

CSI DAILY NEWS

09.02.2026



Russia Becomes Net Soybean Exporter for First Time After Record Harvest

Russia has впервые become a net exporter of soybeans, driven by a sharp fall in imports and a strong domestic harvest, according to a report by *Kommersant*, citing research from the Center for Price Indices (CCI).

The CCI said soybean imports have dropped nearly threefold, to under 500,000 tonnes from about 1.4 million tonnes a year earlier. Similar declines were also noted by market analysts at OleoScope and the Russagrotrans analytical center.

OleoScope estimates that Russia exported around 717,000 tonnes of soybeans in 2025, down 8.9% compared with the previous year. Despite the dip in export volumes, the steep reduction in imports has shifted the country into a net-export position.

Experts attribute the change to a combination of factors, including a record soybean harvest, expanded domestic processing capacity, and the introduction of a 20% export duty.

According to Russia's statistics agency Rosstat, the soybean crop in 2025 reached 8.96 million tonnes, up nearly 30% year on year a key driver behind the country's growing self-sufficiency in the sector.⁴

Russia Ships Over 8 Million Tonnes of Wheat to Egypt in 2025

Russia delivered more than 8 million tonnes of wheat to Egypt in 2025 and is prepared to expand shipments further, Russian Ambassador to Cairo Georgy Bорисенко said in an interview with RIA Novosti.

Bорисенко said Russia had fully met all of Egypt's requests for Russian grain last year and has the capacity to supply even larger volumes if needed.

He added that Egypt continues to be the biggest buyer of Russian grain, underscoring the country's key role in Russia's agricultural exports and in Egypt's food supply strategy.⁵

Commodity Auctions: Results For 06.02.2026

Purchase

ООО Заказчик №. 1

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

ООО Zakazchik No. 1

Wheat, grade 4, 12.5% (excluding VAT) | 15,605 ₽/t | 620 t

ООО OZK Trading

Wheat, grade 4, 12.5% (excluding VAT) | 16,325 ₽/t | 600 t

ООО OZK Trading

Wheat, grade 4, 12.5% (excluding VAT) | 15,490 ₽/t | 300 t

Trading House Sodruzhestvo LLC

Soybeans 40 (incl. VAT) | 32,750 ₽/t | 100 t

Trading House Sodruzhestvo LLC

Soybeans 37 (incl. VAT) | 29,750 ₽/t | 200 t³

New Quality Standards for Chickpeas and Corn Take Effect Across Russia and EAEU

Two new national standards governing the quality of key agricultural products came into force on January 1, 2026, marking an important update for producers, processors and traders of chickpeas and corn.

The revised GOST 8758-2025, titled “Chickpeas. Technical Specifications,” replaces a document that had been in use since 1976. The new standard sets out modern quality and safety requirements for chickpeas, including parameters for grading, physical characteristics and compliance indicators. It is not limited to Russia alone but has also been adopted in several countries of the Eurasian Economic Union (EAEU) and the Commonwealth of Independent States (CIS), including Azerbaijan, Armenia, Belarus, Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan. This harmonization is expected to facilitate cross-border trade and ensure more consistent product quality across the region.

At the same time, a new standard, GOST 35245-2025 “Corn Grain. Technical Specifications,” has been introduced for the first time. The document defines quality criteria for corn intended for the food industry and other sectors, establishing benchmarks for moisture, purity, and suitability for processing. Market participants say the standard will help improve transparency in the grain market and give buyers and sellers a clearer framework for contracts and quality control.

The adoption of these standards reflects a broader effort to modernize agricultural regulation and bring technical requirements in line with current production and trade practices. The full texts of both documents are available on the website of the Federal State Budgetary Institution “Rost,” allowing stakeholders to review the new rules and prepare for compliance.

Officials and industry representatives expect the updated standards to support higher-quality output, strengthen export potential, and improve confidence among domestic and international buyers.⁶

Rapeseed Prices Climb in Ukraine Amid Rising Oil Markets and Improved Biofuel Outlook

Prices on Ukraine’s export rapeseed market continued to move higher, supported by developments in global energy markets and improving sentiment in the US biofuels sector.

The main driver behind the latest price gains was a rise in global oil prices, which strengthened amid growing concerns over a potential escalation of military tensions between the United States and Iran. This geopolitical uncertainty has fueled expectations of tighter energy supplies, indirectly boosting vegetable oil and oilseed markets worldwide.

Additional support came from positive signals in the US biofuels industry, where recent policy and market developments have improved prospects for biodiesel production, increasing demand expectations for oilseeds such as rapeseed.

Against this backdrop, demand prices for Ukrainian rapeseed were mostly quoted at around \$550 per tonne CPT-port, while offers at the western border ranged between \$545 and \$550 per tonne DAP, depending on the specific border crossing.

