

## UKRAINE FACT SHEET

December 2023

### IMPACT OF RUSSIAN AGGRESSION AGAINST UKRAINE SINCE FEBRUARY 24, 2022

- **War Crimes.** > 112k Russian aggression-related and war crimes registered since the start of the full-scale invasion<sup>1</sup>; > 1,200 attacks on hospitals and medical workers, 2,420 damaged or destroyed educational institutions, and circa 1,000 kindergartens.<sup>2</sup> (*Prosecutor General's Office*)
- **Refugees and Displaced Persons.** 5.8m Ukrainian refugees are officially reported globally<sup>3</sup>; nearly 4.6m remain internally displaced<sup>4</sup> (*UN Refugee Agency, IOM*)
- **Deportations.** Number of deported Ukrainians to Russia officially registered is about 1.3 m<sup>3</sup>, unofficially, it varies from 2.8 to 4.7m<sup>5</sup>. 20k children have been illegally deported<sup>6</sup>. Over 1.5m children are said to be brought to Russia since 2014<sup>7</sup> (*National Resistance Center, Regional Human Rights Center, Ministry of Reintegration*)
- **Forced Adoptions.** About 20,000 Ukrainian children were deported to be forced into adoption in Russia<sup>8</sup>, 400 adoptions with verified information and names<sup>9</sup> (*Presidential Commissioners for Children's and Human Rights*)
- **Total Number of Attacks against over 60% of Civilian Targets<sup>10</sup>.** > 6,500 ballistic and cruise missiles; > 4,600 drone attacks<sup>11</sup> (*Presidents Administration, Ukrainian Armed Forces*)
- **Cumulative Number of Air Raid Sirens Nationwide.** Over 29,800 sirens, adding up to the equivalent of 20 days-long of sirens in Western regions, >42 days in Kyiv, > 135 days in Donetsk region<sup>12</sup> (*alerts.in.ua*)
- **Infrastructure Losses.** Over 30% of infrastructure has been destroyed, with a replacement cost of circa US \$270bn<sup>13</sup>
- **Total Cost of Reconstruction and Recovery.** US \$411bn as of February 2023<sup>14</sup> (*Ukraine's Government, EC, WB, UN*)
- **Economic Losses.** -29.2% YoY fall in real GDP in 2022; 27% of GDP budget deficit, excluding grants<sup>15</sup>; Black Sea port operations blocked; -35% YoY in merchandized exports<sup>16</sup>; unemployment surged >2x YoY (to over 20%)<sup>17</sup>; poverty coefficient – increased 5x to 24%<sup>18</sup> (*NBU, Ministry of the Economy, WB*)
- **Mined Area.** 30% of Ukrainian territory is mined (the equivalent of double Austria's size or 8x the size of Israel)<sup>19</sup>; according to different estimates, 30<sup>20</sup>-70<sup>21</sup>, or even up to 757<sup>22</sup> years is estimated to be required to demine Ukraine completely (*State Emergency Service of Ukraine*)

### MILITARY AID PROVIDED BY U.S. AND ALLIES TO UKRAINE HAS ENABLED SUCCESSFUL DEFENSE OF FREEDOM, TERRITORIAL INTEGRITY, AND FREEDOM FOR THE UKRAINIAN PEOPLE

- **Occupied Territory.** 7% of Ukraine was annexed/occupied pre-2022<sup>23</sup>; 27% - at height in March 2022<sup>24</sup>; ~18% - now<sup>25</sup> (*ISW, War Mapper, WB*)
- **Total Military Aid Committed and Disbursed Since Feb 24<sup>th</sup>:** About \$95bn, including circa \$44bn from the U.S., and remainder primarily from Europe, UK and EU institutions<sup>26</sup> (*Kiel Institute, U.S. Department of State*)
- **Liberated Territory.** Over 54% of the territory occupied since Feb 24<sup>th</sup> has been liberated, representing c. 8m hectares<sup>27</sup> and 1900 settlements<sup>28</sup>, including 30k hectares and over a dozen settlements since summer counter-offensive began<sup>29</sup> (*ISW, Ukraine Armed Forces, Presidential Office*)

