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How much access do farmers have to agricultural land in Ukraine?
A community-level analysis

Land concentration and its impact on small farmers

Land concentration is not a new problem; it has long been recognised at the global level as a source of economic, social, and environmental risks for rural development – and it does not only occur in developing countries: land grabbing processes are observed in different regions of the world, regardless of the level of economic development or democracy. The growing interest of academic institutions and public organisations in the issue of land concentration and land grabbing became particularly noticeable in the second half of the 2000s. This was associated with an increase in large-scale land investments against the backdrop of the global food and financial crises, when countries, companies, and investors began to actively buy and lease land, considering it a strategic and reliable resource.

The term "land grabbing" can be defined as control over significant areas of land by individuals or legal entities (state or private, foreign, or domestic), exercised with the aim of expanding the use of and control over resources or commercialising production, often to the detriment of the environment, balanced land use, food security, and human rights[1]. In addition, land grabbing is often closely linked to land concentration, which refers to the increasing accumulation of land in the hands of a limited number of owners or users.

In Ukraine, the problem of land concentration was previously mainly analysed at the national or regional levels, taking into account the assessment of the land bank of individual companies or groups of companies. The issue of land concentration at the community level and its impact on small farmers' access to land remains insufficiently studied, although it is precisely this level that allows for a better understanding of the real socio-economic consequences – particularly in view of the specific structure of agricultural producers that has formed in the country, that is, from farmers (up to 100 hectares of land) to agricultural holdings (100,000 hectares and more).

Smallholder farmers are among the most vulnerable groups affected by land concentration. They provide employment in rural areas and support food security within communities and the local economy. At the same time, access to land is becoming increasingly difficult for them due to heightened competition from large-scale agricultural businesses, rising rents, and the risk of land transfer to large tenants. The issue of smallholder farmers' capacity has been further exacerbated by the onset of full-scale encroachment and the subsequent opening of the land market to legal entities.

[1] What is land grabbing? — Available at https://www.fao.org/family—farming/detail/en/c/1010775/

Research objective and scope

The Centre for Environmental Initiatives Ecoaction, a civil society organisation based in Ukraine, undertook research to both identify the level of concentration of agricultural land within communities and examine the results of a sociological survey of farmers in the different regions of Ukraine to assess the implications of this land concentration on community development. Importantly, this analysis also sought to understand farmers' interactions with agricultural holdings, the obstacles they face in expanding their own land banks, and their sense of fairness in the land market, including their expectations regarding state policy, support, and regulation of it.

This study presents maps of agricultural land concentration at the community level within three regions in Ukraine – Kyiv, Sumy, and Vinnytsia – in order to identify differences and trends using data collected in cooperation with "Vkursi Zemli", a portal for accessing land parcel analytics. While the maps present information for 2022-2024, and thus the data may differ slightly at present, since the land market is already largely established, significant changes in land distribution are not expected and therefore certain trends can still be identified with a high degree of certainty.

Spatial analysis of land concentration at the community level

Within the framework of this study, all companies are conditionally divided into three main groups:

- Small agricultural company: A company that is not part of any group of companies, operates independently, and has Ukrainian beneficiaries.
- Medium-sized agricultural company: A group of companies that has exclusively Ukrainian beneficiaries.
- Agricultural holdings: A group of companies with a vertically integrated structure and foreign beneficiaries.