Market participants also continue to monitor weather-related risks affecting winter rapeseed crops. While concerns over crop conditions persist, their impact on pricing has so far remained limited, with global factors playing a more decisive role in recent movements.

The domestic market followed the upward trend. Ukrainian processors raised their purchasing prices, with demand levels increasing on average to 24,000–24,700 hryvnia per tonne CPT-plant, reflecting stronger export parity and firmer international markets.

Analysts note that further price dynamics will largely depend on developments in the energy sector, geopolitical risks, and crop conditions, as traders remain cautious but increasingly optimistic about short-term market prospects.²

Ukraine Ships Over 19 Million Tons of Grain in 2025/26 Marketing Year, Corn Remains Leading Export

Ukraine has exported 19.38 million tons of grains and pulses since the start of the 2025/26 marketing year, according to operational data released by the Ministry of Economy, citing figures from the State Customs Service.

Of this volume, 473,000 tons were shipped in February alone as of February 6.

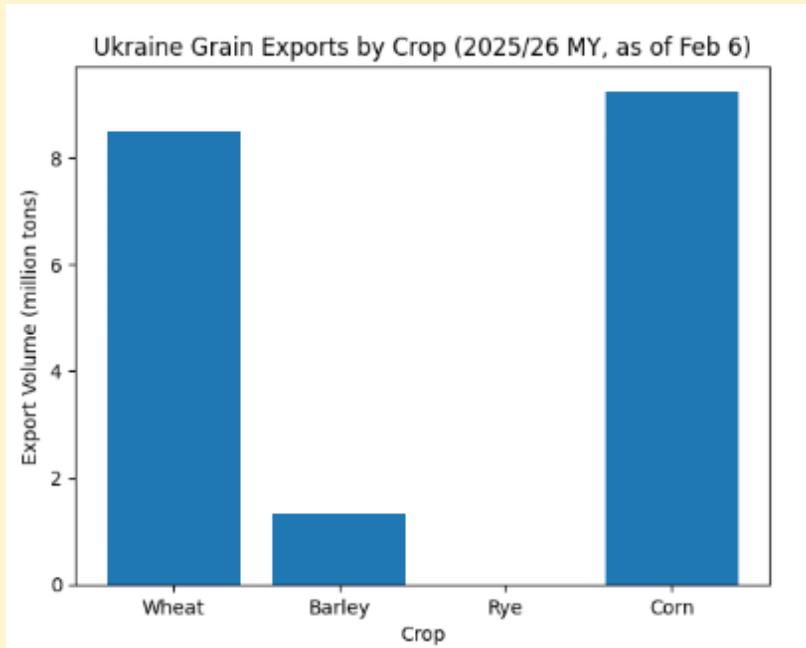
By comparison, exports stood significantly higher at the same point last season. As of February 7, 2025, Ukraine had delivered 26.449 million tons of grains and pulses to foreign markets, including 758,000 tons shipped during February, highlighting a noticeable year-on-year slowdown in export activity.

Corn continues to dominate Ukraine's grain exports in the current season. Since the beginning of the marketing year, corn shipments totaled 9.244 million tons, with 463,000 tons exported in February so far.

Wheat exports reached 8.494 million tons, although only 6,000 tons were shipped during the current month. Barley exports amounted to 1.338 million tons, including 3,000 tons in February. Rye exports remain negligible, standing at just 0.2 thousand tons, with no shipments recorded this month.

In addition to raw grains, Ukraine has also exported processed products. Total flour exports since the start of the season are estimated at 39.5 thousand tons as of February 6, including 700 tons shipped in February. Wheat flour accounted for the vast majority of these volumes, totaling 38.4 thousand tons, with February deliveries also reaching 700 tons.

Market participants note that export dynamics continue to be influenced by logistical constraints, global competition, and pricing conditions, while further developments will depend on demand from key importing countries and overall market sentiment.²



Kazakhstan Sets New Grain Harvest Record in 2025 as Wheat Output Climbs

Kazakhstan harvested a record 25.94 million tons of grains and pulses in 2025, marking a new all-time high for the country's agricultural sector, according to APK-Inform, citing final official statistics. The result exceeded the previous record set in 2024 by around 3% and surpassed the 2023 harvest by a substantial 51%, underscoring a strong recovery in crop production.

Wheat remained the cornerstone of Kazakhstan's grain output. In 2025, wheat production reached 19.32 million tons, harvested from 12.1 million hectares, with an average yield of 15.8 centners per hectare. This represents a notable improvement compared with 2024, when wheat output stood at 18.57 million tons despite a larger planted area of 13.06 million hectares, while yields averaged 14.2 centners per hectare. The higher productivity in 2025 helped offset the reduced acreage and lifted overall production.

