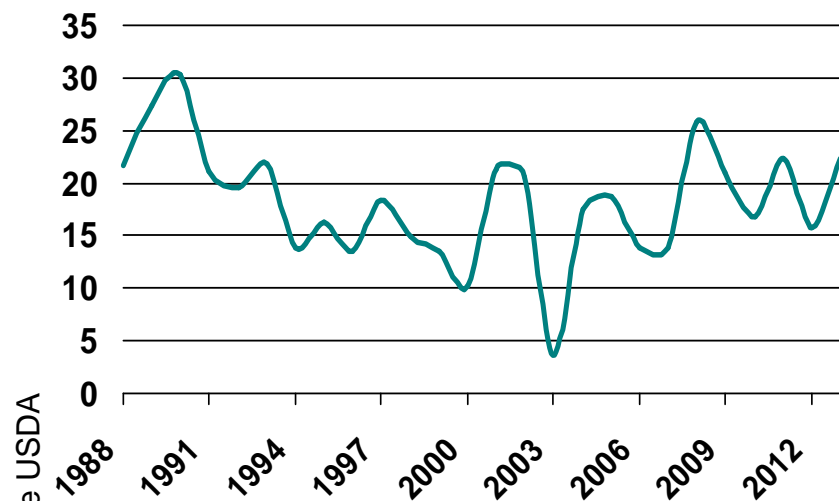


Moyenne quinquennale

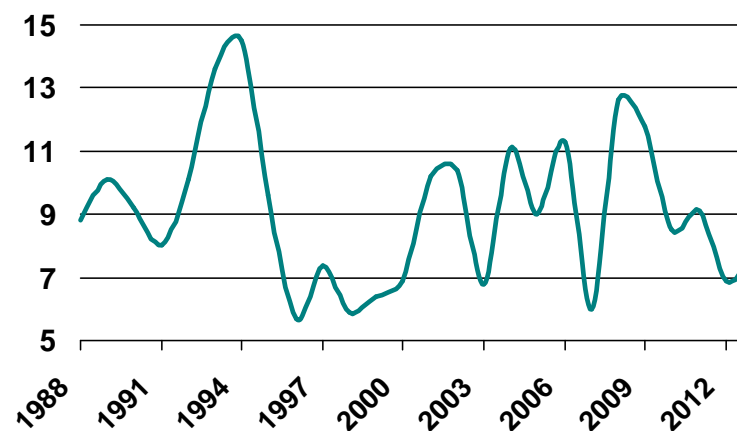


Production céréales et oléagineux

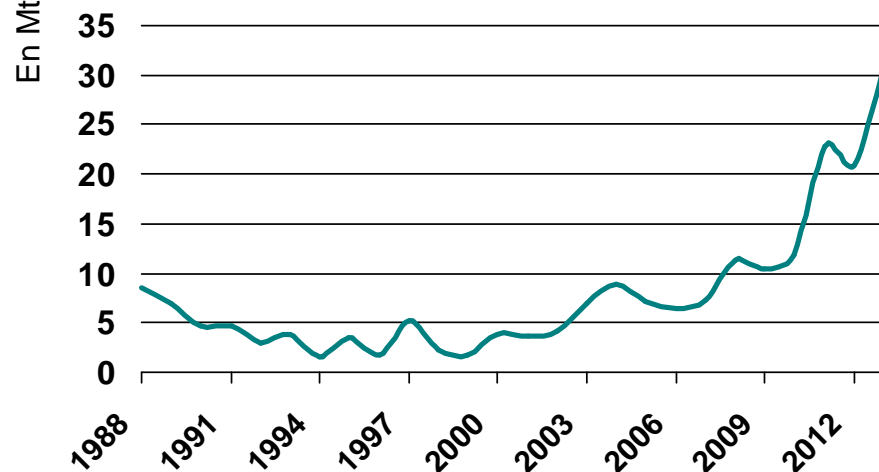
Blé



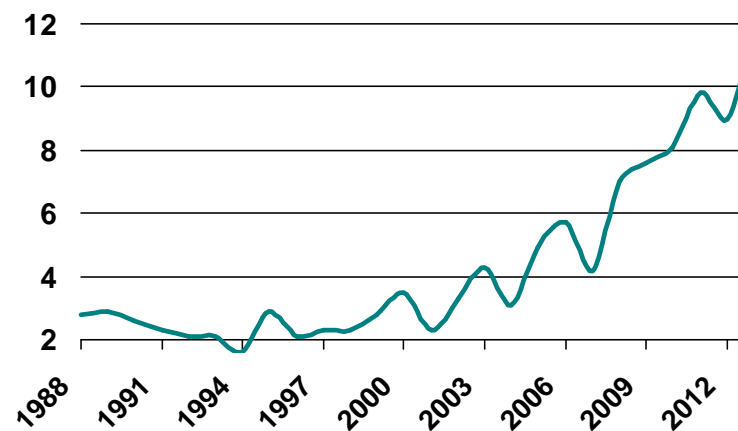
Orge



Maïs

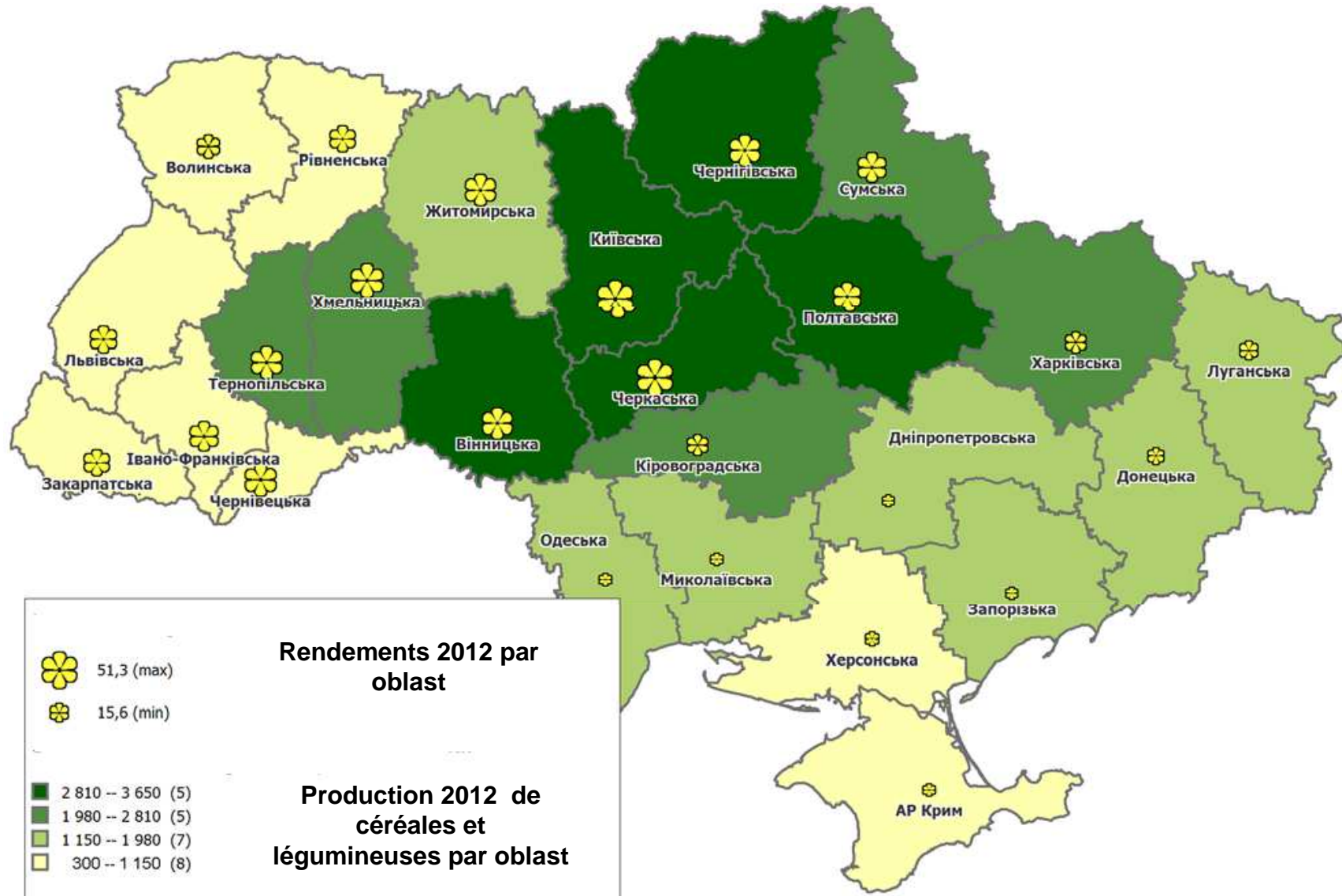


Tournesol



Production brute de céréales et de légumineuses

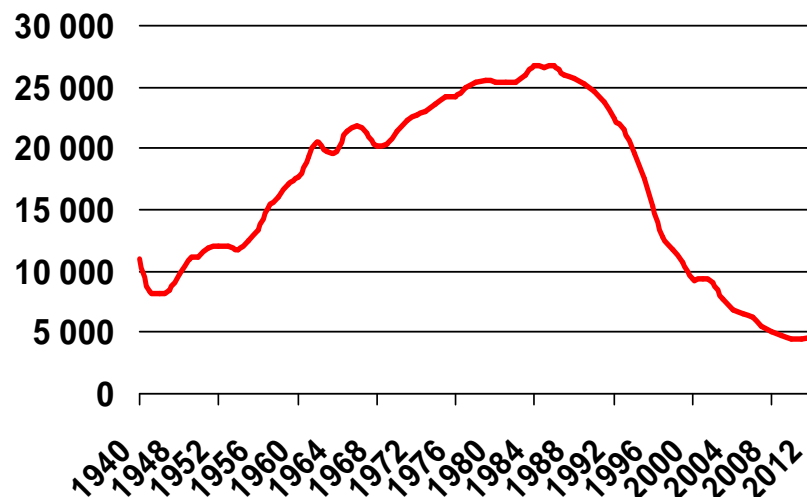
Source ministère de l'agriculture de l'Ukraine