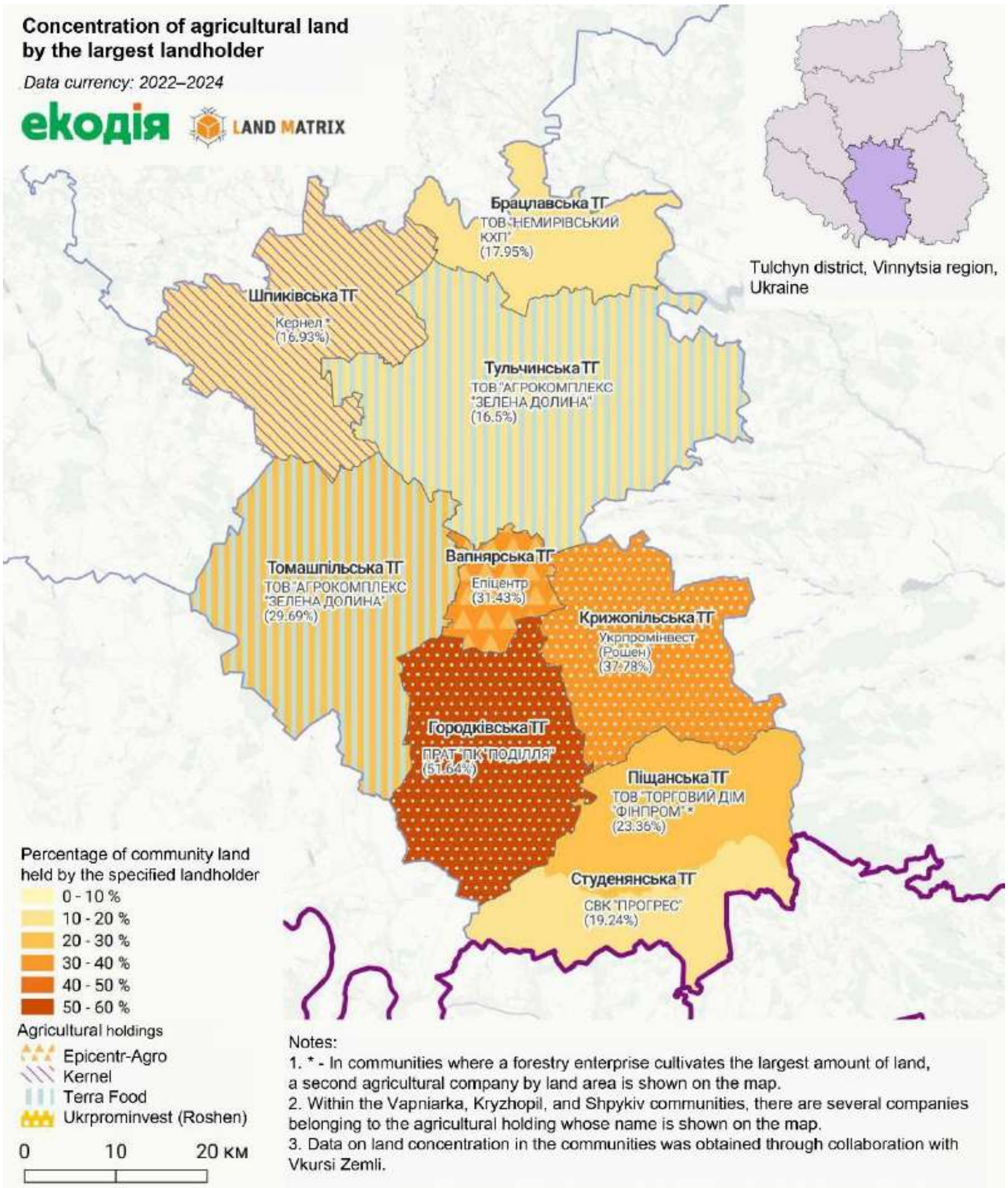
To assess land concentration within a community, a four-level scale has been developed:

Concentration level, %	Description
0-10 %	Low
10.1-30 %	Medium
30.1-50 %	High
Over 50%	Very high

Vinnytsia region, Tulchyn district

Tulchyn district has a mixed structure of land users: alongside agricultural holdings, medium-sized and small companies operate. However, it is agricultural holdings that account for the highest concentration indicators:

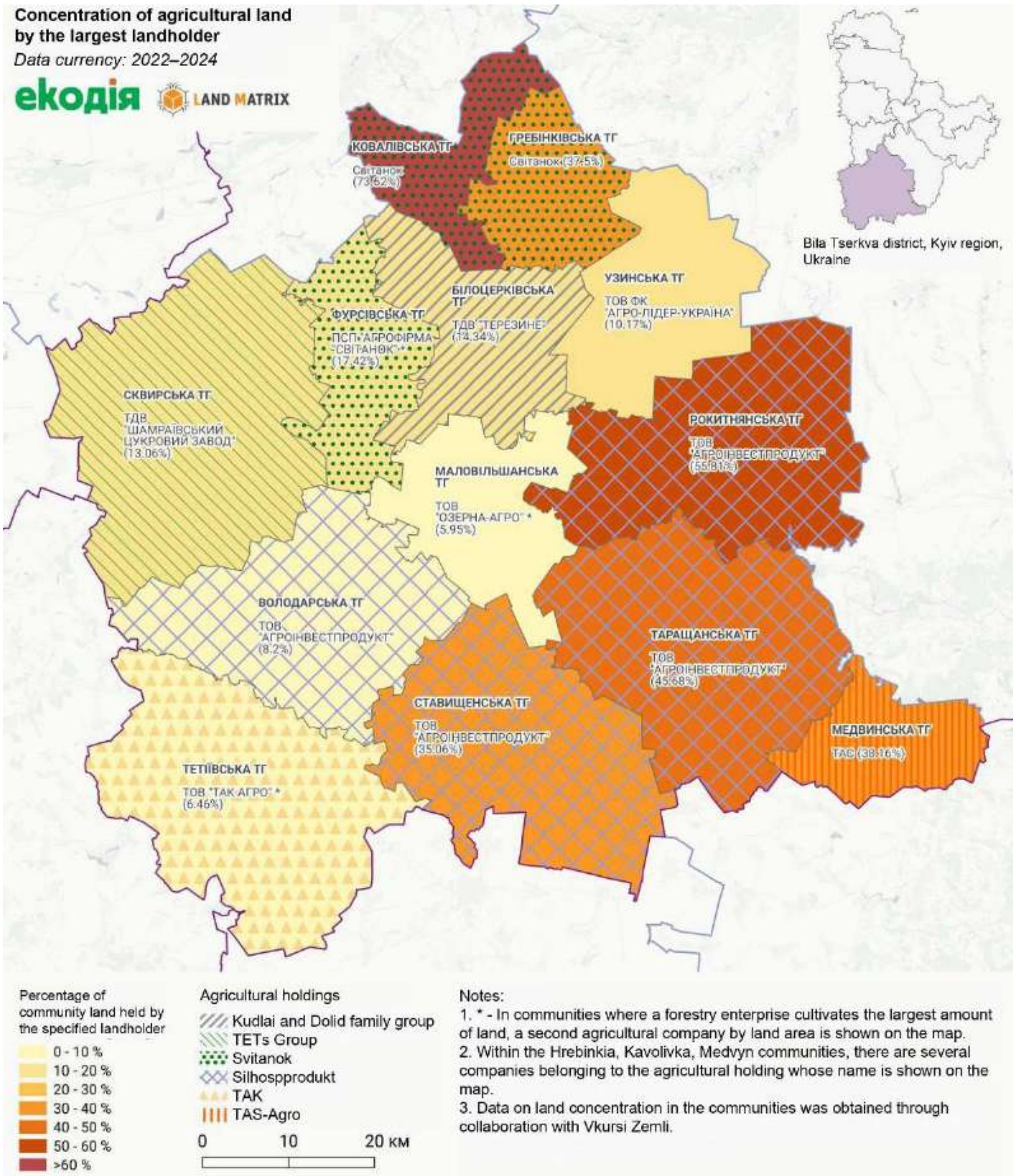
- Companies of the Kernel group use a total of 17% of agricultural land in the Shpykiv community.
- Epicentr-Agro is the largest land user in the Vapniarka community, where several companies of the agricultural holding collectively cultivate 31.43% of agricultural land.
- Ukrprominvest-Agro (Roshen) maintains leadership in two communities: Horodkivka (51.64%) and Kryzhopil (37.78%). In these communities, land concentration is among the highest in the district.