In contrast, barley production declined year on year. The 2025 barley harvest totaled 3.59 million tons, with average yields of 15.7 centners per hectare across a harvested area of 2.28 million hectares. In 2024, farmers collected 3.84 million tons from the same area, benefiting from higher yields of 16.8 centners per hectare, indicating that weaker productivity weighed on last year's barley output.

Corn production remained broadly stable at around 1 million tons, roughly in line with the previous season. This came despite an expansion in planted area from 162,000 hectares in 2024 to 175,000 hectares in 2025, as average yields slipped to 57 centners per hectare from 62 centners per hectare a year earlier.

Analysts note that the record overall harvest was largely driven by improved wheat yields, while mixed performance across other crops highlights ongoing challenges related to weather conditions and productivity. Market participants will now be watching export flows and domestic demand to assess how the bumper crop translates into trade volumes and price dynamics in the coming months.²

Kazakhstan Posts Strong Oilseed and Pulse Growth in 2025 as Grain Areas Contract

Kazakhstan reduced its harvested grain area in 2025 but still managed to increase overall output, driven by improved yields and sharp expansion in oilseeds and pulses, according to official statistics.

The total area harvested for grain crops declined by 5.8% year on year to 15.129 million hectares, while post-cleaning grain production rose by 1.5% to 24.948 million tons, highlighting gains in productivity despite reduced acreage.

Among individual crops, wheat remained the dominant contributor. Harvested wheat area fell by 6.7% to 12.195 million hectares, including a 5.6% decline in soft wheat area to 11.801 million hectares and a sharp 31% reduction in durum wheat area to 394,000 hectares. Nevertheless, total wheat production increased by 4% to 19.326 million tons, marking the second-largest harvest on record after 2011. Soft wheat output rose by 5.5% to 18.531 million tons, while durum wheat production dropped by 22% to 795,000 tons.

Barley acreage remained broadly unchanged at 2.282 million hectares, but production fell by 6.4% to 3.593 million tons, reflecting weaker yields. Corn planting expanded by 8.6% to 176,000 hectares, lifting output to 1.006 million tons. Rice also recorded modest growth, with harvested area up 3.1% to 101,000 hectares and production increasing by 2.5% to 526,000 tons.

By contrast, areas under other minor cereals—including oats, millet, buckwheat, sorghum and similar crops—declined by 17% to 375,000 hectares, while output dropped sharply by 41% to 497,000 tons.

The most significant gains were recorded in oilseeds. Total oilseed acreage surged by 44% to 3.95 million hectares, while production jumped by 48% to 4.948 million tons. Sunflower plantings increased by 41% to 1.777 million hectares, pushing output up by 34% to a record 2.464 million tons. Oil flax saw even stronger growth, with area expanding by 54% to 1.347 million hectares and production rising by 78% to a record 1.352 million tons.

Rapeseed acreage more than doubled, climbing by 117% to 323,000 hectares, while output increased 2.2 times to 630,000 tons. Soybean area grew by 7% to 106,000 hectares, with production edging up 2.4% to 213,000 tons. Safflower also posted gains, with planted area up 16.5% to 368,000 hectares and output rising 17% to 268,000 tons.

Pulse crops recorded similarly strong expansion. Total pulse acreage increased by 59% to 777,000 hectares, while production rose by 56% to a record 998,000 tons. Lentils led the growth, with area up 83% to 641,000 hectares and output climbing 70% to 776,000 tons. Pea plantings declined by 15% to 108,000 hectares, though improved yields pushed production up 17% to 196,000 tons.

Kazakhstan has also significantly expanded its oilseed processing capacity to 5 million tons per year and aims to become the world's third-largest sunflower producer, overtaking Argentina. In 2025, total vegetable oil production increased by 17.4% year on year to 888,800 tons, including sunflower oil output of 757,200 tons, up 17.5%.

Oil exports rose by 34.6% during the first 11 months of 2025, with Uzbekistan accounting for 46% of shipments, followed by China (33.7%), Tajikistan (13.1%), Afghanistan (4.3%) and Turkmenistan (1.8%).

Industry analysts say the rapid expansion of oilseeds and pulses is reshaping Kazakhstan's crop structure, strengthening its position in regional export markets and supporting ambitions to become a major global supplier of sunflower products.¹

Tajikistan Imports 1.2 Million Tons of Wheat in 2025, Cuts Flour Purchases Abroad

Tajikistan significantly increased wheat imports in 2025 as domestic production declined, while at the same time reducing purchases of flour from foreign markets, according to customs data and figures released by the country's Antimonopoly Service.

