CSI DAILY NEWS

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Russia Keeps Grain Export Duties at Zero for Late January–Early February

Russia has once again set export duties on key grain crops at zero, maintaining favorable conditions for exporters.

According to official data, export duties on wheat, barley, and corn will remain at 0 rubles per tonne for the period January 28 to February 3, 2026. The duty rates for all three commodities show no change compared with the previous week (January 21–27), when export taxes were also set at zero.

The zero-duty regime applies across all major grain categories:

- Wheat: 0 rubles per tonne
- Barley: 0 rubles per tonne
- Corn: 0 rubles per tonne

Market participants note that the continuation of zero export duties supports Russian grain competitiveness on global markets and may help sustain export volumes amid ongoing price volatility and shifting demand dynamics. Rus grain

Commodity Auctions: Results For 29.01.2026

Purchase

Purchase

OOO Zakazchik No. 1

Wheat, grade 4, 12.5% (excluding VAT) | 16,250 ₽/t | 600 t

OOO Zakazchik No. 1

Wheat, grade 4, 12.5% (excluding VAT) | 15,625 ₽/t | 620 t

OOO OZK Trading

Wheat, grade 4, 12.5% (excluding VAT) | 16,306 ₽/t | 1,200 t

OOO OZK Trading

Wheat, grade 4, 12.5% (excluding VAT) | 15,340 ₽/t | 300 t

CHERKIZOVO-MASLA LLC

Soybean 40 (incl. VAT) | 33,050 ₽/t | 500 t

Trading House Sodruzhestvo LLC

Soybean 40 (incl. VAT) | 32,750 ₽/t | 600 t

Trading House Sodruzhestvo LLC

Soybean 37 (incl. VAT) | 29,750 ₽/t | 300 t[3]

Ice Crust Poses Risks to Winter Crops in Russia's Sevastopol

The formation of ice crust on agricultural fields may pose a serious threat to winter crops in Russia's Stavropol region, according to specialists from the regional branch of Rosselkhozcenter.

Experts explain that two main types of ice crust can develop under unstable winter weather conditions. The first is a dense, transparent ice crust, which forms when meltwater freezes and encases both the soil surface and plants in a solid layer of ice. Unlike snow, ice conducts heat approximately five times more efficiently, leading to sharp temperature fluctuations beneath the crust. As a result, winter crops may suffer from freezing damage.

The second type is known as a hanging ice crust, which typically forms on the soil surface following a thaw. In this case, plants trapped beneath the crust may experience a lack of oxygen, increasing the risk of rotting or waterlogging, which can significantly weaken or destroy crops.

Rosselkhozcenter notes that the presence of ice crust can have an overall negative impact on the condition of winter crops, depending on its structure, thickness, and duration. To reduce potential damage, specialists recommend mechanically breaking up the ice crust using needle or ring-spiked harrows, allowing air to reach the plants and stabilizing soil conditions.

At the same time, experts emphasize that ice crust formed on the surface of the snow layer after a thaw does not pose a threat to winter crops and does not require intervention.

Given the ongoing temperature fluctuations in the Stavropol region, Rosselkhozcenter specialists continue to closely monitor the condition of winter crops in order to promptly assess risks and recommend protective measures if necessary.[7]

Russia Aims to Cut Grain Share in Agricultural Exports to 25% by 2030

Russia plans to significantly reduce the share of grain in its agricultural exports by 2030, shifting its focus toward products with higher added value, Agriculture Minister Oksana Lut said in an interview with the Russia 24 television channel.

According to the minister, the government's long-term strategy prioritizes the development and export of high-margin agricultural products, including processed food items and value-added goods. This transition is intended to strengthen export revenues and reduce reliance on raw commodity shipments.

Lut noted that in 2025, exports of high-value-added agricultural products reached $19 billion, marking an 8% increase compared with 2024. The growth reflects expanding processing capacity and rising foreign demand for Russian agri-food products.

For comparison, official data show that in 2024, grain crops accounted for 36.9% of the total value of Russia's agricultural exports. The authorities aim to gradually lower this share over the coming years as exports become more diversified.