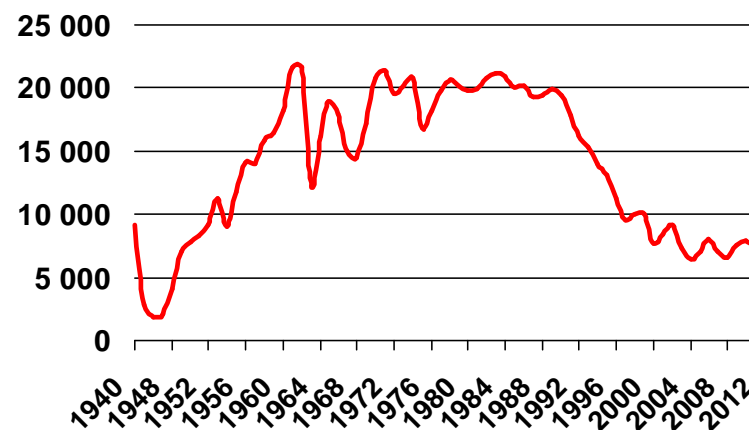
Evolution des cheptels

En nombre de tête Source ministère de l'agriculture de l'Ukraine

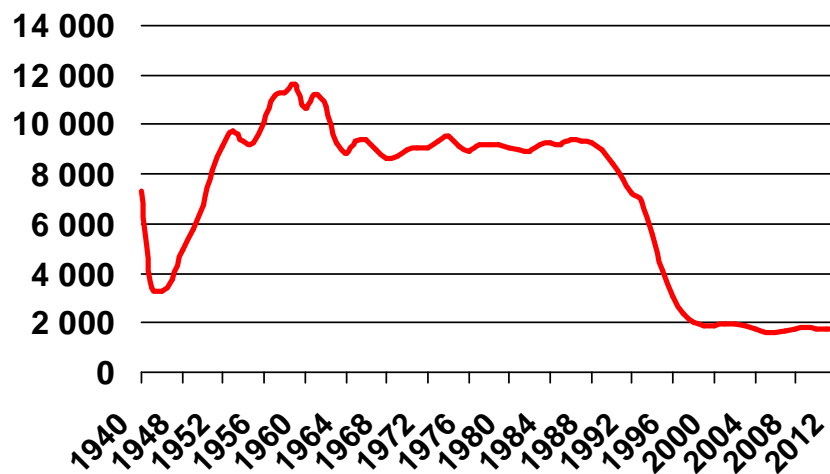
Bovins



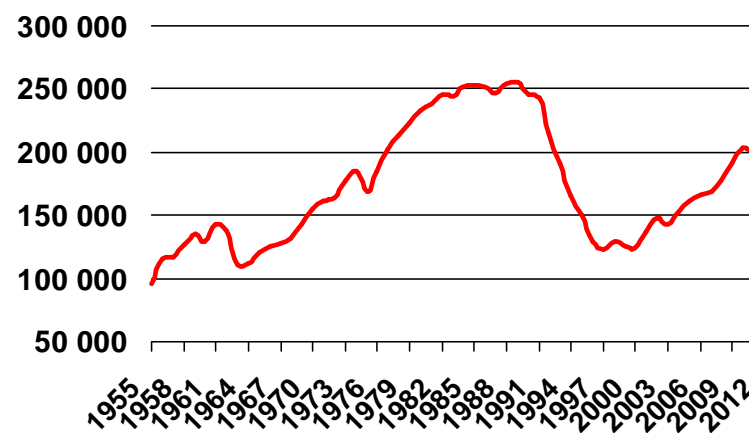
Porcins



Ovins

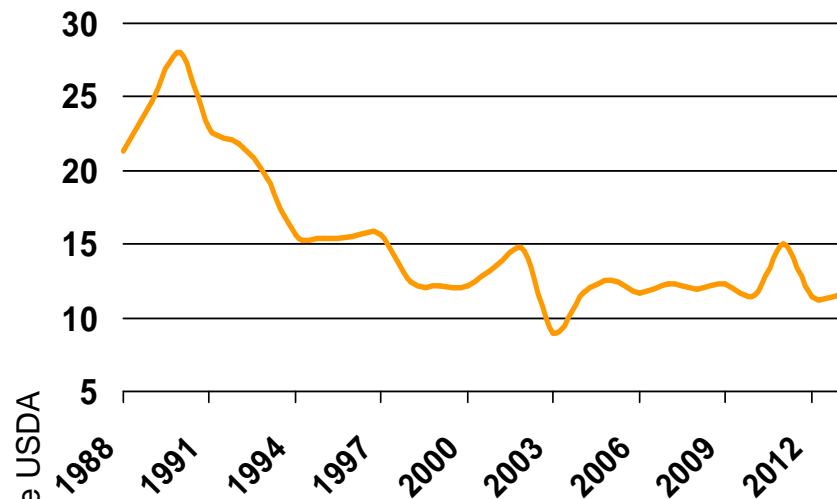


Volailles

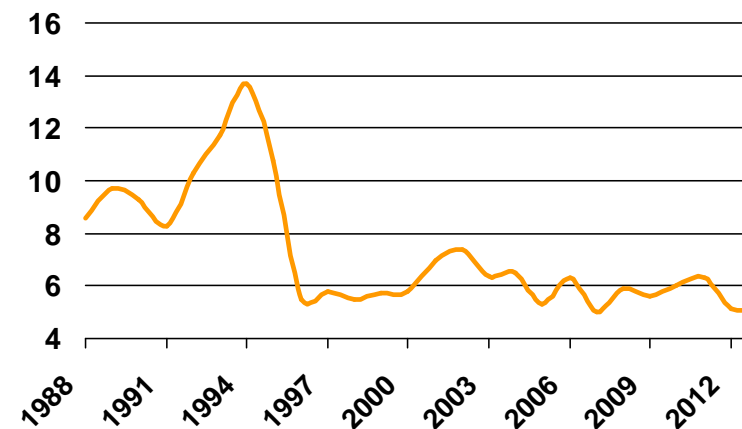


Utilisation céréales et oléagineux

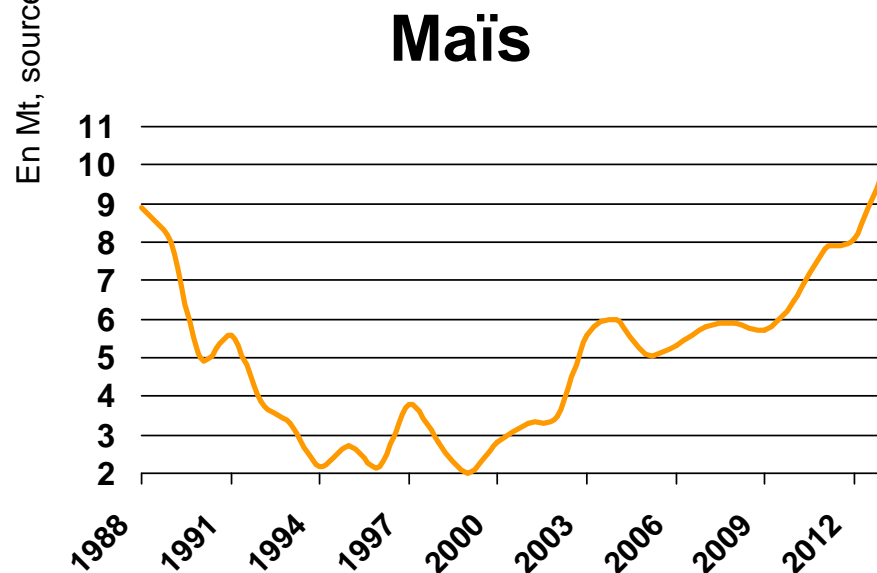
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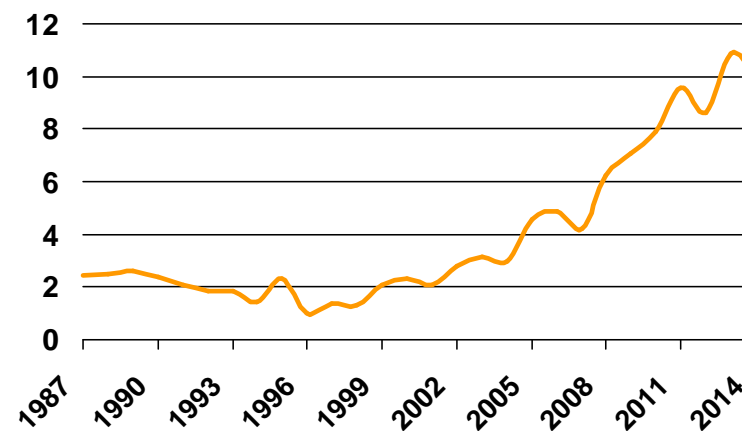
Orge