In 2025, wheat imports exceeded local production, underscoring the country's growing reliance on external supplies. Tajikistan imported approximately 1.2 million tons of wheat, valued at around \$300 million, the Antimonopoly Service reported.

Despite the higher import volumes, the average price of imported wheat fell to \$235 per ton, down by \$25 compared with the previous year, helping to partially offset the rising costs associated with increased purchases. Import volumes rose by 220,600 tons, representing a 20.85% increase, while the total value of imports grew by \$26.4 million year on year.

Officials emphasized that the wheat import market remains highly competitive, with 78 economic entities actively participating in wheat trading during the reporting period.

At the same time, domestic wheat production continued to weaken. According to government statistics, Tajikistan harvested 811,300 tons of wheat in 2025, marking a decline of 69,400 tons, or 7.9%, compared with 2024. As a result, imported wheat substantially outpaced local output.

Customs data also showed a shift in purchasing patterns for processed products. While wheat imports increased, Tajikistan reduced its flour purchases from abroad. During the same period, the country imported 51,900 tons of flour, worth \$16.2 million, at an average price of \$312 per ton. This represents a decrease of 16,000 tons, or 23.6%, compared with the previous year.

Analysts note that the decline in flour imports reflects higher domestic milling activity, supported by increased wheat availability from imports. Market observers say the trend highlights Tajikistan's efforts to strengthen local processing while securing raw grain supplies from international markets.

Looking ahead, industry participants expect import dynamics to remain closely tied to domestic harvest results, global wheat prices, and regional trade flows, as Tajikistan continues to balance food security needs with rising production costs.^{web}

Argentina Doubles Sunflower Oil Exports in January 2026 as Soy Complex Weakens

Tajikistan significantly increased wheat imports in 2025 as domestic production declined, while simultaneously reducing flour purchases from abroad and expanding local milling output, according to customs data and figures released by the country's Antimonopoly Service.

Official data show that wheat imports exceeded domestic production last year, underscoring Tajikistan's growing reliance on foreign grain supplies. The country imported approximately 1.2 million tons of wheat, valued at around \$300 million.

Despite the higher import volumes, prices moved lower. The average cost of imported wheat stood at \$235 per ton, which is \$25 less than a year earlier, helping to partially offset the financial impact of increased purchases. Compared with 2024, import volumes rose by 220,600 tons, while the total value of wheat imports increased by \$26.4 million, or 20.85%.

Authorities noted that the wheat import market remained competitive during the reporting period, with 78 economic entities actively involved in grain trading.

At the same time, domestic wheat production weakened. According to government statistics, Tajikistan harvested 811,300 tons of wheat in 2025, down by 69,400 tons, or 7.9%, compared with the previous year. As a result, imported wheat volumes substantially outpaced local output.

Customs data also indicate a shift in the structure of grain-related imports. While wheat purchases rose, Tajikistan reduced its flour imports. During the year, the country imported 51,900 tons of flour, worth \$16.2 million, at an average price of \$312 per ton. This represents a decline of 16,000 tons, or 23.6%, compared with the same period in 2024.

The reduction in flour imports was accompanied by higher domestic production. Tajikistan produced 693,800 tons of flour, an increase of 23,600 tons, or 3.5%, year on year, reflecting stronger activity in the local milling sector.

Market observers say the figures point to a gradual shift toward domestic processing, with imported wheat increasingly being used by local mills. Analysts expect import dynamics to remain closely tied to domestic harvest performance and global grain prices, as Tajikistan continues efforts to strengthen food security while managing rising demand.¹

US Sets New Record for Grain Exports to EU as Corn Dominates Trade Flows

The United States sharply increased grain exports to the European Union in January–November 2025, reaching the highest level for this period in modern history, according to calculations by RIA Novosti based on data from the US statistical service.

Over the first 11 months of the year, American companies supplied the EU market with grain worth approximately \$1.3 billion, compared with \$523.5 million during the same period in 2024. This represents a 2.5-fold year-on-year increase, highlighting a significant expansion in transatlantic grain trade.

According to the analysis, the value of shipments reached its highest level since at least 1992, the earliest year for which comparable data are available.

Corn accounted for the largest share of exports, totaling \$1.04 billion, making it the dominant commodity in US grain deliveries to Europe. Wheat and meslin followed, with exports valued at \$136.9 million, while shipments of grain sorghum reached \$131.4 million over the same period.

Market analysts attribute the surge in US exports to strong demand from European buyers, competitive pricing, and tighter supplies from other key exporting regions. The trend also reflects shifting trade flows amid global market volatility and ongoing pressure on European grain balances.

Industry participants note that sustained US competitiveness could continue to reshape EU import patterns in the coming months, particularly if global supply conditions remain tight and price dynamics favor American grain.⁵

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