The shift toward higher value-added exports is expected to enhance the resilience of Russia's agricultural sector, improve profitability for producers, and support the country's broader strategy of increasing non-resource exports.[7]

Russia to Promote Domestic Seeds and Technologies as Global Grain Competition Intensifies

Russia intends to strengthen its presence on global agricultural markets by promoting domestically developed seeds and agricultural technologies, as competition in grain exports intensifies due to rising production in other countries, Agriculture Minister Oksana Lut said, according to The Western Producer.

Speaking at the World Grains and Pulses Forum in Dubai, Lut noted that Russia recognizes the long-term limitations of relying solely on exports of raw agricultural commodities. "Sooner or later, every country faces this challenge. Simply trading grain or oilseed products is no longer sufficient," she said.

As part of this strategy, Russia is already holding discussions with Egypt, one of its largest wheat importers, on the use of Russian seeds and production technologies. The initiative aims to help boost local crop yields while enhancing food security in partner countries and deepening long-term cooperation.

Lut highlighted progress in Russia's seed sector, noting that the country has significantly reduced its dependence on imported planting material. While Russia historically relied heavily on seeds sourced from Europe, self-sufficiency in seeds reached 70% in 2024, up from 60% in 2022. By 2025, Russia was supplying its own breeding seeds to 35 countries, she said, adding that cooperation on joint technological development continues to expand.

The minister also warned against assuming that Russia's current role as a major supplier of grain and vegetable oils will remain unchanged. At present, 78% of Russian wheat exports are delivered to traditional markets in the Middle East and Africa, primarily through Black Sea ports. "It would be a serious mistake to believe that Russia will always supply grain or bulk oils to partner markets under the same conditions," Lut said.

According to Lut, agricultural trade through Black Sea terminals has remained stable despite the ongoing conflict in Ukraine, which she referred to as the “current situation.”

Looking ahead, Russia aims to increase agricultural exports by 50% by 2030 and raise grain exports to 80 million tons, compared with 53 million tons in the 2024/25 season. The government also plans to reduce the role of intermediaries by selling more products directly to end buyers.

To support these ambitions, Russia is expanding its export logistics infrastructure. New grain terminals are planned in the Baltic region, while rail shipments to the Far East are being developed. In addition, shipments through the Caspian Sea, primarily to Iran, are increasing. Overall, Russia expects its agricultural logistics capacity to grow by 25% to 100 million tons by 2030. [1]

Ukraine Completes 2025 Harvest, Maintaining Leading Position in European Grain Production

Ukraine has successfully completed its 2025 agricultural harvest, collecting 57.6 million tons of grain and 17.3 million tons of oilseeds, despite the challenges posed by the ongoing full-scale war and unfavorable weather conditions, according to data published by agronews.ua. With the final stages of the corn harvest nearing completion, total grain production is expected to reach approximately 60 million tons.

The harvest results highlight Ukraine’s growing importance in the European agricultural landscape amid its ongoing efforts toward European integration. In terms of grain output, Ukraine currently ranks second among European Union countries, behind only France, which harvested 63.1 million tons. Ukraine has overtaken several major EU producers, including Germany (45.2 million tons) and Poland (36.5 million tons).

Ukraine remains the undisputed leader in corn production across Europe. In 2025, Ukrainian farmers harvested 23.5 million tons of corn, accounting for a substantial share of the EU’s total corn output of 57 million tons. The country also retained its dominant position in sunflower production, producing 9 million tons, compared with 8.5 million tons harvested by all EU member states combined.

Grain yields in Ukraine also remained competitive. The average grain yield reached 5.08 tons per hectare, which is only 14% below the EU average. At this level, Ukraine ranks 18th out of 27 EU countries, outperforming several large agricultural producers. Ukrainian yields were 15% higher than those in Spain and 11% higher than in Romania.

However, a noticeable yield gap remains between Ukraine and Europe’s top producers. Grain yields in France and Germany are 42–48% higher than those in Ukraine. Experts note that this difference cannot be explained by climatic factors, as production in all three countries is concentrated in similar agroclimatic zones. Instead, the gap underscores Ukraine’s significant potential to increase productivity through investments in modern technologies, improved agricultural infrastructure, and broader access to financing.