Maïs

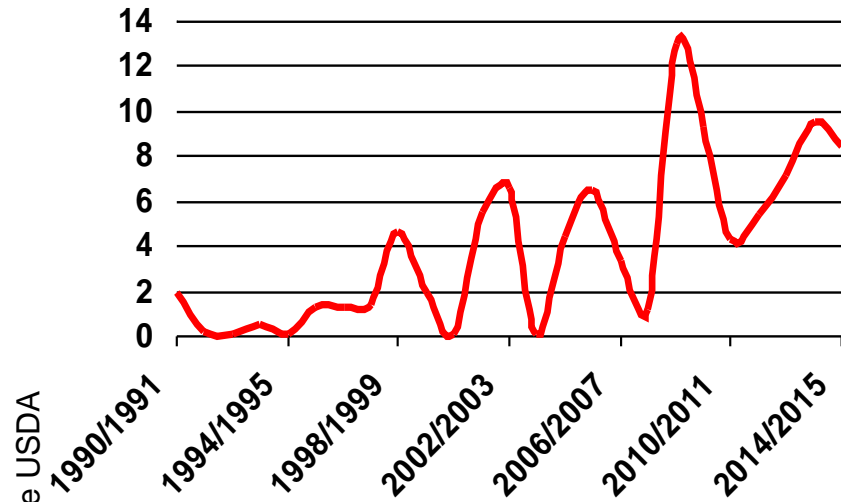


Tournesol trituration

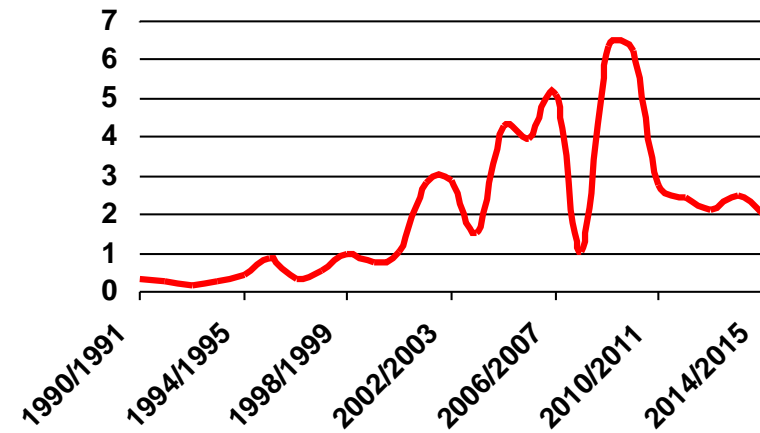


Exportations

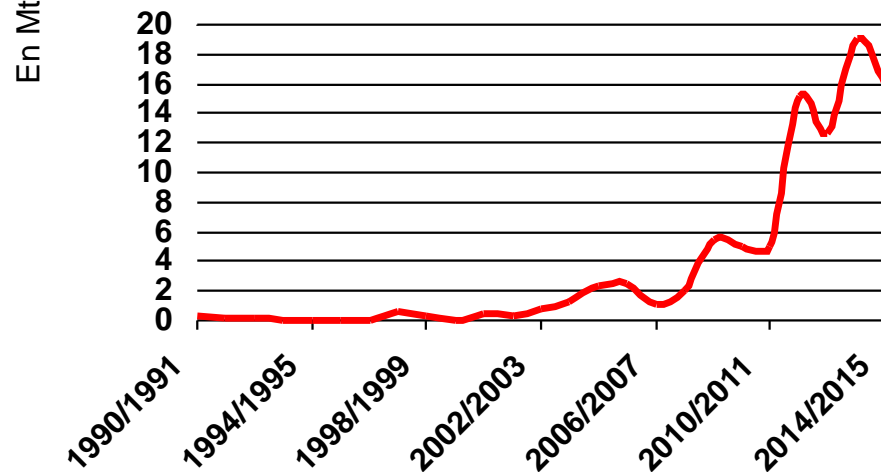
Blé tendre



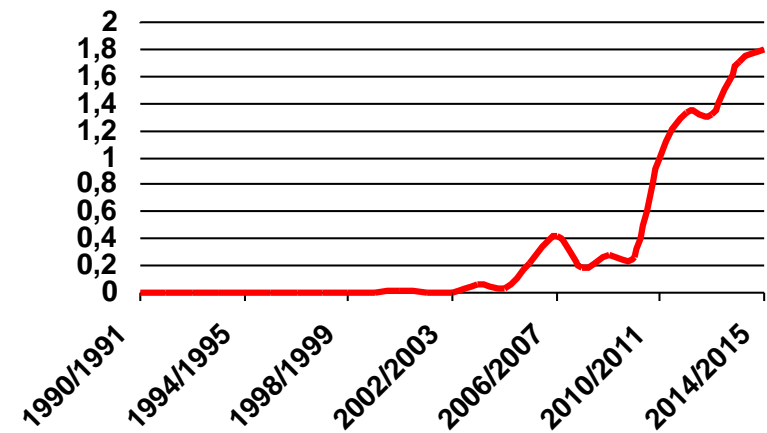
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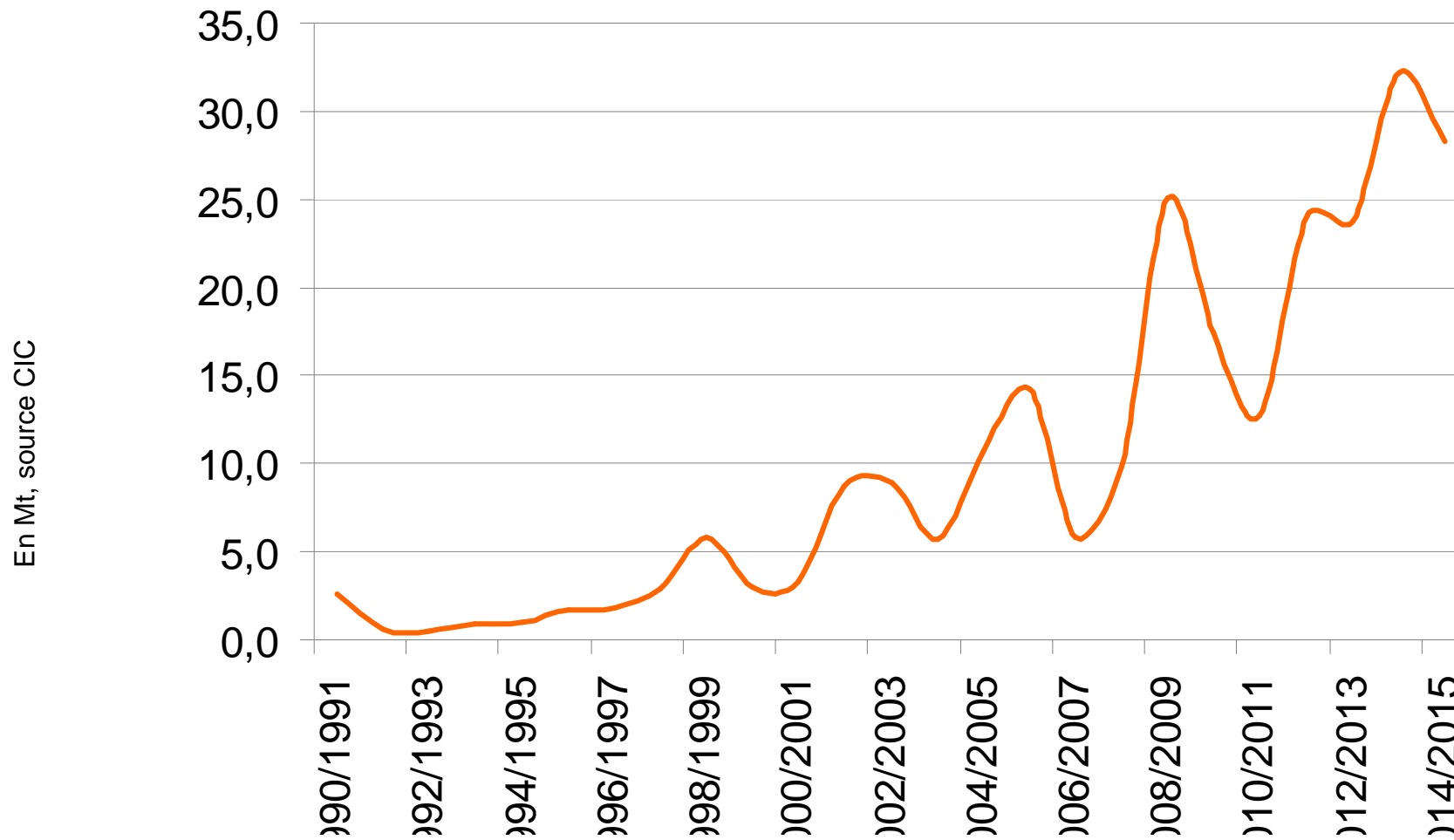
Maïs



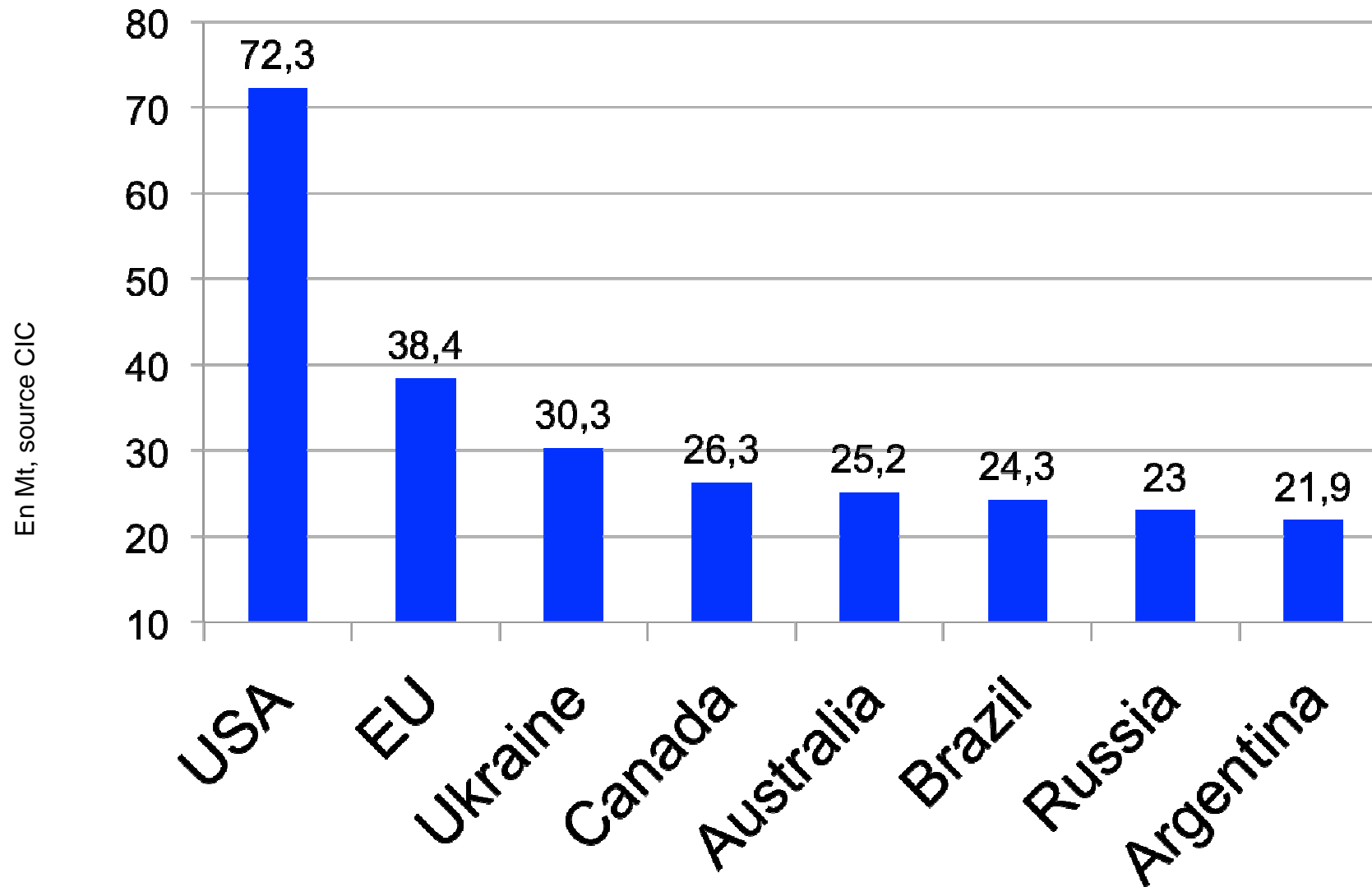
Soja



Exportation totale de grains de l'Ukraine



Ukraine : troisième exportateur mondial de céréales en 2013



Production des principales grandes cultures dans les oblasts les plus troublées

Moyenne quinquennale

| En Mt | Crimée | Donetsk | Lugansk | Total des séparatistes | Ukraine |
|-----------|--------|---------|---------|------------------------|---------|
| Blé | 0,8 | 1,2 | 0,7 | 2,7 | 18,9 |
| Orge | 0,4 | 0,4 | 0,2 | 1,0 | 9,1 |
| Mais | 0,0 | 0,2 | 0,2 | 0,5 | 14,7 |
| Tournesol | 0,0 | 0,7 | 0,4 | 1,1 | 7,0 |
| | 1,3 | 2,5 | 1,5 | 5,3 | 49,6 |

