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New Analysis Identifies $88 Billion Path to Modernize Ukrainian Agriculture – as Post-War Global Leader, Innovation Hub

~$18B in foreign direct investment already has flowed to Ukrainian agriculture since 2015, but the market opportunity is much larger

PHILADELPHIA, PA & KYIV, UKRAINE, June 11, 2026 — Ukraine's drive to modernize its agricultural sector, combined with its proven record of innovation, will strengthen the country's standing as a global agricultural powerhouse, according to a new analysis from Frontline Intelligence ("Frontline"). With parallels to Ukraine's revolutionary approach to battlefield strategy and defense technology, foreign direct investment will accelerate the structural transformation of Ukraine's economy and priority sectors such as agriculture. Through a reconstruction process that serves as a catalyst for technological modernization, industrial upgrading, and higher-value export growth, Ukraine has the potential to build one of the world's most innovative and scalable food systems, or what Frontline Intelligence terms the Leapfrog Economy.

Realizing this transformation will require investment at a scale well beyond historical capital flows, Frontline, a geo-economic opportunity intelligence and advisory firm, estimates an **$88.6 billion in foreign direct investment opportunity** over the decade following a ceasefire to upgrade and improve Ukrainian agricultural infrastructure. The estimate represents 50% more than the $58B projection from the World Bank, EU, and the Ukrainian government, and 5x more than the approximately $18B in FDI attracted over the previous decade. According to Frontline, the pace of investment and innovation will accelerate sharply once a ceasefire is reached. However, investment is not conditional on the ceasefire; the timing is.

The findings are drawn from the **Agriculture & Food Systems Playbook**, as well as **the State of Ukraine 2026 Playbook**, the inaugural studies of Frontline Intelligence's *Why Ukraine, Why Now?* (WUWN) program - a multi-year, multi-sponsor intelligence and advisory engagement covering Ukraine's reconstruction economy through 2027 and into the early re-building phase.

This timing creates a discrete pre-ceasefire window for foreign engagement, according to David Godfrey-Thomas, Chief Executive Officer of Frontline Intelligence. "The partnerships, deal structures, and counterparty relationships that will govern the larger flows are taking shape now — in a sector already functioning at near pre-war levels and innovating under pressure," Godfrey-Thomas said. **"We expect the $88.6B investment amount to be a starting point, given that dollars will support both ongoing reconstruction and the experimentation that allows Ukraine to leapfrog to state-of-the-art technologies and systems."**

Frontline's study categorizes the $88.6 billion opportunity across four segments and sixteen sub-segments of Ukraine's agriculture sector (see *Exhibit*). The largest segments are Logistics, Storage & Processing ($38.2 B) and Land Access & Soil Health ($32 B), both of which are critical to repairing and replacing war-damaged resources with modern technologies and supporting the hundreds of thousands of micro-, small- and medium-sized enterprises (MSMEs) that comprise 85% of all Ukrainian agricultural businesses. On-Farm Inputs & Physical Operations ($16.2 B) covers the industrialization of seed, fertilizer, and machinery manufacturing, while the agricultural-specific estimate of Transportation & Export Corridors ($2.2 B) reflects only a portion of the necessary modernization of seaports and railway infrastructure.

The investment thesis reflects the disconnect between conventional perceptions of Ukraine and operational realities. Ukraine avoided economic collapse after Russia's full-scale invasion by sustaining $50B-60B in annual export earnings, largely driven by the country's resilient agricultural sector. Agricultural exports reached near pre-war levels in 2024 and totaled $22.7B in 2025. Despite logistics challenges and wartime constraints, Ukraine **remains world's 4th largest exporter of grains,** specializing in sunflower seeds and oil (#1), rapeseed (#3), barley and corn (both #4), and wheat (#5).

"The post-ceasefire opportunity is to take that foundation and modernize it into a global leader in regenerative, productive, sustainable agriculture," Godfrey-Thomas said.

The Agriculture & Food Systems Playbook is only the first layer of WUWN's ongoing coverage of specific reconstruction programs, projects, and counterparties. Aligning with widely cited estimates that Ukraine's reconstruction and recovery will require $500B-$800B. Frontline's next series of sector Playbooks will cover Energy (Q4 2026), Defense (2027), and Construction & Infrastructure (2027). Underlying all sector coverage is *State of Ukraine 2026*, Frontline analysts' geopolitical and economic assessment, available for download to qualified institutional readers at frontlineintel.io.

About Frontline Intelligence

Frontline Intelligence delivers actionable intelligence and advisory services to support strategic planning, decision-making, and operational execution for companies and investors entering Ukraine's reconstruction economy. The firm provides foundational sector Playbooks, continuous coverage of major reconstruction programs and projects, direct expert access for subscribers, and bespoke operational support for specific transactions. Frontline has uniquely deep in-country expertise and involvement in national projects such as Ukraine's Agriculture Innovation Hub (celab.org.ua). Frontline is led by senior executives with multi-decade track records in subscription intelligence, Ukrainian agricultural and policy networks, global intelligence operations, and investment banking. Charter subscriptions for Frontline Intelligence's *Why Ukraine, Why Now?* program are open to corporations with new or existing business in Ukraine, financial institutions, and investors evaluating early positioning in Ukraine's reconstruction economy. Frontline Intelligence is a division of Nexia Group Holdings, Inc. Learn more at frontlineintel.io.

Media Contact

David Godfrey-Thomas, CEO, Frontline Intelligence
info@frontlineintel.io

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EXHIBIT: SUB-SEGMENT DETAIL

Investment Opportunities Across Agriculture in Ukraine

Source: Agriculture & Food Systems Playbook 2026, Frontline Intelligence. Estimates calculated by Frontline using government sources and academic models. Where shown, growth potential reflects projected market value change from 2025 baseline to 2030–2033, varying by sub-segment.

Land Access & Soil Health	Est. Investment			Segment Total
	Ag-Specific	Total	% Ag Share	
Demining & soil remediation	$22 B	$31 B	71%	**$32 B** *($41 B)*
Capital infusion for MSMEs	$10 B	-	100%	

On-Farm Inputs & Physical Resources	Est. Investment	Growth Potential			Segment Total
		2025	2033	% Δ	
Industrial seed production	$3.3 B	$2.8 B	$7.5 B	+ 168%	**$16.2 B**
Industrial fertilizer production	$3.5 B	$1.3 B	$6.7 B	+ 415%	
Machinery manufacturing	$720 M	$200 M	$4.5 B	+ 2,150%	
Domestic water & irrigation	$8.7 B	-	-	-	

Logistics, Storage, and Processing	Est. Investment	Growth Potential			Segment Total
		2025	2030-33	% Δ	
Value-add processing	$14.4 B	$10.9 B	$22 B	+ 128%	**$38.2 B**
Grain storage/aggregation	$3.8 B	$15.2 B	$18 B	+19%	
Biomethane (waste products)	$20 B	$107 M	$1.4 B	+ 1,190%	

Transportation & Export Corridors	Est. Investment			Segment Total
	Ag-Specific	Total	% Ag Share	
Roadways and bridges	-	$42.4 B	-	**$2.2 B** *($68 B)*
Railway systems	$2.2 B	$17.6 B	13%	
Maritime transport	$200 M	$8 B	3%	
Source: Calculated by Frontline Intelligence using government sources and relevant academic models. Full methodological details are in Appendix 1.				**Total $88.6 B**