Medium-sized agricultural companies of the Terra Food group also operate in the district. They are the largest land users in the Tulchyn (16.5%) and Tomashpil (29.69%) communities. Small agricultural companies are the largest land users only within three communities of the district: Bratslav (17.95%), Studena (19.24%), and Pishchanka (23.36%).

Kyiv region, Bila Tserkva district

Unlike the Vinnytsia region, Bila Tserkva district of the Kyiv region does not include any of the top 10 agricultural holdings in Ukraine. At the same time, the level of land concentration here remains 'high' and 'very high', based on the four-level scale. Medium-sized agricultural companies play a key role in the district:

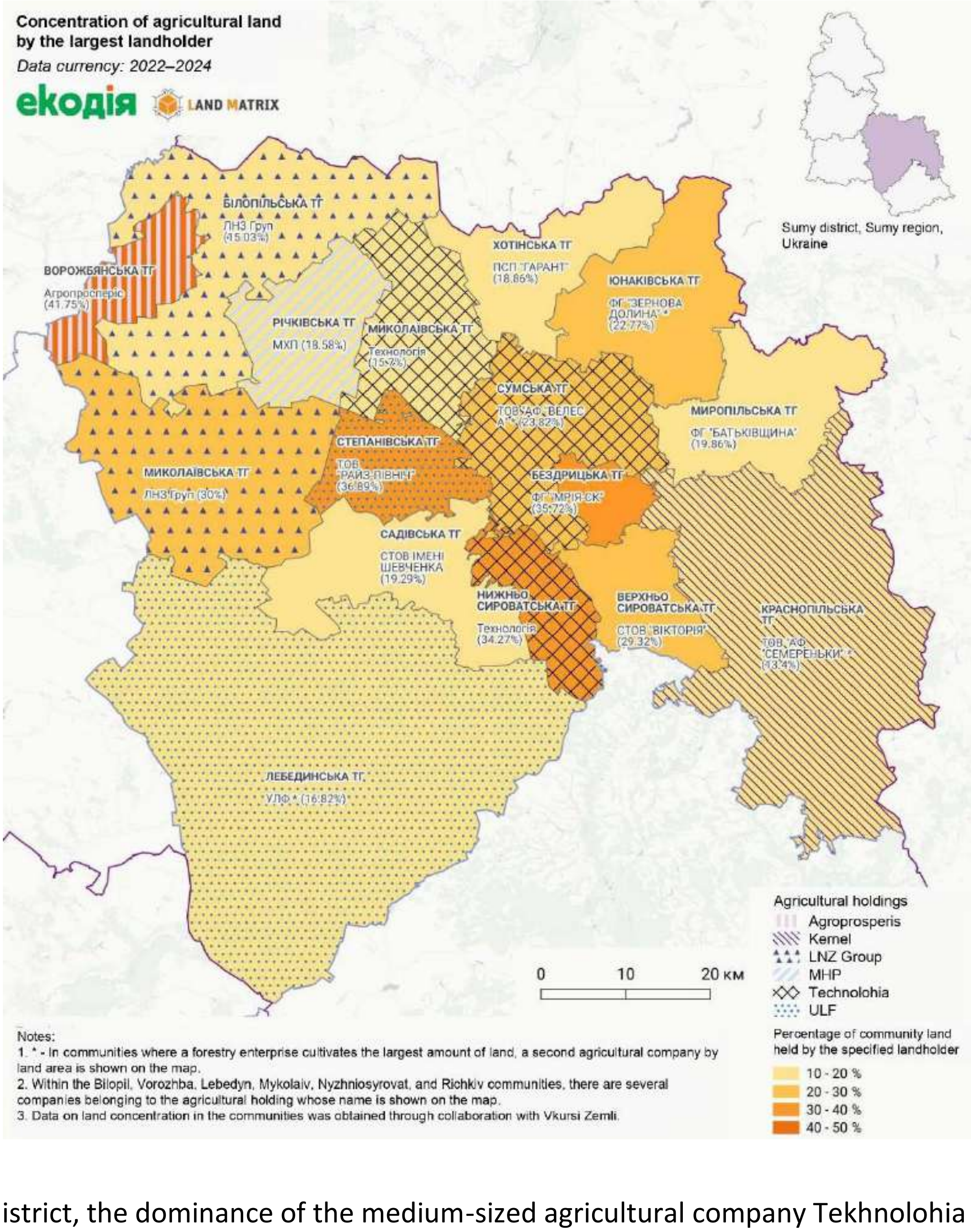


- The Kudlai and Dolid family group cultivates 14.3% of agricultural land in the Bila Tserkva community.
- Silhospprodukt is the largest land user in four communities: Volodarka (8.2%), Rokytne (55.8%), Stavyshche (35%), and Tarashcha (45.7%).
- The Svitanok group dominates within the Fursy community (17.42%), as well as in Hrebinka and Kovalivka, where several companies of the group collectively cultivate 37.45% and 73.6% of agricultural land, respectively. These figures are among the highest in the district.
- TAS-Agro is the largest land user in the Medvyn community, where the group's companies collectively cultivate 38.16% of agricultural land.
- The TETs Group cultivates 13.06% of land in the Skvyra community.
- Tetiiv Agroindustrial Company (TAK) has 6.45% of cultivated land in the Tetiiv community.

Small agricultural companies are the largest land users only in two communities: Mala Vilshanka and Uzyn.

Sumy region, Sumy district