Commenting on the results, Taras Vysotskyi, Deputy Minister of Economy, Environment and Agriculture of Ukraine, emphasized that Ukraine already plays a crucial role in European and global grain markets. He stressed that Ukraine's agricultural sector does not threaten the EU market, but rather contributes to supply stability and global food security. According to Vysotskyi, Ukraine's integration into the European Union would strengthen the EU's resilience to global food challenges by creating a powerful agricultural producer with substantial growth potential.[2]

EU Formally Adds Russia to Money Laundering Blacklist

The European Union has officially added Russia to its list of jurisdictions deemed to pose a high risk for money laundering, following the completion of internal approval procedures, the EU Council's press service announced.

According to the statement, the decision entered into force on January 29 after no EU member states raised objections within the установленный deadline. The approval took place under the EU's so-called "silence procedure," which allows decisions to be adopted automatically if no objections are submitted within a specified period.

The move follows a decision adopted by the European Commission in December, when it proposed updating the EU's list of high-risk countries and territories as part of its broader efforts to strengthen the bloc's anti-money laundering and counter-terrorist financing framework.

Inclusion on the EU blacklist means that financial institutions and other obligated entities within the European Union must apply enhanced due diligence measures when conducting transactions involving Russia. The list is designed to protect the EU financial system from risks related to illicit financial flows and to ensure stricter oversight of cross-border operations.

The EU regularly reviews and updates its blacklist in line with international standards and assessments, including recommendations from global financial watchdogs. The addition of Russia reflects the EU's ongoing efforts to reinforce regulatory controls amid heightened geopolitical and financial risks.[8]

Croatia Records Sharp Rise in Wheat Output in 2025, Mixed Results Across Other Crops

Croatia significantly increased its production of wheat in 2025, with output of soft and hard wheat, including winter, spring, and seed varieties, rising by 28.8% year on year to 1.05 million tonnes, according to data released by the national statistical office.

The strong performance in wheat was accompanied by higher production of several other crops. Output of winter and spring barley increased by 19.5% compared with 2024, reaching 356,000 tonnes. Sunflower production also posted solid growth, rising by 13.3% to 205,000 tonnes, based on provisional estimates.

At the same time, not all crops showed positive dynamics. Maize production declined sharply, falling by 17.7% year on year to 1.702 million tonnes. Sugar beet output also decreased, down

13.8% to 406,000 tonnes, reflecting weaker yields and less favorable growing conditions in some regions.

In contrast, rapeseed production increased by 15.1% compared with the previous year, reaching 61,000 tonnes, supported by improved productivity and stable planting areas.

The mixed results highlight the uneven impact of weather conditions and agronomic factors across Croatia's agricultural sector in 2025. While gains in wheat, barley, sunflower, and rapeseed strengthened overall crop output, declines in maize and sugar beet weighed on total production volumes.[1]

Sorghum Gains Ground in Poland, but Herbicide Ban Raises Cultivation Concerns

Sorghum has been steadily increasing its presence on Polish farmland in recent years, with the crop now covering nearly 12,500 hectares, exceeding the sown area of some traditional crops such as yellow lupine. However, the outlook for further expansion has become more uncertain following the ban on the herbicide S-metolachlor, which has complicated weed control, according to Professor Tadeusz Michalski, President of the Polish Association of Maize and Sorghum Producers.

Michalski noted that sorghum has experienced rapid growth in popularity among Polish farmers. The area under cultivation last season was approximately 60 times larger than five years ago, reflecting rising interest in the crop's agronomic and economic potential. Similar to maize, sorghum in Poland is grown for both silage and grain, although silage production currently dominates, while grain cultivation remains relatively limited.

Originally native to the hot regions of Africa, India, and Mexico, sorghum belongs to a diverse genus of warm-climate grasses and is valued for its high tolerance to drought and elevated temperatures. The crop is considered highly versatile, with applications in animal feed, biogas production, and food processing. For several years, the Polish Association of Maize Producers has been actively promoting gluten-free sorghum flour, highlighting its potential in the food market.

Farmers generally view sorghum not as a competitor to maize, but as a complementary alternative, particularly in regions where maize cultivation is constrained by soil or climatic conditions. This positioning has supported the gradual expansion of the crop across different parts of the country.