Source ministère de l'agriculture de l'Ukraine

La logistique



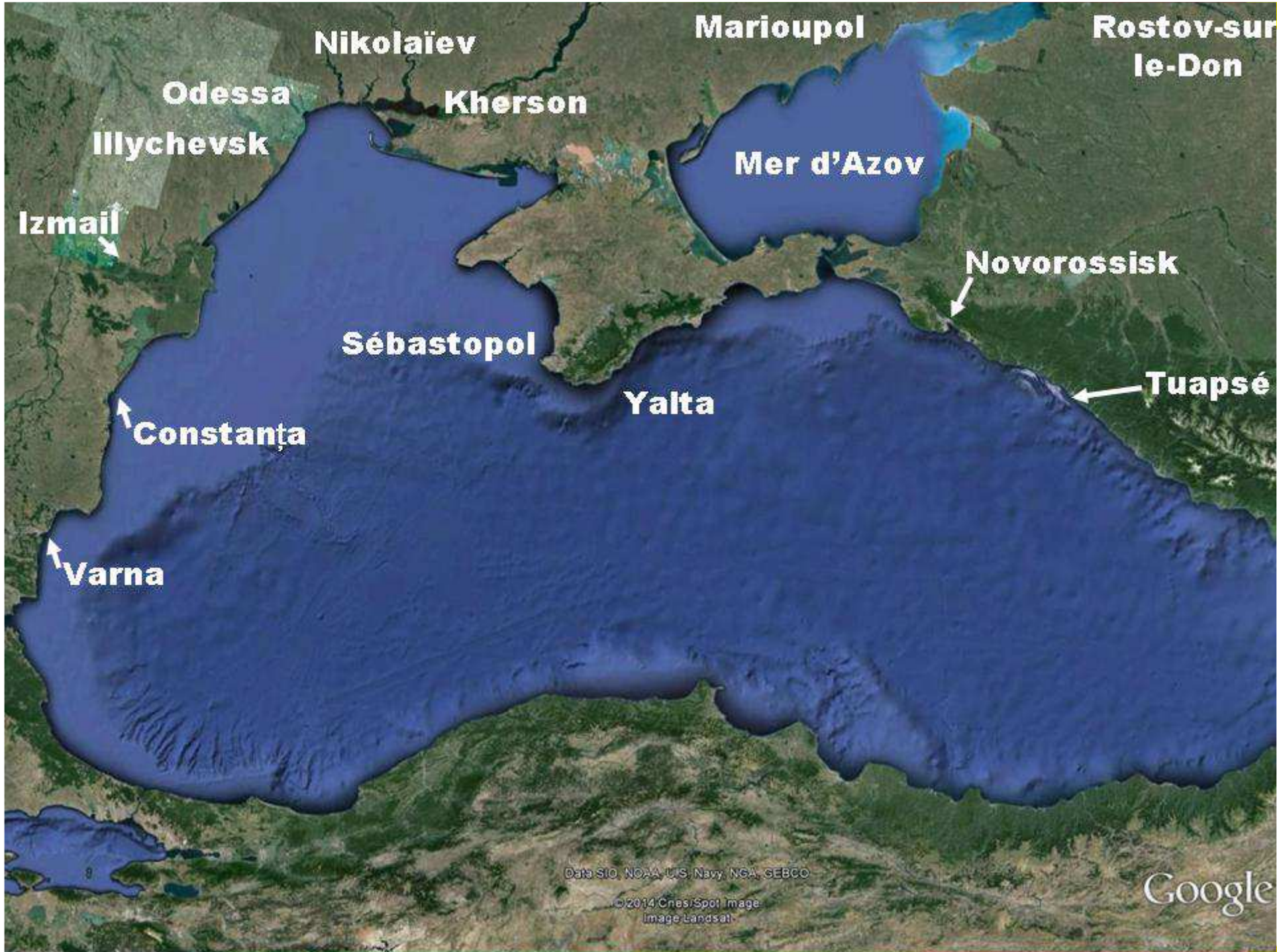
Réseau ferroviaire en Ukraine



Les grands ports du temps de



Source Atlas de la Russie et des pays proches, Reclus-La Documentation Française



Nikolaïev

Marioupol

Rostov-sur-le-Don

Odessa

Kherson

Mer d'Azov

Illychevsk

Izmail

Novorossisk

Sébastienopol

Yalta

Tuapsé

Constanta

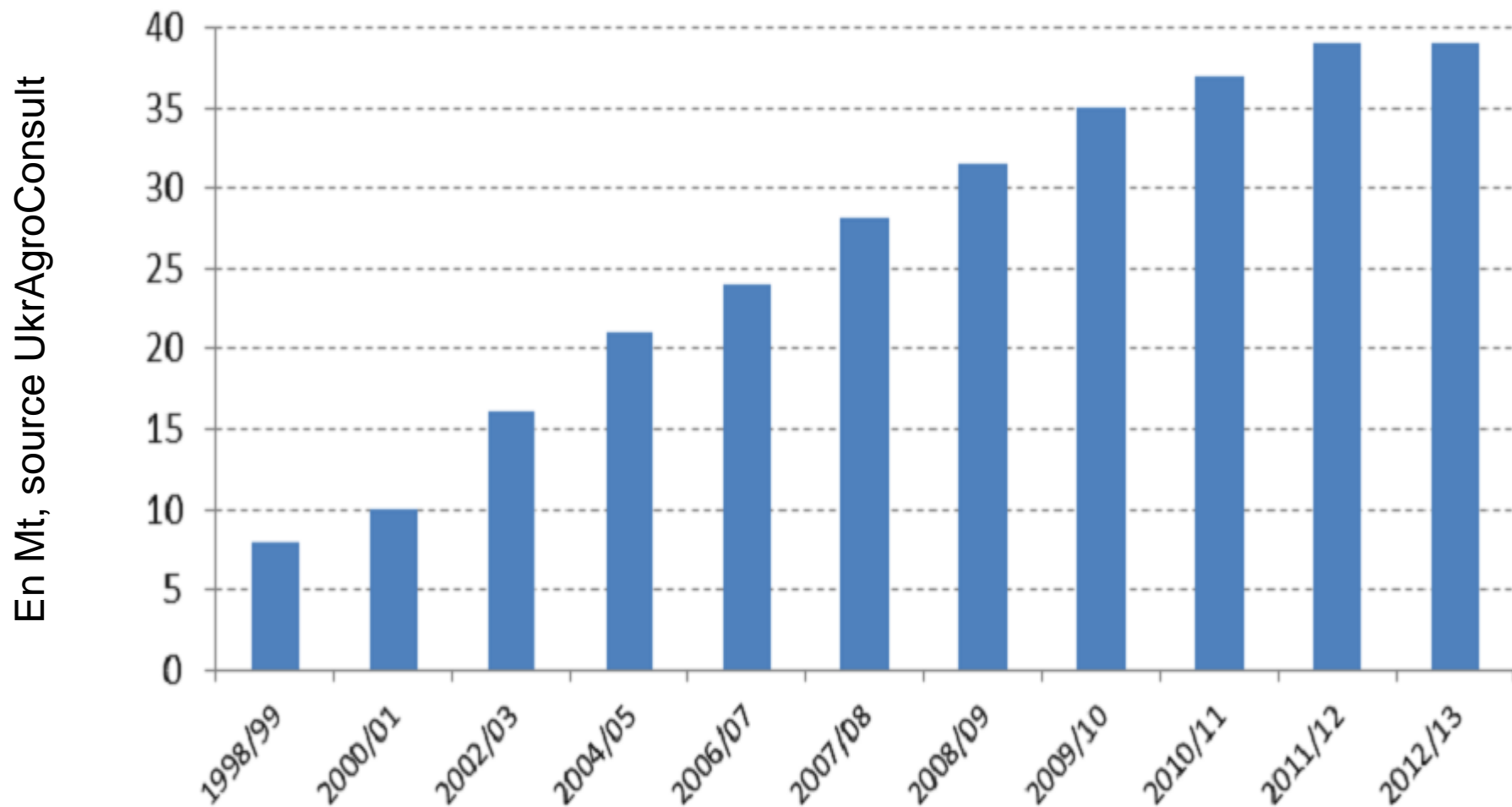
Varna

Data SIO, NOAA, U.S. Navy, NGA, GEBCO

©2014 Ches/Spot Image Image Landsat