Sumy district demonstrates the most diverse land use structure. In some communities, agricultural holdings and medium-sized agricultural companies dominate, often with medium and high land concentration indicators (over 15-40%). In other communities, small agricultural companies prevail, although the level of land concentration remains ‘medium’ or ‘high’ (18-5%). The highest level of land concentration in the district is held by the Agroprosperis agricultural holding. Its companies collectively cultivate almost 42% of agricultural land in the Vorozhba community. However, companies of the LNZ Group agricultural holding are the largest land users in other communities of the district:



- Mykolaivka (Zhovtneve) – two companies of the group collectively cultivate 30% of agricultural land.
- Bilopillia – 15.03%.

Among other large land users in the district, the MHP agricultural holding operates as the largest tenant in the Richky community (18.6%), the Kernel agricultural holding dominates in the Krasnopillia community (13.4%), and Ukrlandfarming (ULF) is the largest land user in the Stepanivka community (36.9%) as well as in the Lebedyn community, where the group’s companies collectively cultivate 16.82% of agricultural land.

In the central part of the district, the dominance of the medium-sized agricultural company Tekhnolohia is notable. Its companies are the largest land users in three communities: Mykolaivka (15.7%), Sumy (23.82%), and Nyzhnia Syrovatka (34.27%). In six communities, the largest areas are cultivated by small agricultural companies, specifically: Bezdryk (35.72%), Verkhnia Syrovatka (29.32%), Myropillia (19.85%), Sad (19.29%), Khotin (18.86%), and Yunakivka (22.77%).

How farmers perceive land concentration

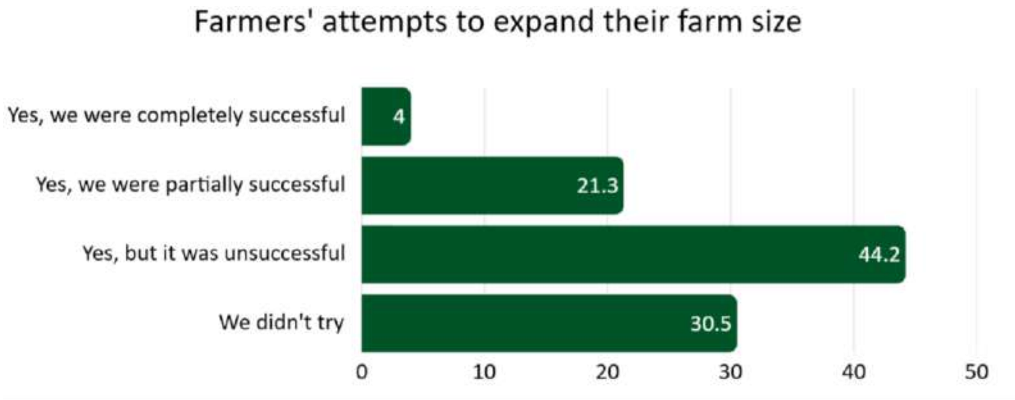
To explore farmers' attitudes towards land concentration, a sociological survey was conducted in August-November 2025 as part of this study. The survey consisted of a quantitative online component, which collected data from 627 respondents across all regions of Ukraine, as well as a qualitative component, which included 12 in-depth semi-structured interviews with farmers.