Large-scale sorghum cultivation in Poland began around two decades ago. The first wave of expansion between 2004 and 2007 was later followed by disappointment, as some of the varieties introduced at the time proved too late-maturing for certain regions. Since then, plant breeding has progressed, and varieties better suited to Polish conditions are now available.

Despite these improvements, weed control has emerged as a key challenge. According to the Ministry of Agriculture and Rural Development, the herbicides currently approved for use in sorghum include pendimethalin, glyphosate, and dicamba. However, post-emergence treatments often deliver limited effectiveness, increasing the burden on farmers.

Professor Michalski stressed that S-metolachlor, which has now been banned, was previously a widely used and effective tool for weed management in sorghum fields. In its absence, producers are forced to rely on a combination of chemical and mechanical weed control, while strictly observing recommended application stages. He warned that mistimed or delayed herbicide treatments can inhibit crop growth, extend the vegetative period by up to two weeks, and lead to significant yield losses.[1]

Palm Oil Prices Expected to Rise Gradually, Data Center Says

Palm oil prices are expected to maintain a steady upward trend in the near term, according to an analysis released by the National Grain and Material Reserves Data Center.

The outlook is supported by several key factors. First, the recent surge in international soybean oil prices has enhanced the relative price competitiveness of palm oil, improving its economic appeal. As a result, import demand from India, one of the world's largest vegetable oil buyers, is likely to shift increasingly toward palm oil as buyers seek more cost-effective alternatives.

Second, market fundamentals in Malaysia, the world's second-largest palm oil producer, continue to strengthen. Analysts expect palm oil inventories to decline by the end of the month, reflecting tightening supply conditions. Seasonal factors are also contributing to the bullish outlook: February is marked by an increased number of public holidays in Malaysia, which typically leads to reduced harvesting activity. Consequently, palm oil production is expected to fall further, reinforcing supply constraints.

In addition, market sentiment has been supported by optimism surrounding the Meisheng Chai policy, which participants believe could have a positive impact on the vegetable oil sector. Expectations of related policy announcements ahead of the policy's implementation are already helping to boost confidence and speculative interest in the palm oil market.

Taken together, these factors suggest that palm oil prices may remain well supported in the short term, with improving demand prospects, tightening supply, and favorable policy expectations contributing to a firmer market outlook.[1]

Argentine Wheat Strengthens Position Against Black Sea Supplies in Algeria Tender

Argentine wheat is emerging as a strong competitor to Black Sea supplies on the global market, following the results of a recent international tender held by Algeria's State Grain Agency (OAIC), according to European traders cited by Milling Middle East & Africa.

Market sources report that OAIC purchased around 600,000 metric tons of milling wheat in the tender, which closed on Monday. Initial price estimates place the purchase at approximately $254 per metric ton on a cost-and-freight (C&F) basis, while some traders indicated that the lowest offers were closer to $253 per ton, including delivery costs.

Early assessments suggest that the tender volume was largely in line with expectations at about 600,000 tons, although some market participants believe total purchases may have reached up to 720,000 tons. As is customary, final confirmation of volumes, prices, and origins is expected to be clarified in the coming days once trade flows are fully allocated.

While the tender did not specify the origin of the wheat, traders widely expect Argentina to be the primary supplier. The arrival of Argentina's new wheat harvest at notably low price levels has increased its attractiveness in international tenders, particularly in North African markets, and has exerted downward pressure on global wheat prices.

According to market analysts, the competitive pricing of Argentine wheat is largely the result of strong yields, which have allowed exporters to offer grain at levels that are challenging for other suppliers to match. One industry expert noted that prices are currently so low that even Black Sea wheat has struggled to remain competitive in recent tenders.

Algeria remains one of the world's largest wheat importers, relying heavily on overseas purchases to meet domestic demand for bread and other staple food products. The country typically imports between 6 and 8 million tons of wheat annually, with the majority consisting of milling-quality wheat.

The tender outcome aligns with earlier projections from the US Department of Agriculture (USDA), which forecasted intensified competition on the global wheat market following upward revisions to production estimates in several major exporting countries. Current market developments suggest that this trend is already taking shape.

Meanwhile, analysts note that Russian wheat exports continue to face challenges, as a stronger ruble has reduced price competitiveness, potentially affecting export volumes and broader conditions within the domestic agricultural sector. [6]

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