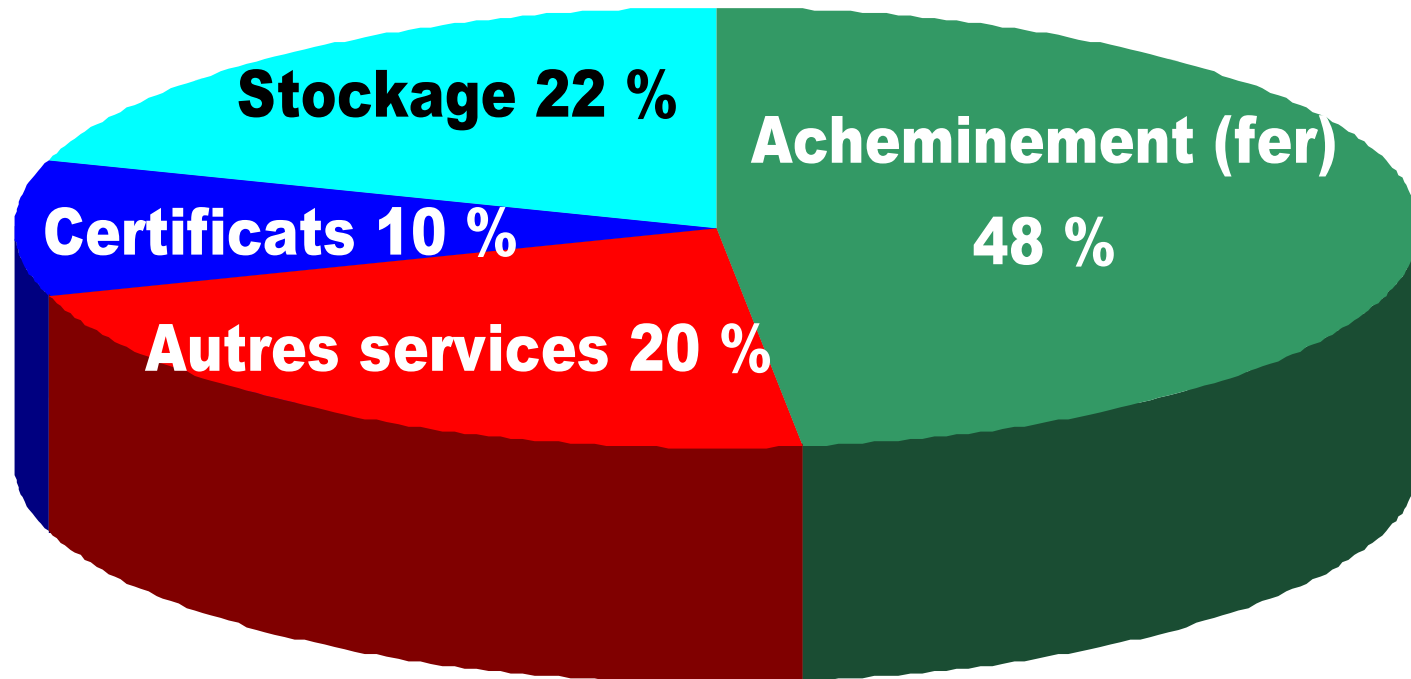
Google

Capacité théorique de manutention des grains des ports ukrainiens 1998-2013



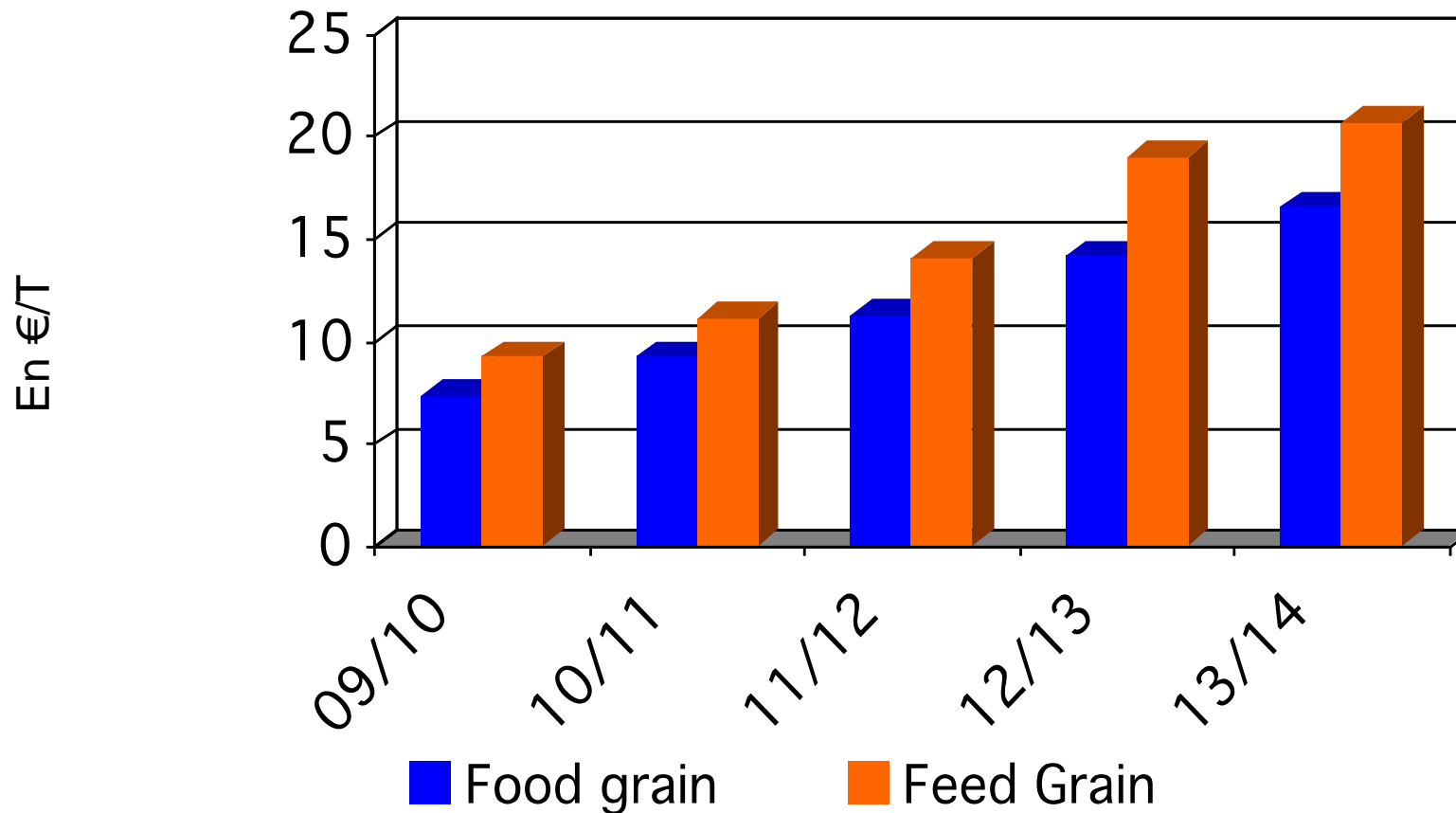
Cout de transport et de mise en fob

En Mt, source UkrAgroConsult



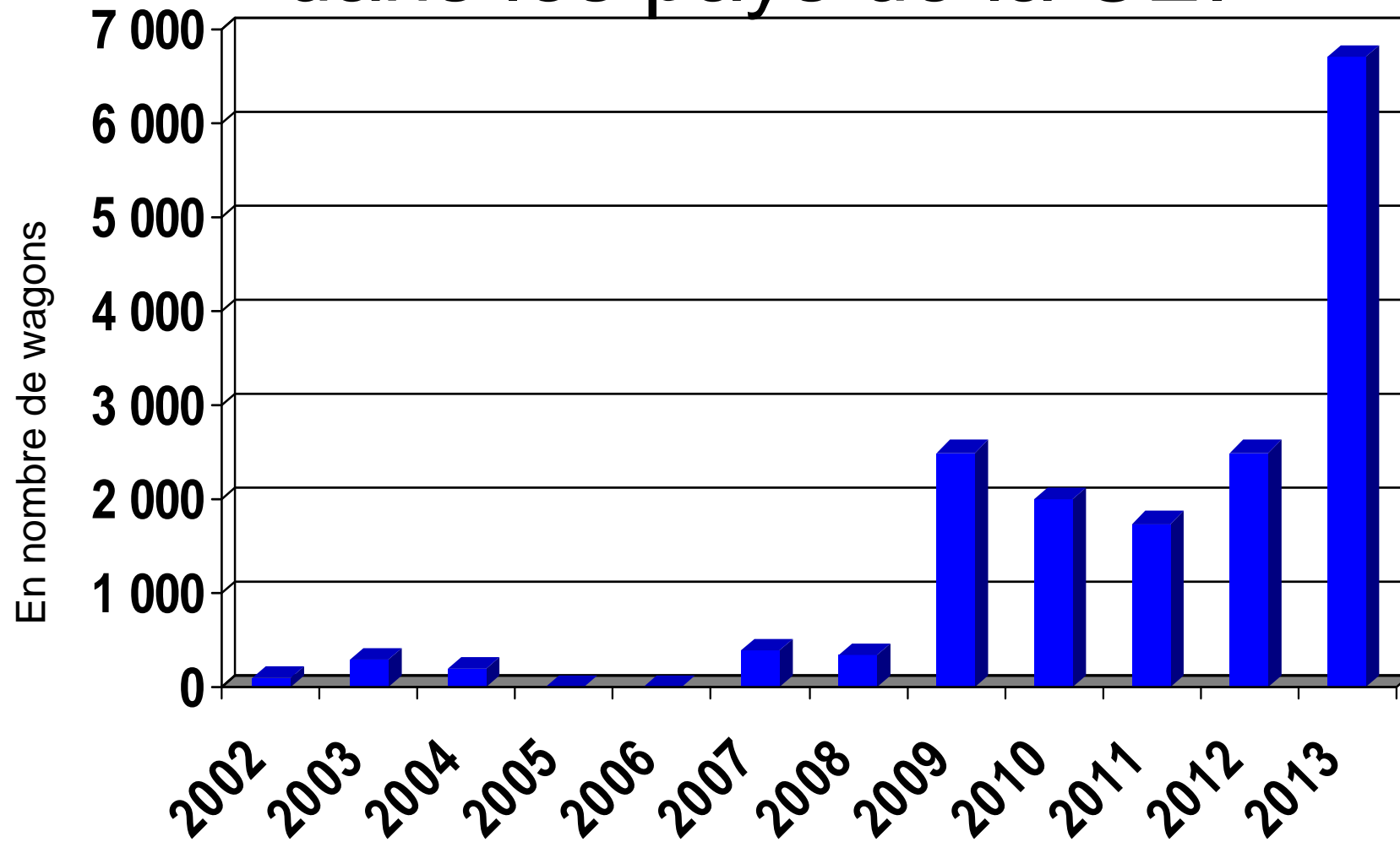
Source : UkrAgroConsult

Evolution des coûts de transport en Ukraine



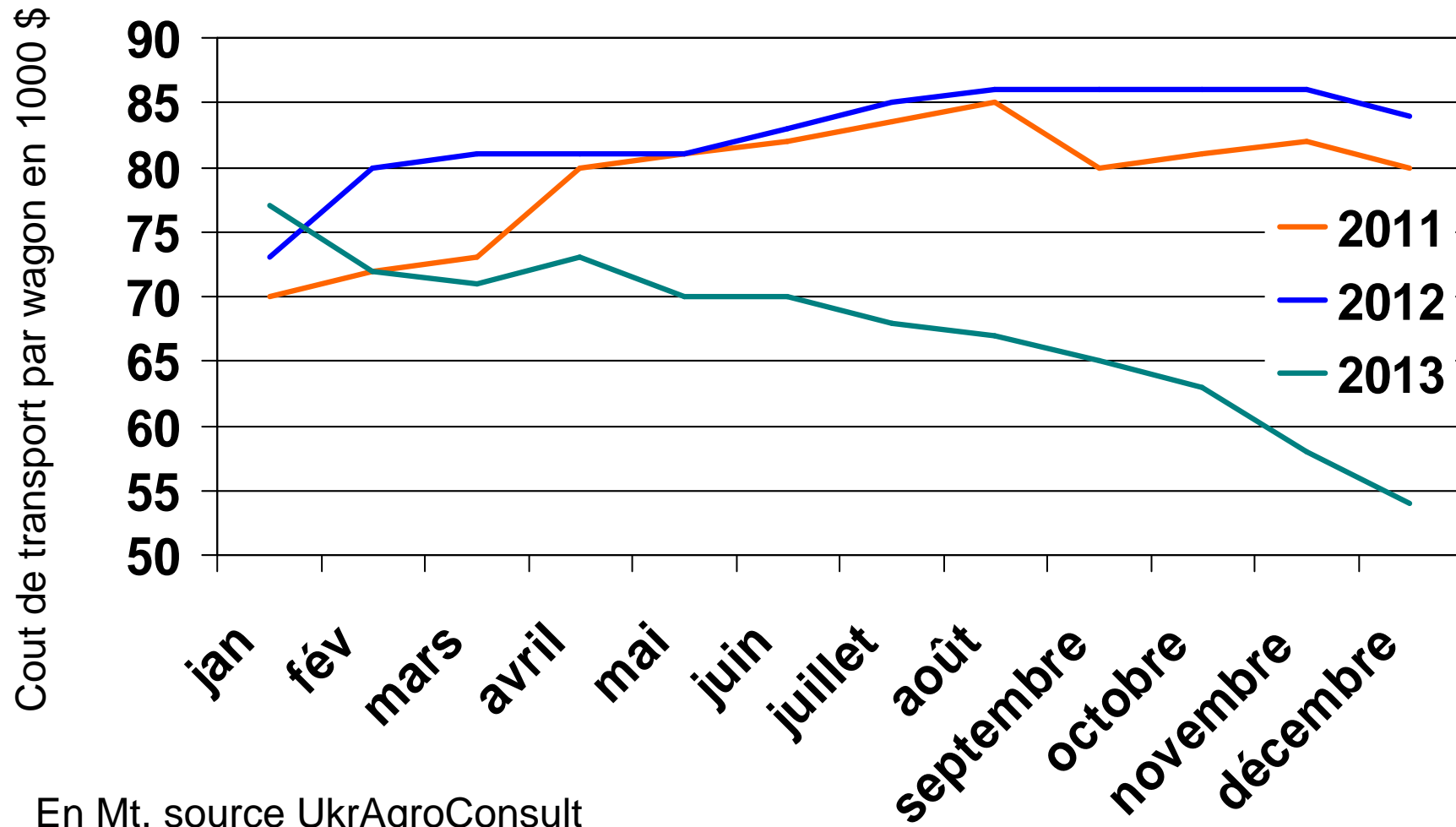
Source : UkrAgroConsult

Construction de wagons-trémies dans les pays de la CEI



Source : UkrAgroConsult