The results of the survey allow for a comprehensive assessment of barriers to accessing land and farm development, the role of agricultural holdings in communities, and farmers' views on possible solutions to improve the situation.

Barriers to land bank expansion

For the majority of surveyed farmers, expanding their land bank is not only a matter of increasing production, but also of ensuring a sense of long-term security. Land is perceived as a guarantee of stability in an uncertain market environment. As one farmer explains, *"Owning land means being confident that you will not be evicted from your lease tomorrow."*

At the same time, the survey results indicate significant constraints on access to land.



Among the key barriers, farmers most frequently mention:

- High land prices and rising rents;
- Lack of financial resources;
- Competition with agricultural holdings for the lease of land shares.

These factors create an asymmetric situation in which large agricultural companies have access to capital, credit, and longer planning horizons, while small farms operate with minimal financial leverage.

In addition to economic factors, administrative and institutional barriers are also significant: complex and opaque procedures, pressure or lobbying of the interests of large players at the local level, and a lack of equipment and personnel on farms themselves. Taken together, these factors create a vicious circle that limits small farmers' access to land.

Farmers' perception of agricultural holdings

About half of the surveyed farmers (49%) confirm the presence of agricultural holdings in their communities. The vast majority associate agricultural holdings with the cultivation of more than 5,000 hectares, which is perceived as a significant competitive advantage.

Farmers emphasise that agricultural holdings are not merely large farms, but corporate structures with substantial financial and institutional resources. This determines unequal conditions of competition in local land markets. *"Holdings are like states within a state. They have everything – lawyers, banks, support. And the farmer is on his own, without protection,"* one farmer points out. *"For them, land is an asset, and for us, it is life,"* another laments.

Multi-dimensional impacts of agricultural holdings

Farmers perceive the concentration of land in large agricultural holdings as a complex issue with economic, social, environmental, and political dimensions, but overall, the majority (71.1%) assess the impact of agricultural holdings as predominantly negative.

The **economic dimension** is manifested in the monopolisation of the market: agricultural holdings charge higher rents, control logistics, storage facilities, and sales channels, and influence prices – often displacing small producers in the process. Indeed, as one farmer illustrates, *"Previously, we delivered grain within the district, and there was competition. Now all roads lead to the holding. The price is whatever they say, and you either agree or look for a truck 300 km away."*

Linked to this is the **social impact** that comes with job losses due to automation, the outflow of young people, and the growing dependence of communities on a single large tenant, gradually further weakening the role of farming as the foundation of the local economy. Meanwhile, **political influence** manifests itself in unequal access to local authorities, non-transparent distribution of communal land, and corruption risks. Under such conditions, competition acquires an administrative and political character. *"We support the community, but the state does not see us. For it, only large taxpayers exist,"* says one of the farmers.

From an **environmental** point of view, land concentration is equally damaging, with its associated intensive land use practices, spread of monocultures, and soil depletion, all of which create long-term risks for the sustainable development of territories.

However, the problems faced by small farmers extend well beyond competition with agricultural holdings: survey data demonstrate that they operate in a multifactorial environment of uncertainty – from war and infrastructure challenges to social changes and limited access to resources – with many of these challenges intertwined with the issue of access to land.