### DIRECT FINANCIAL AID TO UKRAINE'S BUDGET FROM THE U.S. AND ALLIES KEEPS STATE OPERATING WHILE TAXES COLLECTED FUND PRIMARILY WAGES OF MILITARY AND SECURITY PERSONNEL

- **Ukraine's 2022 Pre-War Budget Expenditures:** \$53bn; military & security is 6% GDP and 19% of budget or c. \$10bn<sup>30</sup>
- **Ukraine's 2022 Actual Expenditures:** \$83bn; military & security is 33% GDP and 52% of budget or c. \$44bn<sup>31</sup>
- **Ukraine's 2023 Budget Expenditures:** \$73bn; military & security is 26% GDP and 55% of budget or c. \$40bn<sup>32</sup>; further increase of military spending to c. \$47bn which is >30% of GDP was announced in September 2023<sup>33</sup>
- **Ukraine's 2024 Approved Budget:** \$85bn; military & security is 22% GDP and 55% of budget or c. \$46.5bn<sup>34</sup>
- **2022 Support to Budget by U.S. and Allies.** \$32bn, incl. c. \$12bn grants from the U.S., \$8bn from EU, \$2.7bn from IMF, \$1.9bn from Canada<sup>35</sup>, € 1.7bn from EIB<sup>36</sup>, \$5.5bn from Rest of World
- **Total Support to Budget Since Feb 24<sup>th</sup>:** \$68.5n, incl. \$22.9bn from the U.S., \$25.8bn from EU, \$6.3bn from IMF, \$3.6bn from Canada, \$2.1bn from Japan, \$2.0bn from UK, \$2.0 from WB, \$3.8bn from Rest of World<sup>37</sup>

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- **2022 Key Budget Sources.** 61% from collected taxes; 17% from non-tax income (revenues of budgetary institutions and income from property & business activities); 22% from foreign aid in the forms of grants<sup>38</sup>
- **2022 Key Budget Uses.** 52% military & security; 27% social outlays; 8.2% state support; 7.1% healthcare<sup>39</sup>
- **Increasing Tax Income.** Increasing MoM (+25% YoY in UAH terms in 1H23, in USD - flat), covering 38% of total budget spending<sup>40</sup>, including military wages (1/3 of budget spending<sup>41</sup>), while foreign grants help support the running of the state
- **World Bank's PEACE in Ukraine Project.** Partners provided \$4.3bn to reimburse priority social and humanitarian, non-defense related, expenditures for 1Q23; >93% are US grants; Ministry of Finance presented analytical dashboard to increase transparency: 62% were spent for social outlays, 15% for healthcare, 15% for education, 5% for salaries to rescuers of the State Emergency Service<sup>42</sup> (*Ministry of Finance, Presidential website – Dec 2021, NBU*)

## CONTINUED SUPPORT OF UKRAINE IS INVESTMENT IN INTERNATIONAL WORLD ORDER, GLOBAL SECURITY, AND LARGEST REBUILD SINCE WORLD WAR II