Cout de transport des grains par wagon





Défi de la logistique

- **90% des grains sont exportés à travers les terminaux portuaires.**
- **La capacité des terminaux portuaires environ 55 Mt**
- **Dont 41 Mt dans les régions d'Odessa et de Nikolaïev (74%).**



Défi de la logistique

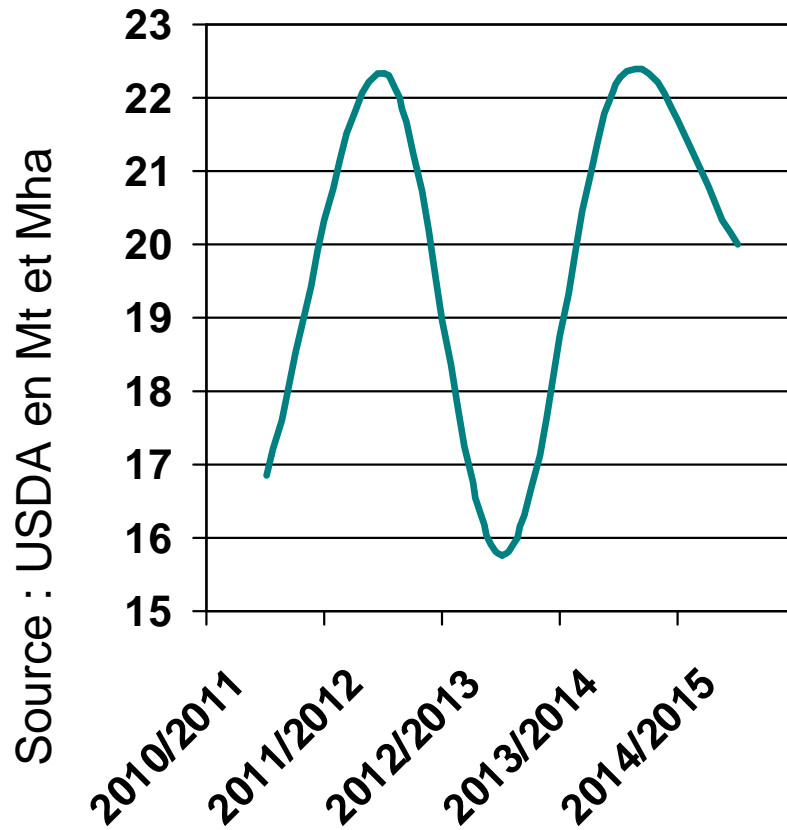
- **Les flux de grains vont se déplacer vers les ports du « grand Odessa »**
- **Probable augmentation des couts de transports**
- **Utilisation intensive des transports fluviaux**