Opening of the land market represents loss, not opportunity

The opening of the land market is not considered by most farmers as an opportunity for development. In fact, more than 40% of surveyed farmers reported that access to new land became more difficult following the launch of the land market, and almost half (46.6%) perceive a risk of losing their leased land to agricultural holdings.

Among the key reasons are higher rents and additional incentives offered by agricultural holdings (such as one-time cash payments for contract renewals as well as material and social incentives like road repairs in communities, social assistance, and support for schools), greater trust from shareholders, long-term contracts, and lobbying of the interests of large agricultural companies at the local level. In addition, 40.8% of respondents believe that communities and local authorities are more supportive of agricultural holdings than of small farmers.

This combination of financial and administrative inequality creates resistance to the land market among farmers and reduces trust in future reforms.

Farmers’ vision of solutions and control mechanisms

When asked what solutions and control mechanisms could be employed to address the issue of land concentration at the hands of agricultural holdings, farmers largely called for a systemic approach rather than one-off benefits or local solutions. Among the most widely supported measures are:

1. Priority for small farmers in access to state and communal land.
2. Control of land concentration.
3. Legal and financial support.
4. A transparent land cadastre and open data.
5. The creation of land banks and funds for small farmers, young people and war veterans.

These proposals reflect a mature understanding of farmers as active policy actors, rather than merely land users. They recognise that the stability of the agricultural sector is impossible without a balance between economic efficiency, social justice, and environmental responsibility. As this farmer emphasises, *“We don’t need to live better than others. We simply want the rules to be the same for everyone.”*

Conclusions

The results of the study allow for an initial comprehensive assessment of the current state, needs, and challenges faced by small farms in Ukraine. Overall, the data demonstrates the presence of systemic inequality in access to land resources, exacerbated by competition with agricultural holdings and institutional weakness of state and local structures, and further intensified by the impact of the war.

Key findings:

1. **Limited access to land and market monopolisation**

   The land rental and purchase market remains opaque and unequal. Most available plots are already controlled by agricultural holdings or are used under informal arrangements. Agricultural holdings concentrate land, infrastructure, and logistics, increasing the dependence of small producers and weakening the social autonomy of communities.

2. **Institutional weakness of communities**

   The transfer of powers to communities without adequate training and resources has led to disorganised land management, administrative errors, non-transparent decisions, and increased corruption risks.

3. **Insufficient state support**

   Existing programmes are often oriented towards large businesses. Many farmers lack advisory support, access to grants, and guarantees of fairness, which limits their opportunities for development and growth.

4. **A crisis of trust**

   Most farmers do not trust authorities, banks, officials, or even cooperative initiatives, which constrains the potential for self-organisation. Authorities must rebuild trust through partnership. Farmers do not require paternalism; they demand fair rules, stability, and participation in decision-making.

Recommendations

1. **Monitoring land concentration: digitalisation, transparency, and openness**
    - **1.1.** Strengthen the role of the Anti-monopoly Committee of Ukraine in assessing the state of economic competition in agricultural land use and conducting regular analysis of land concentration.
    - **1.2.** Ensure transparency in land management through the creation of open local land maps, public registers of available plots, and independent commissions to review lease applications.
    - **1.3.** Introduce a state register for monitoring land concentration and implement regular public reporting on the state of the land market at the community level.

2. **Support for cooperation and advisory services: training, network platforms, consultations**
    - **2.1.** Expand educational programmes for farmers.
    - **2.2.** Strengthen legal protection for farmers.
    - **2.3.** Promote the development of advisory services.

3. **Access to finance: creation of a specialised credit fund for small farmer**
    - **3.1.** Develop financial mechanisms to support small farmers.
    - **3.2.** Expand state and donor grant programmes for the development of small farms.

Modern Ukrainian farming has considerable potential, but its realisation requires partnership across three levels: the state – as a guarantor of fair rules; communities – as an environment of trust and accountability; and farmers – as agents of responsible land use. Supporting small-scale farming is therefore not only a matter of agricultural policy, but also of national security, social sustainability, and the ecological future of Ukraine.