- **Ukraine's Significance.** Largest European country by area (excl. RF), with a population of over 40m, incredibly rich in natural resources, home to 20 of the 'critical' raw materials, incl. lithium, cobalt, graphite, and zirconium<sup>43</sup>, while its exports feed more than 400m people worldwide, given 55% of land's area is arable land<sup>44</sup> (*UN, WB*).  
Over 800m people living in neighboring consumer markets, powered by 20 FTAs with 47 countries, including the EU, making Ukraine a critical player in the global supply chain
- **Oil and Gas Deposits.** Produces crude oil, natural gas, and coal; 2nd in Europe for proven gas reserves, c. 1.1 trn m3 proven reserves<sup>45</sup> (*IEA*)
- **Strategic Earth Minerals.** Among the top 10 countries by proven reserves of titanium - 7% of world production<sup>46</sup>. Lithium reserves, a key component for rechargeable batteries, account for c. a third of those proven in Europe<sup>47</sup> (*ERMA*)
- **IT Powerhouse.** IT is the fastest-growing industry and largest category of services exports (45% in 2022), reaching \$7.3bn vs. \$2bn in 2015, up 2.5x in the last 5 years and ~60x over last 20 years, incl. +6% in 2022<sup>48</sup> (*NBU*)
- **Immense Tech Talent Pool.** One of the highest levels of IT / Tech graduates per capita in Europe, ahead of UK, FR, IT, PL, RO and top-5 globally by the number of tech specialists - over 360k, +15% annually<sup>49</sup> (*UA IT Association*)  
Ukrainian developers rank in the top 5-10 globally in multiple rankings (*SkillValue, Topcoder, HackerRank*). Home to largest number of unicorns in CEE (5), over 100 R&D centers of global businesses, top-3 in CEE by the Tech Ecosystem growth for the last 5 years, incl. 2022, >9x since 2017 (*Ukrainian IT Association*)
- **Major Digitalization Underway.** One of the most advanced countries in the world in terms of digitizing public services: 30 public services & 14 documents in smartphone (about 90 services on official website<sup>50</sup>), used by 19m Ukrainians (>50%) in "Diia", a govt services superapp<sup>51</sup> (*MinDigital*)

## ENSURING UKRAINE'S AGRICULTURAL EXPORTS CONTINUE AND SHIPPING ROUTES OPEN IS KEY TO GLOBAL FOOD SECURITY

- **Agricultural Powerhouse.** In 2021, Ukraine accounted for 10% of global grain trade, ranking as the 4th-largest exporter after the US, Argentina, and Russia. The EU – all 27 members combined – was ranked 5<sup>th</sup><sup>52</sup>
- **Record Breaking 2021.** Ukraine delivered a record-breaking \$28bn of agricultural exports in 2021. Exports included over 50% of global supply of sunflower meal and oil, c. 20% of global export of rapeseed and barley, 3<sup>rd</sup> among global exporters; 4<sup>th</sup> globally in the export of corn (c.12% of global export) and 5<sup>th</sup> in the export of wheat (9%)<sup>53</sup>
- **Key Partner to International Relief Agencies.** World Food Program (WFP), the UN's humanitarian food-assistance, obtains 50% of its wheat from Ukraine, share increased to 80% as of July 2023<sup>54</sup>
- **Feeds Disproportionate Share of World's Hungry.** Largest buyers of Ukrainian grain traditionally are Asian and African countries (50%), followed by Europe (c. 25%). Low-income countries, like Djibouti, Eritrea, Lebanon, Mauritania, or Tunisia are very much dependent on Ukrainian wheat – at least 40% of grain in each is from Ukraine<sup>55</sup>
- **Ukraine Continue to Feed World since February 24<sup>th</sup>.** During 2022, \$23.7bn in agricultural exports, given the Grain Initiative and established alternative export routes<sup>56</sup> In 2023 marketing year, only 25% of Ukraine's harvest will be used for domestic needs, while the reest will be exported to countries at risk of famine.<sup>57</sup>
- **July 2022 –July 2023 UN-brokered Grain Deal.** >1 000 ships with almost 33m tons of grain and other foodstuffs left Ukraine from 3 Ukrainian ports (Chornomorsk, Odesa and Yuzhny/Pivdennyi) during this time. Over 65% of the wheat exported through the Black Sea Grain Initiative reached developing countries<sup>58</sup>

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- **Destroyed Port infrastructure.** 105 port infrastructure objects were damaged<sup>59</sup>, amounting to over \$0.6bn as of June 2023<sup>60</sup>(KSE Institute). Since July, Russia has destroyed over 280 tons of Ukrainian grain held in ports<sup>61</sup>, total cost of damages is not estimated yet.
- **Recent Attacks on Port Infrastructure.** 16 massive attacks in September alone, each attack comprised of 30-40 Iranian drones, on average<sup>62</sup>
- **Impact of Loss of Ukraine Agricultural Exports.** Loss of export revenues without seaborne grain exports at c. \$0.2bn-0.4bn monthly; monthly export to African, Asian and European countries cut by almost 3m tonnes<sup>63</sup>