Perspectives 2014/15

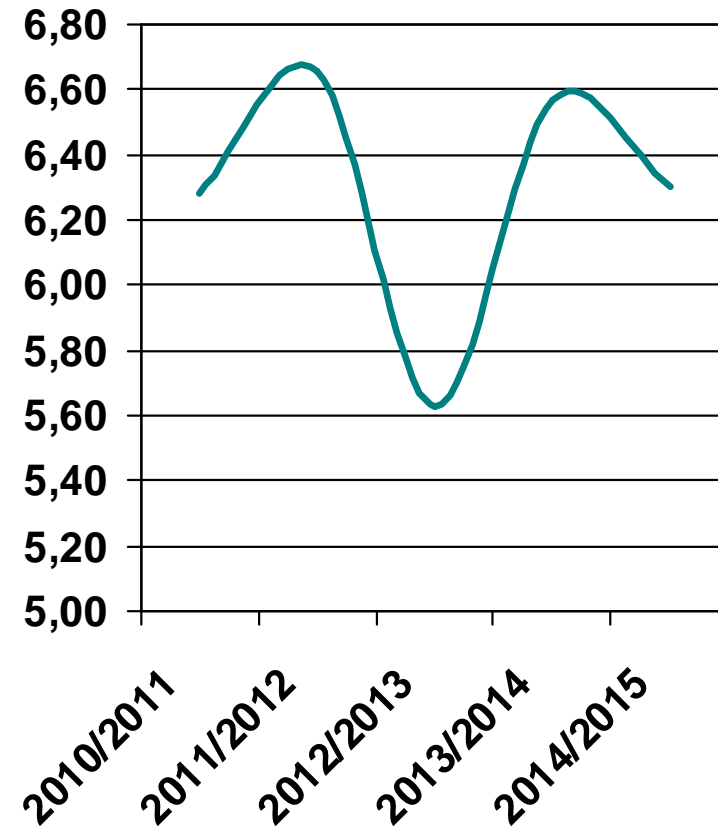


Ukraine : blé

Production

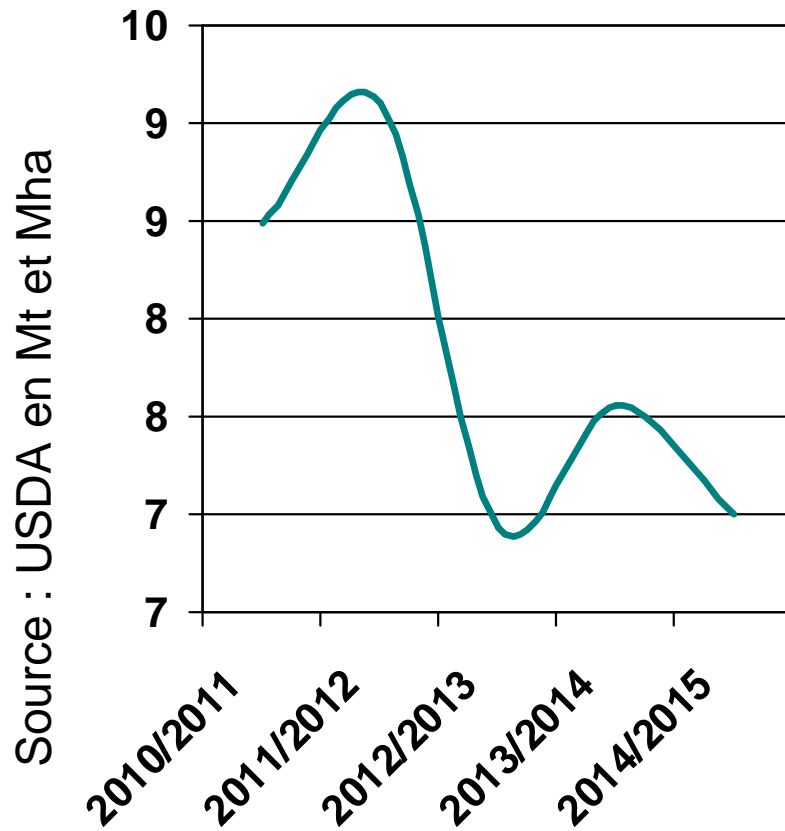


Surfaces

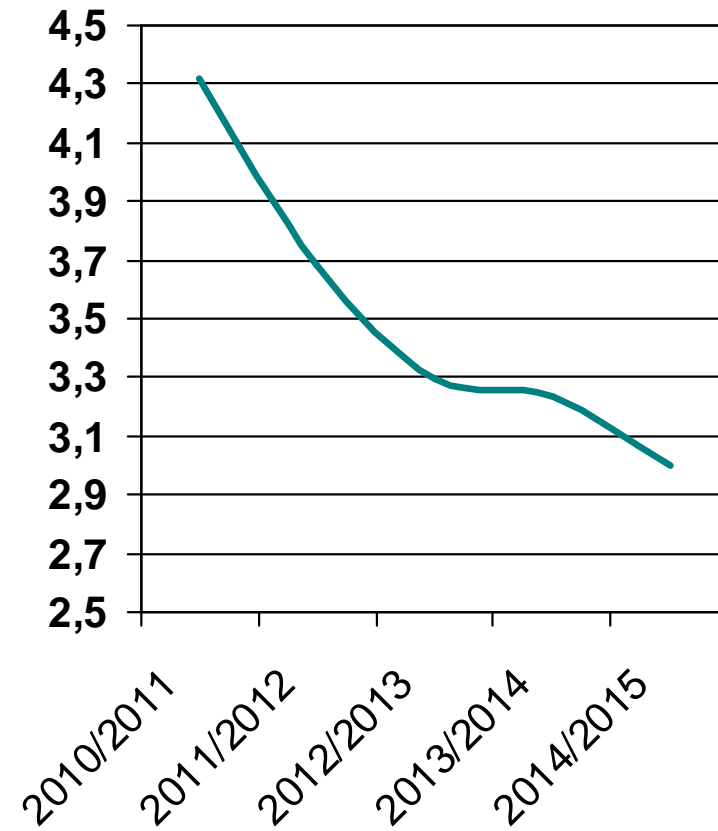


Ukraine : orges

Production

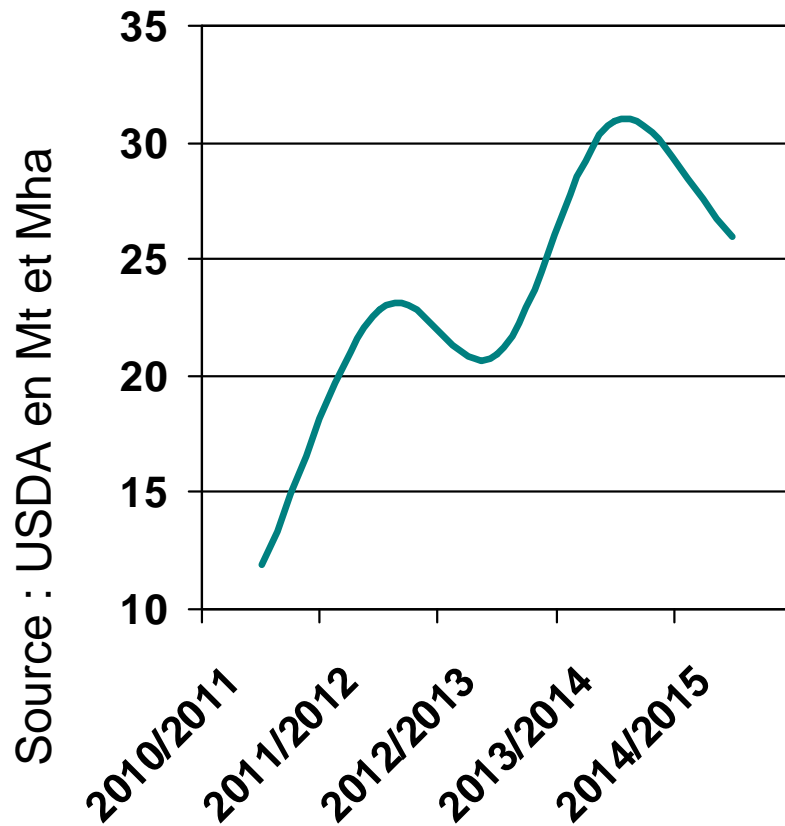


Surfaces

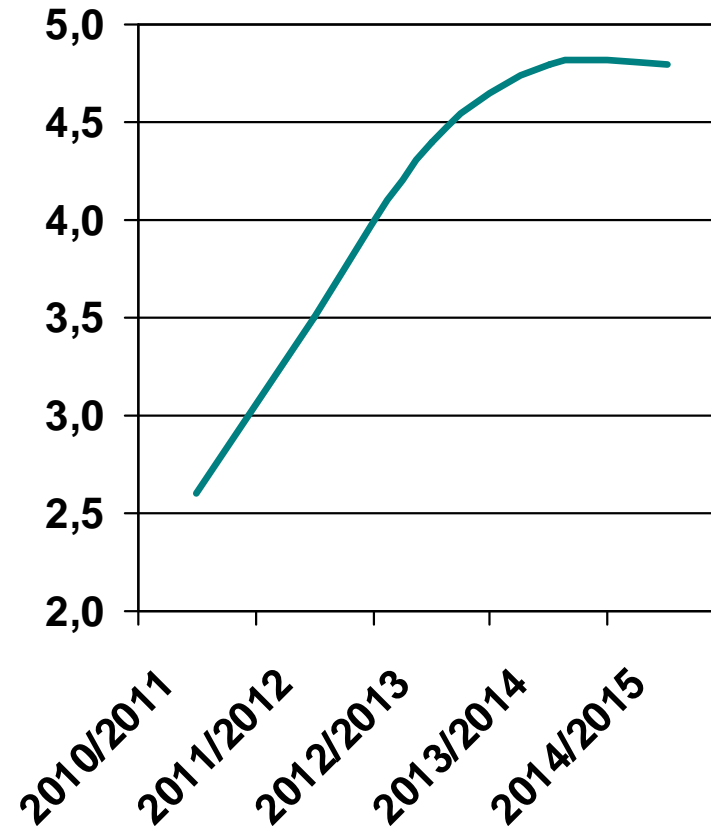


Ukraine : maïs

Production

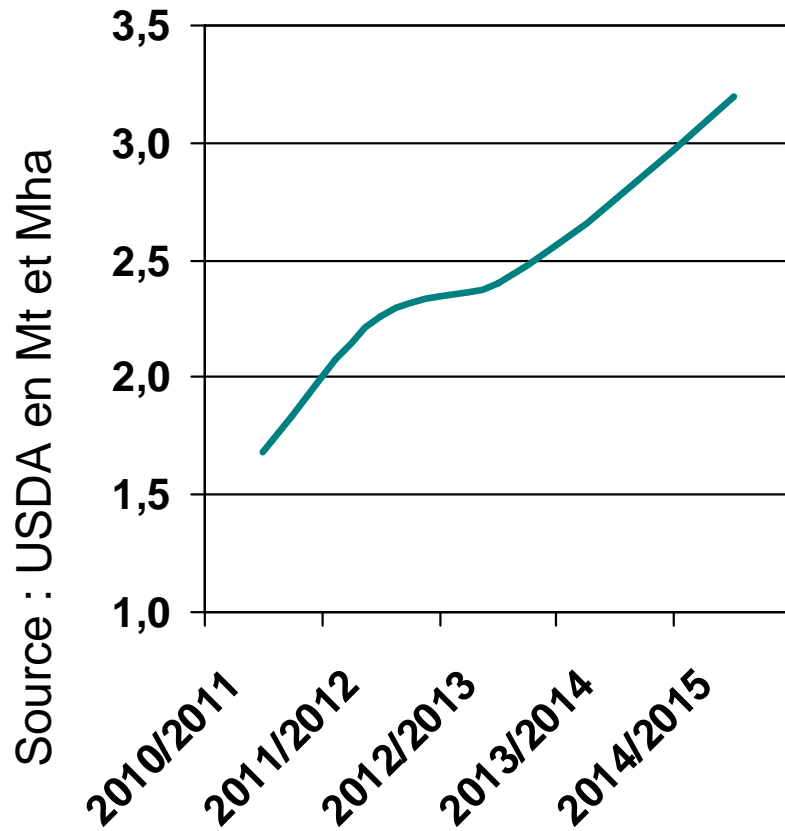


Surfaces

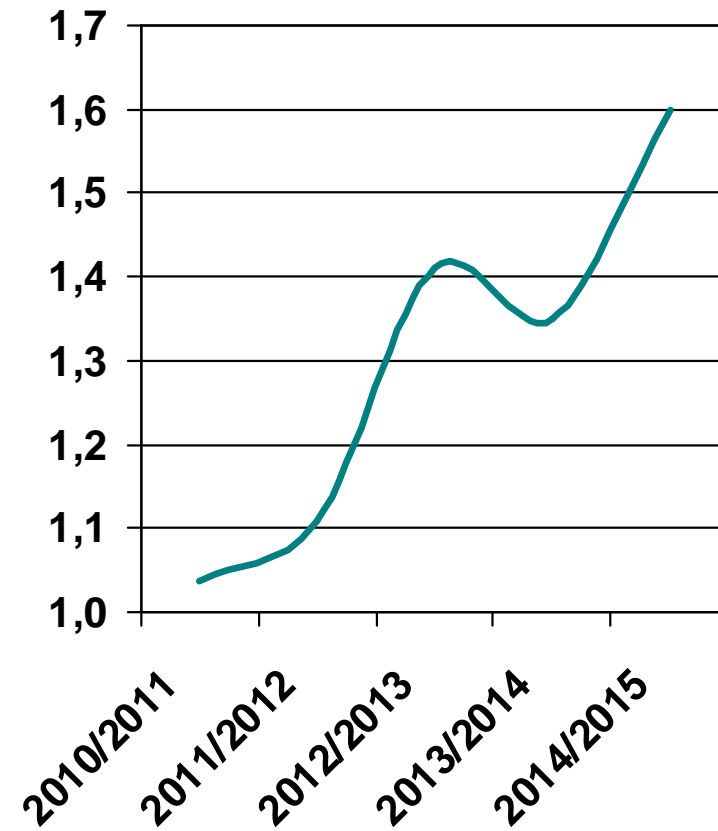


Ukraine : soja

Production