Sources: *Dragon Capital, European Council, World Bank, public data sources.*

## A CORRUPTION-FREE UKRAINE IS AT THE TOP OF UKRAINE'S AGENDA

- **Key institutions launched.** (i) National Agency on Corruption Prevention (NACP), Aug 2016, led by Oleksandr Novikov since 2020; (ii) National Anti-Corruption Bureau of Ukraine (NABU), formed 2014, launched Apr 2015, led by Semen Kryvonos since March 2023; (iii) Specialized Anti-Corruption Prosecutors Office (SAP), formed Sep 2015, launched c. Apr 2016, led by Oleksandr Klymenko, since Jul 2022 (vacant 2 years prior); (iv) High Anti-Corruption Court (**HACC**), launched Apr 2019, led by Vira Mykhailenko since Feb 2023
- **Major Milestones Reached.** (i) fully formed, functioning independent anti-corruption infrastructure after 2022/23 NABU, SAP, and HACC heads' appointments; (ii) Ukraine removed from GRECO (Council of Europe AntiCor Body) blacklist in March 2023; 1<sup>st</sup> time in 32 years based on progress over 5 years since 2017
- **Prevention Stats (NACP).** >1 million annual e-declarations of civil servants; on standby since March 2022, renewed in September 2023 though the obligation to make statements public in one year; President vetoed law, insisting on public declarations immediately, except for select cases incl Armed Forces – expected to be voted through in September
- **Investigation Stats (NABU) and Prosecution Stats (SAP).** 456 investigations opened in 2022<sup>64</sup> vs. 633 in 2021<sup>65</sup> <sup>66</sup>; 129 accused officials in 2022, 147 in 1H23<sup>67</sup> NABU and SAP saved the state \$46m in 1H23 alone<sup>68</sup> (\$92m in 2022<sup>69</sup>, c.\$70m in 2021<sup>70</sup>)
- **High-Anti Corruption Court Stats.** 139 verdicts in 4 years (37 in 2022), 157 corruption sentences<sup>71</sup> (49 in 2022<sup>72</sup>)
- **E-procurement Platform.** Prozorro launched in 2016, mandatory for most state-owned enterprises, government bodies, law enforcement agencies, territorial communities; 160k competitive purchases in 2022, totaling \$6bn, with 33k individuals/ entities taking part<sup>73</sup>. Savings to the government est. at ~\$165mm in 2022<sup>74</sup>
- **Military & Other Aid Oversight.** Monitored through the defense attaché of the US in Kyiv and establishment of the Security Assistance Group-Ukraine. Ministry of Finance, with WB, Deloitte, PWC and BDO audit carries out review according to agreed procedures of eligibility of public government expenditures (under USAID SOREA Project)
- **High-Profile Cases.** In September 2023, criminal case was initiated against oligarch Igor Kolomoisky – in a \$250m money-laundering case<sup>75</sup>; in May 2023, NABU and SAPO exposed a \$2.7m bribery scheme involving the head of the Supreme Court, exposed corrupt actions by 26 heads of state-owned enterprises, held 7 judges accountable 1H23 <sup>76</sup>
- **Lifetime status for Politically Exposed Persons (PEPs).** Ukrainian parliament passed IMF-EU-required legislation on politically exposed persons that reinstated lifetime status for PEPs, related to fight against money laundering, removing an earlier provision that limited it to three years.
- **Conscription Transparency.** President Volodymyr Zelenskyy dismissed all officials in charge of regional military recruitment centers in August 2023<sup>77</sup>, resulting in 112 criminal proceedings on corruption charges<sup>78</sup>; announced review of all issued exemptions from military since the start of full-scale invasion

Sources: *Council of Europe, Presidential website, NACP, NABU, SAPO, HACC, Prozorro websites, public data sources.*

## ABOUT THE AMERICAN CHAMBER OF COMMERCE IN UKRAINE:

The American Chamber of Commerce is Ukraine's leading international business association that has been serving 600+ members in Ukraine since 1992, delivering the shared voice of best-in-class US, international, and Ukrainian companies, who invested over \$50 billion in Ukraine and remain committed to the country.

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**President:** *Andy Hunder*

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