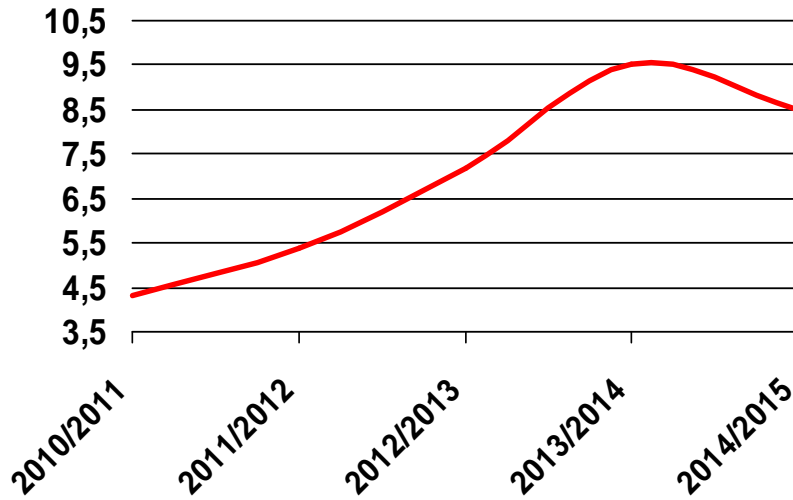


Surfaces

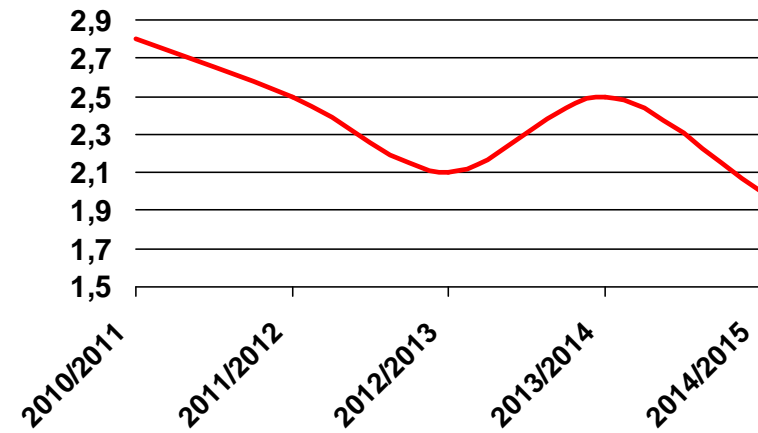


Exportations

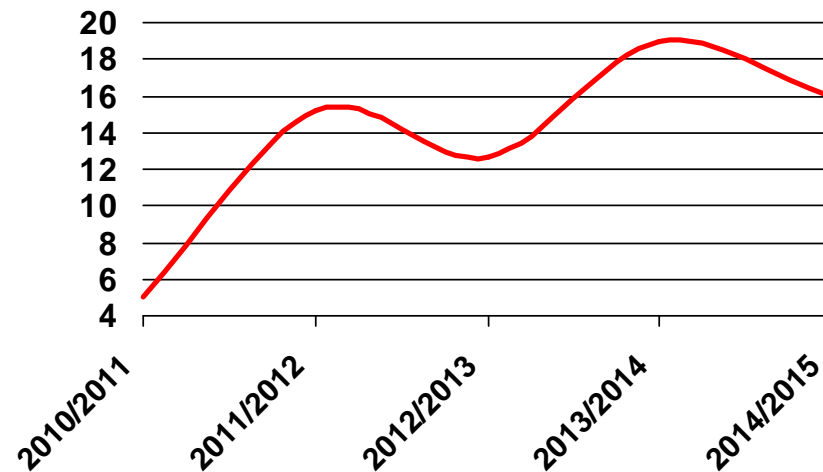
Blé tendre



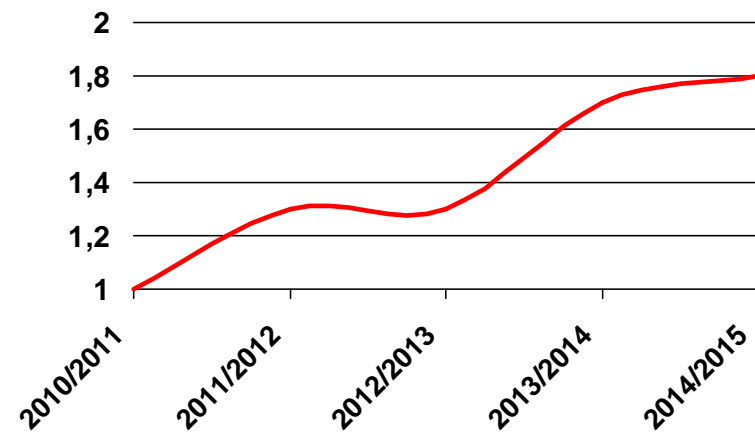
Orge



Maïs



Soja

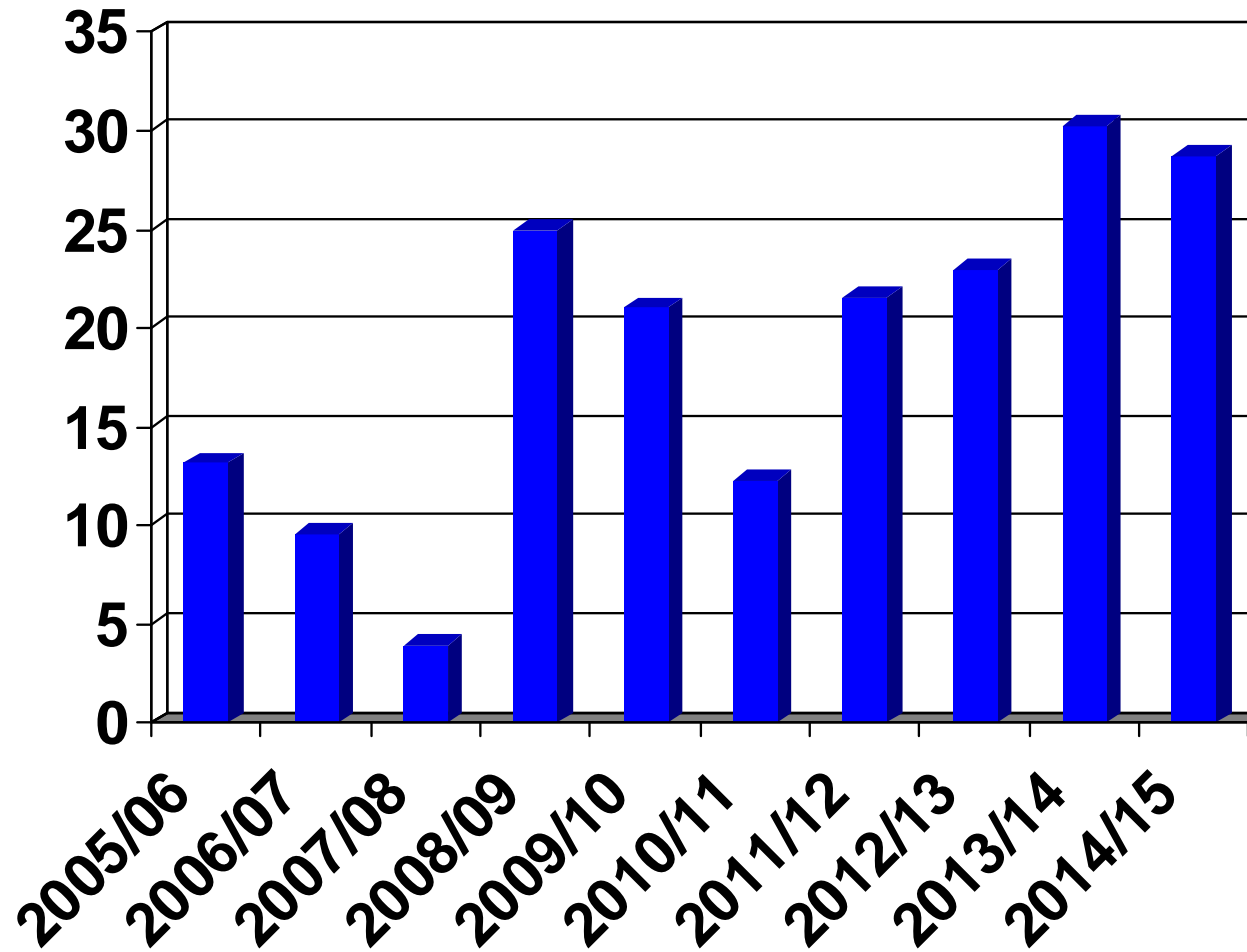


Source : USDA

Ukraine : un exportateur qui monte

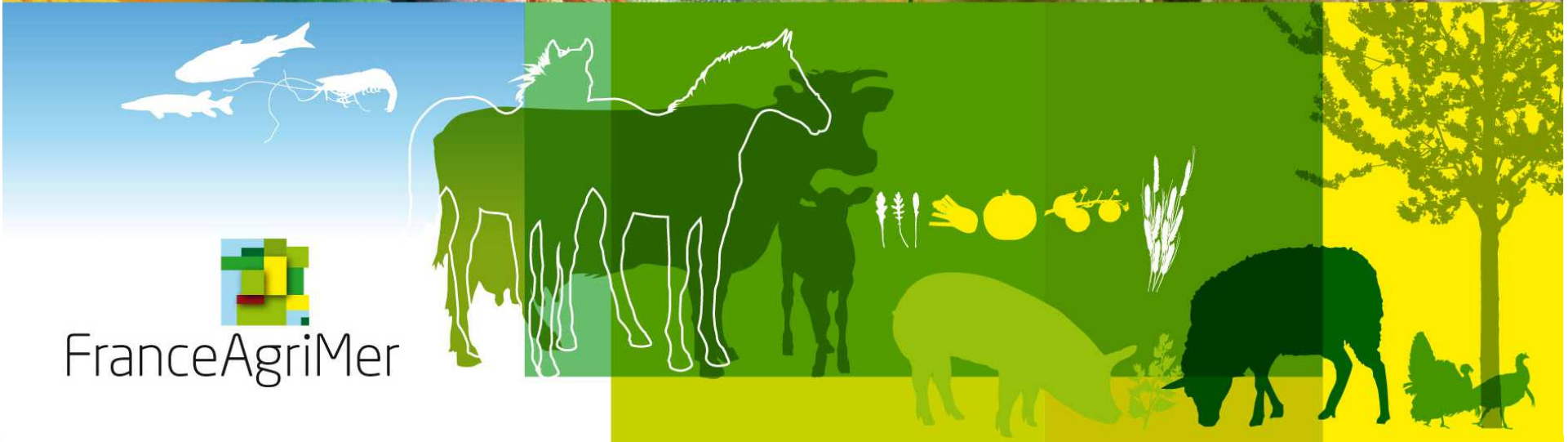
Toutes céréales, en Mt

Source : CIC



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